ABM SaaS Strategy Checklist

Step 1: Establish Your Ideal Customer Profile (ICP)

- [ ] Analyze data from your most successful, long-term, and highest-revenue customers.
- [ ] Identify common firmographic characteristics (industry, size, location, ARR).
- [ ] Document technographic data (current software used, tech stack).
- [ ] Gather behavioral insights (product usage patterns, engagement).
- [ ] Interview sales, customer success, and product teams for qualitative insights.
- [ ] Create a detailed ICP document summarizing key attributes.
- [ ] Schedule a recurring review (e.g., quarterly) to update your ICP.

Step 2: Identify and Prioritize Target Accounts

- [ ] Compile a list of companies matching your ICP using data sources (CRM, LinkedIn Sales Navigator, databases).
- [ ] Collect detailed information on each potential account (initiatives, news, challenges).
- [ ] Assess each account's potential value and strategic fit.
- [ ] Determine the appropriate ABM approach for segments of your list (one-to-one, one-to-few, or one-to-many) based on value and resources.
- [ ] Prioritize target accounts based on your assessment.
- [ ] Finalize your initial target account list size (e.g., 10-20 for 1:1, 20-100 for 1:few).

Step 3: Identify Key Stakeholders and Build Personas

- [ ] Research the organizational structure within each target account.
- [ ] Identify individuals involved in relevant purchasing decisions (decision-makers, influencers, end-users).
- [ ] Map reporting lines and understand individual roles and responsibilities.
- [ ] Research individual goals, performance metrics, pain points, and aspirations.
- [ ] Develop detailed buyer personas for each key stakeholder type.
- [ ] Document key characteristics for each persona (demographics, responsibilities, psychographics).

Step 4: Craft Personalized Messaging and Content

- [ ] Develop core messaging that addresses target account/persona pain points and goals.
- [ ] Map existing content assets to buyer journey stages (Awareness, Consideration, Conversion).
- [ ] Identify content gaps based on personas and stages.
- [ ] Create new content assets as needed (whitepapers, case studies, demos, landing pages).
- [ ] Develop personalized messaging variations for key personas within target accounts.
- [ ] Plan how to tailor content examples (e.g., personalized demo scripts, customized report snippets).
- [ ] Organize content assets in an accessible way for sales and marketing.

Step 5: Execute Multichannel Engagement

- [ ] Plan outreach sequences and cadences for different account/persona segments.
- [ ] Draft personalized email templates referencing account-specific research.
- [ ] Prepare personalized LinkedIn connection requests and message templates.
- [ ] Define triggers and messaging for targeted phone outreach.
- [ ] Set up targeted advertising campaigns on relevant platforms (LinkedIn, Google Ads) for account lists.
- [ ] Consider personalized direct mail or gifting for high-value accounts.
- [ ] Implement tracking for interactions across all channels.

Step 6: Cultivate Relationships and Nurture Interest

- [ ] Plan ongoing value-add touchpoints (sharing insights, inviting to webinars).
- [ ] Set up automated email nurturing sequences delivering relevant content.
- [ ] Configure retargeting ad campaigns to reinforce messaging and showcase value.
- [ ] Develop a process for sales to act as helpful resources, not just sellers.
- [ ] Document interactions and engagement levels in the CRM.
- [ ] Maintain patience and a long-term perspective for complex sales cycles.

Step 7: Ensure Sales and Marketing Alignment

- [ ] Establish a SLA for ABM roles and responsibilities.

- [ ] Define criteria for Marketing Qualified Accounts (MQAs).
- [ ] Create a clear, documented process for account handoffs from marketing/SDRs to AEs.
- [ ] Set up regular joint sales&marketing meetings focused on target accounts.
- [ ] Ensure shared access to account data and interaction history (e.g., via CRM/ABM tool).
- [ ] Establish feedback loops between sales and marketing for continuous improvement.

Step 8: Measure Account Based Marketing Success

- [ ] Define key ABM metrics to track (Engagement Rate, Penetration Rate, Pipeline Velocity, Win Rate, ACV, CLTV, ROI).
- [ ] Set up tracking mechanisms in your CRM, marketing, or ABM software.
- [ ] Create a reporting dashboard or system for monitoring account progress and campaign performance.
- [ ] Regularly analyze results against your initial objectives.
- [ ] Identify top-performing content, channels, and messaging.
- [ ] Use data insights to optimize campaigns and strategies.
- [ ] Track costs associated with ABM activities to calculate ROI.

Step 9: Foster Customer Advocacy

- [ ] Identify key milestones in the customer journey for requesting advocacy.
- [ ] Plan outreach to happy customers to request testimonials/case studies.
- [ ] Develop templates for easy testimonial and referral submission.
- [ ] Consider implementing a referral program with clear incentives.
- [ ] Maintain ongoing relationships with key customer contacts.
- [ ] Leverage customer success stories in future ABM campaigns.