

# ABM ROADMAP

Welcome to The Mx Group's ABM Roadmap, which organizes key decisions and activities by each of the seven stages we use to develop and run ABM initiatives. There are scope and scale decisions crucial to defining an ABM program that aligns with your organization's needs and environment. To this end, our Roadmap provides "crawl, walk, run" breakouts to distinguish between easier-to-implement and more-difficult-to-implement activities in each category.

This Roadmap also indicates the class of technology / tools required to deliver different levels of activity. There are some ABM activities your current CRM or MA tools do not natively support, which may point to a need for additional software. There may be some activities in the Roadmap you are not familiar with – and that's ok! We will work through it together in our Discovery and Scoping activities if you decide to work with The Mx Group.



## How to use the Roadmap:

- **Learn:** Each section outlines a range of ABM activities. This will help your team put shape around the things that can / should be done.
- **Assess:** Identify the activities you have already engaged in and your level of current satisfaction / effectiveness in these areas. This information (including gap analysis) will help clarify that "state of the state" and will shorten discovery cycles later.
- **Prioritize:** Identify activities that you have not engaged in, and indicate how important you believe they are to your organization. This will help clarify what needs to be done and shorten scoping cycles.
- **Compare / Benchmark:** Have different people or teams from your organization complete the Roadmap to gain an understanding of how they assess the current state and prioritize future activities and needs.

# 1

## Define Objectives & Ensure Alignment




Set a solid strategic foundation with clear objectives, quantifiable goals, and alignment between your sales and marketing teams (and others).

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	1a	Sales and Marketing establish a mutual understanding and vocabulary for what "ABM" means to the organization, including clarity around a "Large," "Named" and/or "Industry" focus	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1b	Sales and Marketing have formally engaged and are aligned on ABM strategy, including scope, goals, key metrics, expectations and timelines ... balancing decisions around scale / automation vs. insight / personalization	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1c	Sales and Marketing have discussed, prioritized and quantified ABM activities to identify / find new opportunities, nurture accounts and opportunities, accelerate opportunities and engage / expand current customers with repeat purchase, cross-sell and up-sell	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1d	Marketing has evaluated current martech stack capabilities against ABM strategy, scope, goals, key metrics and expectations to determine required toolset	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1e	Organization has budget allocated to support ABM initiatives	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1f	Sales and Marketing have engaged in account-level opportunity forecasting, using a methodology such as SiriusDecisions' Demand Waterfall® or other approach	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1g	Sales and Marketing have developed a joint SLA (service-level agreement) specifying accounts, lead / opportunity definition, lead management / routing rules, rules for engagement, ongoing communication / feedback, and CRM adherence	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1h	Sales and Marketing have committed to ongoing ABM "huddle" meetings to ensure coordination and alignment	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1i	Sales leadership has identified key personnel to be part of core ABM team to ensure ongoing representation and alignment	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	1j	Team has considered and prepared teams for changes to sales approach based on ABM	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		

# 2

## Identify & Prioritize Accounts



Define the profile, names and prioritization of the key accounts that represent the best revenue potential for your organization and will be your focus for ABM.

		We've done this.	We haven't done this.			Tools	
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)				
	2a	Identify firmographic profile of target accounts based on internal team discussion	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2b	Sales team validation / agreement on firmographic profile of target accounts	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2c	Identify list of specific accounts using firmographic profile	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2d	Prioritize / tier accounts from this list (static prioritization)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2e	Sales validation / agreement on prioritized / tiered list of specific accounts	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2f	Identify / validate profile of target accounts using historical sales data	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Predictive Analytics
	2g	Use this predictive profiling data set to identify "like accounts" that match this ideal profile	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2h	Prioritize / tier accounts from this list based on data set: static incorporating "fit" data signals	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2i	Identify / validate profile of target accounts using historical sales data, historical marketing data and external predictive data	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Predictive Analytics Marketing Automation
	2j	Use this predictive profiling data set to identify "like accounts" that match this ideal profile	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2k	Prioritize / tier accounts from this list based on data set: static incorporating "fit" data signals	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	2l	Prioritize / tier accounts from this list based on data set: model for dynamic incorporating "intent" and "behavior" data signals	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	

# 3

## Configure CRM, MA & Martech



Build a solid data foundation to support ABM goals. Configure and integrate tools and systems for account-based reporting, insight, lead management, sales activity, and campaign / marketing program management and delivery.

		We've done this.		We haven't done this.		Tools	
		Effectiveness (1 = Low, 5 = High)		Importance (1 = Low, 5 = High)			
	3a	CRM data structure: assign accounts for locations and match to master accounts for accounts	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Marketing Automation Automated Data Tools
	3b	CRM data review and clean-up: ensure contacts matched to proper accounts by location	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3c	CRM data review and clean-up: ensure opportunities matched to proper accounts by location	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3d	CRM: finalize data structure and fields to support ABM requirements (e.g., account tier, account score [if dynamic], persona, role in buying decision, etc.)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3e	CRM data: clean, standardize, de-dupe and auto-append missing firmographics	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3f	CRM database assessment: counts, penetration against target accounts list, data gaps (quality, completeness, coverage)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3g	CRM: configure account-based reporting that is possible / native to your CRM without other tools: counts and pipeline reports using accounts for locations, master accounts, opportunities-to-accounts, custom reporting values	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3h	CRM: configure penetration / activity against target accounts reports that are possible / native without other tools, including % change over time for penetration against accounts list	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3i	CRM: automate lead management, including direct and indirect teams (routing, reject, etc.)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3j	CRM and MA: determine sync rules and configure sync	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	3k	MA: ensure website embed code and site forms / landing pages configured correctly	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
3l	MA: review data structure and ensure required fields are available for automation programs	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5		
	3m	Determine whether data sourcing (contacts at accounts) is required for better management of outbound and inbound; make sourcing decision	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Predictive Analytics
	3n	CRM data review and clean-up: match leads to accounts (Predictive, ABM or CRM plug-in may be required)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	

# 3

## Configure CRM, MA & Martech



Continued.

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	3o	CRM: add lead-to-accounts reports to reporting	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		ABM Data Management & Measurement  Website Personalization  IP-based Content & Targeting  Cookie-based Content & Retargeting
	3p	CRM: configure custom object support for "buying centers" to link groups of contacts that operate collectively to make buying decisions within a location — provides permanent account mapping not possible when buying centers tracked at the opportunity level	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3q	Set up IP identification for anonymous website traffic to monitor and identify inbound traffic from key accounts, including appropriate automated sales and marketing alerts and triggered activities	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3r	Configure cookie-based retargeting (and display)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3s	Configure account and IP-based digital display (and retargeting)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3t	Data exchange or direct integration between CRM and customer purchase (and other) data managed in SAP for account intelligence, Predictive Analytics modeling, and marketing and sales triggers (re-purchase cycles, cross-sell, upsell, etc.)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3u	Configure predictive analytics activity ("intent" and "behavior") monitoring for key accounts, including appropriate automated sales and marketing alerts and triggered activities	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		CRM  Predictive Analytics  ABM Data Management & Measurement  IP-based Content & Targeting  Website Personalization  Automated Outbound  Specialized Content Delivery & Tracking
	3v	Configure predictive analytics-based account scoring, if utilizing dynamic scoring and dynamic accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3w	Configure IP-based (account) real-time website content personalization for tiered accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3x	Configure cookie-based (contacts) real-time website content personalization for tiered accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3y	Deep content monitoring metrics and account-based roll-ups for reporting (e.g., Vidyard for video)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	3z	Automated, outbound, personalized direct mail, keyed to triggers	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		

# 4

## Develop Account Data, Information & Insight



Targeted and personalized account-based sales and marketing activity is more effective with increasing levels of account information and insight. The more your organization knows about accounts, the more you can create sales and marketing plays that speak directly to buyers' needs and concerns.

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	4a	Develop CRM-delivered aggregate and individual account dashboards for Marketing and Sales	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation	
	4b	Map accounts in CRM – locations, buying groups, contacts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4c	Develop documented account profiles, plans and playbooks	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4d	Conduct account awareness, perception, preference and opportunity audits	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4e	Create account / industry sector / buyer persona message grids documenting needs, pain points, key messages, etc. using internal expertise	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4f	Map account / industry sector / buyer persona buyer's journey using internal expertise	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4g	Predictive Analytics modeling and scoring for account-level sales activity	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation	
	4h	Predictive Analytics modeling and scoring for account-level marketing activity	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4i	Predictive Analytics for account-level activity surges signaling "intent"	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4j	Conduct qualitative 1-to-1 interviews with key buyers at accounts for account-level insights	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4k	Expose complete marketing touches for opportunities and leads within CRM	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		

# 4

## Develop Account Data, Information & Insight

*Continued.*

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	4l	Develop CRM-delivered aggregate and individual account dashboards for Marketing and Sales with MA data	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	Predictive Analytics  ABM Data Management & Measurement	
	4m	Research and develop buyer personas to use to guide role-based communications using primary research conducted with real accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4n	Create account / industry sector / buyer persona message grids documenting needs, pain points, key messages, etc. using primary research	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4o	Map account / industry sector / buyer persona buyer's journey using primary research	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4p	Social monitoring and listening for account intelligence	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM  Marketing Automation  Predictive Analytics  ABM Data Management & Measurement	
	4q	Automated "scraping" or "polling" for key accounts information (expansions, acquisitions, key personnel changes, etc.) for sales and marketing intelligence	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	4r	Manual creation and updating of account profiles for information and insights not possible from automated sources, including regular updates from account owners.	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		

# 5

## Create Content, Select Channels & Run Campaigns

Effective, account-based content and multi-channel campaigns optimize inbound and outbound activities, drive engagement and create opportunities.



		We've done this.		We haven't done this.		Tools	
		Effectiveness (1 = Low, 5 = High)		Importance (1 = Low, 5 = High)			
	5a	Conduct audit of existing marketing content to assess performance, gaps and what can be leveraged	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Marketing Automation Predictive Analytics ABM Data Management & Measurement Website Personalization IP-based Content & Targeting Automated Outbound
	5b	Conduct audit of existing campaigns (inbound, outbound, organic, paid, owned media, to assess performance, gaps and what can be leveraged	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5c	Conduct audit of existing channels to assess performance and finalize recommendations	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5d	Develop and finalize content, campaigns and channels plan to support ABM program	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5e	Develop approach for campaign tracking, measurement and reporting possible within CRM + MA only	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5f	Create content and campaigns utilizing automated personalization / customization from data fields in MA	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5g	Cookie-based retargeting campaigns for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5h	Outbound email campaigns for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5i	Paid search for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5j	Organic search for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5k	Paid digital display for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5l	Paid social for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5m	Print advertising for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5n	Outbound direct mail for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5o	Outbound telequalification / appointment setting for ABM	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5p	"Surround" marketing for key accounts (billboards, local media, etc.)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	5q	Website ABM optimization and conversion paths	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	



# 5

## Create Content, Select Channels & Run Campaigns


Continued.

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	5r	Create content and campaigns utilizing automated personalization / customization from data provided by Predictive Analytics and / or IP-based Content & Targeting	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		CRM Marketing Automation Predictive Analytics
	5s	Develop approach for campaign tracking, measurement and reporting possible within CRM + MA + Predictive Analytics	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		ABM Data Management & Measurement Website Personalization IP-based Content & Targeting
	5t	Real-time ABM website personalization	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		Automated Outbound
	5u	Create content and campaigns that feature automated personalization / customization from Specialized Content Delivery & Tracking tools (e.g., personalized video from Vidyad)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		CRM Marketing Automation Predictive Analytics
	5v	Develop approach for campaign tracking, measurement and reporting possible within CRM + MA + Predictive Analytics + Specialized Content Delivery & Tracking tools	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		ABM Data Management & Measurement Website Personalization IP-based Content & Targeting
	5w	Create highly custom, 1-to-1 content and campaigns featuring a mix of automated and manual personalization / customization, leveraging qualitative sources such as account-level research, documented account plans, and / or participation from account relationship owners	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		Automated Outbound Specialized Content Delivery & Tracking

# 6

## Equip, Enable & Empower Sales



Ensure your sales team is supported with the information, process and tools they most need to succeed.

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	6a	Regular, ongoing communication between Sales and Marketing on ABM program, opportunity quality, etc.	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation	
	6b	Automated sales triggers and alerts from core CRM and MA data	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6c	Identify / find new opportunities within targeted accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6d	Nurture accounts and opportunities within targeted accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6e	Accelerate existing opportunities within targeted accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6f	Engage / expand current customers within targeted accounts	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6g	Ongoing CRM adherence monitoring and compliance reinforcement	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6h	Configure ABM-based individual rep and territory summary reports, including comparatives (individual, territory, all) possible within core CRM and MA	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	6i	Create static list of prioritized accounts and contacts within accounts for sales reps to use in their own prospecting activities (as a supplement to marketing-qualified opportunities routed to them)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		

# 6

## Equip, Enable & Empower Sales




Continued.

		We've done this.		We haven't done this.		Tools	
		Effectiveness (1 = Low, 5 = High)		Importance (1 = Low, 5 = High)			
	6j	Real-time reporting against opportunity forecasts	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Marketing Automation Predictive Analytics
	6k	Automated opportunity acceleration content and campaigns executed under the sales rep's name	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	6l	Develop and publish account-based sales rep playbooks including account, location, and account details	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	6m	1-to-many customized sales content: presentations, rep emails, follow-up materials, etc.	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	6n	Automated sales triggers and alerts from core CRM + MA + Predictive Analytics data	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	6o	Dynamic lists of prioritized accounts and contacts within accounts for sales reps to use in their own prospecting activities (as a supplement to marketing qualified opportunities routed to them)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	
	6p	1-to-1 customized sales content: presentations, rep emails, follow-up materials, etc.	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	CRM Marketing Automation Predictive Analytics
	6q	Automated customer expansion / engagement content and campaigns using purchased and other data housed in SAP (executed under the sales rep's name)	<input type="checkbox"/>	1 2 3 4 5	<input type="checkbox"/>	1 2 3 4 5	

# 7

## Measure & Refine

Comprehensive account-based measurement and metrics ensure the right things get measured and reported, your team has critical information to understand performance, and insights are used to drive refinements and improvements.

		We've done this.	We haven't done this.			Tools
		Effectiveness (1 = Low, 5 = High)	Importance (1 = Low, 5 = High)			
	7a	Data coverage and overall penetration against targeted accounts (changes over time)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation	
	7b	Opportunity pipeline by account, location within account, tier, territory (including appropriate cross-tabs)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7c	Campaign and source-level marketing attribution	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7d	Opportunity tied-to-account velocity reporting	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7e	Contact engagement scoring from MA tracked behaviors	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7f	Lead pipeline by account, location within account, territory (including appropriate cross-tabs)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation Predictive Analytics ABM Data Management & Measurement	
	7g	Lead tied to account velocity reporting	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7h	Opportunity & Lead pipeline by custom object "Buying Group" to account (including appropriate cross-tabs)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7i	Account engagement scoring	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7j	Multi-touch marketing attribution	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5		
	7k	Deep content engagement reports (e.g., individual and account video engagement)	<input type="checkbox"/> 1 2 3 4 5	<input type="checkbox"/> 1 2 3 4 5	CRM Marketing Automation Predictive Analytics ABM Data Management & Measurement Specialized Content Delivery & Tracking	