bombora

Foundational GTM Checklist

Predictable Pipeline | Bombora Playbook

Use this checklist to set the foundation for the Playbook for Marketing's Predictable Pipeline.

You should already know or document as many of the following as possible. Not all are necessary, but the more that can be provided, the stronger signal you'll be able to create, and the more successful Playbook you'll run.

Intent data is not a silver bullet for your sales and marketing efforts; it provides insights and a data input to help you prioritize your focus and effort. There still needs to be the basics of solid messaging and positioning, strategy, process, & other data inputs to make your account-based marketing successful. Additionally, you will want to have measurement benchmarks across sales and marketing to ensure you can show the impact of your intent data and account-based marketing strategy.

Basic Needs:

- [ ] 100+ closed/won accounts associated with the products driving each of the core sales signals.
- [ ] A list of competitors and/or associated partners.
    - [ ] Within the list of competitors, provide the products or services that you compete with each directly.
    - [ ] Within the list of partners, provide the products or services that your partners support or are integrated with.
- [ ] Web content that has a laser focus on the product/messaging for each product/service.
- [ ] A list of top organic keywords associated with each product/service/persona

Technical Information:

- ❑ Where will your intent data live? CRM or MAP, Bombora UI, etc.
- ❑ How do your Sales Reps use this tool for account management? (ex: They use accounts + contacts in SFDC; They work out of List views, dashboards, tasks; Etc.)
- ❑ Are accounts assigned to your sales reps in your CRM/MAP platform? At what stage? Is it manual or automated?

Go-To-Market Strategy:

This section will establish information about your go-to-market (GTM) strategy and resources that will help you execute this playbook.

- ❑ Do you have multiple products or business units that you support? If yes, which of these is your marketing team responsible for driving demand for?
  - Why: You may not have a mandate to drive demand for every product or solution that your company offers. You want to build these always-on campaigns around the products you have targets against as marketing. In an ideal world, these would align with the business strategy and sales targets.
- ❑ Have you clearly defined your total addressable market (TAM) for each of the products/solutions identified in step 1? Not a list of named accounts, but the parameters of what makes a good fit account for each product or solution.
  - Some things to consider: Geography, size of account, industry, etc. Some businesses have very robust data science models to do this, others start with the basics as mentioned above. They key is to have a definition; you can always change and adapt it over time.
  - Another key question you need to answer about your TAM is do you only want to look at your named accounts or the entire relevant TAM that is surging? Our recommendation is the entire TAM to create the biggest population possible for surge identification.
  - Why: These will become the inputs to create the entire ecosystem of accounts of where your surging accounts will come from. Often if you limit your TAM to your named account list, there will not be enough

volume for your campaigns, and you are leaving opportunity on the table.

- [ ] Do you have an established campaign for each of these products, services, or solutions? If not, do you have a campaign that has worked well in the past that you could update and use? If not, what is a realistic timeline to get a campaign in place for each?
    - Why: You can use these existing campaigns or update older, successful campaign to become the start of where leads go as accounts surge. If you do not have these campaigns, you will need to decide on the piece of content you will use or create, the ads to support that, the landing page, and the nurture flow with supporting content.
- [ ] For each of the products you've identified above, have you identified the buying committee or demand unit?
    - Why: Rarely in the B2B world are you dealing with one stakeholder, typically it can be between 4-8 people involved in a purchasing decision. You will want to know these personas so you can identify relevant contacts for each product, solution, or business unit you're running a campaign for once you see an account surging.
- [ ] Do you have a content strategy to fuel this campaign? Where will new content come from to keep the campaign alive?
    - Why: While your marquee piece of content will stay consistent for the life of the campaign, you will need supporting content to round out your campaign - infographics, blogs, data sheets, etc. You will want to ensure you have an approach that will give you content for social media post, SEO, nurture streams, and your ISRs.
- [ ] Will this effort be led by your digital marketing team only, your ISR/SDR team, a combination?
    - Why: You will want to think through who is on point for starting the outreach and what the sequencing will be. Will you start warming them up with advertising and follow with SDR/ISR outreach? Will marketing work the account until it reaches a score certain score before handing off? These are important things to work through ahead of starting this strategy so that handoffs are agreed to.
- [ ] Does your ISR/SDR and/or sales teams need to be enabled on these campaigns and solutions?

  - Why: You will want to make sure the relevant handoffs have context for how this lead came to be, what content they have interacted with, and what they should do next. You will also want to ensure they have been properly enabled on the solution and how to talk to it to help with your success. This is a very important step as blind handoffs happen far too frequently between marketing and ISR/SDR teams.
- [ ] What channels and tactics will you use in your always-on campaign strategy? Will these be scalable in an always-on fashion to add more accounts to each week?
  - Why: You will want to ensure a scalable campaign that can be measured and optimized over time. This is how you create always-on campaigns that generate predictable pipeline.

Metrics

Additionally, there are a few metrics you will want to have benchmarks for ahead of implementing your intent strategy. These will help you establish benchmarks of key areas of conversion to help you measure the success of your strategy and will inform the measurement section of the playbook.

- [ ] What is your lead-to-meeting conversion rate? (Leads given to SDR/ISR that turn into meetings)
- [ ] What is your meeting-to-opportunity conversion rate? (Meetings your SDR/ISR set that sales then decides to work.)
- [ ] How long does this usually take?
- [ ] What is your opportunity to Closed Won conversion rate? How long is this sales cycle?
- [ ] What is your average sales cycle time?
- [ ] What is your average sales price/deal size?

TIP: One of the most common and measurable impacts of Intent data is in efficiencies it drives into the system. These are often found in conversion rate and velocity (timing) since you're targeting in-market accounts for your product or service. Thus, it is good to set benchmarks before implementing.