MountainTop Data

ABM DATA CHECKLIST

Target Account Profiles

☐ Create 2-4 Target Account Profiles

Examine your best clients and create several profiles based of the best types of companies to pursue. Consider Industry, company size, geography, technologies used, and any other defining characteristics.

Account Data

☐ Collect internal account data

Pull together all information you have in-house on potential target companies (marketing data, newsletter lists, past clients, previously purchased data).

☐ Append missing company information to internal data*

Every account needs an identified industry if that's part of your criteria.

☐ Add new companies*

Purchase additional target companies from data vendors.

☐ Manually collect additional companies within your target

Only manually collect data if your in-house data and list vendors aren't sufficient.

Create Accounts List

☐ Calculate the number of accounts

*The number of accounts your ABM will focus on at a time can depend on many factors. You can start by having 20 accounts per sales rep, or use this calculation: (B*ROI)/CR*CLV) = NTA. Number of Target Accounts = Budget x Marketing ROI ÷ Close Ratio x Customer Lifetime Value.*

☐ Add a priority score to each account

Go with your gut and give each company a score from 1-100 or create a system where you give a score to each target criteria and compile for the final account score. Add a multiplier to each target criteria score to compensate for criteria that are more important than others. Sort your accounts by priority and pull the top companies for your initial ABM campaign. Pull twice as many as you will use in your first campaign for surplus.

Contact Data

☐ Collect internal contact data

Pull all contacts from your in-house data that fit your contact target. Keep in mind you want to have a more general contact target for ABM than your standard marketing campaigns.

☐ Clean your data*

Email verification is a start, but more thorough verification including phone numbers, etc is better.

☐ Append missing contact information*

Add as much information as possible to your contacts. (Job description, social media handles, etc.)

☐ Purchase additional target contacts from third party data vendors*

Add as many relevant contacts within your target companies as possible.

MountainTop Data provides the ABM Data Services of:

- **Append missing company information to your internal data**
- **Add new targeted companies**
- **Clean your internal data**
- **Append missing information to your internal contacts**
- **Provide additional targeted contacts**