

# 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.

# 6 Key Areas of an ABM Charter

## Opportunity Statement

## Program Vision

## Objectives /Goals

## Account Selection Criteria

## Measuring Success

## Critical Success Factors

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### **Opportunity Statement:**

*Why are you considering an ABM approach? What is the value you hope to gain? This should tee up your objectives for the program.*

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### Program Vision:

*What is the longer-term strategy? The current opportunity may just be a pilot for where you eventually want to take your ABM program.*

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### **Objectives/Goals:**

*Outline what you want to accomplish with your ABM program. These should align with the stated opportunity. Your program will be evaluated based on how well you achieve your objectives.*

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### Account Selection Criteria:

*What are the attributes that would qualify an account for the ABM program?*

- *ABM 1:1 & 1:Few - Selection of accounts is high profile and should be a very rigorous and deliberate process. Not every account is a candidate.*
- *ABM 1: Many - Rigor around ICP, appropriate size of the list, using data from an ABM platform, intent vendors, etc.*

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### Measuring Success:

*What criteria will you use to assess if your ABM is successful? What metrics will Sales and Marketing agree on to measure the impact? Metrics can be qualitative and quantitative.*



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### Critical Success Factors:

*Understand the reality of your current situation and communicate the key elements that are essential for your program to be impactful.*

# ABM Selection Criteria

# ABM 1:1 Account Selection Criteria Example

Criteria	Details	Rationale
<b>Executive / Corp priorities known</b>	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.
<b>Champion / Exec Sponsor</b>	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.
<b>Account Potential</b>	\$750k+ revenue potential an 18-month period	The ABM program is for driving substantial revenue.
<b>Multi threaded / Friendly Contacts</b>	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.
<b>Highly licensed, under-deployed</b>	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.
<b>Scope of Decision</b>	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.

# 1: Many Account List Sizing

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

	Segment			
	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 TAL	60	386	1200	1,646
TAL-to-Pipeline Conversion Rate	20%	20%	20%	20%
<b>Total Accounts Needed</b>	<b>300</b>	<b>1929</b>	<b>6000</b>	<b>8,229</b>

# Critical Success Factors

# Key Considerations for ABM Success



# 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.



inverta

Thank You

