Daily Account-Based Sales Development Routine

It's no secret best-in-class firms use data to drive great sales results. Account-based sales development is no different: the right mix of people, process and tech creates a deadly cadence that hunts down even the toughest accounts. The following routine, which pulls together insights from TOPO, Trish Bertuzzi, Engagio, Sales for Life and more, will set you up to be a world-class sales hunter.

Step 1: Identify Accounts/ICPs

- ☐ Work with marketing to identify Tier 1, 2 and 3 accounts (prework)
- ☐ Identify target contacts within each account by purchasing or creating org charts

Step 2: Check Google Alerts

- ☐ Set a reminder to check insights that spark new conversations within each account

Step 3: Check Navigator

- ☐ Check in with ICP activity

Step 4: Share Content

- ☐ Use Feedly/employee advocacy to find and share content with your network

Step 5: Check Engagement

- ☐ Check marketing automation/Salesforce to see what ICP within target account is engagaging with

Step 6: Account Planning

- ☐ Try Steve Richard's (Vorsight) three-tiered research strategy: 3 insights in 3 minutes
    - ☐ Market, company, individual

Step 7: Create Messaging

- ☐ Create messaging: context, value, call-to-action
- ☐ Leverage Gartner reports, 10-K's, competitor 10-k's and annual reports

Step 8: Execute Outreach

- ☐ Block off time in your calendar to perform multiple touchpoints with each account

Step 9: Qualify

- ☐ Once you get your prospect live, identify business challenge(s) and set time for discovery call

Step 10: Pass to Sales

- ☐ Collaborate with your team to determine next steps for each account

Step 11: Review Contact Reminders

- ☐ Remember to review job change alerts
- ☐ Can you gain more insight into why they left?

Step 12: Document Activity in CRM

- ☐ Document interactions in CRM
- ☐ Shape the future of Sales and Marketing—take our five-minute Account Based Everything Survey **here**

Sales for Life