**[A green sign with white text

Description automatically generated with medium confidence](https://www.smartsheet.com/try-it?trp=11941&utm_source=template-word&utm_medium=content&utm_campaign=ABM+Reporting-word-11941&lpa=ABM+Reporting+word+11941)** **ACCOUNT-BASED MARKETING (ABM)   
REPORTING TEMPLATE**

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| --- | --- | --- |
| ABM Scorecard | Time Frame Represented |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | 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 |  | | | |
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| 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 Frame Represented |  | | |
|  |  |  |  |  |  |  |  |  |
| 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 Frame Represented |  | | |
|  |  |  |  |  |  |  |  |  |
| 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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