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# Building an ABM Charter

Setting the foundation for your ABM Planning

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### Why should you start with a charter?

#### A proper charter takes some time, but is incredibly important (and useful!)



Clearly articulate "Why ABM"?



Align the organization around an ABM "North Star"



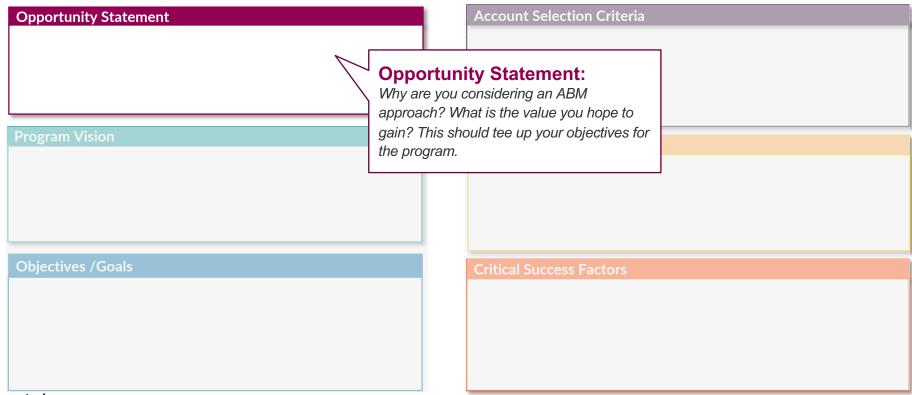
Agree on how to evaluate ABM's impact and success

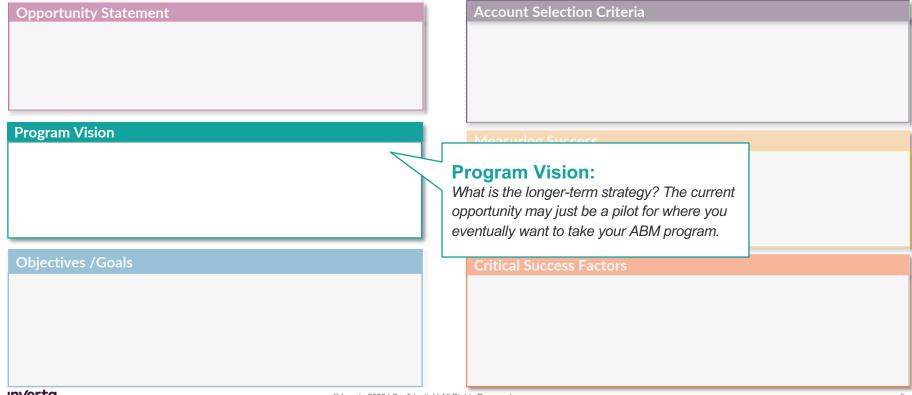
### Differences by company size or complexity

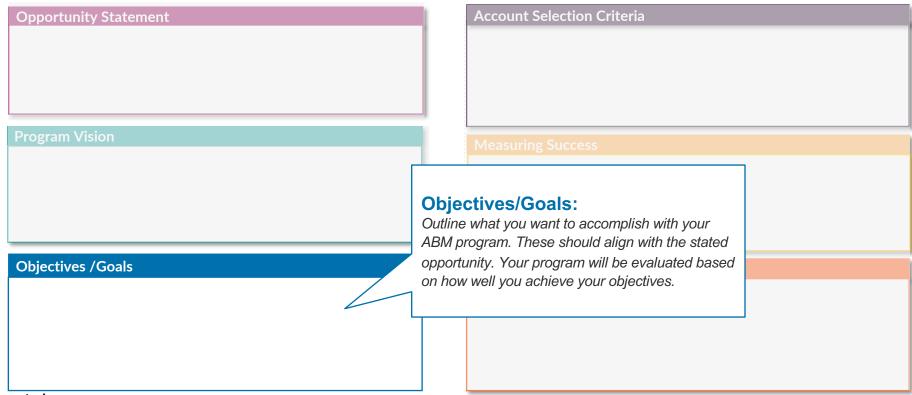
**Enterprise:** Usually wrangling a lot of executive stakeholders. Often times a pilot for a GTM strategy with large accounts.

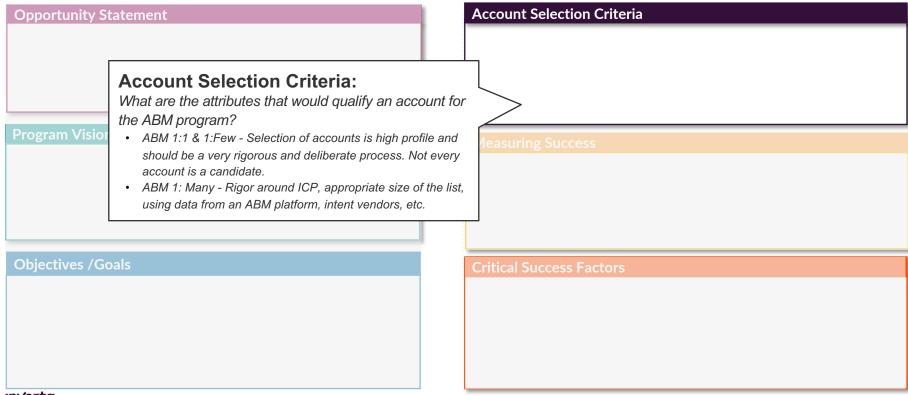
**Midmarket:** Establishing what ABM is and is NOT. Often time a pilot for converting demand gen, to smarter more efficient GTM.

Opportunity Statement		Account Selection Criteria
Program Vision		Measuring Success
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Objectives /Goals		Critical Success Factors

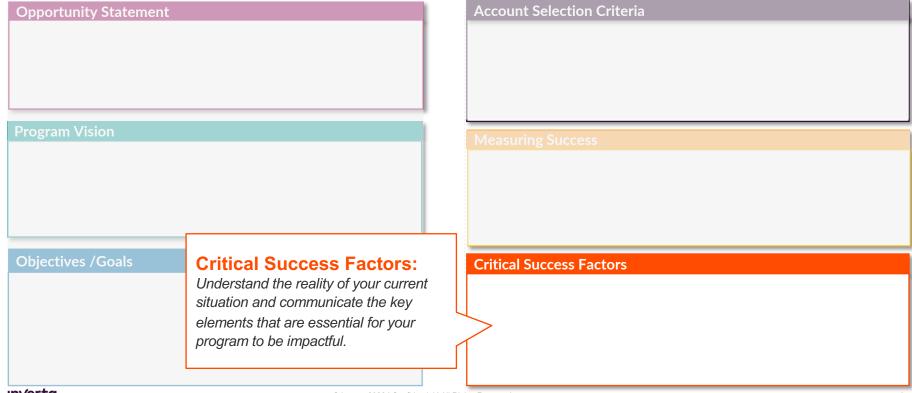












## **ABM Selection Criteria**



### **ABM 1:1 Account Selection Criteria Example**

Criteria	Details	Rationale		
Executive / Corp priorities known	YES/NO (NO is a disqualifier).	This is the most important and required criteria. If we don't know corporate priorities we spend thousands of dollars a year in hyper-custom marketing program where we are guessing what they care about.		
Champion / Exec Sponsor	YES/NO (NO is a disqualifier).	We need a champion who will be our sponsor, provide us an opportunity to meet the right stakeholders and will promote us within the company. They provide insight to us about their initiatives, influencers and decision-makers plus provide feedback on our custom content and programs.		
Account Potential	\$750k+ revenue potential an 18-month period	The ABM program is for driving substantial revenue.		
Multi threaded / Friendly Contacts	YES/NO (NO is a disqualifier)	This does not mean at the exec level or multiple champs. This means multiple POCs and friendlies at the Mgr/Director level. If our main POC quits or goes dark, we need others who will take our calls and give us internal insight.		
Highly licensed, under-deployed	YES/NO (NO is a disqualifier)	Accounts that have brought into our vision but have not rolled out solutions are accounts that can be a risk.		
Scope of Decision	Enterprise-Wide decision being made in less than 6 months (YES is a disqualifier)	The 1:1 ABM program is intended to support an account for a year or more to help build relationships and support and progress opportunities. Once an account is selected it takes 2-3 months for programs to go live and with a short time frame, inclusion in the program would not be worthwhile.		

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### 1:Many Account List Sizing

### How big should your Target Account List (TAL) be?

	Strategic	Enterprise	Midmarket	Total
% of Revenue Assigned to Segment	25%	45%	30%	
2021 Net-New Business Revenue	\$120,000,000	\$225,000,000	\$150,000,000	\$495,000,000
% coming from New Business	30%	30%	30%	30%
TAL derived Quota	\$36,000,000	\$67,500,000	\$45,000,000	\$148,500,000
Average Deal Size (ACV)	\$1,500,000	\$500,000	\$150,000	\$323,529
# of Deals needed from TAL	24	135	300	459
Close Rate	40%	35%	25%	33%
# of Pipeline Opps Needed from TAI	60	386	1200	1,646
TAL-to-Pipeline Conversion Rate	20%	20%	20%	20%
<b>Total Accounts Needed</b>	300	1929	6000	8,229

### **Critical Success Factors**



### **Key Considerations for ABM Success**

Culture **GTM Strategy** Is your organization set up to embrace How does your GTM impact your ability and execute ABM? to successfully execute ABM? **Sales Structure & Alignment Technology Organizational** Does your sales team have the right Will your tech stack (sales and Readiness mindset, inner workings and approach marketing) support an ABM effort? to execute ABM? **Centricity: Product vs Customer** Marketing Resourcing What kind of messaging does your Do you have a team with the right organization use in it's GTM? experience and structure for ABM? This includes having the capabilities to create This includes resources and budget. customer focused content

### ABM 1:Many Charter - Finished Product

#### **Opportunity Statement**

Develop a new methodology for generating and accelerating pipeline that is more efficient, repeatable and predictable.

#### **Program Vision**

ABM as the primary GTM engine, for both new business as well as customer expansion. A truly blended ABM strategy mapped to revenue needs.

#### **Objectives / Goals**

- Accelerate pipeline generation engine to make up for Q1/Q2 pipeline shortfall
- Leverage ABM to increase close rates and funnel velocity
- Develop a motion that can integrate with Sales processes
- Target customers with relevant offers for expansion

#### **Account Selection Criteria**

- Accounts in North America with the following attributes
  - Prospects: \$100m in annual revenue and SAP as their ERP system
  - Customers: Accounts with one product only (accounts with at two products are 90% more likely to renew)

#### **Measuring Success**

- Increase close rates by 3%
- Improve engagement by 10% (relevant offers should drive this)
- Broaden the use of Content Hubs by Sales by 25%
- Expand the number of reps making quota by 10%

#### **Critical Success Factors**

- Gaining true alignment and accountability with Sales
- Ability to optimize and leverage technology to scale efforts
- Ample funding from Finance to ensure impact and success
- Development of dashboards and the discipline around optimization of campaigns

### Who is Inverta?

We are a women-owned B2B firm comprised of experienced marketers who have built and delivered high-impact demand and revenue strategies for B2B brands.

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# Thank You

