



**BETTERPROSPECTING**  
SALES PROSPECTING SUPPORT



# ACCOUNT-BASED MARKETING FOR BEGINNERS

# Workbook

# Content

01 INTRODUCTION

02 BETTERPROSPECTING FRAMEWORK

03 STEP BY STEP GUIDE

04 RESOURCE PAGE



# HELLO AND... Welcome!



You are in the right place if you're looking to learn about account-based marketing.

This course helps anyone who is involved in growing a B2B organization, from CEOs to customer service reps, everyone in your company should be on the same page when it comes to providing services to your prospects and clients.

With this DIY workbook, we guide you step-by-step through our tried and true method of developing an effective ABM plan.

You'll be able to create an excellent sales prospecting method that is efficient, and effective, and will attract and convert more of your ideal prospects.

## LET'S GET STARTED!

# Framework

## 7-STEP ACCOUNT-BASED MARKETING

This framework for creating, implementing, and evaluating your PR plan will take you from being ‘the best-kept secret’ in your sector, to being the go-to spokesperson. There are 9 steps within 3 pillars to Prepare, Plan and Produce a thorough and effective plan.





# Account Selection

## IDENTIFY THE CUSTOMERS THAT MATTER

Determine your Ideal Customer Profile with a list of 5 criteria to identify your highest potential accounts. Criteria to consider can be revenue, number of employees, type of pain points, credit rating, or business sector.

Criteria #1

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Criteria #2

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Criteria #3

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Criteria #4

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Criteria #5

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# Account Insight

## KNOW THE CUSTOMERS' BUSINESS

Start gathering deep research into your selected accounts. Find information such as location information and background, business areas, finances, products, challenges and pain points, customers and competitors, and what their motivating factors are. Jot ideas down below for each account.

Account #1:

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Account #2:

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Account #3:

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Account #4:

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Account #5:

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# People Insight

## KNOW YOUR CUSTOMERS

Identify the buying committee decision-makers, their contact information, and their responsibilities. Then we highly suggest creating a Persona Profile (next page) for each to gain insights into their pain points, preferences, possible objections, and where you can best engage with them online, in print, or in person. Personalization is key to success.

Account #1/ Person #1

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Account #1/ Person #2

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Account #1/ Person #3

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Account #2/ Person #1

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Account #2/ Person #2

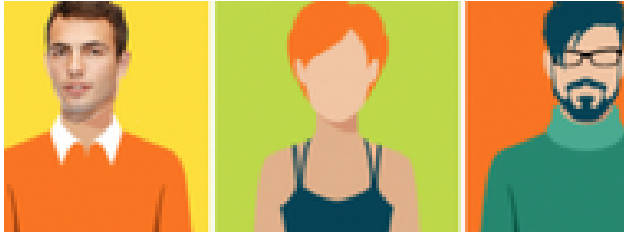
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# Bonus: Buyer Persona

Get specific with each role you want to reach by filling out a buyer persona profile page for each role!

NAME:  
ROLE/TITLE:



## DEMOGRAPHIC

Age & gender \_\_\_\_\_

Location \_\_\_\_\_

Education \_\_\_\_\_

Job \_\_\_\_\_

Family \_\_\_\_\_

INTERESTS &  
where they can be reached  
(online, print publications, etc.)

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## PAIN POINTS

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## GOALS/MOTIVATIONS

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# Content & Messaging

## WRITE YOUR KEY MESSAGES

Develop key messaging to address the problem you solve and your value proposition for each Buyer Persona you've identified. Remember to focus on the benefits for the prospect - not the features of your products/services.



PERSONA 01:

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PERSONA 02:

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PERSONA 03:

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PERSONA 04:

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PERSONA 05:

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# Content & Messaging

## LIST YOUR CONTENT TO BE CREATED

Content is needed to be created for each stage of the customer journey and should be personalized for each persona.



**01 AWARENESS** Content: Social media, advertising, SEO/SEM, events, lead magnets, landing pages.

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**02 CONSIDERATION** Content: E-books, case studies, white papers, comparison charts, email campaigns.,

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**03 CONVERSION** Content: sign ups forms for events, webinars, landing pages.

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**04 PURCHASE** Content: demos, webinars or other events.

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**05 RETENTION + ADVOCACY** Content: onboarding

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# Outreach

## CONTACT DECISION MAKERS THAT MATTER

Contact the decision makers that matter. Use the insight research you've completed to personalize your messages for this outreach stage using emails, LinkedIn inmail, or phone calls. Track your outreach. (We suggest you create a spreadsheet to better track your outreach)

### SAMPLE TRACK SHEET

## Focused Outreach:

Contact the few decision makers that matter

Email	LinkedIn	Name	# LI Invites	Date Invite	# Accepts	Date Accept	% Accepts/Invites	LI T/U	5/1
kate@{prospect}.com	{linkedin profile}	Kathy D	1	4/15/2021	1	4/17/2021	100%	1	
alan@{prospect}.com	{linkedin profile}	Alan K	1	4/15/2021	1	4/17/2021	100%	1	
oliver@{prospect}.com	{linkedin profile}	Oliver R	1	4/15/2021	1	4/17/2021	100%	1	
nick@{prospect}.com	{linkedin profile}	Nick T	1	4/15/2021	1	4/17/2021	100%	1	
Mike@{prospect}.com	{linkedin profile}	Michael B	1	4/15/2021	1	4/17/2021	100%	1	
Todd@{prospect}.com	{linkedin profile}	Todd S	1	4/17/2021	1	4/21/2021	100%	1	
Joan@{prospect}.com	{linkedin profile}	Joan H	1	4/17/2021	1	4/21/2021	100%	1	
Marilyn@{prospect}.com	{linkedin profile}	Marilyn T	1	4/17/2021	1	4/21/2021	100%	1	
Jennifer@{prospect}.com	{linkedin profile}	Jennifer M	1	4/17/2021	1	4/21/2021	100%	1	
Vishal@{prospect}.com	{linkedin profile}	Vishal K	1	4/20/2021	1	4/21/2021	100%	1	
Paige@{prospect}.com	{linkedin profile}	Paige K	1	4/27/2021	1	5/2/2021	100%	1	
Amanda@{prospect}.com	{linkedin profile}	Amanda K	1	4/27/2021	1	5/2/2021	100%	1	
Rhonda@{prospect}.com	{linkedin profile}	Rhonda H	1	4/27/2021	1	5/2/201	100%	1	
Roberto@{prospect}.com	{linkedin profile}	Roberto R	1	4/27/2021	0		0%		
Mike@{prospect}.com	{linkedin profile}	Mike F	1	4/27/2021	0		0%		
Paul@{prospect}.com	{linkedin profile}	Paul K	1	4/27/2021	0		0%		
Jeff@{prospect}.com	{linkedin profile}	Jeff R	1	4/27/2021	0		0%		
Jon@{prospect}.com	{linkedin profile}	Jon K	1	4/27/2021	0		0%		
Mona@{prospect}.com	{linkedin profile}	Mona S	1	4/27/2021	1	4/28/2021	100%	1	
Rick@{prospect}.com	{linkedin profile}	Richard L	1	4/27/2021	0		0%		
Brad@{prospect}.com	{linkedin profile}	Brad S	1	4/27/2021	0		0%		
Eugene@{prospect}.com	{linkedin profile}	Eugene R	1	4/27/2021	0		0%		
		22	22	4/22/2021	14	4/21/2021	64%	14	
		Legend							
		Completed							
		30%+							
		10-29%							
		0%-9%							
Outreach Tracking ▾	Prospect 1 ▾	Prospect 2 ▾	Prospect 3 ▾	Prospect 4 ▾	Prospect 5 ▾	Prospect 6 ▾	Prospect 7 ▾	Pr	

# 6

## Customer Journey

Developing an excellent customer journey using a multi-channel approach is key to ABM success. Repeated contact establishes awareness, credibility, and trust. Along with personalized content, you can persuade your prospect to purchase your solution.

### SAMPLE CAMPAIGN ACTIVITY SHEET

Timing	Activity	Target	Actual
Week 1	Follow up with new connection. Remind them how & why you are connected-> help with the problem they are experiencing.	30% connection rate	
Week 2	Send contextually relevant articles (or blog, podcast, video, etc.)	20% open rate	
Week 3	Relevant market studies by third parties that similarly identify the problem or ideal solution. Get reprint and/or distribution rights. As part of the work	10% response rate	
Week 4	Podcast on a contextually relevant subject, focus on problem	15% progress to next step	
Week 5	ZOOM call follow up, or video email	15% progress to next step	
Week 6	More social media planning and execution based on best response and	1% progress to next step	
Week 7	Follow up call, send product information with cover personalized in the context of the prospective customer's business	W% conversion to demo	
Week 8	New release re: product, case study, company or team members. Rely on the content plan library (created in ABM Stage 4 Content & Messaging)	X% conversion to follow up call	
Week 9	Send contextually relevant industry study (licensed for reproduction) to the potential customer	Y% conversion to follow up call	
Week 10	Email check in, send them e-book on the business challenge and solutions	Z% conversion to follow up call	
Week 11	Assign non-responsive contacts to a scalable nurturing program	% conversion to SQL in 3 months	

# 7

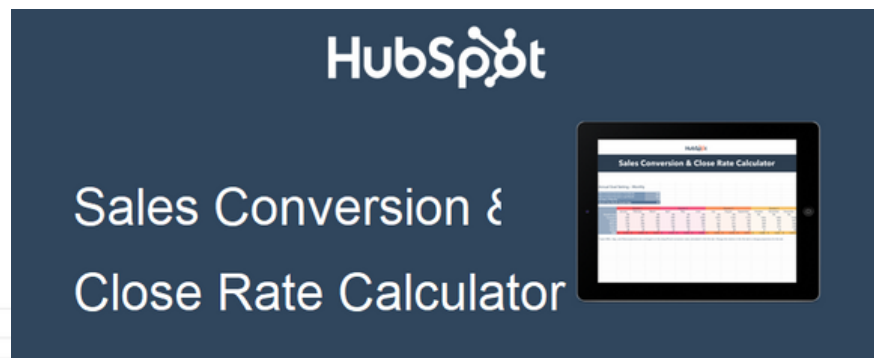
# Measurement

Setting your KPIs and tracking the metrics is an important part of our ABM process. This will give you objective insights into what is delivering results and what isn't. Measurement makes the ABM process efficient and effective and enhances the customer experience.

We highly suggest you download for free the Hubspot Sales Conversion and Close Rate Calculator here: [Sales Conversion & Close Rate Calculator](https://offers.hubspot.com/increase-sales-close-rates)

In it, you will find a Conversion rate tracker, a Deal Tracker, and Goal Setting sheets to simplify your measurement activities.

<https://offers.hubspot.com/increase-sales-close-rates>



Dropoff Rate Calculator		
	Number	Dropoff Rate
Total Contacts		N/A
Total Leads / Prospects		#DIV/0!
Total MQLs		#DIV/0!
Total Opps		#DIV/0!
Total Deals		#DIV/0!
Enter Your MRR Earned in This Period		
Conversion Rate Metrics		
For tips on how to increase these conversion rates, read the guide attached in this offer.		
Contact Metrics		Lead Metrics
Contact > Lead	#DIV/0!	Lead > MQL
Contact > MQL	#DIV/0!	Lead > Opp
Contact > Opp	#DIV/0!	Lead > Deal
Contact > Deal	#DIV/0!	MRR Per Lead
MRR Per Contact	#DIV/0!	
MQL Metrics		
MQL > Opp	#DIV/0!	
MQL > Deal	#DIV/0!	
MRR Per MQL	#DIV/0!	

## Deal Tracker

Quarter One				
Deal Name:	Contact Name:	Deal Stage:	Deal Size:	Probability:
Company ABC	Vincent Vega	Contacted	\$110,000	15%
Company XYZ	Jules Winfield	Decision Maker Bought In	\$85,000	35%
Company FGH	Mia Wallace	Contract Sent	\$75,000	80%
Company LMK	Winston Wolfe	Closed - Won	\$70,000	100%
Q1 Total			\$340,000	
Quarter Two				
Deal Name:	Contact Name:	Deal Stage:	Deal Size:	Probability:
Company ABC	Alan Grant	Contacted	\$110,000	15%
Company XYZ	Ian Malcolm	Contacted	\$85,000	15%
Company FGH	Ellie Sattler	Contract Sent	\$75,000	80%
Company LMK	John Hammond	Closed - Won	\$70,000	100%
Q2 Total			\$340,000	

# Thank You

## LET'S STAY IN TOUCH!



We are here to help you succeed! Reach out to us with questions or feedback about this program workbook, and make sure you're on our email list.

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