**** **ACCOUNT-BASED MARKETING (ABM)
REPORTING TEMPLATE**

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| ABM Scorecard | Time FrameRepresented |   |

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|   |  | FUNNEL PROGRESSION |   |  |  |  |
|   | TOTAL ACCOUNTS | ENGAGED ACCOUNTS | OPPORTUNITY ACCOUNTS | WON ACCOUNTS | PIPELINE CREATED | REVENUE WON | REVENUE PER ACCOUNT | VELOCITY |
|   | # | # / % | # / % | # / % | $ | $ | $ | # of Days |
| Segment 1 |   |   |   |   |   |   |   |   |
| Segment 2 |   |   |   |   |   |   |   |   |
| Segment 3 |   |   |   |   |   |   |   |   |
| Segment 4 |   |   |   |   |   |   |   |   |
| Segment 5 |   |   |   |   |   |   |   |   |
| Segment 6 |   |   |   |   |   |   |   |   |

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| Ultimate Acquisition ABM Metrics | Time Frame Represented |   |
|   |   |   |   |   |   |   |   |   |
| TARGET ACCOUNT LIST TALMETRIC | DESCRIPTION | GOAL | ACTUAL |
| TAL Opportunities | Total opportunities generated from TAL |   |   |
| TAL Pipeline | Total pipeline generated from TAL |   |   |
| TAL Pipeline Value | Dollar value of net new opportunities generated |   |   |
| TAL Sales Velocity | Average speed at which an account moves through the pipeline to generate revenue |   |   |
| TAL Close Rate | Rate at which open deals are converting to won |   |   |
| TAL Average Contract Value | Average contract value of all deals |   |   |
| TAL Revenue | Total revenue earned on all accounts |   |   |
| TAL Average Recurring Revenue (ARR) | Total revenue recurring from accounts |   |   |

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| Ultimate Retention ABM Metrics | Time FrameRepresented |   |
|   |   |   |   |   |   |   |   |   |
| METRIC | DESCRIPTION | GOAL | ACTUAL |
| Customer Churn | Rate at which customers stop doing business with you |   |   |
| Revenue Churn | Percentage of revenue lost from existing customers in a given time period |   |   |
| Net Promoter Score(NPS) | Quantitative measure of general satisfaction and brand loyalty |   |   |
| Retention Rate | Ratio of customers that return to do business  |   |   |
| Customer Lifetime Value (CLV) | Measure of how much revenue is generated by a single customer over time |   |   |

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| Ultimate Expansion ABM Metrics | Time FrameRepresented |   |
|   |   |   |   |   |   |   |   |   |
| METRIC | DESCRIPTION | GOAL | ACTUAL |
| Upsell Opportunities | Total opportunities generated for upsell |   |   |
| Customer TAL Upsell Contract Value | Average contract value of all upsell deals |   |   |
| Customer TAL Upsell Win Rate | Number of TAL upsell deals closed |   |   |
| Customer TAL Upsell Sales Cycle Length | Average length of time it takes to move an upsell deal through to close |   |   |

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