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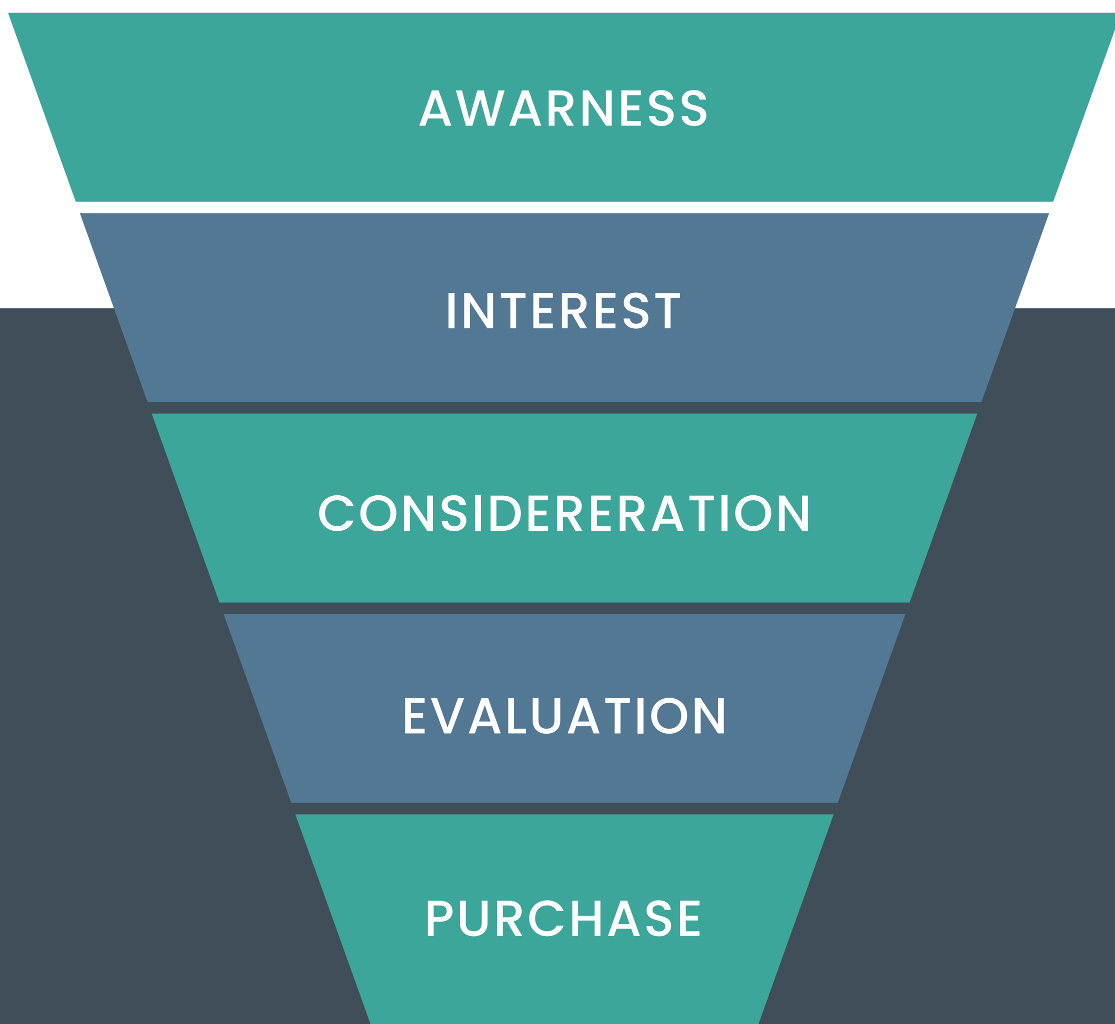
7 Planning Activities to Drive ABM Success

A Practical Workbook for B2B SaaS Teams



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ABM vs. Broad Demand Generation

Targeting	Objective	Messaging	Success Metric	Resource Focus
ABM selects a finite list of strategic accounts. Demand gen pursues large segments.	ABM expands revenue per account; demand gen maximises lead volume.	ABM content is personalised by account. Demand gen content is persona-based.	ABM tracks pipeline influence and deal value. Demand gen tracks MQL counts.	ABM allocates high touch to few accounts. Demand gen scales low touch across many.

Typical ROI Uplift from ABM

- 81 % of programmes report higher ROI than any other marketing activity.
- Deals driven by ABM average 20 % larger contract values.
- Aligning ABM with targeted advertising lifts win rates by 60 %.
- Engaged-account-to-meeting conversion runs 25–35 %, vs 5–10 % for demand gen.

Pre-Launch Prerequisites

- **Data hygiene:**
  Verify account, contact, and intent fields are current.
- **Sales alignment:**
  Agree on target list, outreach cadence, and opportunity hand-off.
- **Budget sign-off:**
  Secure media, content, and tooling funds for two quarters.

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Ideal Customer Profile

Five Critical ICP Attributes

- **Industry Fit.**
  The company operates within your highest-value vertical or sub-vertical.
- **Revenue or Headcount.**
  Annual turnover or employee size supports enterprise-grade purchase capacity.
- **Technology Stack Alignment.**
  Current tools integrate cleanly with your platform or ecosystem.
- **Growth Signals.**
  Funding rounds, hiring spikes, or expansion plans indicate budget availability.
- **Buying Committee Complexity.**
  Defined roles exist for IT, finance, and operations decision-makers.

Attribute	Weight (1-5)	Threshold	Evidence Source	Notes
Industry Fit	☐	☐	☐	☐
Revenue / Headcount	☐	☐	☐	☐
Tech Stack Alignment	☐	☐	☐	☐
Growth Signals	☐	☐	☐	☐
Committee Complexity	☐	☐	☐	☐

Validation Checklist:

- Export ten recent closed-won accounts from CRM.
- Mark presence of each attribute per account.
- Ensure 80 % alignment across all attributes.
- Revise thresholds where alignment is below 80 %.
- Secure sales leadership approval of final ICP grid.

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Account Scoring & Tiering

Scoring converts raw account data into priorities. Tiering focuses resources on high-value targets. Follow this structured approach to rank, group, and assign every prospect objectively.

Factor	Example Signals	Recommended Weight*
Figmographic Fit	Revenue. emplyemee count, region	40%
Technographic Aligment	Complementry platforms in use	15%
Intent Surge	Topic Interest spikes	20%
Engagement	Site visits, webinar attends	15%
Strategic Value	Reference potential, market influence	10%

Sample Scoring Formula

Total Score = (Firmographic × 0.4) + (Tech × 0.15) + (Intent × 0.2) + (Engagement × 0.15) + (Strategic × 0.1)

Account	Firmographic (0–10)	Tech (0–10)	Intent (0–10)	Engage Strategic (0–10)	Total	Tier
☐	☐	☐	☐	☐	☐	☐

Tier 1 (Top 10 %) **Scores ≥ 85.** Requires personalised plays and dedicated SDR.

Tier 2 (Next 30 %) **Scores 70–84.** Use segment-level personalisation.

Tier 3 (Remaining 60 %) **Scores < 70.** Route to scalable nurture programmes.

Action Checklist

- ✓ Calculate weights using last 12 months' wins.
- ✓ Score current target list with agreed formula.
- ✓ Assign explicit owners for each tier.
- ✓ Schedule re-scoring every quarter.

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Buying Committee Mapping

Six Common SaaS Buyer Roles

Role	Key Pains	Desired Outcomes
Economic Buyer (CFO / VP Finance)	Rising software spend, unclear ROI	Lower TCO, clear payback period
Technical Decision-Maker (CTO / VP Engineering)	Integration risk, maintenance load	Seamless API fit, low admin effort
Security / Compliance Lead (CISO / IT Security)	Data breach liability, audit gaps	Proven controls, fast compliance mapping
Operations Owner (VP Ops / RevOps)	Manual workflows, siloed data	Process automation, single data view
Functional Champion (Department Head)	Inefficient team output, weak reporting	Productivity lift, actionable dashboards
Procurement Manager	Lengthy sourcing cycles, contract bloat	Aligned terms, negotiated savings

Worksheet – Map Two Priority Accounts

Account	Role	Name	Email	Core Pain	Outcome Sought	Preferred Channel
☐	Economic Buyer	☐	☐	☐	☐	☐
☐	Technical Decision-Maker	☐	☐	☐	☐	☐
☐	Security Lead	☐	☐	☐	☐	☐
☐	Operations Owner	☐	☐	☐	☐	☐
☐	Functional Champion	☐	☐	☐	☐	☐
☐	Procurement	☐	☐	☐	☐	☐
☐	Economic Buyer	☐	☐	☐	☐	☐
☐	Technical Decision-Maker	☐	☐	☐	☐	☐
☐	Security Lead	☐	☐	☐	☐	☐
☐	Operations Owner	☐	☐	☐	☐	☐
☐	Functional Champion	☐	☐	☐	☐	☐
☐	Procurement	☐	☐	☐	☐	☐
☐		☐	☐	☐	☐	☐

Instructions.

- ✓ List real contacts for two Tier 1 accounts.
- ✓ Capture primary pain and desired outcome per contact.
- ✓ Note preferred outreach channel for later play sequencing

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Insight Sheet Creation

Purpose

Insight sheets turn raw data into tailored talking points. They guide personal messaging and tighter pitches

Key Data Sources

CRM. Closed-won notes, open deals, contact history.

Intent Vendor. Topic surges, competitive research spikes.

Social Listening. Press releases, job posts, funding news.

Product Usage Logs. Trials, freemium sign-ups, feature drops.

Public Filings. Earnings calls, regulatory updates.

Sample Insight Sheet Snippet

Dimension	Data Point	Relevance	Action Idea
Firmographic	ARR ≈ $250 M, Series C	Budget confirmed	Pitch enterprise tier
Technographic	Uses Competitor X	Displacement chance	Stress migration ease
Intent Surge	“Workflow automation” +63 %	Active research	Send case study
Trigger Event	New CTO hired Apr 2025	Fresh roadmap	Welcome note, demo

Task – Capture Trigger Events

- ✓ Scan news, funding, hiring feeds for each Tier 1 account.
- ✓ Record three events dated within last 90 days.
- ✓ Link each event to a personalised outreach angle.

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Message Framework

Value Proposition Breakdown

Component	Guiding Question	Example for SaaS Workflow Tool
Pain	What hurts the buyer today?	Teams waste hours on manual approvals.
Proof	Why trust our fix?	200 firms cut approval time by 60 %.
Promise	What future can we guarantee?	Close tasks in minutes, not days.

Tip. *Draft one concise sentence per component before merging into copy.*

Stage-Specific Calls-to-Action

Funnel Stage	Goal	CTA Wording
Awareness	Spark interest	"See how peers speed approvals."
Consideration	Prove fit	"Download the ROI benchmark sheet."
Decision	Secure commitment	"Book a 30-minute custom demo."
Expansion	Grow account	"Add two new teams free for 60 days."

Message Worksheet – One Per Role

Role	Pain Statement	Proof Point	Promise Line	Final CTA
Economic Buyer (CFO)	☐	☐	☐	☐
Technical Decision-Maker (CTO)	☐	☐	☐	☐
Security Lead (CISO)	☐	☐	☐	☐
Operations Owner (RevOps)	☐	☐	☐	☐
Functional Champion	☐	☐	☐	☐
Procurement	☐	☐	☐	☐

Instructions.

- ✓ Fill pain, proof, promise cells using account insights.
- ✓ Combine the three into one crisp message per row.
- ✓ Align CTA with buyer's current funnel stage.

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Channel Coordination Plan

Key Takeaways

Eight touches cover 30 business days.

Rotate channels to avoid saturation.

Each touch needs a named owner and finished asset.

Review progress weekly and adjust if signals lag.

30-Day Multi-Channel Calendar Template

Biz Day	Channel	Suggested Asset	Owner	Status
1	Personalised email	Pain-proof-promise opener	☐	☐
5	LinkedIn InMail	ROI benchmark PDF	☐	☐
9	Display retargeting	15-sec value motion graphic	☐	☐
13	Phone call	Warm script, insight sheet	☐	☐
17	Direct mail	Hand-written note + case study	☐	☐
21	Webinar invite email	Live demo registration	☐	☐
25	LinkedIn ad	Customer quote carousel	☐	☐
29	Executive email	Business case + next-step request	☐	☐

Use company working-day calendar to map actual dates.

Touch Cadence Rules

- ✓ Four business days between touches keeps momentum steady.
- ✓ Never repeat the same channel consecutively.
- ✓ Adjust sequence if an account books a meeting earlier.

Owner & Asset Checklist

- ✓ Assign one marketing owner and one sales owner per account.
- ✓ Finalise creative for all eight touches before Day 1 launch.
- ✓ Load emails and ads into automation platforms with correct dates.
- ✓ Confirm direct-mail production lead times.
- ✓ Hold a weekly stand-up to approve upcoming assets.

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Sales Collaboration

Purpose

Marketing and sales must act as one. Fast follow-up converts interest into pipeline.

SLA – 24-Hour First Touch

Requirement	Detail
Response window	**First sales touch within 24 hours of MQA alert.**
Channels	Email, phone, or LinkedIn—match buyer preference.
CRM logging	Log every attempt the same business day.
Escalation	Flag accounts with no reply after three touches.

Warm Outreach Script Template

Section	Example Text
Opening	"Hi {{Name}}, noticed your team researching {{Topic}} last week."
Insight	"Similar firms like {{Peer}} cut costs 30 % using our platform."
Relevance	"Your recent funding suggests growth plans needing efficient workflows."
CTA	"Could we explore tailored gains Thursday at 2 PM?"

Edit each line using account-level insights before sending.

Action Checklist

- ☐ Book a 30-minute weekly sync with the sales lead.
- ☐ Review active MQAs, feedback loops, and handoff quality.
- ☐ Adjust script messaging based on sales call outcomes.

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Metrics & Dashboard

Purpose

Track what matters. Refine inputs. Prove revenue impact.

Core KPIs

Influenced pipeline. Qualified value touched by ABM touches.

Deal velocity. Average days from MQA to closed-won.

ACV lift. Percentage increase versus historical deal size.

Dashboard Wireframe

KPI	Target	Actual	Trend	Owner
Influenced pipeline	$	$		
Deal velocity (days)	________	________	▲ / ▼	☐
ACV lift (%)	________	________	▲ / ▼	☐
Meetings booked	________	________	▲ / ▼	☐
Tier 1 coverage (%)	________	________	▲ / ▼	☐

Update weekly. *Highlight red flags during team review.*

Task

- ✓ Pull last-quarter numbers.
- ✓ Agree stretch but realistic targets for next quarter.
- ✓ Enter targets in the table above before campaign launch.

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Continous Optimization

Goal

Improve results through structured experimentation.

Common Test Types

Subject line. Hook variation on email step one.

Audience segment. Compare C-suite versus VP engagement.

Offer. Swap demo for calculator download.

A/B Guardrails

- Test one variable at a time.
- Minimum 95 % confidence threshold.
- Run until loser reaches 250 conversions or four weeks.
- Stop early only if confidence ≥99 %.

Action – Draft Two Initial Tests

Test	Hypothesis	Metric	Success Threshold
Subject line A vs B	Line with number wins	Email open rate	+15 % opens
Offer switch	Calculator beats demo	Click-to-meeting rate	+20 % meetings

Complete remaining blanks and load into your platform.

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Case Snapshot & Next Steps

SaaS Case

A Series C HR-tech firm adopted this seven-step plan. Within six months, influenced pipline hit $4.2M. Average contract value tripled from $32k to $96k. Deal velocity dropped 28 days. Marketing and sales credited ABM for 72 % of new revenue.

Completion Checklist

- ICP grid filled and approved.
- Account list scored and tiered.
- Committees mapped for Tier 1-2 accounts.
- Insight sheets contain three fresh triggers each.
- Messages drafted per buyer role.
- 30-day calendar scheduled with finished assets.
- Sales SLA signed; first touches scripted.
- Dashboard targets locked; tracking live.
- First two optimisation tests designed.

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Contact Us

Let’s Connect

We’d Love to Hear From You

If you have questions, feedback, or want to explore how we can work together, reach out to us anytime.

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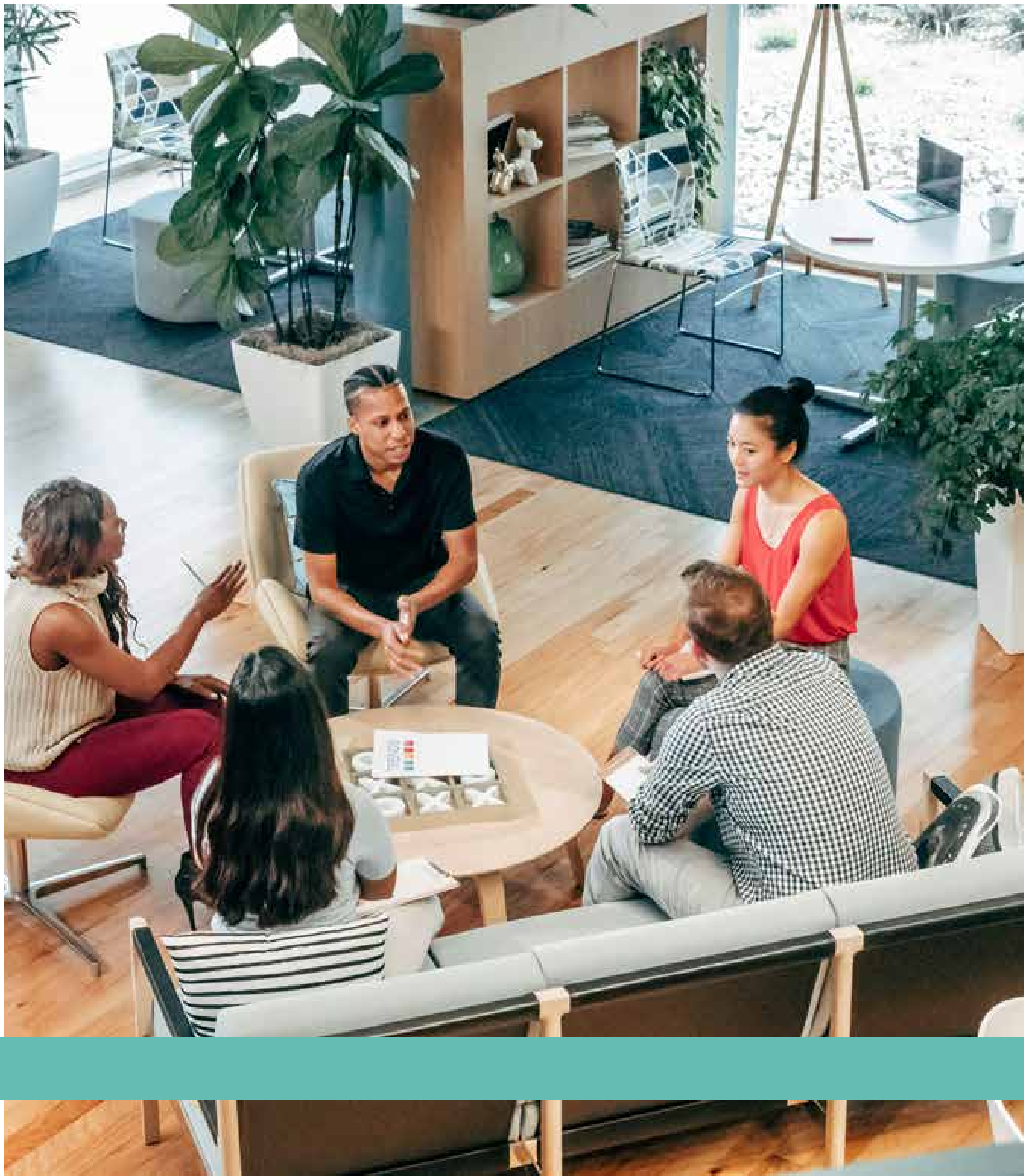

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