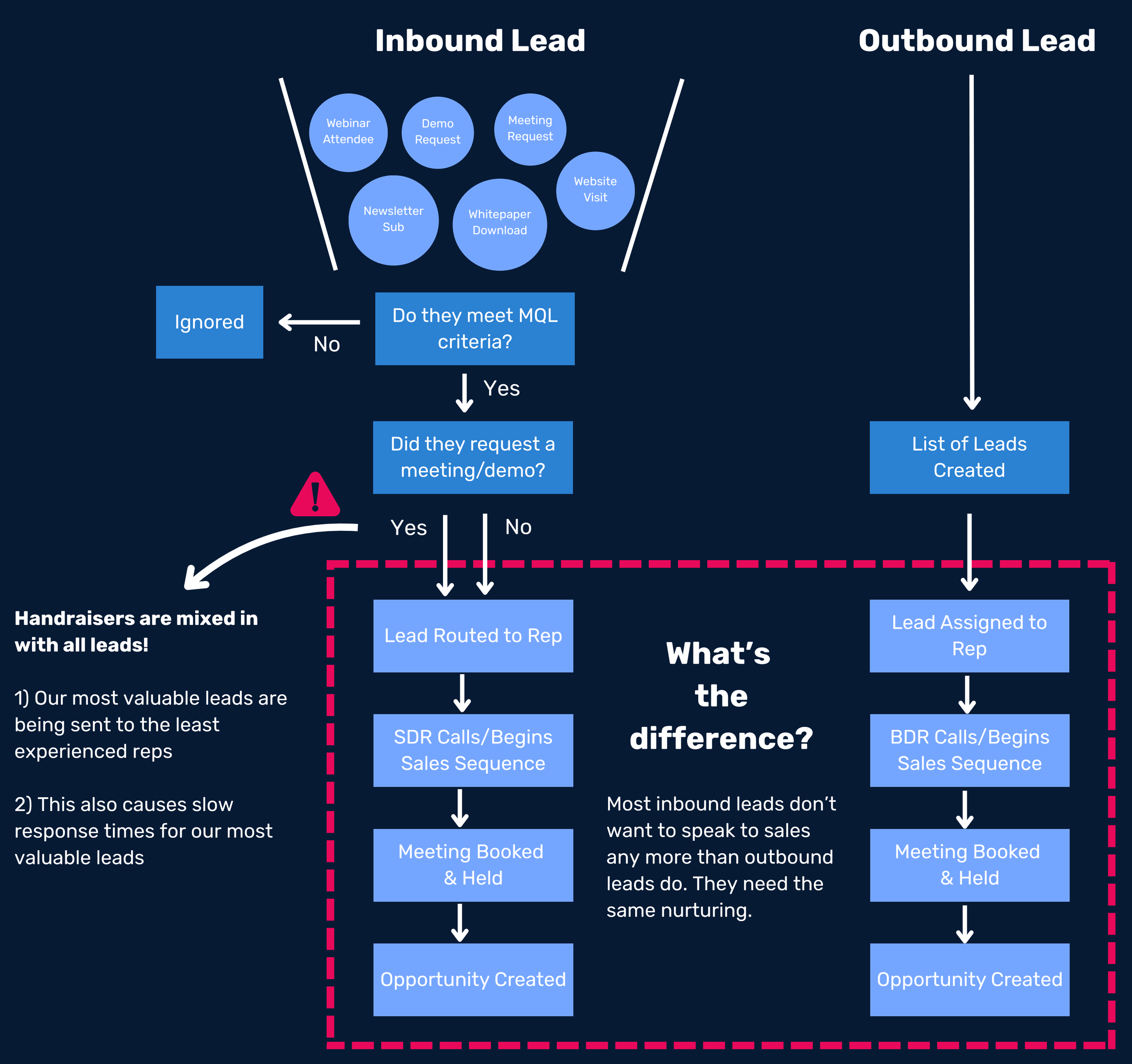
The Allbound ABM Framework

There's No Difference Between Inbound & Outbound

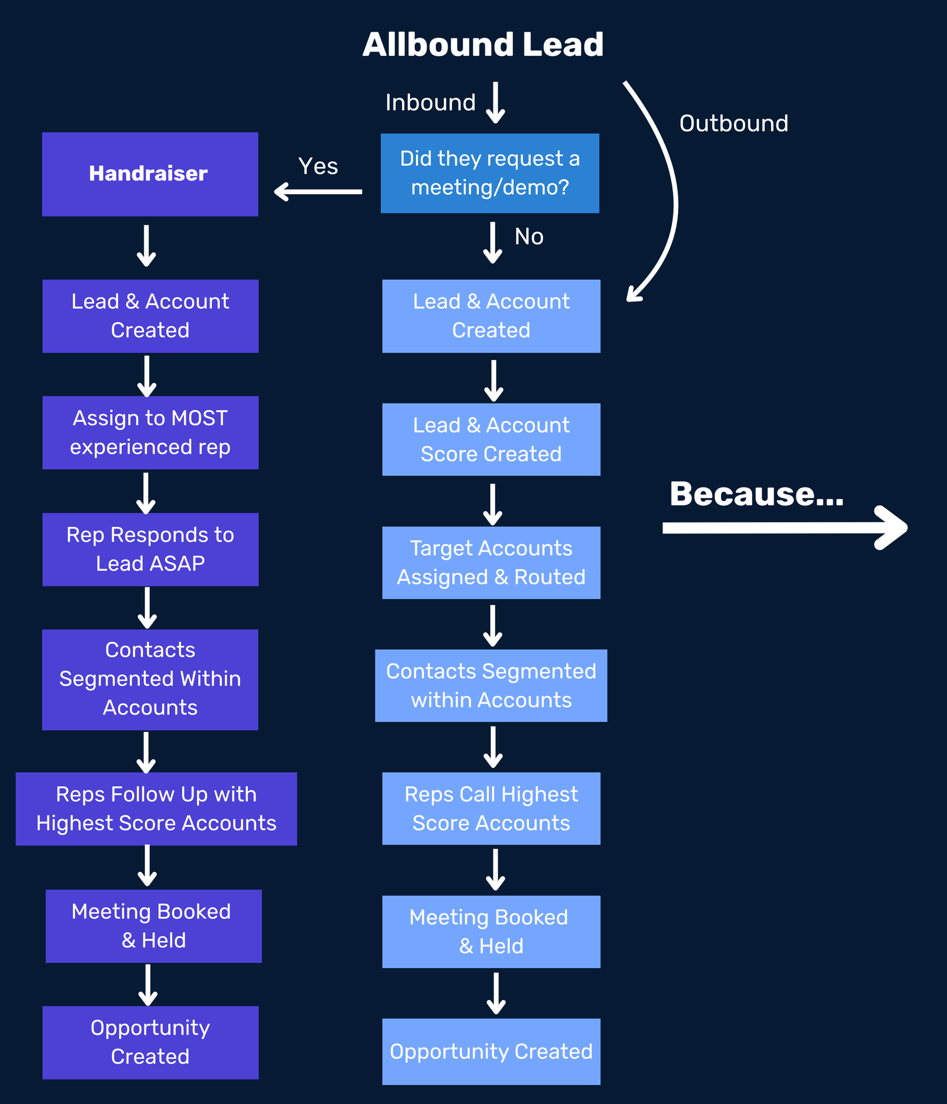
Click Here to Read the Full Framework

UNION SQUARE CONSULTING

How it Works Today



How it Should Work



Because...

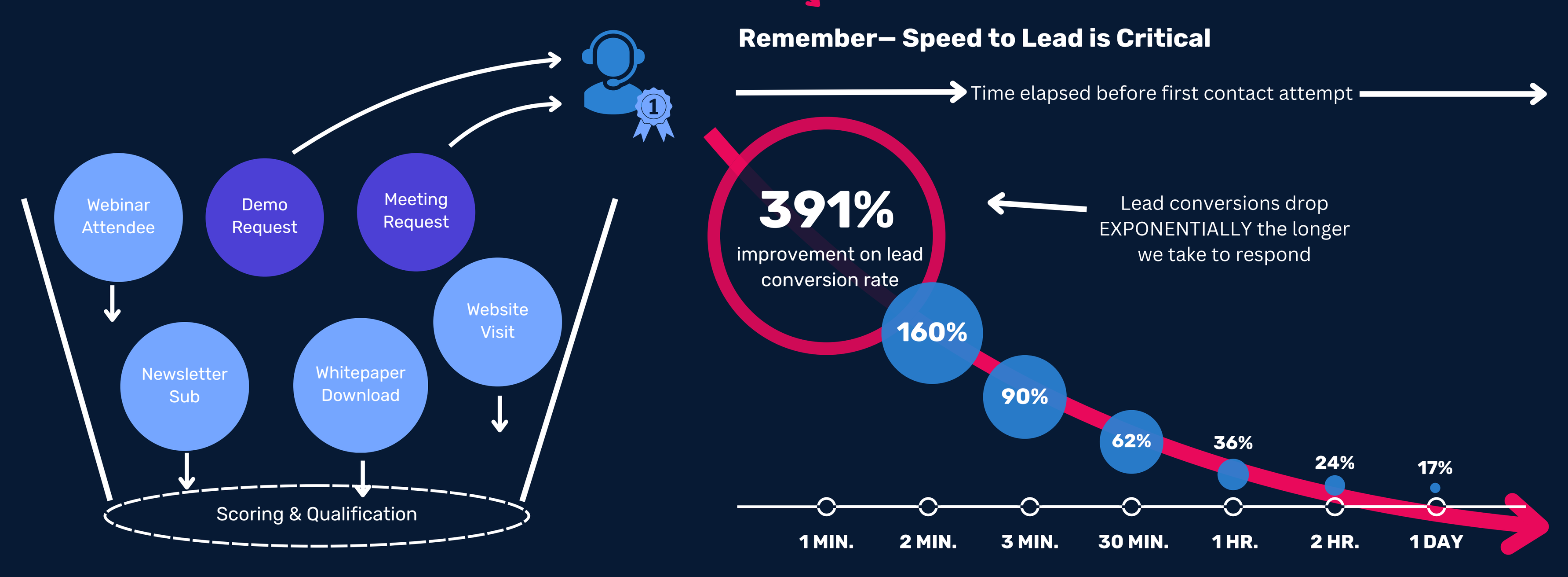
One Lead Source is Always More Valuable

When comparing two lead sources, there will always be one that's more valuable. When we silo inbound and outbound lead funnels, one team is always spending resources calling down inferior leads.

Metrics	Inbound	Outbound
Leads	1000	1000
Sales Activities	12k	12k
Meetings	80	100
SQOs	32	50
Closed Deals	8	12.5
ASP	$60k	$60k
Revenue	$480k	$750k
Lead Value	$480/Lead	$750/Lead

Step 1: Separate Handraisers

Leads requesting demos or sales conversations should be **immediately** routed to your most experienced reps.



Source: Velocify Report: Ultimate Contact Strategy Study

Step 2: Aggregate Your Data

What are the characteristics of your most valuable leads?

Step 3: Build a Lead Score

Using historical data, create a weight and scoring system to rank the value of new leads.

EXAMPLE	Firm. Data	Tech. Data	Marketing Interactions	3rd Party Intent	Weighted Total	Grade
Weighting	30%	25%	15%	20%	(Out of 10)	(A, B, C)
Lead 1	10	9	7	9	8.10	A
Lead 2	7	9	9	7	7.10	B
Lead 3	9	6	10	8	7.30	B
Lead 4	6	5	5	9	5.60	C

Step 4: Translate to Account Score

Combine individual lead scores into a holistic account score. Prioritize calling accounts that show broader interest—these are your highest potential converters.

EXAMPLE	Firm. Data	Tech. Data		Marketing Interactions	3rd Party Intent	Weighted Total	Grade
Weighting	30%	25%	**Weighting**	15%	20%	8.05	A
Account 1	10	9	**Lead 1**	7	9		
			Lead 2	9	7		

EXAMPLE	Firm. Data	Tech. Data		Marketing Interactions	3rd Party Intent	Weighted Total	Grade
Weighting	30%	25%	**Weighting**	15%	20%	6.13	B
Account 2	9	6	**Lead 3**	10	8		
			Lead 4	5	9		

Step 5: Create Segments with Similar Messaging

Segment your contacts by Buyer Persona and industry/sector/company types. This will help your salespeople create targeted, relevant messaging more efficiently.

EXAMPLE	B2B SaaS	Professional Services
VP of Sales	Segment 1	Segment 2
CMO	Segment 3	Segment 4

Segment accounts by industries/sectors/types of companies that respond to similar messaging

Segment contacts by Buyer Personas that respond to similar messaging

Create one set of messaging for each segment that will resonate with the buyers in those segments

Step 6: Map out Processes

Standardized processes must be defined and trained on to ensure your reps to ensure consistent performance and data accuracy.

Cadences Tailored by Segment → How Many Call/Emails/ Messages to Send → Stage Progression Criteria → At What Point Reps Walk Away

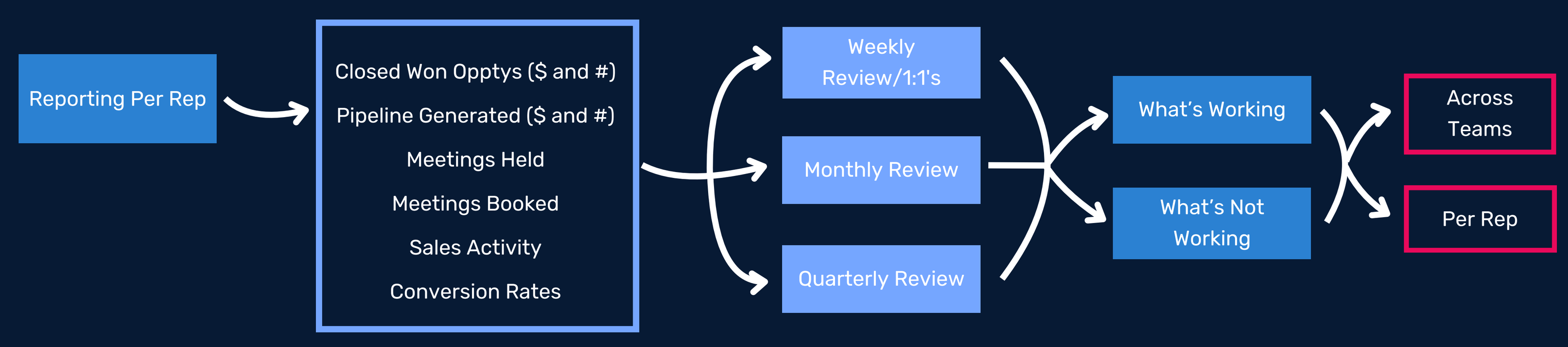
Step 7: Run a Capacity Plan

Knowing the capacity of our team will help us focus reps on the absolute best accounts they actually have time to work...properly.

1. Quality Activities per Rep per Day X Working Days per Year = Yearly Activity Capacity per Rep
   - What does "quality" look like?
   - What research is needed?
   - What personalization is needed?
2. $\frac{\text{Yearly Activity Capacity per Rep}}{\text{Avg Activities per Contact}}$ = Yearly Contact Capacity per Rep
   - Max number of activities before giving up
   - Avg number of activities anticipated, including prospects that respond/convert to meetings
3. Yearly Contact Capacity per Rep X # of Reps = Total Contact Capacity
4. $\frac{\text{Total Contact Capacity}}{\text{Average Target Contacts per Account}}$ = Account List Size

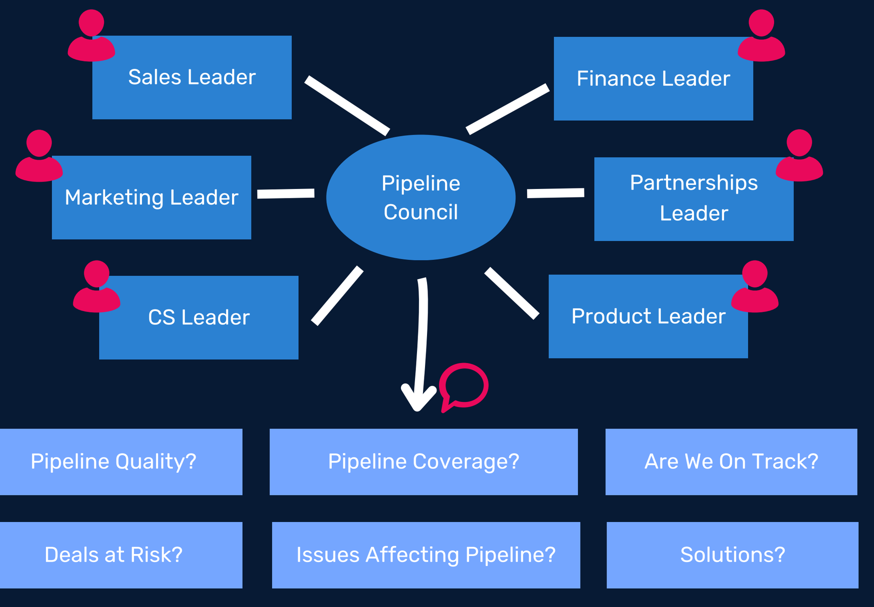
Step 8: Track, Measure & Drive Adoption

Sales reps need accountability. Track their execution rigorously through clear, accessible reporting.



Step 9: Establish Pipeline Council

If we have a large enough revenue team, it can make sense to pull in heads of our revenue departments and create a pipeline council. This is will help us take action on data insights



Step 10: Accelerate with AI

Once we've optimized our manual processes, we can layer in AI to help enhance messaging precision, scoring speed/accuracy, and sales productivity. Remember, AI doesn't replace foundational work.