ABM Playbook 2026

Link: 2026 ABM Playbook.jpg

How it works?

Step 1: Analyze & Backtest Existing CRM Data

Start with revenue truth and pull data from CRM (HubSpot / Salesforce).

- **Closed Won**
  - Identify highest spend customers.
  - Analyze:
    - ACV
    - Sales cycle
    - Expansion revenue
  - Interview AEs and CSMs.
  - Extract:
    - Buying triggers
    - Decision-makers involved
- **Closed Lost**
  - Identify common patterns:
    - Industry mismatches
    - Budget issues
    - Competitor wins
    - Repeated objections
- Output:
  - Win patterns
  - Loss patterns

Step 2: Build the ICP Model

Backtest ICP using CRM data and define:

- **Firmographics**
  - Industry
  - Headcount
  - Revenue
  - Geography

- **Technographics**
  - Tools used
  - Tech stack
- **Account-Fit Signals**
  - Hiring activity
  - Funding stage
  - Growth signals

Step 3: Build Broad TAM Map

Source companies using multiple inputs.

- **Databases**
  - Apollo
  - AI Ark
  - Ocean.io
  - Discolike
  - Sales Navigator
  - StoreLeads
- **Scraping**
  - Apify
  - Octoparse
  - Serper.dev
  - Python

Aggregate all accounts into Clay.

Step 4: Data Enrichment & AI Qualification

Clean and filter in Clay.

- Enrich firmographics and technographics.
- Use "Use AI" in Clay with ChatGPT model.
- Classify accounts:
  - Qualified
  - Not Qualified
- Remove non-qualified accounts.

Step 5: Account Scoring & Tiering

Score accounts using:

- Clay formulas
- AI scoring logic

Assign tiers:

- **Tier 1:** Strong fit
- **Tier 2:** Good fit
- **Tier 3:** Okay fit

Push tier property to CRM.

Step 6: Enrich Target Account List

Operationalize Tier 1 and Tier 2 accounts.

- Sync prioritized accounts into:
    - LinkedIn Ads
    - HubSpot Ads
- Build buying committee audiences.

Step 7: Contact Sourcing & Stakeholder Mapping

For each qualified account, source:

- Decision Makers
- Champions
- Influencers

Enrich contacts and upload to CRM:

- Companies
- Contacts
- Custom properties:
    - Tier
    - ICP fit
    - Stakeholder role

Step 8: Signal Tracking Infrastructure

Track multi-layer signals.

- **1st Party**
    - CRM activity
    - Outreach replies
    - Website visits
    - Gated downloads
- **2nd Party**
    - Ad engagement
    - LinkedIn engagement
    - Event participation
    - Warm intros
- **3rd Party**
    - Hiring signals
    - Funding news
    - Tech stack changes
    - Social signals

Step 9: Lead Scoring

Implement scoring system.

Create awareness stages:

1. Identified
2. Aware
3. Interested
4. Considering
5. Selecting

Create CRM custom events:

- Pricing page visits
- Demo requests
- High-intent actions

Trigger:

- CRM tasks
- Slack notifications for qualified activity

Step 10: Demand Generation Execution

Run coordinated plays based on:

- Tier
- Awareness stage
- Signal strength
- **1:1 Plays**
    - Warm intros
    - Personalized microsites
    - Event invites
    - Manual outreach
- **1:Many Plays**
    - Automated emails
    - Parallel dialing
    - Retargeting ads
    - Webinars
    - Video outreach
    - Social content
    - LinkedIn DMs

Step 11: Push Back to CRM

Sync all engagement and signals back to CRM.

Monitor:

- Pipeline progression
- Tier movement
- Awareness shifts
- Closed Won rate
- Revenue by tier

Final Output:

- Account mapped
- Company tiers defined
- Stakeholder maps complete
- Signals centralized
- Awareness scores tracked
- Closed Won attribution clear