**ACCOUNT-BASED MARKETING (ABM) PLAN
TEMPLATE – EXAMPLE**

PLANNING

EXECUTION

PURPOSE

ACCOUNT SEGMENTATION

ANNUAL ACCOUNT PLANNING

QUARTERLY ACCOUNT REVIEW

WEEKLY / BIWEEKLY STATUS CHECK

* Target High-Value Accounts Precisely
* Align Sales and Marketing Efforts Efficiently
* Maximize Return on Marketing Investment (ROMI)
* Deliver Personalized and Relevant Messaging
* Shorten Sales Cycle for Key Accounts
* Set Clear Account Revenue Goals
* Identify Key Account Stakeholders
* Map Out Account Engagement Strategies
* Review Historical Account Interactions
* Allocate Resources for Target Account Initiatives
* Evaluate Account Engagement Metrics
* Assess Progress Toward Revenue Goals
* Review Feedback from Key Account Stakeholders
* Adjust Account Strategies Based on Performance
* Forecast Next Quarter's Account Activities
* Monitor Account Engagement Activities
* Track Progress Toward Short-Term Milestones
* Review Feedback and Insights from Sales Team
* Update Account Health and Risk Indicators
* Refine Communication Plans with Key Stakeholders
* Target High-Value Accounts Precisely
* Align Sales and Marketing Efforts Efficiently
* Maximize Return on Marketing Investment (ROMI)
* Deliver Personalized and Relevant Messaging
* Shorten Sales Cycle for Key Accounts

Account-Based Marketing Plan – EXAMPLE

PLANNING

EXECUTION

PURPOSE

ACCOUNT SEGMENTATION

ANNUAL ACCOUNT PLANNING

QUARTERLY ACCOUNT REVIEW

WEEKLY / BIWEEKLY STATUS CHECK

* Target High-Value Accounts Precisely
* Align Sales and Marketing Efforts Efficiently
* Maximize Return on Marketing Investment (ROMI)
* Deliver Personalized and Relevant Messaging
* Shorten Sales Cycle for Key Accounts
* Set Clear Account Revenue Goals
* Identify Key Account Stakeholders
* Map Out Account Engagement Strategies
* Review Historical Account Interactions
* Allocate Resources for Target Account Initiatives
* Evaluate Account Engagement Metrics
* Assess Progress Toward Revenue Goals
* Review Feedback from Key Account Stakeholders
* Adjust Account Strategies Based on Performance
* Forecast Next Quarter's Account Activities
* Monitor Account Engagement Activities
* Track Progress Toward Short-Term Milestones
* Review Feedback and Insights from Sales Team
* Update Account Health and Risk Indicators
* Refine Communication Plans with Key Stakeholders
* Target High-Value Accounts Precisely
* Align Sales and Marketing Efforts Efficiently
* Maximize Return on Marketing Investment (ROMI)
* Deliver Personalized and Relevant Messaging
* Shorten Sales Cycle for Key Accounts

Account-Based Marketing Plan

PLANNING

EXECUTION

PURPOSE

ACCOUNT SEGMENTATION

ANNUAL ACCOUNT PLANNING

QUARTERLY ACCOUNT REVIEW

WEEKLY / BIWEEKLY STATUS CHECK

* Text
* Text
* Text
* Text
* Text

|  |
| --- |
| **DISCLAIMER**Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |