

CHECKLIST

Planning for ABM Success

Take the guesswork out of your ABM audit. With this checklist, you can review your ABM performance and uncover opportunities for growth in the future.

UNDERSTAND YOUR TARGET AUDIENCE

- ☐ **Review your account selection strategy.**
Do you select target accounts from a list of known accounts, or dynamically with an ideal customer profile (ICP)?
- ☐ **Comb through your current customers.**
Are there natural upsell or cross-sell opportunities?
- ☐ **Consider the climate.**
What technological, economic, and social trends impact buying potential?

SPEAK THEIR LANGUAGE

- ☐ **Evaluate your key themes.**
*Can you consolidate or enhance your messages?
How do you position your solutions to your prospects?
What language should you update?*
- ☐ **Analyze your competitors' messages.**
What topics and selling points do they emphasize?
- ☐ **Map your communication to the buying stages.**
What types of content and language resonate at each stage? How can you deliver the right content when it's needed most?

TIMING IS EVERYTHING

- ☐ **Examine your stage duration.**
*In which stages do your prospects spend the most time?
How does this correlate to your win/loss rates?*
- ☐ **Measure touch performance.**
How many touchpoints do customers interact with before they close? Can you reduce the time between touchpoints?

KNOW WHERE YOU SHOULD BE

- ☐ **Assess your channel performance.**
*Which channels do you use the most? Which are the most effective? Can you tailor your messages to the channel?
Can you experiment with new channels?*
- ☐ **Assess the competition.**
Which channels do they use to interact with your target audience?
- ☐ **Find engagement opportunities.**
Where can you add value? Can you start or join conversations?

STREAMLINE REPORTS & OPERATIONS

- ☐ **Streamline your analysis.**
*Can all data sources feed into one platform?
What can you automate?*
- ☐ **Judge your reporting effectiveness.**
*Do your reports tell the full story of your customer journey?
What data models can you use to better evaluate progress?*
- ☐ **Review your KPIs.**
Are your success metrics in alignment with sales objectives?

