

Things to Consider Checklist – Key Accounts, Channel & ABM

Strategic Program Design & Alignment

- ☐ **Define Program Vision and Strategic Objectives** - Set clear, measurable goals for revenue, retention, and mutual growth, ensuring alignment with your company's overall strategy.
- ☐ **Segment and Prioritize Accounts/Partners** - Use analytics to tier accounts/partners based on potential, fit, and strategic value.
- ☐ **Develop Ideal Account/Partner Profiles** - Document the characteristics, needs, and buying behaviors of your most valuable accounts and partners.
- ☐ **Assess Internal and Partner Capabilities** - Evaluate both your and your partners' readiness, resources, and gaps for program execution and customer delivery.
- ☐ **Adopt a Strategic Selling Framework (e.g., LAMP)** - Implement a process like LAMP to map account relationships, identify growth opportunities, and drive long-term value through joint account planning and opportunity management.

Team Structure, Enablement & Support

- ☐ **Define Clear Roles and Responsibilities** - Specify internal and partner roles (e.g., account manager, channel manager, ABM lead) and reporting structures.
- ☐ **Recruit and Assign High-Performing Talent** - Select individuals with relationship, consultative selling, and industry expertise for both your team and partners.
- ☐ **Develop Structured Onboarding for Teams and Partners** - Provide onboarding that covers processes, tools, and expectations for both internal teams and external partners.
- ☐ **Deliver Ongoing Training and Certification** - Offer continuous learning, including product, process, and soft skills training, plus certifications for partners.

Engagement, Co-Marketing & Value Creation

- ☐ **Establish Joint Business Planning** - Collaborate with key accounts/partners on mutual business plans, setting shared objectives and strategies.
- ☐ **Implement Co-Marketing Programs and MDF** - Provide Market Development Funds (MDF) and resources to support co-branded campaigns, events, and demand generation initiatives.
- ☐ **Enable Mutual Key Account Targeting & Joint Pursuits** - Work with partners to identify, target, and win high-value end customers together, aligning resources and go-to-market strategies.
- ☐ **Enhance Partner Capability to Serve Customers** - Supply partners with training, tools, and support to better address their customers' needs and differentiate in the market.
- ☐ **Map Stakeholders and Decision Makers** - Identify and document key contacts, influencers, and decision-makers within both your organization and partner organizations for effective engagement.

Process, Tools & Measurement

- ☐ **Deploy CRM/PRM Systems for Collaboration** - Use robust platforms for managing relationships, tracking opportunities, sharing insights, and measuring performance.
- ☐ **Standardize Pipeline and Opportunity Management** - Implement consistent processes for lead qualification, pipeline reviews, and forecasting across internal and partner teams.
- ☐ **Define and Track Key Performance Indicators (KPIs)** - Monitor metrics such as revenue per account, partner pipeline, MDF ROI, retention, and engagement to assess program health.
- ☐ **Provide Real-Time Reporting and Dashboards** - Give all stakeholders visibility into program performance, account/partner health, and campaign outcomes.

Leveraging ABM for Strategic Focus

- ☐ **Develop an ABM Roadmap** - Start with focused pilot campaigns targeting high-potential accounts or partners, then expand to broader initiatives as processes mature. Prioritize quick wins to build momentum and demonstrate early value.
- ☐ **Develop Strategic Messaging** - Tailor messaging to each account, segment, and stage of the buyer journey. Ensure consistency and relevance across all touchpoints to maximize engagement and trust.
- ☐ **Personalize Content and Multi-Touch Outreach** - Tailor campaigns to the unique needs of each account/partner and their customers, ensuring alignment between sales, marketing, and partner teams for coordinated engagement.

Want to understand the next steps for your own program? Email us to get started.



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