

ABM Program Toolkit

All you need to get started with
your ABM Program in **2026**

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But first, What is ABM?

Account-based Marketing, or ABM is a go-to-market strategy that coordinates highly valuable, personalized experiences across all functions that impact the customer (e.g. marketing, sales development, sales, and customer success) to drive engagement at a targeted set of new or existing accounts.



MARKETING

are communication tools that can be used as documents, brochures, speeches, reports, and more. It is presented before an audience. It serves a variety of purposes. Presentations powerful tools for convincing and

PRESENTA



Introduction & Foundation

Account-Based Marketing in 2026 is no longer just a strategy—it's the operating system for modern B2B revenue generation. The landscape has fundamentally shifted: buyers are more informed, buying committees are larger (averaging 8-10 stakeholders), and traditional demand generation tactics are delivering diminishing returns.

This toolkit gives you everything you need to build, execute, and measure an outcome-oriented ABM program.



What's Shaping ABM in 2026

AI as the Default: Generative AI is now embedded across research, content creation, and account scoring—making hyper-personalization scalable for the first time.

Privacy-first Execution: With third-party cookies gone and regulations tightening, successful ABM relies on first-party data, intent signals, and account-level tracking over individual surveillance.

Revenue Operations Unity: Marketing, Sales, and Customer Success are finally aligned under shared metrics, tech stacks, and account ownership models.

Account Experience Over Campaigns: The shift from "campaign thinking" to "experience design"—orchestrating every touchpoint across channels to deliver a cohesive journey.





Intent Data as Infrastructure: Buying signals (both first-party and third-party) are no longer "nice-to-have"—they're the foundation of account selection and prioritization.

Video and Interactive Content Dominance: Static PDFs and text-heavy emails are being replaced by personalized video messages, ROI calculators, and interactive microsites.

Multi-channel Orchestration: Winning ABM programs coordinate LinkedIn ads, direct mail, email, video, and sales outreach into synchronized sequences—not isolated touches.

Bottom line: ABM in 2026 requires you to be data-driven, technology-enabled, and relentlessly focused on the account—not just the lead. This toolkit shows you exactly how to do it.



ABM Templates

A. Strategy & Planning

ABM Business Case & ROI Calculator

How to Use This: Before launching, use this framework to secure the executive budget by forecasting revenue impact rather than just lead volume. Input your actual baseline metrics and apply industry-standard ABM lift ranges to build a data-driven business case.

Step 1: Document Your Current State Metrics

Metric	Your Current Baseline	Data Source
Average Deal Size (ACV)	\$_____	CRM closed-won deals (last 12 months)
Sales Cycle Length	_____ months	Opportunity created → Closed-won timeline
Win Rate	_____%	Opportunities → Closed-won conversion rate
Customer Acquisition Cost (CAC)	\$_____	Total Sales + Marketing spend ÷ New customers



Step 2: Apply Expected ABM Lift (Industry Benchmarks)

Metric	Expected ABM Lift Range	Your Projected Result
Average Deal Size (ACV)	+30% to +50% (Reason: Targeted upsell, multi-product bundling)	\$_____
Sales Cycle Reduction	-25% to -35% (Reason: Buying committee pre-alignment)	_____ months
Win Rate Increase	+15 to +20 percentage points (Reason: High-intent account selection)	_____%
CAC Efficiency	-20% to -30% (Reason: Reduced wasted spend on unqualified leads)	\$_____

Step 3: Calculate ROI

Use the formula below to determine your ABM program ROI:

Component	Your Numbers
Expected Revenue Impact (Year 1) Increased ACV × Faster Cycle × Higher Win Rate	\$_____
Total ABM Investment Tech stack + Agency/Team + Content production	\$_____
Net Gain	\$_____
ROI % (Net Gain ÷ Investment) × 100	\$_____

Source: Forrester Research, ITSMA ABM Benchmark Studies, Demandbase State of ABM Reports (2023-2025)

Pro Tip: Conservative modeling wins trust. Use the lower end of lift ranges (e.g., +30% ACV, -25% cycle) for your business case, then exceed expectations in execution. Always cite data sources when presenting to executives.



ABM Martech Architecture Guide

Building a signal-led, revenue-aligned ABM engine requires more than just purchasing software—it demands a connected ecosystem. This guide serves as the strategic blueprint for our clients to transition from siloed tools to a unified operating model. In the post-cookie landscape of 2026, the competitive advantage belongs to organizations that can master bi-directional data flow. This architecture guide provides a framework to establish a real-time sync between your CRM, data enrichment sources, and ABM platforms. By shifting focus from individual leads to buying groups (6-10 stakeholders) and leveraging intent data, this model enables predictable pipeline creation and helps organizations move beyond vanity metrics to quantifiable revenue attribution.

[Access the ABM Martech Architecture Guide 2026 →](#)

What's Inside This Guide

Strategy & Foundation

Core ABM fundamentals, the 5-stage maturity model, and the shift to signal-first GTM strategies.

Platform Selection

Deep-dive comparison head-to-head: Demandbase vs. 6sense, with decision trees for tool selection.

Data & Enrichment

Best practices for ZoomInfo, Apollo, and Clay workflows to ensure data hygiene and coverage

Integrations & Architecture

Best practices for ZoomInfo, Apollo, and Clay workflows to ensure data hygiene and coverage

Implementation Roadmap

A phased 90-day rollout strategy covering Foundation, Model Training, and Live Activation.

Budget & ROI Framework

Financial models for sustainable ABM, including Total Cost of Ownership and time-to-value benchmarks.



ABM Prompts & AI Tools

The difference between a good ABM strategy and a great one often lies in execution speed and personalization depth. To bridge this gap, we have developed a comprehensive ABM Prompts Library. We've designed this resource to empower your team to operationalize AI immediately - it is like a "plug-and-play" companion to your daily workflow.

By feeding our engineered prompts into your preferred AI tools, you can instantly generate account research, buyer personas, messaging & strategy, and execution. We have done the heavy lifting of prompt engineering so you can focus on strategy and relationship building

[Access the AI Prompts Library →](#)

How to Use This Library

Best Practices for Success:

- **Context is King:** Never paste a prompt blindly. Always fill in the bracketed placeholders [Client Name], [Industry], [Pain Point] with specific details to get tailored outcomes.
- **Iterative Refinement:** Treat the AI tool as a junior analyst. If the first draft isn't perfect, reply with specific feedback (e.g., "Make the tone more professional" or "Focus more on financial ROI").
- **The "Human in the Loop":** AI is a drafting tool, not a publishing tool. All outputs especially those facing customers—must be reviewed for accuracy, tone, and brand alignment.
- **Data Privacy:** Do not feed confidential client data (PII, trade secrets, specific contract pricing) into public AI models. Anonymize names before prompting.



Recommended AI Tools for ABM

While the prompt library is platform-agnostic, we recommend the following stack for the best results in 2026:



ChatGPT (OpenAI) / GPT-4o

Best for : Strategy & Versatility

Use Case : The "Swiss Army Knife" of ABM. Use it for drafting email sequences, role-playing sales objections, and summarizing meeting notes. It excels at reasoning and creative brainstorming.



Claude (Anthropic)

Best for : Strategy & Versatility

Use Case : Ideal for analyzing large documents like annual reports or technical whitepapers due to its large context window. It produces more natural, human-sounding copy that requires less editing.



Perplexity AI

Best for : Real-Time Research

Use Case : A search engine replacement that provides citations. Use it to find the latest news on a target account, verify executive moves, or research competitor feature sets with high accuracy.



Genspark AI

Best for : Comprehensive Research & Multi-Source Intelligence

Use Case : An AI-powered research engine that aggregates information from multiple sources to create comprehensive "sparkpages" on any topic. Perfect for deep account research, competitive intelligence gathering, and building detailed market landscapes with verified sources.



Gemini (Google)

Best for : Google Ecosystem Users

Use Case : Powerful for processing video content (like earnings calls on YouTube) and integrating directly with Google Workspace docs and sheets for seamless workflow.



Microsoft Copilot

Best for : Enterprise Security & Office Integration

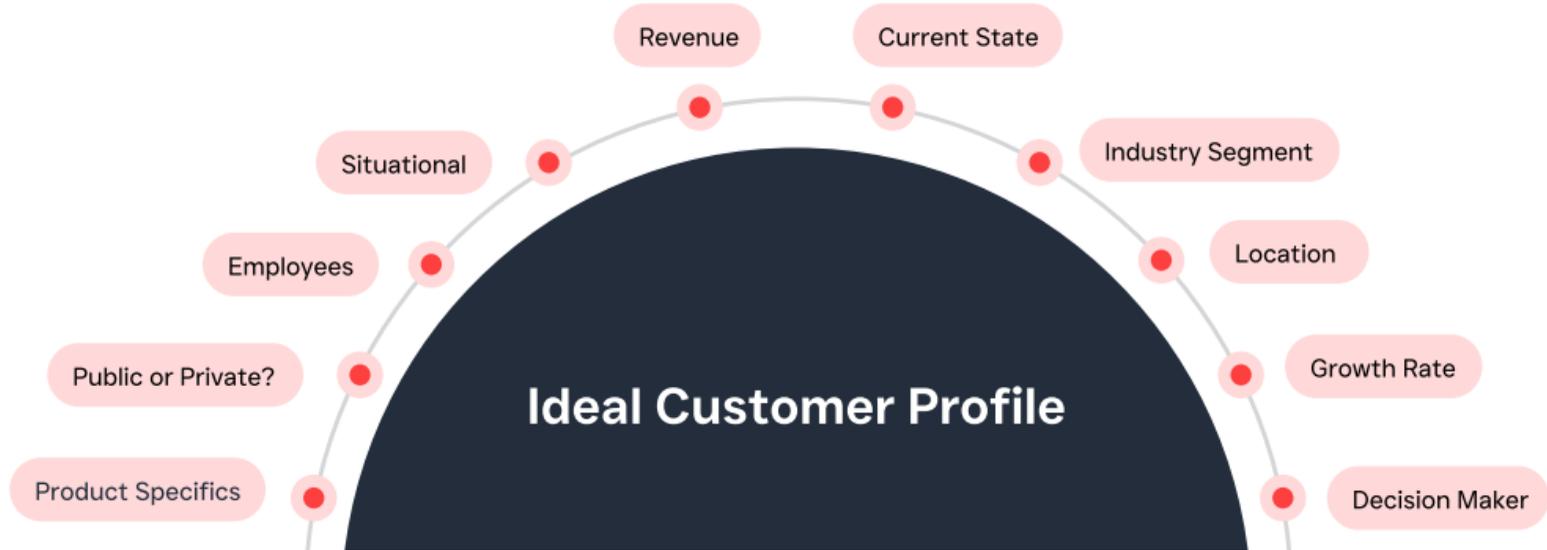
Use Case : Best for internal data analysis. Use it to synthesize data from your own Excel spreadsheets, PowerPoint decks, and Teams meetings without data leaving your secure corporate environment.



Ideal Customer Profile

How to Use This : Leverage this template to dig deep into your existing customers and target segments and define an ideal customer profile. The ICP can then be used to define your target account lists and further create ABM programs.

[Access ICP Template →](#)



Target Account List

How to Use This : Use this template to build your target list be it any type of campaign you will be running (1:1, 1:few, 1:Many) along with basic firmographic details and their tech stack.

[Access Account List Template →](#)

Stakeholder Mapping

How to Use This : Map all your target prospects within an account and capture their contact information and other details.

[Access Stakeholders MappingTemplate →](#)



Account Research

How to Use This : This template will help you plug in the data for the target account on your list. Ideally recommended for 1:1 ABM campaigns

Ideally recommended for 1:1 ABM campaigns

[Access The Template Here →](#)

- **Account Overview :** Gather information about the company's line of business, geographic presence, and revenue. Do a SWOT analysis if, required. Check out the market landscape into which your account falls.
- **Tech Stack :** Look for information about technologies like ERP, CRM, Finance, HR applications, etc., the company is currently using. (Add as per the relevancy to your business.)
- **Trigger Events /Scoops/ Recent Developments :** Any signals that lead to an opportunity. For eg: change in CIO/CFO, entering a new market, etc.
- **CXO's Reflections / Verbatims :** Collate conversations on transformation, disruption, innovation, tech implementations, focus areas, future strategy, etc., based on your target audience, business, and industry.
- **IT Vendors :** Look for strategic alliances and partnerships, deals with tech vendors, and what work you're doing with them.
- **ITStakeholder Mapping :** Find out who are the decision-makers and influencers in a particular target account for your value proposition.
- **Analysis & Inferences :** With the above, you can draw inferences to understand the target account's pain points, focus areas, and intent.



Content Audit

How to Use This : This template will become a go-to document to organize all your existing content. It's meant to map all the content across the TOFU, MOFU, and BOFU stages along with gated and non-gated content. It covers core questions like which marketing asset targets which persona, industries, and what pain points to offer a comprehensive overview.

Accordingly, you can plan touchpoints and what is missing from your content strategy for ABM campaigns. You can update it every month as and when new content is published or is ready to be used for campaigns.

[Access Content Audit Template →](#)





Buyer Persona Research & Analysis

How to Use This : This template will help you define your ideal customer profile (ICP) or the buyer persona and how you can communicate with the different sets of personas on your target list. It will also help you understand what the individuals within those roles desire, fear, and care about and which questions, opportunities, and success factors to utilize.

You can gather the data through research, surveys, interviews, inputs from sales teams, etc. Once you have the information you can craft the message for your different target personas accordingly.

[Access Buyer Persona Audit Template →](#)



Buyer Persona Research & Analysis

How to Use This : This template will help you collate information about your target industry and a cluster of accounts belonging to a particular industry sector. It also gives you content strategy takeaways. With this, you can plan your content for campaigns.

Ideally recommended for 1: Few, 1:Many ABM campaigns.

[Access Content Audit Template →](#)

Industry Sub segments

Market Size

Other Facts & Figures

Top Players

Industry Pain Points

Regional Trends

Industry CXO's Speak across region

Key trends & development shaping XYZ Industry

Analyst Comments

XYZ Industry Transformation (Evolving Business Models)

Key Takeaways

Overview of sector digital environment, adoption trends, investment trends & opportunities. List down some Use Cases, examples etc.

Areas where digital developments will drive value for XYZ sector

What are the factors that limit the industry to adopt certain technology/solution you offer?

What benefits come in with the adoption of certain technology? (Cost-savings, efficiency, productivity by XX% - look for average industry numbers if available)

Best Practices that industry is adopting to take into account to increase their chance of success in a particular technology implementation

Best Practices that industry is adopting to take into account to increase their chance of success in a particular technology implementation



Messaging Framework

How to Use This : Use this template for making up your core messaging document for your target audience to tell a coherent story. You must define the vitals, including your elevator pitch, brand narrative, positioning statement, etc., here.

[Messaging Framework Template →](#)

Campaign Brief

How to Use This : Make use of this format for creating a list of campaign themes or scenarios you intend to run the campaigns on. It can differ based on the type of ABM program, audience, and duration, and accordingly, map it to your use cases. Here, you can also mention possible subject lines to run A/B tests for different scenarios.

[Campaign Brief Template →](#)



Solution Mapping

How to Use This : Organize your business use cases for a specific industry, audience, problem statement, how your solutions help, and its USPs. List down the reasons why prospects should consider your company over your competitors and any existing content assets you have already in place for the same.

[Solution Mapping Template →](#)

Account-based Advertising

How to Use This : Keep a track of your ad copies, audience creatives, budgets, duration, advertising channels you are leveraging, customer journey, and optimization plan while running ads via multi-channel platforms

[Account-based AdvertisingTemplate →](#)



Scoring Matrix

How to Use This : Use this template to give scores to leads and arrive at account scores accordingly. Feel free to add channels and metrics you want to measure and allot scores to. This is just a sample of possible metrics and channels but it can vary from company to company

[Messaging Framework Template →](#)

Campaign Reporting

How to Use This : This will be a comprehensive sheet to track engagement with leads and accounts across various channels. Dates, assets being sent, and actions taken by the prospect on the assets across channels can be tracked here. Feel free to modify it as per your campaign plan and strategy.

[Campaign Brief Template →](#)



Marketing and Sales SLA

How to Use This : To align marketing and sales teams, leverage this SLA and set up SOPs between the two functions. This will allow smooth transitions between sales and marketing when reaching out to the prospect.

[Marketing & Sales SLA Template →](#)



B. Campaign Execution

Multi-Channel Orchestration Matrix

How to Use This : Coordinate your touches so the prospect sees a unified message everywhere.

Day	Marketing Action	Sales Action
1-5	IP-Targeted Display Ads (Air Cover)	CRM closed-won deals (last 12 months)
6-8	Direct Mail (Physical Gift) arrives	Opportunity created → Closed-won timeline
9-12	Retargeting via LinkedIn	Opportunities → Closed-won conversion rate

Gen AI for ABM Execution

Use Gen AI not just for copy, but for scale..

- **Content:** Create 50 industry-specific variations of a landing page copy in minutes.
- **Creative:** Generate ad image variations for A/B testing.
- **Research:** Summarize annual reports of Tier 1 accounts to find trigger events.



Account-based Advertising Planner

Account-based advertising has evolved beyond LinkedIn-only strategies. Modern B2B buyers consume content across fragmented touchpoints—from streaming audio and Connected TV to programmatic display.

Here's a multi-channel framework to reach buying committees with consistent messaging across channels, using privacy-first, cookie-less targeting strategies (IP-based matching, first-party data, contextual alignment) to optimize spend for pipeline impact.

[Access Account-based Advertising Template →](#)

Core Advertising Channels

01

LinkedIn Ads (The Foundation)

Overview : Remains the most accurate source of professional data. While often the most expensive channel (CPM), its precision for job titles and seniority makes it indispensable for initial engagement.

- **Best For:** High-intent engagement, lead generation forms, and delivering complex thought leadership content.
- **Strategy:** Use "Thought Leader Ads" to humanize the brand (promote employee posts) and "Document Ads" for ungated content consumption.
- **Budget Allocation:** Typically 40–50% of total ad spend due to high cost but high quality.



02

Programmatic Display (The Scale)

Overview : Essential for cost-effective frequency and scale. Utilizing platforms like StackAdapt, The Trade Desk, or ABM-specific DSPs (Demandbase/6sense) to target accounts across thousands of premium publisher sites.

- **Best For:** Brand awareness, staying top-of-mind (air cover), and retargeting engaged visitors at lower CPMs.
- **Strategy:** Focus on "Contextual Targeting" (placing ads on industry-specific articles) to bypass cookie limitations.
- **Budget Allocation:** 20-30% of spend to drive frequency and reach.

03

Connected TV (CTV) (The Premium Impact)

Overview : B2B advertising on streaming platforms (Hulu, Roku, etc.) brings the emotional impact of TV to targeted accounts. It reaches executives in a "lean-back" environment where they are more receptive to storytelling.

- **Best For:** Brand prestige, emotional storytelling, and reaching the C-suite in non-work environments.
- **Strategy:** Use 15-30 second high-production value spots. Creative must be engaging, not just a "talking head."
- **Budget Allocation:** 10-15% of spend (reserved for Tier 1 accounts).



04

Audio & Podcast Advertising (The Intimacy)

Overview : Targeting business podcasts and streaming audio (Spotify, Pandora). Audio allows for high attention share as listeners are often engaged in focused activities.

- **Best For:** Deeply engaged audiences, niche industry targeting.
- **Strategy:** Host-read ads perform best for trust; programmatic audio ads work for scale. Target specific business categories relevant to your ICP.
- **Budget Allocation:** 5-10% of spend.

Channel Selection Matrix

Channel	Best Used For	Target Audience	Typical CPM Range	Key Platforms
LinkedIn	Precision targeting, Lead Gen	Specific Job Titles / Roles	\$60 - \$150+	LinkedIn Campaign Manager
Programmatic	Reach, Frequency, Retargeting	Broad Account Buying Committee	\$5 - \$15	StackAdapt, 6sense, Demandbase
CTV	Brand Prestige, Storytelling	C-Suite / Executive Approvers	\$25 - \$45	MNTN, The Trade Desk
Audio/ Podcast	Attention, Niche Topics	Learners / Researchers	\$15 - \$30	Spotify Ad Studio, Acast



Channel Selection Matrix

01 Budget Allocation by Buying Stage

- **Awareness (40%):** Heavy programmatic and CTV focus to saturate the account and build brand familiarity.
- **Consideration (40%):** Shift to LinkedIn for educational content and specific solution messaging.
- **Decision (20%):** High-frequency retargeting & validation/ social proof ads (case studies) to the entire committee.

02 Creative Best Practices

- **Refresh Frequency:** Rotate creative every 4-6 weeks to prevent ad fatigue (banner blindness).
- **Message Matching:** Ensure the ad copy matches the landing page headline exactly to reduce bounce rates.
- **Personalization:** Use dynamic creatives where possible to insert [Industry] or [Company Name] into the ad copy for Tier 1 accounts.

03 Measurement & Attribution

Move away from Click-Through Rate (CTR) as the primary metric. In ABM, success is defined by account progression, not just individual clicks

- **Engagement Lift:** Are target accounts spending more time on site after ad exposure?
- **Pipeline Velocity:** Are deals moving faster through stages when "air cover" ads are running?
- **View-Through Conversions:** Tracking users who saw an ad (didn't click) but later visited the site.



Getting Started Checklist



Audience Definition

Upload Target Account List (TAL) to all platforms and verify match rates (>50% is target).



Creative Assets

Prepare 3 variations of ad creative (Problem-Agitation-Solution) for A/B testing.



Pixel Implementation

Install LinkedIn Insight Tag and DSP pixels on the website for retargeting and attribution.



Launch & Monitor

Set up a weekly review cadence to optimize bid caps and exclude underperforming publishers.



C. Revenue Operations (RevOps)

RevOps Alignment Framework

How to Use This: Align Marketing, Sales, and CS on common definitions.

- **MQA (Marketing Qualified Account):** An account that fits the ICP and shows high intent.
- **Engagement Score:** The threshold of activity required to trigger outbound sales.
- **SLA:** Sales commits to actioning Tier 1 MQAs within 24 hour



Account Expansion & Upsell Strategy

ABM doesn't stop at the deal. Use this playbook for "Land and Expand" strategies.

How to Use This: Identify other business units within your current customer accounts that fit the ICP. Target them as "warm" leads leveraging internal case studies.

Account Scoring Matrix

Score the account, not just the lead.

Activity	Points
Visits Pricing Page	+15
Third-Party Stakeholders active in 1 week	+30 (Surge)
Content Download (Technical Spec)	+10



D. Campaign Execution

Executive ABM Dashboard

Report on the metrics that matter to the Board.

- **Pipeline Velocity:** Are deals moving faster?
- **ACV Lift:** Are deals getting bigger?
- **Target Account Penetration:** What % of our Tier 1 list is engaged?
- **Influence Revenue:** Total pipeline influenced by ABM touches.

Pipeline Velocity & Attribution Modeling

Move away from "Last Touch" attribution. Use a multi-touch model (W-Shaped or U-Shaped) to credit all interactions across the buying committee.



Ready To Put This Into Action?

You've got the strategy. Now choose how you want to execute.

Partner With Us

You need expert guidance, execution support, or lack the internal resources.

- ✓ Strategy workshops & ICP development
- ✓ Campaign design & content creation
- ✓ Tech stack integration & setup
- ✓ Ongoing optimization & reporting

[Talk to a Smarketer](#)

Need help refining your 2026 ABM Strategy?

That's what we specialize in - get in touch with us today!



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Thank You