Strikezone Consulting

Business Development as a Service (BDaaS)

A data-driven system for identifying, prioritizing, and engaging high-value target accounts.

Phase 1: Governance & Engagement Setup

Goal

Establish the legal, data, and operational framework required to begin analysis and execution.

Process

Review and execute the following documents:

- Nondisclosure Agreement (NDA)
- Master Services Agreement (MSA)
- Data Processing Agreement (DPA), if applicable
- Statement of Work (SOW)
- Proposal/Contract

Deliverable

All required agreements are in place, enabling secure data access and formalizing the scope, expectations, and accountability for the engagement.

Phase 2: ERP Data Extraction & High-Value Customer Identification

Goal

Identify your highest-value customers and uncover the attributes that define them.

Process

- Secure administrative or read-only access to your ERP system
- Extract only the necessary tables and fields
- Define "best customers" as the top 20% by gross margin over the last 36 months
- Analyze their purchasing behavior, product mix, and financial patterns

Data Required

- Customer master data
- Account information
- 36 months of purchase history
- Product categories and SKUs
- Order frequency and order values
- Payment terms and payment history
- Geographic and industry data

Deliverable

A clear analysis of your top 20% of accounts, including revenue sources, margin contribution, and behavioral patterns. AL/ML to be used in this phase to analyze and answer initial questions of the data extracted. This becomes the foundation for building customer's Ideal Customer Profile (ICP).

- Summarize trends
- Identify top customers
- Calculate margins, order frequency, AOV
- Spot patterns in product mix
- Build the first version of your ICP

Strikezone can uncover:

- The top 20% of customers by gross margin.
- Patterns you see among the highest-value accounts
- Which customers buy across the most product categories
- The average order frequency by customer segment

Phase 3: Ideal Customer Profile (ICP) & Look-Alike Identification

Goal

Reverse-engineer the shared traits of your best customers, leveraging AI, and identify similar companies in the market or already in your ERP or CRM system.

Process

Using ERP data and Microsoft Copilot AI (optional data visualization tool) to identify:

Firmographic Traits

- Industry (NAICS/SIC)
- Company size (revenue, employees)
- Geography

Behavioral Traits (from ERP)

- Order frequency
- Product mix
- Service usage

Financial Traits

- Margin profile
- Payment behavior
- Growth rate

Operational Traits

- Lead-time sensitivity
- Customization requirements

These traits form your **Ideal Customer Profile (ICP)**.

Look-Alike Identification

We match your ICP against external data sources, allowing us to develop a list of accounts and personas that match your current ICP.

These accounts will fall into the **Inactive/Win Back and Strategic Account** categories**.** These will not be Tier 1 and 2 as those are current accounts determined to have a higher propensity to expand.

We will be looking for suggestions from the developer on which tools will best help determine look-alike accounts for Inactive/Win Back and Strategic Accounts.

Possible tools: Apollo.io, LinkedIn Sales Nav, D&B Hoovers (industrial data)

Prioritization (Manual Collaboration)

Strikezone and your sales leadership jointly rank accounts based on:

- Revenue potential
- ICP fit score (see below scoring model)
- Engagement readiness
- Relationship warmth
- Strategic value

We categorize accounts into four groups:

Tier A & B are part of the analysis of your current accounts. These will be utilized in development of your ICP. In addition, these accounts will receive next best steps on expansion opportunities for the salesperson to then execute against.

A-Tier: High-Priority Targets

- High value, high frequency, multi-product buyers
- Strong growth trajectory
- Excellent payment history

B-Tier: Growth Opportunity

- Solid history but limited product penetration
- Clear cross-sell or upsell potential

These are new, target accounts that will fall into your ICP. These accounts will go through the full processes outlined in Phases 4 & 5 (Account Planning & Account Outreach)

Inactive / Win-Back

- Historically valuable but inactive
- No orders in 6–12 months

Strategic Prospects (New)

- Not yet customers
- Strong ICP match
- High potential fit

Deliverable

A prioritized, data-driven target list with the highest likelihood of accepting meetings and converting into revenue.

Phase 4: Account Planning & Enrichment

Goal

Equip the sales team with complete, actionable intelligence on each target account.

Process

For each target account, we leverage a data enrichment and/or sales intelligence tool to gather:

General Company Data

- Revenue, employee count
- Industry classification
- Recent news and growth indicators
- Competitive landscape

Org Chart & Decision-Makers

- Procurement leaders
- Operations managers
- Plant managers and engineers
- Supply chain leadership
- C-suite for strategic accounts

Contact Information

- Verified email addresses
- Phone numbers

- LinkedIn profiles
- Reporting structure
- Relevant background insights

Deliverable

A fully enriched account list with decision-maker intelligence, enabling targeted and personalized outreach. Copilot AI-assisted messaging to develop hyperpersonlization at scale.

Phase 5: Account Outreach Plans

Goal

Turn the prioritized target list into **qualified meetings** through coordinated, multi-touch outreach across email, LinkedIn, and phone.

This is where strategy becomes pipeline.

Process

1) Build & Refine Cadences in data enrichment/sales intel tool (example: Apollo.io)

We create structured outreach sequences tailored to each segment (Win-Back, Strategic Prospects).

Cadences include:

- 8–12 touchpoints
- A mix of email, LinkedIn, and phone
- Messaging aligned to the ICP attributes and pain points

2) Execute Multi-Channel Outreach

Email

- Personalized

- Value-driven messaging
- Clear call-to-action
- Short, conversational tone

LinkedIn

- Profile views
- Connection requests
- Soft engagement (likes/comments)
- Direct messages

Phone

- Warm calls based on ICP fit
- Voicemails with value statements
- Follow-up calls tied to email/LinkedIn activity

This multi-touch approach increases reply rates and meeting conversions.

3) Messaging Frameworks

Each segment gets its own messaging strategy:

Inactive / Win-Back

- “We noticed you haven’t ordered recently…”
- New product updates
- Incentives or re-engagement offers

Strategic Prospects

- ICP-aligned pain points
- Industry-specific insights
- Social proof and case studies

4) Response Management & Handoff

Strikezone handles:

- Reply monitoring
- Qualification
- Objection handling
- Meeting scheduling

Sales receives:

- Fully qualified meetings
- Account notes

This ensures sales stays focused on closing, not chasing.

Deliverable

A predictable, repeatable outbound engine that consistently generates meetings with high-value prospects powered by data, ICP scoring, and multi-channel outreach.