RADISH

THE ABM TOOLKIT

7 FRAMEWORKS FOR DATA ANALYTICS AND TECH BRANDS

Welcome to your ultimate ABM toolkit

For senior marketers at data analytics and tech brands, ABM isn't just part of the playbook—it's one of the most powerful ways to differentiate.

In a market where messages often sound the same and incumbents dominate the narrative, ABM offers a chance to cut through the noise - not by shouting louder, but by connecting smarter. It allows you to shift from generic, one-size-fits-all messaging to tailored experiences that resonate with real business pain points. That way, you can build relevance, trust and standout positioning where it matters most.

But delivering truly unforgettable (and commercially successful) ABM campaigns isn't an easy task.

That's why we've created this incredibly practical ABM toolkit. It contains the frameworks we use every day at Radish to plan and execute our programmes.

They're designed to help you break down the barriers of traditional ABM and unlock new insights that power unforgettable campaigns. Plus, each framework has a downloadable template which means you can use them straight away.

- 🔍 The sector/vertical prioritisation matrix
- 🤝 The customer 1:1 account scoring framework
- 📄 The 1: Few account factsheet template
- 🔩 The account funnel framework
- 🗳️ The account nomination form
- 🚀 The customer experience map
- 📈 Stakeholder advocacy tracker

The sector prioritisation matrix

Many companies structure their businesses and offerings by vertical/sector. This is a great way to cluster a number of 1:few accounts and find the right balance of personalisation to scale. It means that multiple accounts can share content and messaging.

This matrix enables ABM practitioners to decide where the best opportunity for their sector 1:few programme is by using a combination of data points to review those opportunities and how well you currently serve them. By working through these, you can rank the opportunities — helping to identify the steps and resources needed to capitalise on them.

LINK TO TEMPLATE

OPPORTUNITY MAPPING (Once complete use conditional formatting to observe high and low opportunity sectors)			E-commerce	Retail	Banks	Insurance	Services	Health	Media	Telecom	Transport & Logistics	Public Sector
Market size & growth	Market Size (Billions)	Measured by total revenue of that sector. Can be global or regionally specific.										
	CAGR	Predicted growth rate over 5 years.										
	Market consolidation (number of companies)	Is the sector highly consolidated into a few large players or fragmented? If numbers aren't available use low, medium, high.										
	Rate of innovation adoption	How quickly are advancements in innovation for example new technology adopted by the sector, and therefore likely to invest in new products										
Service or product need	Long-term need for product/service	Will vary based on the product. E.g If the product is a data product, is data growing in the sector and therefore the need increasing over time. High medium or low.										
	IT Spend (% revenue)	Useful for Tech products/services - Average sector IT spend as a percentage of company revenue										
Current customers	Number of customers	How many current customers does the business have in each sector.										
	Revenue per sector	Total revenue from customers in each sector in 1 year or averaged over 3 years depending on deal structure.										
	Average spend per customer per sector	Revenue per sector/number of customers										
	Customer churn rate per sector	Lost customers/total customers at the start of time period										
	Sales velocity	Time it takes to move from opportunity to closed/won										

Use for

Deciding a priority sector to focus your 1:few programme. Or generally deciding where to prioritise resources and marketing spend across your different sectors.

What we like about it

Gaining internal agreement on sector priorities can be difficult – especially when sales people are aligned to sectors and all want support. This framework uses data to build a business case and, when using conditional formatting to highlight positive and negative factors, becomes a visual tool to add to a slide.

The sector/vertical prioritisation matrix | **The customer 1:1 account scoring framework** | The 1: Few account factsheet template | The account funnel framework | The account nomination form | The customer experience map | Stakeholder advocacy tracker

The customer 1:1 account scoring framework

This is designed to help narrow down an already small number of important customer accounts. The framework covers account fit, account opportunity, account relationships and intent and engagement.

But we can't stress this enough: it's not designed to be used for hundreds or even tens of accounts. That number you're thinking of? Too high. Go smaller. Smaller...

LINK TO TEMPLATE

	Metric	Score Description - 1	Score Description - 5	Account 1 Account Score	Account 2 Account Score	Account 3 Account Score	Account 4 Account Score
Account Fit	Size	Does not fit witin the our Ideal Customer Profile size	Matches our Ideal Customer profile size. If larger companies are favoured then large company size				
	Industry	Does not match priority industry	Matches our priority industry perfectly				
	Geography	Does not align with our priority geographic regions	Matches our priority geographic regions perfectly				
	Company strategic alignment	No alignment on visions, goals, objectives or values.	Very similar strategic vision, shared values. Complimentary business objectives and goals				
	Favourable technology environment (if applicable)	Customer technology environment is not complimpentary to our products and services	Technology enviroment highly faviourable e.g includes other complimentary providers, has old technology or customer teams are familar with similar technology				
	Competitive environment	Heavily ingrained competitor/s in place with long term partnershoips and favourable perception	No known direct competition for our technology/service				
	Partner/intermediary environment	No relationship exists with intermediaries, partners, SIs	Have at least 1 Intermediary relationship is in place who also is selling to the account				
Account Opportunity	Account value (ARR)	Significantly lower than average account value for similar size accounts	Significantly higher than average account value for similar size accounts				
	Current number of usecases	1 usecase or product/service sold	>5 different usecase or product/service sold				
	Use case potential	No multi use case/product scoped or defined. Account unlikely to look for additional use cases	Additional use case/products have been well defined and conversations are ongoing within the account.				
	Current Opportunities	No live account opportunities in CRM (Salesforce)	>2 live account opportunities in CRM (Salesforce)				
	Salesperson perception and feeling	The salesperson's gut feeling about the growth potential is poor	The salesperson's gut feeling about the growth potential is very good				
Account Relationships	Customer satisfaction	The customer is unhappy with your service and has or would give you a poor NPS score	The customer is very happy with your service and has or would give you a very good NPS score				
	Main stakeholder relationship strength	Stakeholder will rarely take calls, will not make intros to other areas of the business and shows limited engagement	Stakeholder will regularly reach out for information, is willing to make intros, create case studies or speak at events				
	Account awareness	Low levels of awareness of your brand or product suite, low number of contacts beyond main client contact	High volume of quality contacts in the database, several departments enaged, understanding of all your products and services				
	Salesperson strength & engagement	The salesperson is new and still finding thier feet in role, or unengaged and needs persuading to be part of the ABM Programme	The salesperson is strong, well established in thier role, actively engaged and eager to be involved in the ABM programme				
	Understanding of painpoints	We have no knowledge or intelligence about the current customer painpoints	We have good knoweldge of the customer's painpoints				
Account Intent & Engagement	1st party intent (engagement with marketing or sales)	Account has limited activity across marketing marketing (ads, content, website, social) and or sales (meetings, strategy days)	Account activity is high, they are engaging with marketing (ads, content, website, social) and or sales (meetings, strategy days)				
	3rd party Intent (If tool available such as Bombora)	Account is not currently actively researching your solutions	Account is actively researching your solutions				
	TOTAL			0	0	0	0

Use for

Once you've narrowed down your accounts to a shortlist, the matrix is populated with a combination of sales person insights, general account firmographics and technographics, CRM data and intent data — if you have a platform. This can then be used as a way to engage sales and reach a collective decision on final accounts for your 1:1 programme. You'll find you can easily alter this to be used for non-customer accounts, too.

What we like about it

strength and attitude, which can make or break an ABM programme, as well as balancing data inputs with an element of gut feel.

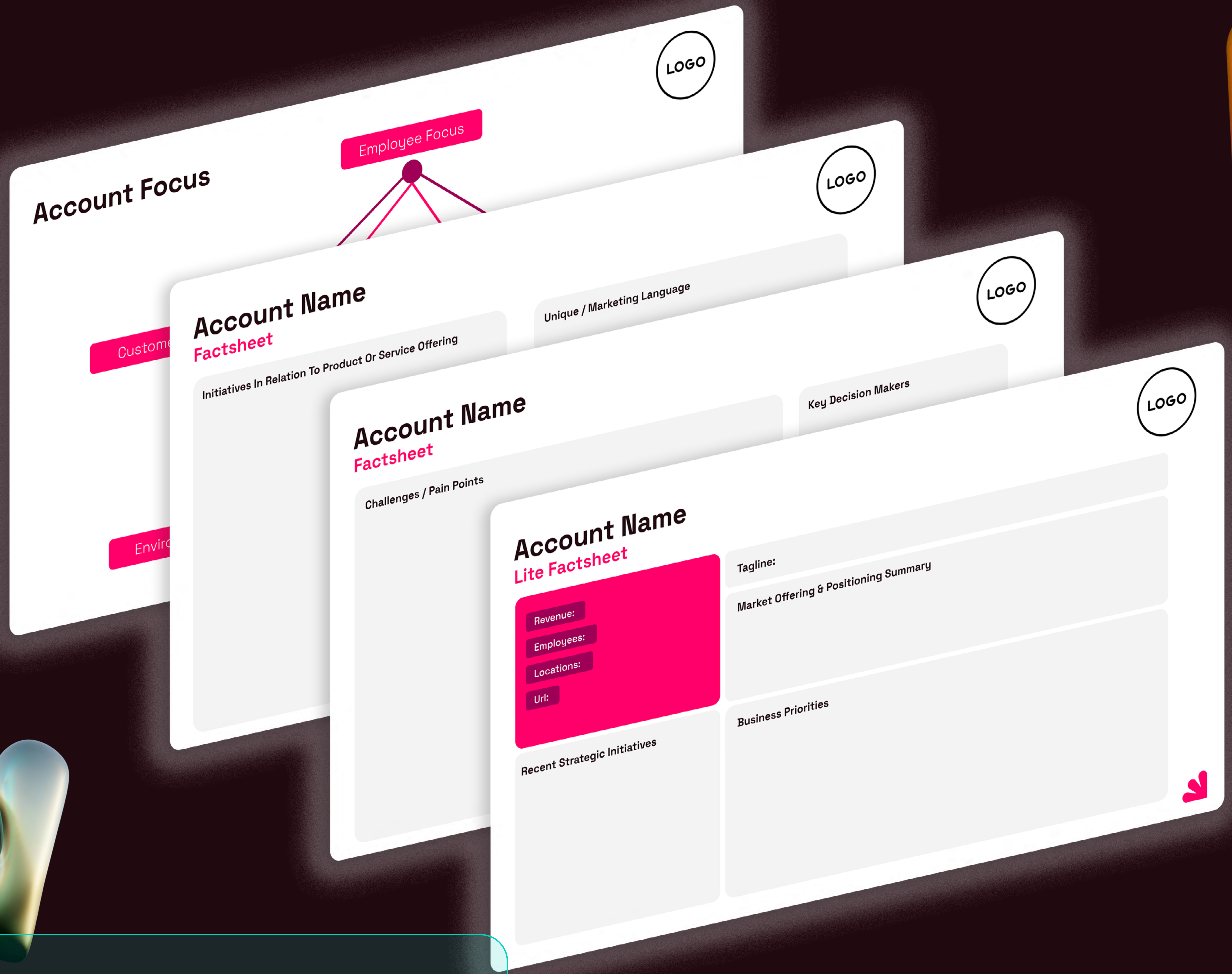
The 1: Few account factsheet template

This framework helps you create assets that speak directly to your audience, **helping you build stronger, longer-lasting relationships.** It's a template that should streamline account research and inform personalisation for your 1:few campaigns.

LINK TO TEMPLATE

Use for

We particularly like the unique marketing language section. It gives us a chance to understand the tone of the company, and any special ways they address customers or their teams (so we can mirror that in our communications). Some account intelligence can be 30 slides long. That's necessary in some situations, but programmes with more accounts (or fewer resources) benefit from a shorter format, which is more manageable and referenceable. It captures useful info, which is ideal for creating more personalised outreach. And with the chart at the back, it's very handy to get a sense, at a glance, of where the accounts priorities are — the labels can of course change.



What we like about it

Structuring light-touch account research that can be used for personalisation for 1:few programmes or providing insights to sales.

The account funnel framework

This framework helps you create assets that speak directly to your audience, **helping you build stronger, longer-lasting relationships.** It's a template that should streamline account research and inform personalisation for your 1:few campaigns.

Use for

Mapping your account universe to each stage of the funnel to build a clearer picture of where the strengths and weaknesses (or blockers) are. Once mapped, progress and velocity of accounts at each stage can be monitored building the outline of a KPI framework. It can be modified to fit the stages of your specific marketing/sales funnel.

What we like about it

Enables businesses to be much more focused and measurable with their ABM objectives. And helps align marketing and sales around shared objectives.

For example, an objective might be to focus on making more category-aware accounts familiar with your brand. Or perhaps the focus is further down the funnel to improve your opportunity win rate.

PREQUALIFIED ACCOUNTS
Meet scoring criteria/ match ICP

CATEGORY AWARE
Showing 3rd party intent but limited brand awareness

BRAND AWARE
Engaged with your brand - e.g. visited website pages, engaged with ads, downloaded content, showed event interest

QUALIFIED
Activity increase, threshold for engagement reached

OPPORTUNITY
Sales having active conversations & open opportunity

CUSTOMER
Closed won

ADVOCATE
Active promoter of your brand, seeing account retention and growth

The account nomination form

The clue is in the title as to what this is – it's, err, a form to gather and structure account intelligence information from sales or customer success teams. In one place you can ensure all aspects of the account history and landscape, their perception, stakeholders and awareness is captured and discussed.

Use for

As part of the inputs for account selection for a 1:1 programme. This tends to work best when we send out to sales in advance and then follow up with a call to discuss the answers in more detail.

What we like about it

This quickly weeds out accounts with little or no intelligence, or rationale, for submission. It can identify the most engaged sales/customer success leads (some fill it out in detail and some don't) and engages sales teams in the process and makes it transparent.

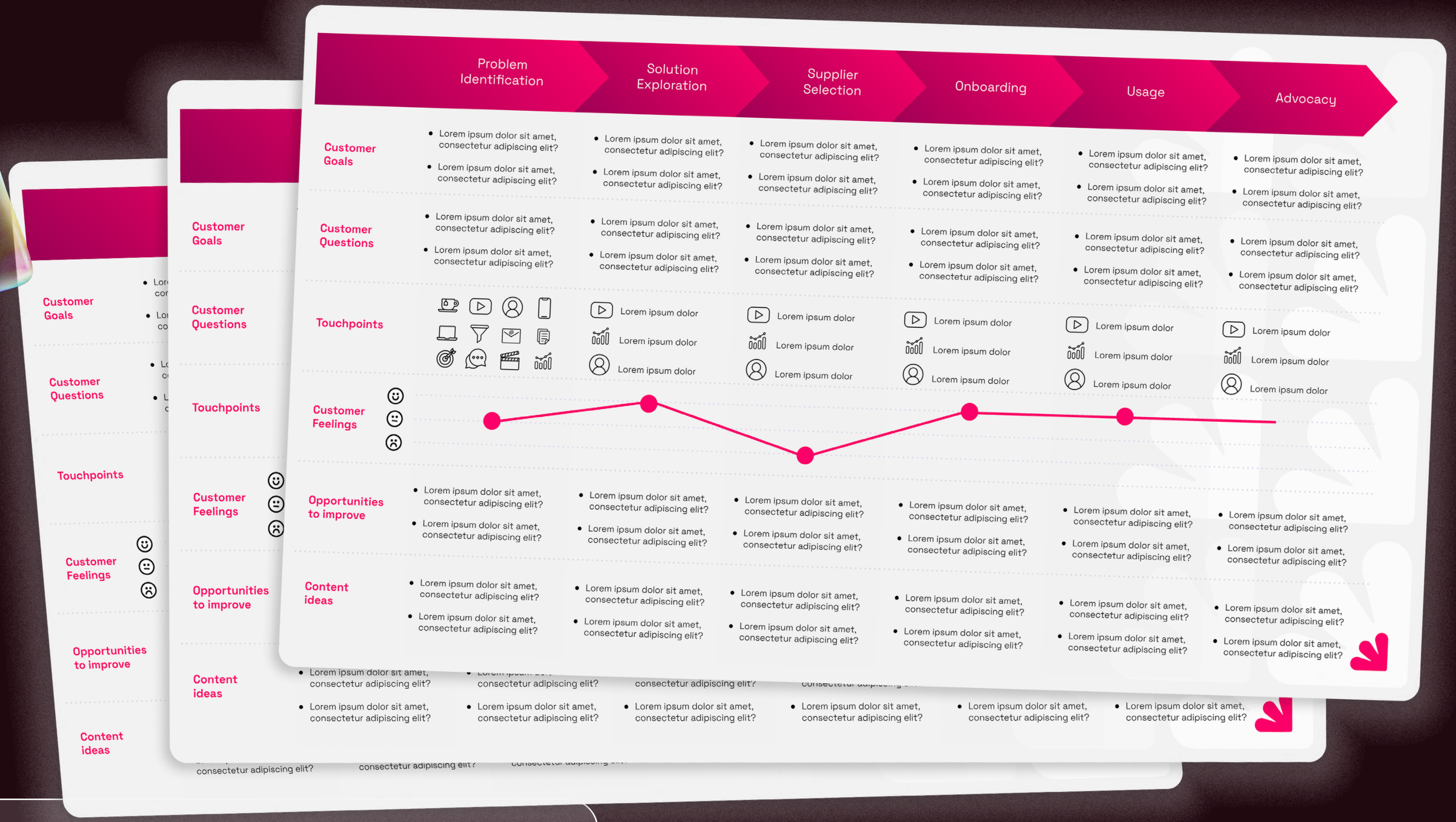
ABM Account Nomination		
Name of Nominee	Name	
Account History		
Question	Response	Additional comments
Account Name (full company name)		
Account is a Customer or Prospect	Customer	
Region or sales theatre		
Vertical	Other - please specifiy	
Is the account part of a group? If yes please provide details		
If account is a customer, please list the active products/use cases		
Number of Open Opportunities (please provide details)		
Open Opportunity $ Value	$0.00	
Account Landscape		
Please describe the partner ecosystem and relationships around the account (Channel partners, tech partners, Systems integrators ect)		
What is known about the company strategy or objectives? What are they trying to achieve?		
What is know about the company/ department painpoints?		
How can these painpoints be solved by our products and services?		
What competitors operate within the account? And which have the strongest relationships?		
What does their current tech stack look like?		
Where do you think we'd have the most success with targeting? i.e. Which departments, business units, personas		
Marketing and Awareness		
How aware are the target account of our company products or services?		
How is our company percieved by the target account?		
Please list the top contacts you are currently engaged with (name, title)		
1		
2		
3		
4		
5		
What content themes, topics, formats would this account be receptive to?		
Are there any existing case studies in this account? Please provide details		
Final comments		
Why do you think this account is a good target for ABM? What other information do you have?		

LINK TO TEMPLATE

The customer experience map

A one-page template structured around a typical B2B buyer journey (including post sale), this enables you to get into your ideal customer's shoes and understand the experience they go through when interacting with you.

LINK TO TEMPLATE



Use for

Understanding, as a business, the drivers, barriers and typical experience of an account and their interactions with you. Often this will include any questions they have, the touchpoints they have available, and their emotions at each stage. It will help you identify opportunities to improve the experience, or have a greater influence in order to improve conversion. Ideally, this needs to be a collaborative exercise and the output of discussions with prospects and customers, as well as sales and customer success teams.

What we like about it

A great tool for visually illustrating the customer journey and having a consistent reference. We like to print large copies and put them on the wall, helping to keep focus and retain information. It can be particularly useful for content planning as it allows you to really understand the typical questions, issues and frustrations at each stage and create content to help solve these.

The stakeholder advocacy tracker

ABM is, at the end of the day, all about building relationships. This template allows you to put some metrics around relationships that are typically hard to measure.

Use for

Mapping known and unknown stakeholders within customer accounts. It can help you to assess the current relationship strength and trajectory, enabling you to plan engagement programs. Populated by interviews with sales/customer success as well as engagement data, such as number of meetings, events attended, frequency of communications.

What we like about it

So much of ABM success both within the target account and influencing net new business, relies on stakeholder relationships and nudging more people towards advocacy. This is a useful planning exercise and valuable KPI to monitor and improve.

Account name	ACME ltd					
			SEE KEY BELOW			
Stakeholder name	**Job title**	**Assigned to**	**Stakeholder Status 2022**	**Stakeholder Status 2023**	**Trajectory**	**Notes & Actions**
John Biggs	*Head of IT*	*Janice Smith*	*Neutral*	*Positive*	*Improving*	*Ask to speak at upcoming event*

Status Key

Unaware

Stakeholder is not aware of the company/product/proj

Negative

Stakeholder may block or not open communications – any responses may be negative or provocative

They will not pick up the phone to take your call

Neutral

Communications have resulted in interactions with the stakeholder but these are sporadic, without momentum and deliver little in measurable value

Stakeholder will engage infrequently with communications responding (if they do) in their own time – often without commitment

They will only take your calls as/when it suits them to do so

Positive

Communications result in more regular interactions with the stakeholder – these interactions are likely to be positive, information and thinking will be s

Stakeholder will both engage with communications and proactively reach out seeking information and advice – they will also share information they ha

Interactions with the Stakeholder are frequent, positive and collaborative - resulting in measurable outcomes for the stakeholder and for Neo4j

They will take your calls ‘during office hours’. Open to social engagements and dinners.

Active Advocate

Stakeholder will regularly reach out for information, advice and help while also eulogizing about your product across the business and with peers

They will pick up the phone to take your call even ‘out of hours’

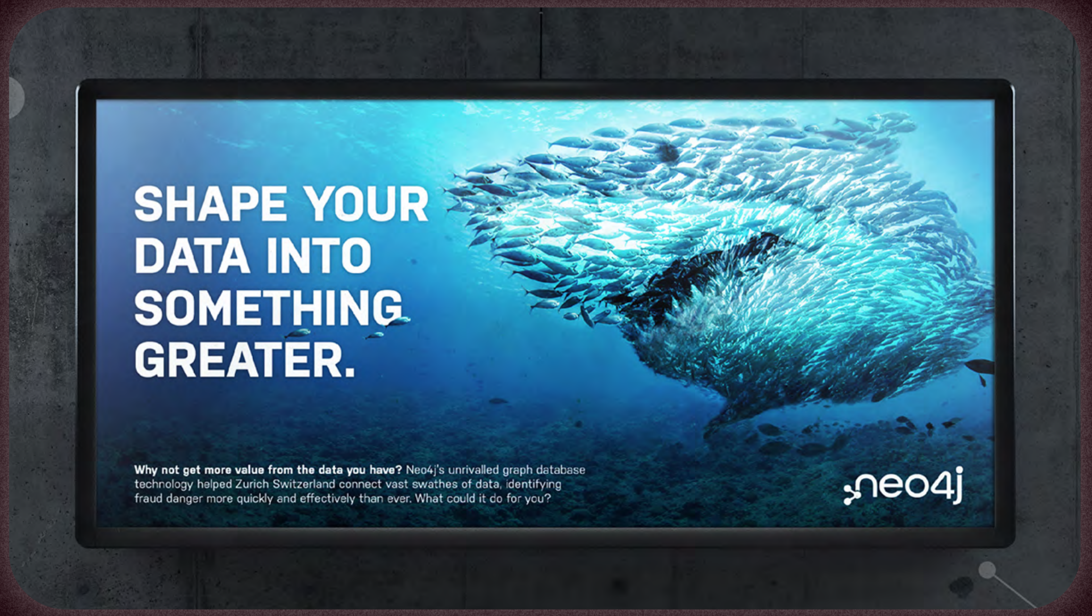
Open to co-creating content, co-presenting at events, helping craft propositions and identifying additional use cases

LINK TO TEMPLATE

THAT'S A WRAP

Well, what can we say? We know there's a lot to read and absorb in this toolkit, but fear not, help is on hand. Just drop us an email a **info@radishagency.co.uk**, or feel free to message the team through LinkedIn if you have any questions on how to use each framework.

If you're curious to see how we've used them in our previous ABM campaigns for data analytics and tech brands, head to our website where you'll find our **case studies**. These include our Gold B2B Marketing Award winning programmes for **Neo4J** and **Exasol**, plus **Quantexa**, winner of 'Best Enterprise Targeted Campaign' at Ignite's B2B Elevation Awards.



RADISH