

Account Insights Readiness Assessment

ABM Program Type: Large Named Industry Customer Lifecycle

ABM Program Scale: One-to-one

Deep research to deliver fully customized experience



One-to-few

Key selling points (for cluster / account) to deliver tailored experience with personalization



One-to-many

Industry or segment insights to deliver relevant experience with basic personalization



Insight Source Planning

	Importance <i>1=Low, 5=High</i>	Accessible in tech stack <i>CRM, SFA, MAP, etc. list system</i>	Accessible in historical reports <i>list system</i>	Gather input from internal meetings and interviews <i>list participants</i>	Gather through research <i>list owner</i>	Acquire this data <i>append, telemarketing, third-party resource, etc.</i>	Gather over time <i>progressive forms, sales conversations, etc.</i>	Not important or applicable <i>exclude from insights</i>
Example	1 2 3 4 5			Meet with SDRs	Emily P.			<input type="checkbox"/>

Account Insights

SWOT Analysis	1 2 3 4 5							<input type="checkbox"/>
Business Strategy & Priorities	1 2 3 4 5							<input type="checkbox"/>
Competitors	1 2 3 4 5							<input type="checkbox"/>
Buying Centers	1 2 3 4 5							<input type="checkbox"/>
Org Chart	1 2 3 4 5							<input type="checkbox"/>
Contract Cycle	1 2 3 4 5							<input type="checkbox"/>
Technographics	1 2 3 4 5							<input type="checkbox"/>
Previous Proposals	1 2 3 4 5							<input type="checkbox"/>

	Importance <i>1=Low, 5=High</i>	Accessible in tech stack <i>CRM, SFA, MAP, etc. list system</i>	Accessible in historical reports <i>list system</i>	Gather input from internal meetings and interviews <i>list participants</i>	Gather through research <i>list owner</i>	Acquire this data <i>append, telemarketing, third-party resource, etc.</i>	Gather over time <i>progressive forms, sales conversations, etc.</i>	Not important or applicable <i>exclude from insights</i>
Account Insights (continued)								
Relationships with Key Contacts	1 2 3 4 5							<input type="checkbox"/>
LinkedIn Connections	1 2 3 4 5							<input type="checkbox"/>
Persona / Contact Insights (persona-level for one-to-many, contact-level for one-to-one)								
Title / Role	1 2 3 4 5							<input type="checkbox"/>
Tenure	1 2 3 4 5							<input type="checkbox"/>
Purchase Authority	1 2 3 4 5							<input type="checkbox"/>
Media & Web Habits	1 2 3 4 5							<input type="checkbox"/>
Priorities	1 2 3 4 5							<input type="checkbox"/>
Pain Points	1 2 3 4 5							<input type="checkbox"/>
Buyer's Journey	1 2 3 4 5							<input type="checkbox"/>
Perceptions of Our Brand	1 2 3 4 5							<input type="checkbox"/>
Perceptions of Competitors' Brands	1 2 3 4 5							<input type="checkbox"/>

	Importance <i>1=Low, 5=High</i>	Accessible in tech stack <i>CRM, SFA, MAP, etc. list system</i>	Accessible in historical reports <i>list system</i>	Gather input from internal meetings and interviews <i>list participants</i>	Gather through research <i>list owner</i>	Acquire this data <i>append, telemarketing, third-party resource, etc.</i>	Gather over time <i>progressive forms, sales conversations, etc.</i>	Not important or applicable <i>exclude from insights</i>
Persona / Contact Insights (continued)								
Engagement History	1 2 3 4 5							<input type="checkbox"/>
Skills & Interests	1 2 3 4 5							<input type="checkbox"/>
Current Customer Insights								
Purchased Products / Services	1 2 3 4 5							<input type="checkbox"/>
Engaged Buying Centers	1 2 3 4 5							<input type="checkbox"/>
Share of Wallet	1 2 3 4 5							<input type="checkbox"/>
Renewal Date	1 2 3 4 5							<input type="checkbox"/>
<i>Custom:</i>	1 2 3 4 5							<input type="checkbox"/>
Market Insights								
News & Trends	1 2 3 4 5							<input type="checkbox"/>
Growth Drivers	1 2 3 4 5							<input type="checkbox"/>
Growth Inhibitors	1 2 3 4 5							<input type="checkbox"/>
M&A Activity	1 2 3 4 5							<input type="checkbox"/>