

# Chapter 10: The Account, Not the Lead

## Table Reference

Every table from this chapter, with what it's for and how to actually use it.

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### The ICP Blank Template

| ICP Dimension                    | Primary Criteria | Secondary Criteria | Disqualifiers |
|----------------------------------|------------------|--------------------|---------------|
| Industry / Vertical              |                  |                    |               |
| Company Size (Employees)         |                  |                    |               |
| Annual Revenue                   |                  |                    |               |
| Geography                        |                  |                    |               |
| Technology Stack (Technographic) |                  |                    |               |
| Growth Signals                   |                  |                    |               |
| Existing Tech Spend (Intent)     |                  |                    |               |
| Organizational Structure         |                  |                    |               |

**Description:** A blank template covering every ICP dimension (industry, company size, revenue, and others) for defining your own ideal customer profile.

**How to use it:** Populate with your own org's real criteria – this becomes the shared definition Sales and Marketing both target instead of each team guessing independently.

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## Account Tiers

| Tier                           | Definition                                                         | # of Accounts | Engagement Model                                                            | Review Cadence |
|--------------------------------|--------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------|----------------|
| Tier 1 – Named Accounts        | Highest-value, fully ICP-matched accounts; full 1:1 ABM treatment  | 25-100        | Dedicated SDR + AE pair; custom content; direct mail; executive sponsorship | Monthly        |
| Tier 2 – Priority Accounts     | Strong ICP fit; 1:few personalization; higher marketing investment | 100-500       | SDR-supported; persona-level personalization; intent-triggered plays        | Quarterly      |
| Tier 3 – Programmatic Accounts | Broad ICP match; scaled 1:many campaigns; low-touch outbound       | 500-5,000     | Automated nurture; retargeting; event invites; content syndication          | Semi-annual    |

**Description:** Defines the three-tier account structure (Named, Priority, Programmatic) with real volume ranges and the engagement model for each.

**How to use it:** Use as a starting framework for your own tiering – the specific numbers will vary by org, but the three-tier logic and shrinking engagement model per tier generally holds.

## A Real ICP, Filled In

| ICP Dimension                    | Primary Criteria                              | Secondary Criteria                   | Disqualifiers                                                                               |
|----------------------------------|-----------------------------------------------|--------------------------------------|---------------------------------------------------------------------------------------------|
| Industry / Vertical              | SaaS, Financial Services, Healthcare Tech     | Manufacturing, Professional Services | Government, Education (long sales cycles, poor fit for product)                             |
| Company Size (Employees)         | 500-5,000                                     | 200-499 or 5,001-10,000              | Under 200 (can't support deal size); over 10,000 (requires enterprise motion not yet built) |
| Annual Revenue                   | \$50M-\$500M                                  | \$500M-\$1B                          | Under \$10M (budget risk)                                                                   |
| Geography                        | US, Canada, UK                                | EU (GDPR-compliant regions only)     | Regions without legal entity support                                                        |
| Technology Stack (Technographic) | Salesforce + Marketo/HubSpot already in place | Any modern CRM + any MAP             | Homegrown/legacy systems with no API access                                                 |
| Growth                           | Recent funding round,                         | Leadership change in                 | Recent layoffs affecting the target                                                         |

| ICP Dimension                | Primary Criteria                                                  | Secondary Criteria                            | Disqualifiers                                           |
|------------------------------|-------------------------------------------------------------------|-----------------------------------------------|---------------------------------------------------------|
| Signals                      | active hiring in target department                                | the last 6 months                             | department                                              |
| Existing Tech Spend (Intent) | Actively researching category-relevant topics per intent platform | Moderate, sporadic research activity          | Zero intent signal over a 90-day window                 |
| Organizational Structure     | Centralized marketing/RevOps function                             | Federated structure with a clear budget owner | Fully decentralized with no identifiable economic buyer |

**Description:** A complete, real worked example of the ICP template above, filled in with actual illustrative criteria.

**How to use it:** Use as a reference to see what a genuinely specific, usable ICP looks like versus a vague one.

## Intent Data & Signal Management

| Intent Signal                           | Platform            | CRM Field              | Trigger Action                                                 | Owner     |
|-----------------------------------------|---------------------|------------------------|----------------------------------------------------------------|-----------|
| Account surge – high intent             | 6sense / Demandbase | Intent Score > 70      | Alert to paired SDR; add to ABM nurture track                  | SDR       |
| Account surge – medium intent           | 6sense / Demandbase | Intent Score 40-70     | Add to display retargeting; enroll in awareness email sequence | Marketing |
| Anonymous web visit from target account | 6sense / Demandbase | Web Engagement Score   | Alert to paired SDR if Tier 1 account                          | SDR       |
| Competitor research signal              | Bombora             | Competitor Intent Flag | Add to competitive displacement campaign                       | Marketing |
| Intent spike after dark period          | 6sense              | Re-Engagement Signal   | Reactivate dormant SDR outreach sequence                       | SDR       |

**Description:** Maps specific intent signals (account surge, anonymous target-account visits) to the CRM field, automated trigger, and owner for each.

**How to use it:** Use as a build spec for configuring intent-based alerting and routing in your own CRM/MAP.

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## ABM Campaign Orchestration by Stage

| ABM Stage              | Account Status                           | Marketing Play                                              | Sales Motion                                                 | Success Metric                        |
|------------------------|------------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------|
| Awareness              | Unknown to brand; intent signal detected | Targeted display ads; content syndication to account domain | SDR social connection + cold outreach                        | Account reach %, ad impressions       |
| Engagement             | Some web activity; email opened/clicked  | Personalized nurture sequence; webinar invite; direct mail  | SDR multi-touch sequence (6+ attempts)                       | Account engagement score increase     |
| Consideration          | Demo requested or meeting booked         | Champion content (case studies, ROI tools); exec outreach   | AE conducts discovery; MarkOps provides account intelligence | Meeting booked; opp created           |
| Decision               | Opportunity in active evaluation         | Competitive battle cards; proof-of-concept support          | AE-led evaluation; legal/procurement engaged                 | Proposal submitted; verbal commitment |
| Closed Won / Expansion | Customer                                 | Onboarding content; case study request; upsell campaigns    | Customer Success handoff; AE expansion conversation          | NPS; expansion ARR; referral          |

**Description:** Maps each ABM funnel stage (Awareness through Close) to the account status, marketing play, sales motion, and success metric that define it.

**How to use it:** Use as the shared reference for what “Engagement” or “Consideration” actually means at your org, so Marketing and Sales are working from the same stage definitions.

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Quarterly ABM Engagement Tracker

| Account Name | Tier | Intent Score | Stage | SDR Owner | Last Activity | Next Play | Pipeline (\$) |
|--------------|------|--------------|-------|-----------|---------------|-----------|---------------|
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**Description:** A blank, account-by-account tracker for logging real ABM engagement and pipeline progress.

**How to use it:** Populate weekly with your actual Tier 1/2 accounts to track engagement and pipeline at the individual account level, not just in aggregate.

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## Quarterly ABM Rollup

| Metric                               | Tier 1 | Tier 2 | Tier 3 |
|--------------------------------------|--------|--------|--------|
| Total Pipeline (\$)                  |        |        |        |
| # Accounts Advanced a Stage This Qtr |        |        |        |
| # Accounts Stalled (No Movement)     |        |        |        |
| Avg. Intent Score                    |        |        |        |

**Description:** A blank summary template for rolling up the engagement tracker into quarter-end totals by tier.

**How to use it:** Complete at quarter-end to answer “is ABM working” at a glance, without reading every account row by hand.

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