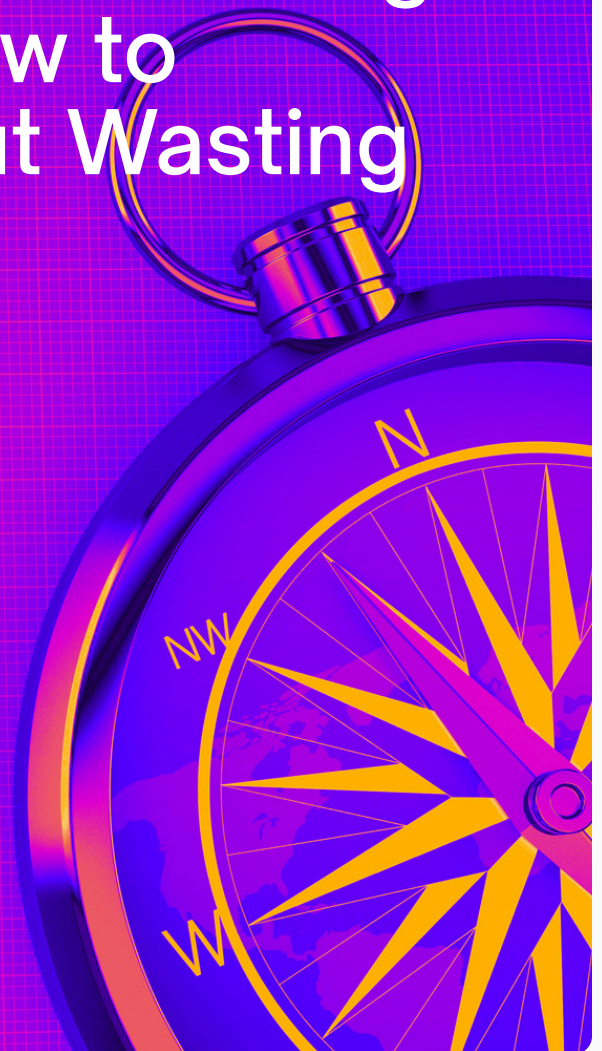


FOR B2B TEAMS

# Account-Based Marketing: A Practical Playbook

How to Decide If ABM Is Right  
for You — and How to  
Execute It Without Wasting  
Budget



# Executive Summary

Account-Based Marketing (ABM) is often presented as a silver bullet for B2B growth. In reality, it is a highly effective strategy only when the right conditions are met. This playbook is designed for B2B marketing leaders and practitioners who are asking two fundamental questions: Should we adopt an ABM approach? And if so, how do we execute it properly without wasting time, budget, or credibility with sales?

ABM (Account-Based Marketing) fundamentally shifts from high-volume lead generation to a **focused growth model centered on a limited number of high-value accounts**. Instead of broad outreach, ABM begins with a predefined Target Account List, treating each as a "market of one." Content, messaging, channels, and sales interactions are precisely orchestrated around that account's specific business context, stakeholders, and buying dynamics.

However, ABM is not universally applicable. Success requires a certain level of sales maturity, data quality, deal size, and **organisational alignment**. When these are missing, ABM efforts often lead to complex campaigns and disappointing returns. This playbook, therefore, helps marketers **assess readiness, define clear boundaries, and make informed go / no-go decisions** before execution.

For ready teams, the playbook provides a structured, actionable methodology across four phases:

1. **Strategic Account Selection and ICP Definition** to ensure focus on winnable, valuable accounts.
2. **Development of High-Value Lead Magnets** that demonstrate authority at the account level.
3. **Multi-Channel Outreach and Human-in-the-Loop Automation** for scalable, personalized engagement.
4. **Monitoring Account Engagement and Sales Handoff** using account-level signals for timely sales intervention.

Emphasizing **sales-marketing alignment** as an operational discipline—supported by shared data and clear handoff criteria—the playbook uses real-world examples from complex B2B environments.

Ultimately, this playbook positions ABM as a **strategic operating model** for B2B growth. Applied correctly, it enables marketing and sales to accelerate pipeline velocity, deepen account penetration, and build predictable, high-value revenue from the most critical accounts.

PREPARED BY  
Emmanuel Carpentier

# The Account-Based Marketing Playbook

## The Strategic Shift: From Demand Generation to Account-Based Marketing Excellence

Transitioning from traditional demand generation to a high-performance Account Based Marketing (ABM) model represents more than just an update to your technology stack; it necessitates a fundamental and profound shift in operational philosophy and strategic alignment.

This comprehensive playbook outlines a proven, pragmatic methodology designed specifically for experienced marketing professionals seeking to identify, engage, and successfully convert the most high-value accounts. The core principle of this approach is to treat each target account as a "market of one," ensuring that your most valuable resources—time, budget, and creative effort—are concentrated precisely where they offer the highest potential return on investment (ROI) and strategic growth.

This guide is engineered to move decisively beyond abstract theory, providing a concrete, step-by-step process that is immediately actionable. We will meticulously examine the full execution lifecycle: from the initial methodology for building a highly qualified target account list to the nuanced art of crafting compelling, personalized lead magnets, and the sophisticated orchestration of multi-channel automation campaigns.



# Chapter 1

# The ABM Readiness Diagnostic

## Should You Invest in Account-Based Marketing Now?

### How to Use This Diagnostic

- Score each statement from 0 to 3
- Be brutally honest — this is a decision tool, not a justification exercise
- Involve Sales leadership in scoring (non-negotiable)

### Scoring scale

- 0 - Not true at all
- 1 - Partially true / inconsistent
- 2 - Mostly true
- 3 - Fully true / consistently true

## 1/ Business & Revenue Model Fit

**ABM is a growth model, not a campaign. This section tests whether your economics justify it.**

Our average deal size (ACV) comfortably justifies high-touch marketing and sales effort  
Our sales cycles are complex and involve multiple stakeholders  
A small number of accounts represent a large share of potential revenue  
Expansion (upsell, cross-sell, land & expand) is a key growth lever  
Losing or winning a single account has a material business impact

Score (0-3)

—  
—  
—  
—  
—

Section Score: /15

≤7 → Demand generation or hybrid model likely more appropriate

8–11 → ABM possible, but selectively (Tier 1 only)

12–15 → Strong ABM business case

## 2/ Sales Model & Alignment Readiness

**Most ABM failures are sales failures in disguise.**

Sales focuses on named accounts, not just inbound lead follow-up  
Sales leadership actively supports account prioritisation  
Marketing and Sales agree on what a “good account” looks like  
SDRs/AEs can personalise outreach beyond templates  
Sales is willing to provide structured feedback to Marketing

Score (0-3)

—  
—  
—  
—  
—

Section Score: /15

≤7 → ABM will stall or fail without leadership intervention

8–11 → Alignment exists but must be formalised

12–15 → Strong alignment foundation

### 3/ Data, Targeting & Insight Maturity

**ABM without data discipline becomes expensive guesswork.**

- Our CRM account data is accurate and reasonably complete
- We can reliably identify buying committees (not just contacts)
- We track account-level engagement (not only individual leads)
- We understand our customers' tech stack and environment
- We can detect intent or trigger events (internal or external)

Score (0-3)

—  
—  
—  
—  
—

Section Score: /15

≤7 → Fix data before launching ABM

8–11 → Data gaps manageable for a pilot

12–15 → ABM-ready data foundation

### 4/ Content & Value Proposition Readiness

**ABM amplifies relevance — or irrelevance.**

- Our value proposition is clear and economically defensible
- We can tailor messaging by industry, role, or use case
- We have proof points (case studies, internal references)
- We can create high-value, non-generic assets
- Sales trusts and uses marketing content in conversations

Score (0-3)

—  
—  
—  
—  
—

Section Score: /15

≤7 → Strong ABM content foundation

8–11 → Content exists but needs sharpening

12–15 → ABM will expose weaknesses rather than fix them

### 5/ Organisational Commitment & Governance

**ABM without sponsorship becomes an overloaded marketing side project.**

- Leadership understands ABM as a long-term strategy
- ABM success is defined beyond lead volume
- Budget can be protected for at least 6–12 months
- Sales and Marketing share ABM KPIs
- We can prioritise focus over volume

Score (0-3)

—  
—  
—  
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Section Score: /15

≤7 → Do not launch ABM yet

8–11 → Risk of short-termism

12–15 → Strong execution conditions

## Overall Scoring & Recommendation



Maximum score: 75

Total Score	Recommendation
60–75	Green light — Launch ABM with confidence
45–59	Pilot ABM — Limited scope, Tier 1 only
30–44	Hybrid model — ABM principles + demand gen
<30	No ABM (yet) — Fix fundamentals first

# The ABM Readiness Diagnostic

## The decision tree

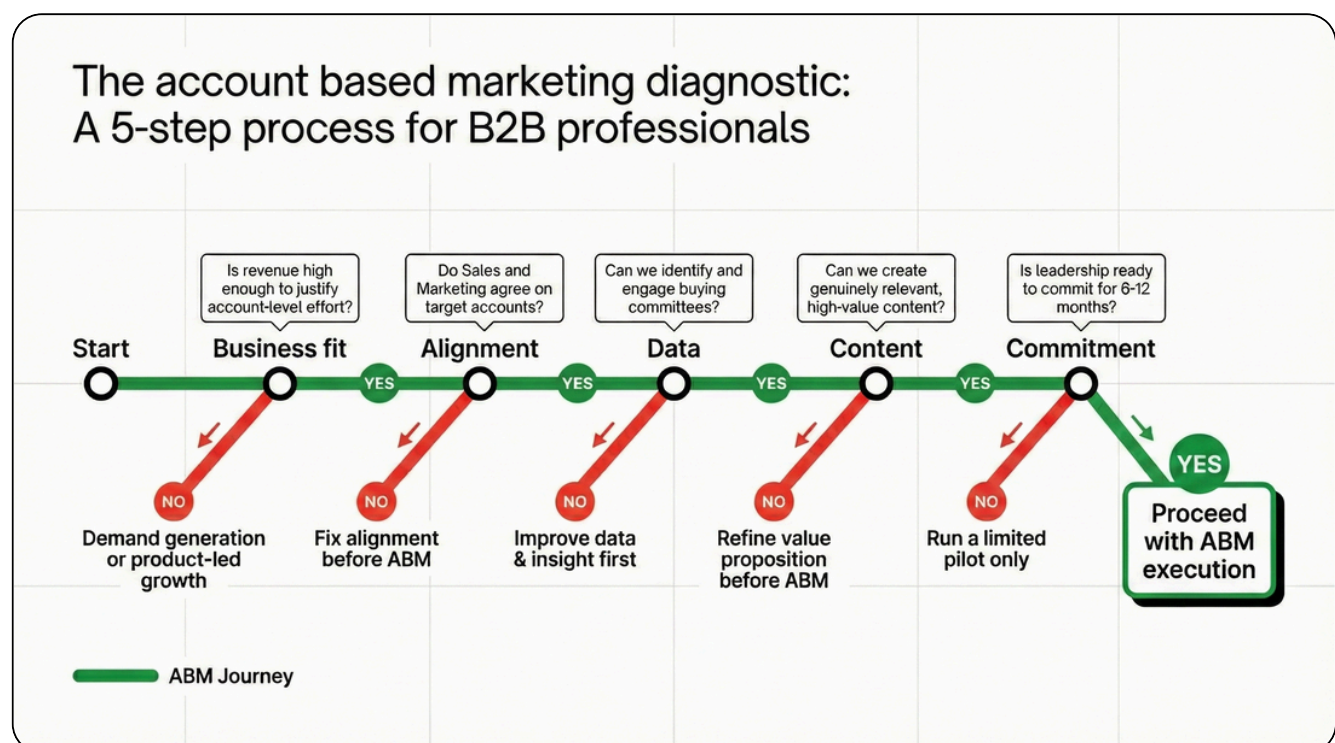
The Account-Based Marketing (ABM) decision tree is a critical diagnostic tool designed to comprehensively evaluate an organization's readiness for launching or scaling an ABM program. It is founded on an assessment across five fundamental pillars, each representing a vital area for ABM success:

- 1. Business Fit:** Evaluating the strategic need for ABM, the clarity of target accounts, and the potential revenue impact.
- 2. Alignment:** Assessing the synergy between sales, marketing, and leadership, ensuring shared goals and processes for account engagement.
- 3. Data:** Reviewing the quality, completeness, and accessibility of account and contact data necessary for personalization and targeting.
- 4. Content:** Analyzing the availability of relevant, personalized, and high-value content assets required to engage specific accounts through their buying journey.
- 5. Commitment:** Measuring the dedication of resources, budget, and executive sponsorship to sustain the ABM effort long-term.

Each of these areas is scored, and the sum total determines the organization's ABM readiness level, dictating a specific, strategic recommendation:

- **Green Light (60-75):** High preparedness. Launch a full-scale ABM program, focusing on optimization and expansion.
- **Pilot (45-59):** Good foundation, but with minor gaps (e.g., data, content). Initiate a controlled, limited-scope ABM pilot to learn and refine before wider rollout.
- **Hybrid (30-44):** Significant challenges. Adopt a Hybrid approach, integrating select ABM principles into existing demand generation, while aggressively fixing foundational issues.
- **No ABM (<30):** Critically lacking foundational elements. Defer the ABM program entirely and focus resources on establishing prerequisites: alignment, executive buy-in, and robust data infrastructure.

By providing a clear, quantified recommendation, the decision tree ensures that resources and focus are deployed wisely, maximizing the probability of a successful ABM implementation tailored to the organization's current operational maturity.



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## Phase 1

# ICP Definition and Strategic Account Selection

## First things first, identify your ICPs

The initial and most fundamental pillar for the execution of any successful Account-Based Marketing (ABM) campaign is the rigorous, data-driven definition of your **Ideal Customer Profile (ICP)**. This process demands moving well beyond surface-level attributes such as standard firmographics (e.g., industry, company size, revenue) and basic demographic data.

Instead, the focus must shift to a deep, forensic understanding of the **internal triggers** and organizational **pain points** that signify an organization's readiness and *propensity* to purchase and adopt your specific solution. These internal triggers—often referred to as 'intent signals' or 'buying triggers'—might include a recent change in executive leadership, a major acquisition or merger, a new round of funding, a public announcement of a strategic initiative, or a significant technological adoption.

Crucially, the ICP definition phase cannot be relegated to a marketing-only exercise. It necessitates deep, transparent, and continuous collaboration with the sales team. The goal of this cross-functional alignment is twofold:

1. **Ensure Winnability:** Sales must validate that the selected accounts are genuinely **winnable**, meaning they align with the sales team's existing expertise, territory coverage, and historical success factors.
2. **Optimize Lifetime Value (LTV):** The criteria must be weighted towards identifying accounts that offer a high potential for **Lifetime Value (LTV)**. This involves assessing factors like the potential for upselling and cross-selling, low churn risk, and the ability to serve as a high-profile reference for future business.

By rigorously defining the ICP collaboratively, the organization ensures that marketing resources and sales efforts are concentrated exclusively on the accounts most likely to result in significant, profitable revenue.

## Build a robust Target Account List

Once the Ideal Customer Profile (ICP) has been meticulously established, the subsequent and critical step in any effective Account-Based Marketing (ABM) strategy is the construction of a robust and highly refined "Target Account List" (TAL). This list is not a mere compilation of companies; it is a strategic asset that must be rigorously segmented and prioritized to ensure maximum marketing and sales efficiency.

## Moving Beyond Simple Volume with a Strategic Segmentation

The TAL must be dynamically segmented based on two primary dimensions: **Priority** and **Readiness**.

### Priority Segmentation (Strategic Value):

1. **Tier 1 (High Priority/Strategic):** These accounts represent the highest potential revenue, strategic importance (e.g., market leaders, lighthouse customers), and best fit against the established ICP. They warrant the most intensive, personalized, and high-touch ABM campaigns (often referred to as "One-to-One" ABM).
2. **Tier 2 (High Potential/Growth):** These accounts are strong candidates but may require slightly more nurturing or a less intensive, slightly scaled approach (often "One-to-Few" ABM). They offer significant growth potential and should be a focus for consistent engagement.
3. **Tier 3 (Opportunistic/Long-Tail):** These accounts meet the basic ICP criteria but may have a longer sales cycle or lower immediate revenue potential. They can be addressed via scaled, programmatic ABM campaigns (often "One-to-Many" ABM).

### Engagement Readiness Signals:

This dimension determines when and how to engage the account. For sophisticated B2B targeting, especially when pursuing large entities or listed groups, selection criteria must extend beyond simple firmographics to include critical indicators of readiness and probability of conversion:

1. **Digital Maturity Score:** Assessing their current level of technological adoption, willingness to innovate, and investment in digital transformation initiatives. Accounts with high digital maturity are often more receptive to advanced solutions.
2. **Existing Technology/Software Stack:** A deep dive into the technologies they currently employ (technographics). For example, if your solution integrates with a specific CRM or ERP, targeting accounts already using that platform significantly increases the likelihood of a successful integration and adoption.
3. **Recent Trigger Events:** Monitoring for publicly available signals such as recent funding rounds, executive hires (especially in IT or strategy), M&A activity, or major product launches, which often indicate a window of opportunity for new software or service acquisition.
4. **Observed Intent Data:** Utilizing third-party data to track topics and keywords accounts are actively researching online. High-intent accounts are actively looking for solutions to a known problem.

## Moving Beyond Simple Volume with a Strategic Segmentation

This meticulous preparation and multi-layered segmentation directly addresses and prevents the common, costly mistake of "**casting a wide net**." A broad, untargeted approach dilutes resources, lowers the perceived relevance of marketing messages, and inevitably leads to a poor Return on Investment (ROI).

By focusing only on high-probability accounts, this strategic process ensures that every element of the marketing budget—be it dedicated sales development time, highly customized content creation, personalized event sponsorship, or targeted advertising spend—is precisely allocated to a prospect that has already been vetted for both strategic fit and immediate readiness. The result is a dramatically improved conversion rate and maximal impact from every pound of the marketing and sales expenditure.

## Phase 2

# Developing High-Value Lead Magnets

In an ABM framework, your content must act as a demonstration of technical authority. Generic whitepapers are often ignored by high-level decision-makers. Instead, you should develop "Lead Magnets" that provide immediate utility, such as structured checklists, ROI calculators, or implementation frameworks. These assets serve as the "hook" for your outreach sequences and establish you as a strategic partner from the very first interaction.

To illustrate this approach, consider a past engagement with a Digital Asset Management (DAM) software provider. This provider had successfully implemented its solution within a specific Business Unit of a French publicly-listed corporation. The sales team then identified 30 priority subsidiaries across three distinct industries as expansion targets. The strategy involved promoting a dedicated asset—which highlighted the existing successful implementation—through targeted campaigns on both LinkedIn and email.

The software vendor opted to provide the identified decision-makers with a specific use case, sharing a valuable scenario from a current customer, rather than a generic brochure. To encourage adoption, they also included the contact information for the project owner who agreed to advocate for the DAM solution among their peers.



Neutralized cover page view of the use case.

## Actionable Insight: Adopt a High-Impact ABM Asset Strategy

To maximize the effectiveness of Account-Based Marketing (ABM) assets and ensure they resonate deeply with high-value prospects, it is crucial to execute a multi-faceted approach centered on hyper-personalization and strategic consumption design.

### 1. Hyper-Personalization: Mirroring the Account's World

The most impactful ABM assets are highly specific, moving beyond generic industry language to mirror the target account's technical language and environment. This involves:

- **Linguistic Precision:** Utilizing the exact terminology, acronyms, and internal jargon found in the prospect's documentation, website, or previous communications. This signals deep research and understanding.
- **Environmental Context:** Referencing the specific technology stack, regulatory landscape, or operational challenges unique to that account. For a prospect using a specific cloud provider, the asset should discuss that platform directly, not "the cloud" generally.

### 2. Concrete Proof of Concept and Credibility

Building trust requires moving beyond claims to **incorporate concrete proof of concept**. This can be achieved through:

- **"Neutralized" Success Stories:** Presenting case studies that feature similar companies or use cases without revealing sensitive client names (if necessary). The focus should be on quantifiable results (e.g., "30% reduction in operational spend," "99.9% system uptime").
- **Visual Validation:** Integrating screenshots, diagrams, or short video clips that demonstrate the solution in action. These visuals should ideally simulate the prospect's environment or directly address their pain points, offering undeniable evidence of capability.

### 3. Low-Friction Consumption, High Strategic Value

The asset must be designed for immediate, **low-friction consumption** while simultaneously delivering **deep strategic value**.

- **Format Efficiency:** Opt for formats that minimize barrier to entry—interactive infographics, personalized one-pagers, or short executive summaries—instead of lengthy, static whitepapers. The prospect's time is a premium resource.
- **Strategic Depth:** Despite the brevity, the content must articulate a clear, high-level solution to a recognized strategic problem. It should enable the champion within the account to easily understand and justify the solution to internal stakeholders.

### 4. The Critical Call to Engagement (CTE)

Finally, every ABM asset must **conclude with a clear, compelling call to engagement (CTE)**. This is the mechanism that translates interest into action.

The CTE must not be a generic "Contact Us," but rather a guidance system that shepherds the prospect toward a logical, low-risk next step. This could be a:

- **Discovery Call:** Positioned not as a sales pitch, but as a collaborative session to validate assumptions and explore potential fit.
- **Personalized Demo:** Offering a demonstration tailored specifically to the prospect's tech stack and current workflows.
- **Strategic Assessment:** An offer for a free, high-value audit or assessment of their current situation, providing immediate, actionable insights.

The entire asset must function as a guided pathway, ensuring the prospect's journey from awareness to active consideration is smooth, informed, and leads directly to a meaningful human interaction.

## Phase 3

# Multi-Channel Outreach and Automation

The final stage after successful account identification and lead magnet creation is systematic **orchestration**. This is where the strategy moves from planning to execution, requiring a highly coordinated "human-in-the-loop" automation model. This approach leverages technology to handle the scale and consistency of outreach while ensuring that human interaction—the personalization and insight required for ABM—is injected at critical moments.

## The Technology of Orchestration



Effective orchestration is built upon a tech stack that allows for multi-channel, multi-step sequences. **Specialized Sales Engagement Platforms (SEPs)** or purpose-built integrated **Account-Based Marketing (ABM) platforms** serve as the backbone, enabling marketers to launch campaigns that seamlessly blend various touchpoints<sup>1</sup>:

- **LinkedIn Engagement:** Automated connection requests, profile views, and personalized messages designed to warm up the account before a direct sales touch.
- **Direct Email:** Highly segmented and personalized email sequences that deliver the identified lead magnets and specific value propositions.
- **Follow-up Calls/Meetings:** Scheduled human intervention triggered by specific engagement signals (e.g., viewing a pricing page, downloading a whitepaper).

The fundamental objective of this orchestration is to achieve a **seamless, one-to-one feel at a one-to-many scale**. The prospect should feel as if the message was crafted solely for them and their organization, not as part of a mass campaign.

<sup>1</sup> Examples of specialized Sales Engagement Platforms include Waalaxy and Linked Helper. Examples of integrated ABM platforms are often referred to as mini-CRMs in an ABM context.

## Sophisticated Account Penetration: Internal Targeting



A key component of advanced ABM execution is the "**internal targeting**" method, which focuses on leveraging existing success within a large or global account to expand into new departments or geographical entities. This strategy moves beyond traditional "cold" outreach and capitalizes on social proof and internal credibility.

## Execution Steps for Internal Targeting:

1. **Identify the Beachhead Success:** Pinpoint a specific division, department (e.g., finance, HR, legal), or subsidiary where your product or service has already delivered measurable results.
2. **Cultivate the Champion's Testimony:** Secure a strong internal advocate or champion from the successful division. Their testimonial, or even better, a documented, quantifiable case study, becomes the core asset for expansion.
3. **The Targeted Sequence:** The outreach sequence to the new entities should focus primarily on relaying this success. The message shifts from "Here is what we do" to "Here is the success we have already delivered for your colleagues in the [Successful Department Name] division."
4. **Bypassing Cold Outreach Barriers:** By introducing a proven success story from within the same organizational ecosystem, you effectively bypass the initial barriers of "cold" outreach, immediately establishing relevance, trust, and credibility.

This transition from a validated, warm lead in one department to a new, highly qualified lead in an adjacent entity is the definitive hallmark of sophisticated account penetration and the most efficient path to maximizing the value of a target account.



## Phase 4

# Monitoring Engagement and Sales Handoff

The final phase of the Account-Based Marketing (ABM) execution playbook is the critical transition from broad marketing engagement to targeted sales intervention. Success in this phase hinges on moving beyond conventional, individual-centric metrics. Instead of simply tracking individual clicks, it is imperative to track and analyze "**Account Engagement Scores**".

This holistic scoring mechanism synthesizes various data points across an entire target organization. A significant indicator of high account intent and readiness for sales outreach is the simultaneous interaction of **multiple stakeholders** from the same organization with your **core marketing assets**. These assets—which include high-value content such as case studies, interactive demos, product webinars, and detailed white papers—represent a serious investigation into your solution.

This sophisticated, data-driven approach allows the sales development and account executive teams to intervene with impeccable timing. By monitoring the Account Engagement Score, the sales team can pinpoint the precise moment when the prospect organization is collectively most receptive, informed, and motivated to discuss a potential solution.

This hyper-personalized, timely intervention dramatically increases the likelihood of converting a high-intent account into a qualified opportunity, optimizing resource allocation, and shortening the overall sales cycle.

A cornerstone of successful Account-Based Marketing (ABM) is the establishment and maintenance of a robust, **virtuous cycle of continuous feedback and optimization**. This iterative loop ensures that the strategy remains agile, highly targeted, and maximally effective.

## The Role of Sales in the Feedback Loop

Sales teams are on the front lines, engaging directly with the target accounts. Their daily interactions yield invaluable qualitative data. Specifically, sales must be equipped and mandated to systematically report back to marketing on:

- **Quality of Conversation:** Were the discussions relevant? Did the prospects' pain points align with the message delivered by the marketing campaign?
- **Relevance of Marketing Collateral:** How effective were the lead magnets, content offers, and personalized resources in moving the account forward? Did the content resonate with the actual buyers and decision-makers?

- Accuracy of the Ideal Customer Profile (ICP) Fit: Did the target accounts, once engaged, truly exhibit the characteristics of a high-value customer? This real-world validation is critical for refining the ICP.
- Identification of New Intelligence: Sales interactions often uncover new organizational structures, key buying center members, competitive intelligence, or unstated needs that can immediately inform and personalize ongoing campaigns.

## Marketing's Response and Refinement



Marketing's responsibility is to ingest this granular feedback and translate it into actionable strategic adjustments. This refinement process involves:

- **ICP Modification:** Adjusting the criteria for identifying the next wave of target accounts based on what attributes truly drive high-quality engagement and closure rates. This might involve updating firmographic, technographic, or behavioral triggers.
- **Content and Asset Optimization:** Refining the lead magnets, campaign messaging, and content themes to better address the specific, validated pain points and information needs expressed by the target accounts. This ensures that resources are highly relevant and increase conversion rates.
- **Targeting and Personalization Enhancement:** Using the sales feedback to improve the personalization strategy, ensuring future outreach is even more tailored to the individual account and key persona.

## Focusing on Key Performance Indicators (KPIs)



The ultimate goal of this feedback-driven optimization is to accelerate core business outcomes. By maintaining this tightly integrated sales and marketing function, the organization can achieve:

- **Pipeline Velocity:** The speed at which an account moves through the sales pipeline, from initial engagement to closed-won. Accelerated velocity is a direct result of highly qualified leads and relevant, timely content.
- **Account Penetration (or Expansion):** The depth and breadth of engagement within a target account, often measured by the number of buying center members engaged, the increase in deal size, or the successful expansion into new departments or business units.

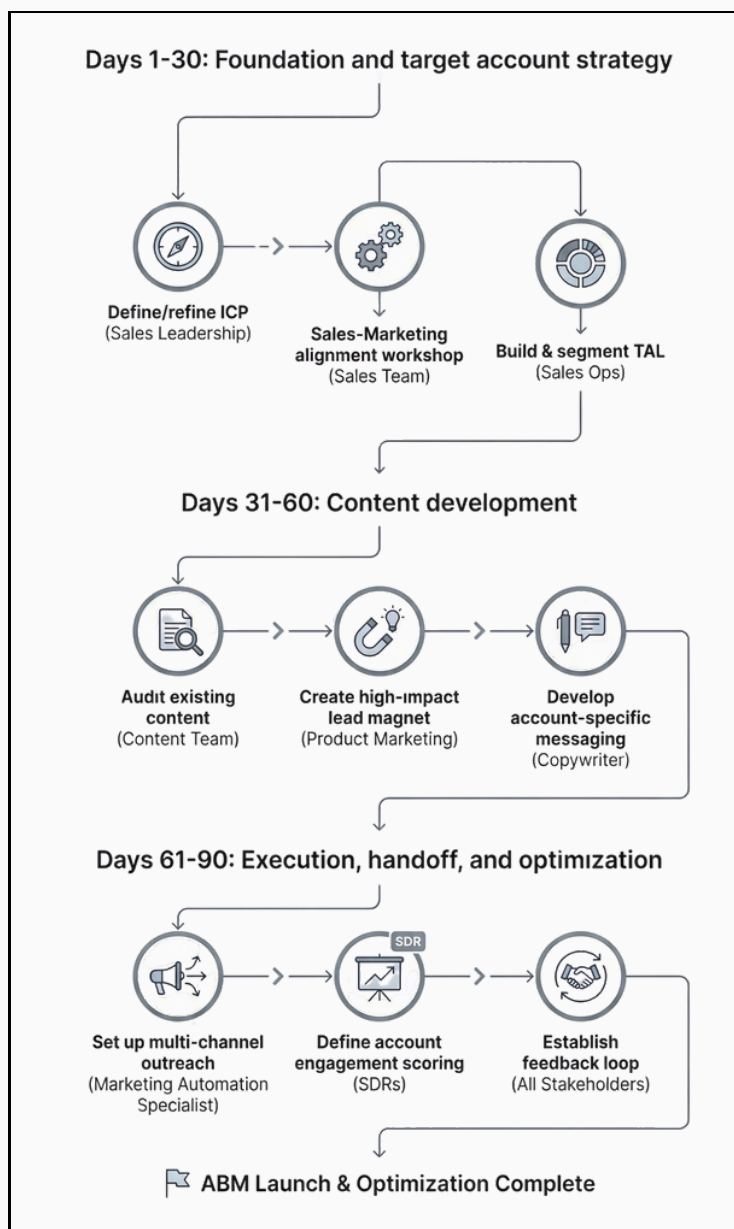
By relentlessly focusing on these two critical metrics—pipeline velocity and account penetration—and fueling them with continuous feedback, the ABM efforts are guaranteed to transcend simple lead generation, resulting in **sustainable, high-value growth** for the entire organization

## Chapter 2

# Action Plan: A 90-Day ABM Implementation Roadmap

If you answered **YES** to ABM readiness, start here.

This roadmap provides a structured, 90-day plan for a B2B marketer to transition from traditional demand generation to a focused Account-Based Marketing (ABM) strategy, aligning with the four phases outlined in this playbook



## Days 1–30: Foundation and Target Account Strategy

Timeframe	Action Item	Goal/Objective	Deliverables	Key Collaborator
Day 1-10	<b>1. Define/Refine Ideal Customer Profile (ICP)</b>	Move beyond basic firmographics to identify pain points and buying triggers.	Documented ICP (including intent signals and technographics).	Sales Leadership
Day 11-20	<b>2. Sales-Marketing Alignment Workshop</b>	Vet potential accounts against sales winnability and Lifetime Value (LTV) criteria.	Finalized validation criteria and SLA between Sales & Marketing.	Sales Team (AEs & SDRs)
Day 21-30	<b>3. Build &amp; Segment Target Account List (TAL)</b>	Create a prioritized list of 20-50 Tier 1 accounts and map their buying committees.	Tier 1 TAL with 6-10 key stakeholders mapped per account.	Sales Ops

## Days 31–60: Content and Asset Development

Timeframe	Action Item	Goal/Objective	Deliverables	Key Collaborator
Day 31-40	<b>4. Audit Existing Content for ABM Fit</b>	Identify high-value assets (checklists, frameworks) that can be personalized for the TAL.	Inventory of reusable/customizable content.	Content Team
Day 41-50	<b>5. Create High-Impact Lead Magnet</b>	Develop one bespoke, high-utility asset demonstrating authority for the Tier 1 TAL's primary pain point.	Tier 1 ABM Lead Magnet (e.g., ROI Calculator, Implementation Guide).	Product Marketing
Day 51-60	<b>6. Develop Account-Specific Messaging</b>	Craft personalized value propositions, headlines, and calls-to-action (CTAs) for each Tier 1 account persona.	Three sets of personalized email/LinkedIn message templates.	Copywriter

## Days 61–90: Execution, Handoff, and Optimization

Timeframe	Action Item	Goal/Objective	Deliverables	Key Collaborator
Day 61-70	<b>7. Set Up Multi-Channel Outreach Sequence</b>	Implement the human-in-the-loop automation using the tech stack (e.g., Waalaxy, CRM extensions).	Live, 5-step multi-channel outreach sequence targeting the TAL.	Marketing Automation Specialist
Day 71-80	<b>8. Define Account Engagement Scoring &amp; Handoff</b>	Implement a scoring model that tracks aggregate account behavior, not just individual clicks.	Defined Account Engagement Score threshold for sales handoff.	Sales Development (SDRs)
Day 81-90	<b>9. Establish Feedback Loop and Review</b>	Conduct a formal review to assess initial campaign performance, quality of conversations, and ICP accuracy.	ABM Campaign Review Report and documented ICP modifications.	All Stakeholders

# Next Steps

**To initiate your transition from traditional SEO to Generative Engine Optimization (GenEO) and start building Answer Authority, prioritize these five immediate actions:**

**01 Internal Audit and Sales Readiness Assessment**

Formally audit sales and marketing technology (CRM, automation, data), assess account data quality, and document the existing Sales-Marketing SLA. Deliver an ABM Readiness Report highlighting data and alignment gaps.

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**02 Defining the Economic Value Proposition for Target Accounts**

Collaborate with finance and product to define a clear, quantifiable Economic Value Proposition (EVP) for Tier 1 accounts. Translate features into hard metrics (cost reduction, revenue increase, risk mitigation) to form the foundation for all personalized content.

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**03 Securing Executive Sponsorship and Long-Term Budget**

Forecast 12-month ABM revenue, ACV, and pipeline velocity improvements. Secure executive sponsorship (CMO/CRO) and dedicated budget for data, technology, and high-touch creative assets to prevent short-term budget cuts.

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**04 Dedicated Technology and Data Stack Selection**

Select core ABM tech for orchestration and intent capture. Prioritize tools that aggregate multi-stakeholder activity into a single Account Engagement Score to establish an objective sales handoff threshold.

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**05 Establishing the Sales-Marketing Feedback Loop Charter**

Define a mandatory Sales-Marketing Feedback Loop Charter. This charter must specify the meeting structure (weekly/bi-weekly), required sales data (e.g., conversation relevance, competitive threats), and corresponding marketing actions (e.g., ICP changes, content refinement).

# Thank you!

**Thank you for taking the time to read this playbook. If you have any questions or would like to discuss this topic further, please don't hesitate to reach out to me.**

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