

# **ABX** readiness checklist for 2023.

**Empower your account based strategy with our comprehensive checklist.**

In today's market, you don't have the time or budget for random acts of account based marketing, me-too creative, wasted media spend, or poorly-executed technology. That's why it's important to use a proven revenue growth framework for assessing your organization's ABX readiness.

You can achieve true account based success by following a proven, integrated blueprint that ensures you are ready to use a cross-channel, holistic approach with your ABX program.

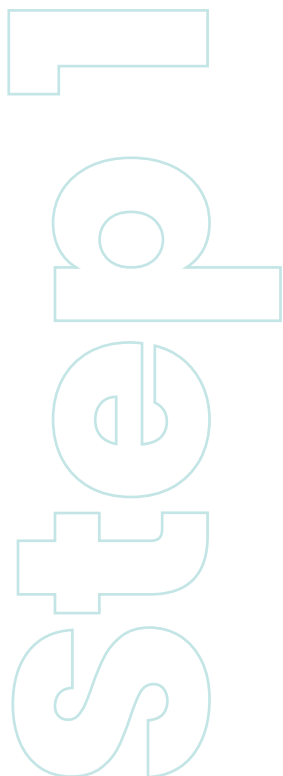
**Use this comprehensive checklist with your team to identify strengths and gaps.**

## **Establish your corporate growth goals and priorities.**

The best account based strategies are built on the foundation of integrated growth plans informed by data-driven insights. Aligning your account based goals with your organizational goals allows you to find the most valuable (and likely to convert) accounts—fostering deeper relationships, faster.

To successfully prioritize and scale ABX programs, start with these defined goals:

- ☐ **Establish a clear, shared understanding of your organization's growth priorities.**
- ☐ **Make sure your growth priorities meet department goals in marketing, sales, and customer success.**
- ☐ **Formulate clear, shared goals and success measures across brand awareness, acquisition, retention, and expansion.**
- ☐ **Ensure you have a strong, cross-functionally aligned sense of how an account based program will help reach larger goals and KPIs.**





# Foster go-to-market alignment to drive real revenue.

Having a solid go-to-market alignment ensures your marketing, sales, and customer success teams have the highest likelihood of achieving their growth goals. With authentic cross-functional integration and orchestration, all departments can operate as one superpower revenue team.

To reduce the gaps that exist between strategic planning and tactical execution, use these points to guide you:

- ☐ **Evaluate your market—including customer base—to see if there are enough high-value, strategically-important account types to warrant investing in an ABX program.**
- ☐ **Determine if your organization is competitive in your space and has achieved at least moderate levels of product/market fit.**
- ☐ **Ensure your target audience sees the value and is willing to pay for your offerings.**
- ☐ **Define the characteristics of your ICP. Use data to translate that into winning at an above-average conversion rate, value, and/or velocity.**
- ☐ **Be sure relevant executives, team leads, and team members are prepared to align their goals, roles, processes, and KPIs to successfully collaborate.**
- ☐ **Decide if you can map the right integrated campaign approach (1:One, 1:Few, 1:Many, 1:ICP) to the appropriate growth priority and go-to-market goal.**
- ☐ **Ensure you can confidently identify and define the account types, buying teams, buyer personas, and customer journeys you will target.**
- ☐ **Check if you can generate the insights needed to target, engage, and speak in personalized ways to target accounts or personas.**
- ☐ **Establish a value proposition and positioning that is credible, relevant, and differentiated to target accounts, buying centers, and personas.**
- ☐ **Develop overarching campaign concepts that tell your story in compelling ways.**
- ☐ **Personalize creative and messaging to resonate with different accounts/buyer personas.**
- ☐ **Identify the right budget amount, budget sources, and approvals to fund your account based program.**



# Create integrated experiences across all touchpoints.

Gone are the days of disconnected, poorly-targeted acts of messaging, advertising, and selling. By implementing integrated experiences across every touchpoint, you're empowered to create targeted, personalized, and well-orchestrated campaigns.

To determine if you have the expertise, capabilities, and staff bandwidth needed to plan, design, execute, manage, and optimize, be sure to:

- ☐ **Develop the brand awareness-focused portion of your account based strategy in ways that directly connect and feed the demand and sales elements of your program.**
- ☐ **Ensure your strategy connects and feeds the demand and sales elements of your ABX program.**
- ☐ **Dig deep and laser focus on the acquisition part of your account based strategy. Be sure you choose the correct integrated approach (1:One, 1:Few, 1:Many).**
- ☐ **Build out the retention/renewal-focused part of your account based strategy.**
- ☐ **Understand how to integrate the cross-sell, upsell, and land-and-expand part of your account based program.**
- ☐ **Make sure you have project management in place to manage the integrated projects, scopes, budgets, deliverables, milestones, and stakeholder communications for your account based program.**



## Develop tactical support services to seal the deal.

Think of tactical services as the “get stuff done” layer of your integrated growth program. With a winning go-to-market strategy in place and integrated experiences defined—tactical support services provide you with the high quality and expert capabilities needed to power your growth engine.

To establish if you have the tools, expertise, and bandwidth to ensure your efforts remain on time and on budget, be sure you:

- ☐ **Create an effective messaging strategy, creative concepts and assets, copy, and design elements to power your account based program.**
- ☐ **Access paid digital media, traditional paid media, social media, direct mail, retargeting, and other channels to reach, engage, and convert your target accounts.**
- ☐ **Ensure your ABX media choices maximize the channels, contexts, and devices your customers prefer.**
- ☐ **Design, develop, and optimize the websites and microsites, landing pages, content hubs, and hybrid events needed to support your ABX program.**
- ☐ **Identify the necessary tools to run SDR/Sales/Customer Success enablement, insights, content, and sales-triggered campaigns that support your account based program with human-powered engagement.**
- ☐ **Clearly identify and map the minimum marketing technology, advertising technology, sales technology, and platform integrations that you need to support your account based program.**
- ☐ **Execute and effectively manage lead-to-account matching, account and contact data, process management, and lead/account scoring.**
- ☐ **Don't forget to establish stakeholder workflows as well.**
- ☐ **Define the account based cross-platform analytics, reporting, dashboard, and attribution tools needed to launch and optimize your ABX strategy from end to end.**

## An expert, trusted ABX partner can be your secret weapon.

As you completed this account based readiness checklist, did you uncover any gaps? If so, you're not alone. Most ABX leaders and teams are developing their account based skillset to achieve clear ROI. If you're unsure how to get started or how to turn your ABX campaigns into a revenue-driving machine, we've got you covered.

Intelligent Demand uses a growth framework that isn't academic theory or alleged best practice. It's deeply rooted in a strategic and pragmatic approach that we test and prove every day for our clients. When you find the right partner, it can lead to some pretty powerful results.

**Let's talk.**

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