

GTMBench.co

ABM & BUYER HUB PLAYBOOK

How to Run Account-Based Marketing Campaigns That
Actually Close

Account Tiering & Intent Signals	Buyer Hub & Deal Room Setup	Executive Plays & Private Dinners
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<p>Covers</p> <ul style="list-style-type: none"> ✓ 5-Component Buyer Hub Framework ✓ Tier-1 / Tier-2 / Tier-3 Sequence Strategy ✓ Intent Signal Activation Playbook ✓ StoryLane + DealRoom Configuration ✓ Executive Roundtable Execution Guide ✓ Private Dinner Playbook for Big-Bet Accounts ✓ ROI Analysis & PoV Document Templates 	<p>Version 1.0</p> <p>GTMBench.co — www.gtmbench.co</p> <p>Classification: Internal — GTMBench.co Sales & Marketing</p> <p>Audience: AEs, CSMs, Field Marketing, RevOps</p> <p>Key Principle</p> <p>"ABM is not a tool. It is a strategy that aligns your entire go-to-market motion around the accounts most likely to generate outsized revenue."</p>
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1

ABM Foundations & Account Tiering

Define the accounts worth every dollar of your GTM spend

What ABM Actually Means

Account-Based Marketing (ABM) is the discipline of treating high-value accounts as markets of one — coordinating sales, marketing, and customer success to deliver a hyper-relevant, multi-touch experience that accelerates pipeline velocity and deal size.

<p>3x</p> <p>Higher win rate vs. non-ABM accounts</p>	<p>40%</p> <p>Larger average deal size with Tier-1 plays</p>	<p>67%</p> <p>More pipeline generated per ABM dollar spent</p>	<p>24%</p> <p>Faster sales cycle with coordinated signals</p>
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Account Tiering Model

Tiering is the foundation of your ABM programme. Every subsequent play — content, cadences, budget allocation, executive attention — flows from tier assignment.

TIER 1 — Named Accounts / Big-Bet Accounts	
Criteria	<ul style="list-style-type: none"> • Annual contract value (ACV) potential > \$250K • Identified by ICP fit score ≥ 85/100 • Active buying signal OR sponsor confirmed • Max 25–50 accounts per AE per quarter
Motion	<ul style="list-style-type: none"> • 1:1 fully customised campaign • Dedicated Buyer Hub (StoryLane + DealRoom) • Executive sponsor mapped and activated • Private dinner or executive roundtable • Weekly AE + marketing sync on account

TIER 2 — Strategic Cluster Accounts	
Criteria	<ul style="list-style-type: none"> • ACV potential \$50K–\$250K • ICP fit score 65–84/100 • Intent signal OR similar company recently closed • Max 100–200 accounts per marketing segment
Motion	<ul style="list-style-type: none"> • 1:Few campaign (cluster of 10–30 similar accounts) • Shared Buyer Hub template lightly personalised • SDR-led multi-touch sequence (12–15 touches)

- Virtual roundtable or webinar invitation
- Bi-weekly account review in forecast call

TIER 3 — Programmatic / Scale Accounts

Criteria	<ul style="list-style-type: none"> • ACV potential < \$50K • ICP fit score 40–64/100 • Inbound interest OR list-based targeting • Unlimited volume — programmatic motion
Motion	<ul style="list-style-type: none"> • 1:Many automated campaign sequences • Standard nurture track with light personalisation • No dedicated Buyer Hub — use generic demo • Automated scoring to promote to Tier 2 • Monthly cohort analysis and conversion review

ICP Fit Scoring Matrix

Use this 100-point scoring model to assign tiers. Score accounts quarterly or upon new intent signal.

Dimension	Weight	High (Full pts)	Medium (50%)	Low (0 pts)
Industry vertical	25 pts	Exact ICP vertical	Adjacent vertical	Outside ICP
Company headcount	15 pts	500–5,000 employees	100–500 or 5K+	< 100 employees
Revenue / ARR	20 pts	> \$50M revenue	\$10M–\$50M	< \$10M
Tech stack fit	15 pts	3+ matching tools	1–2 matching tools	No overlap
Buying centre depth	15 pts	5+ stakeholders IDs	2–4 stakeholders	1 contact only
Geographic match	10 pts	Primary geo target	Secondary geo	Outside all geos

Tier Assignment Rule

- Score ≥ 85 → Tier 1 (review monthly)
- Score 65–84 → Tier 2 (review quarterly)
- Score 40–64 → Tier 3 (programmatic, auto-promote if score rises)
- Score < 40 → Hold / Suppress from active spend

2

Intent Signal Activation

Turn buying signals into same-week pipeline

Signal Source Hierarchy

Not all intent signals carry equal weight. Use this hierarchy to prioritise activation response time and play selection.

Signal Type & Source	Activation Play & SLA
● HOT — Direct product page visit (3+ pages, ≥2 min)	AE personalised outreach within 4 hours. Add to Tier-1 sequence. Notify CSM if existing customer.
● HOT — Pricing / ROI calculator interaction	AE + SDR double-tap within same business day. Send Buyer Hub link immediately.
● WARM — G2 / TrustRadius review read (via Bombora/6sense)	SDR sequence trigger within 24 hrs. Send competitor battle card + social proof asset.
● WARM — Keyword surge: 3+ topics in 2 weeks (Bombora)	Add to Tier-2 cluster campaign. Enrol in 12-touch SDR sequence within 48 hrs.
● SOFT — LinkedIn engagement (likes, post views, ad clicks)	Marketing nurture + connection request. Move to active watch list.
● SOFT — Trade show badge scan / event attendance	Post-event follow-up sequence within 48 hrs. Invite to next virtual roundtable.
● PASSIVE — Job post for relevant roles (Hiring signal)	Research-led outreach. Personalise message around their growth pain point.
● PASSIVE — Funding announcement / acquisition news	Congratulatory outreach with relevant use case. Update account tier if ACV now qualifies.

Signal-to-Sequence Activation Workflow

#	Step	Detail
1	Signal Detection	6sense / Bombora / HubSpot alerts fire to Slack #abm-signals channel. RevOps reviews daily at 9 AM and 2 PM.
2	Account Lookup	SDR verifies account in CRM: tier assignment, existing relationships, open opps, recent activity. Takes < 5 minutes.
3	Play Selection	Match signal type to play from hierarchy table above. Hot signals → AE-led. Warm → SDR-led. Soft/Passive → marketing automation.
4	Personalisation	Pull 3 research points: trigger event, relevant use case, peer customer story. Use in first 2 touches.

5	Sequence Enrolment	Enrol in CRM sequence within SLA window. Tag signal source for attribution reporting.
6	Buyer Hub Activation	For Tier-1/2 signals: clone and customise Buyer Hub template. Set account-specific domain (e.g., acme.yourhub.com).
7	AE Notification	Slack AE with signal summary, research brief, and Buyer Hub link. AE reviews within 2 hours.
8	Signal Logging	Log activation in CRM. Track response rate, meeting booked, and pipeline influenced in ABM dashboard.

Sample Tier-1 Intent Activation Sequence (15 Touches / 21 Days)

Day	Channel	Owner	Touch Type	Personalisation Hook
Day 1	Email	AE	Signal acknowledgement	Reference exact pages visited or topic surge
Day 1	LinkedIn	AE	Connection request	Personalised note referencing trigger
Day 2	Buyer Hub	Marketing	Hub launch email	Account-specific demo + ROI snapshot
Day 3	Phone	SDR	Voicemail + email	Peer customer story in same vertical
Day 5	Email	AE	Value prop + PoV	Account-specific PoV document (see Part 7)
Day 7	LinkedIn	AE	Thoughtful comment	Engage on their recent post / company news
Day 8	Phone	SDR	Direct dial attempt	Reference PoV sent on Day 5
Day 10	Email	AE	ROI case study	Same industry + similar headcount company
Day 12	Video	AE	1:1 Loom	30-sec personalised video with screen share
Day 14	LinkedIn	SDR	InMail	Breakup tone, invite to roundtable
Day 16	Email	Marketing	Exec invite	Private dinner / roundtable invitation
Day 18	Phone	AE	Executive call	Reference dinner invite, offer direct briefing
Day 19	Email	SDR	Mutual connection	Name-drop shared connection or champion

Day 20	LinkedIn	AE	Engage share	Share their company content with commentary
Day 21	Email	AE	Breakup email	Clear ask: are you the right person, or who is?

3

5-Component Buyer Hub Framework

Build a single destination that converts champions into consensus

What is a Buyer Hub?

A Buyer Hub is a private, branded microsite that consolidates every asset, interaction, and next step for a single buying committee. It replaces the 'forwarded email attachment' chaos with a single URL that the champion can share internally — and that you can track in real time.

The Business Case

Deals with an active Buyer Hub close 34% faster on average

Champions who share the Hub with 3+ colleagues are 2.8x more likely to close

Hub engagement data gives your AE real-time deal health signals without asking "what's the status?"

The 5 Components

1

The Headline Story (StoryLane Interactive Demo)

Your personalized, clickable product story — the cornerstone of every Hub.

- ▶ Built in StoryLane with account logo, industry vertical, and champion's use cases embedded
- ▶ 5–7 chapter structure: Problem → Solution → Key Feature → Peer Story → ROI → Next Step
- ▶ Guided tour hotspots call out the 2–3 features most relevant to their pain points
- ▶ "Request Live Demo" CTA feeds directly to AE's calendar via Calendly embed
- ▶ Enable StoryLane's analytics: track chapter completion, click depth, time per screen

2

The Business Case Dock (DealRoom)

The live workspace where your team and the buyer co-author the business case.

- ▶ DealRoom workspace with mutual action plan (MAP) visible to both sides
- ▶ Upload: PoV document, ROI model (interactive), security questionnaire responses
- ▶ Stakeholder map visible to champion — shows who on their side has engaged
- ▶ Tasks assigned to both buyer and seller with due dates and owners
- ▶ Auto-reminder emails fire when tasks go overdue (configured in DealRoom settings)

3

Social Proof Engine

Curated proof assets that match the buyer's profile — no generic logos.

- ▶ 2–3 written case studies from the same industry vertical and company size band
- ▶ 1 video testimonial (ideally same title/role as the champion)
- ▶ Reference customer offer: "We can connect you with [Customer] who solved this exact problem"
- ▶ G2 / Gartner Peer Insights reviews screenshotted and surfaced (buyer's vertical filtered)

▶ Analyst quote or report excerpt relevant to their strategic initiative

4 **The Executive Summary Page**
 A one-page shareable asset designed for the economic buyer who won't attend demos.

- ▶ Account name, date, prepared by (AE name + headshot for personalisation)
- ▶ 3-bullet problem statement mirroring their language from discovery
- ▶ Proposed solution summary in plain English (no feature names)
- ▶ Financial impact: cost of inaction vs. projected ROI (numbers from ROI model)
- ▶ Recommended next steps with clear deadlines and owners on both sides

5 **The "Next Step" CTA Module**
 Remove all friction from the buyer's path to the next conversation.

- ▶ Embedded Calendly / Chili Piper for AE and for executive sponsor (separate links)
- ▶ "Add to your team" share link with tracking UTM — champion forwards the Hub URL
- ▶ Live chat widget connected to AE's Slack (Drift or HubSpot Chat)
- ▶ "Questions?" button triggers a pre-populated email to the AE
- ▶ Milestone tracker showing buyer's progress through the evaluation (gamification)

Hub Engagement Scoring

Use these engagement benchmarks to trigger AE actions. Configure alerts in 6sense or your CRM.

Engagement Level	Criteria	Hub Score	AE Action	SLA
Cold	< 2 pages, < 60 sec	0–20	No action — continue sequence	N/A
Warming	2–4 pages, 1–3 min total	21–50	Personalised follow-up email referencing what they viewed	48 hrs
Active	4+ pages, 3+ min, returned visit	51–75	AE call + LinkedIn message referencing specific content	24 hrs
Hot	5+ pages, shared internally, DealRoom task completed	76–90	Immediate AE outreach. Offer exec briefing or demo	4 hrs
Buying	All 5 components viewed, MAP tasks active, exec page opened	91–100	Pull in executive sponsor. Accelerate to close plan	Same day

4

StoryLane + DealRoom Configuration

Technical setup for a production-ready Buyer Hub in < 4 hours

StoryLane Setup Guide

#	Step	Detail
1	Clone Master Demo	In StoryLane, duplicate your 'ABM Master Template' demo. Never edit the master. Rename to [AccountName]_[AE Name]_[Quarter].
2	Inject Account Branding	Replace logo placeholder (top-left): upload account's logo PNG (400x120px max). Update colour accent if brand colours are known. Add company name to demo headline text.
3	Customise Chapter Titles	Edit Chapter 1 title to reference their specific pain point (discovered in call notes). Edit Chapter 4 to name their industry. Delete chapters irrelevant to this account.
4	Set Hotspot Callouts	Review 5 default hotspot annotations. Rewrite 2–3 to specifically call out features matching their use case. Keep callout text under 20 words.
5	Configure End Screen CTA	Set primary CTA to your personal Calendly link. Set secondary CTA to the DealRoom URL. Enable "Lead Capture" form on the last screen for non-champion viewers.
6	Enable Analytics & Alerts	In StoryLane Settings → Notifications: turn on 'Chapter Completion' and 'New Viewer' email alerts to the AE. Connect StoryLane ↔ HubSpot via Zapier (or native integration) to log views as CRM activities.
7	Generate Hub URL	Publish demo. Copy the unique URL. Use this URL as the StoryLane embed in the Buyer Hub page. Test on mobile — ensure it renders correctly on iOS Safari and Chrome Android.

DealRoom Setup Guide

#	Step	Detail
1	Create Workspace	In DealRoom: New Workspace → clone 'ABM Tier-1 Template'. Name it [AccountName] Deal Room. Set internal visibility to AE + AE Manager + Field Marketing + SE.
2	Upload Core Documents	Upload: (1) PoV Document, (2) Interactive ROI Model PDF/Link, (3) Security & Compliance FAQ, (4) Mutual Action Plan (MAP) template.
3	Build the Mutual Action Plan	Add tasks for both sides. Buyer tasks: intro to IT stakeholder, complete security questionnaire, schedule exec briefing. Seller tasks: deliver custom demo, produce ROI model, intro to customer

		reference.
4	Invite Champion	Send DealRoom invite to champion via personal email (not generic). Use invite message template (see Part 7). Set champion as co-owner so they can add their own team members.
5	Configure Notifications	Turn on: daily digest to AE (9 AM), instant alert on new stakeholder joining, instant alert on document opened by new viewer, overdue task reminder to both sides.
6	Embed in Buyer Hub Page	Copy DealRoom workspace URL. Embed as a button link (not iframe) in the Buyer Hub page — link opens in new tab to avoid SSO issues. Label button: 'Open Our Shared Workspace'.
7	Set Review Cadence	Schedule weekly 15-min DealRoom review with AE. Track: tasks completed, new stakeholders, documents viewed, MAP progress. Update Champion on progress each Friday via short email.

Buyer Hub Assembly Checklist

Run this checklist before sending any Hub link to a prospect. A Buyer Hub that is not personalised is worse than no Hub.

Checklist Item	Status / Notes
Account logo uploaded to StoryLane and Hub header	<input type="checkbox"/> Completed
Demo chapter titles personalised (account/industry name visible)	<input type="checkbox"/> Completed
Hotspot callouts rewritten for account pain points	<input type="checkbox"/> Completed
StoryLane end-screen CTA links to AE Calendly	<input type="checkbox"/> Completed
DealRoom workspace created and MAP populated	<input type="checkbox"/> Completed
3 relevant case studies uploaded (same vertical / size)	<input type="checkbox"/> Completed
ROI model pre-populated with prospect's numbers	<input type="checkbox"/> Completed
Executive Summary page drafted and uploaded	<input type="checkbox"/> Completed
StoryLane analytics alerts configured to AE email/Slack	<input type="checkbox"/> Completed
DealRoom champion invite sent and accepted	<input type="checkbox"/> Completed
Hub URL tested on desktop, iOS, and Android	<input type="checkbox"/> Completed
Hub link logged in CRM contact record with tag ABM_HUB_LIVE	<input type="checkbox"/> Completed

5

Executive Roundtable Execution

Peer-to-peer credibility at scale — the highest-ROI event format in ABM

Roundtable Strategy Overview

Executive roundtables are invitation-only, agenda-driven conversations that position GTMBench.co as a thought leader rather than a vendor. The format: 10–15 executive peers (same title/function) discuss a shared strategic challenge. GTMBench.co facilitates — it does not pitch.

The Golden Rule of Roundtables

The vendor NEVER presents a product during the session itself. You earn the right to a 1:1 follow-up by creating genuine value in the room. If your attendees feel sold to, you will never get a referral — and referrals are the primary ROI of this format.

Pre-Event Execution (T-6 Weeks to T-Day)

Timeline	Activity	Owner	Target Accounts	Success Metric
T-6 weeks	Select theme (data-driven, avoid generic)	Marketing + Sales	Internal	Theme approved by 2 AEs
T-6 weeks	Build guest list: 50% Tier-1 prospects, 30% customers, 20% influencers	AEs + Marketing	20 invites for 10 seats	List reviewed by VP Sales
T-5 weeks	Venue selection: private room, circular seating, no theatre rows	Field Marketing	N/A	Venue booked & confirmed
T-5 weeks	Send personalised invitations (AE-to-exec, not generic marketing blast)	AEs	All 20 on guest list	First wave: 20 invites sent
T-4 weeks	Secure 1–2 customers as co-facilitators / peer speakers	CSM + AE	Champion at customer account	1 confirmed co-facilitator
T-3 weeks	Follow-up wave: AE calls + LinkedIn to non-responsive invitees	AEs + SDRs	Non-responders	70% response rate
T-2 weeks	Send pre-read: 1-page agenda + 3 provocative questions for discussion	Marketing	Confirmed attendees	Pre-read open rate > 60%

T-1 week	AE 1:1 pre-call with each Tier-1 attendee (10-min conversation)	AEs	Tier-1 accounts only	100% pre-call completion
T-2 days	Confirm catering, AV, printed name cards, seating chart	Field Marketing	N/A	Logistics confirmed
T-1 day	Brief internal team: facilitator guide, no-pitch rule reminder, account research	Sales Manager	All attending staff	Team briefed

Day-Of Execution Guide

#	Step	Detail
1	T-90 min: Setup	Arrive 90 minutes before guests. Check seating (circular, no head-of-table power dynamic). Test AV. Place printed discussion guide and branded notepad at every seat.
2	T-30 min: Greeting window	CEO/VP present at door for arrivals. Personal hello to every Tier-1 account exec. Introduce prospects to relevant customers before the session starts (intentional seating strategy).
3	0:00 — Opening (10 min)	Facilitator opens: welcome, agenda, confidentiality agreement (Chatham House Rules — no attribution outside the room). This builds psychological safety for candour.
4	0:10 — Provocateur (15 min)	Internal exec or customer co-facilitator shares a 10-minute lightning talk on the strategic tension. End with 2–3 discussion questions. No product mention.
5	0:25 — Table discussion (45 min)	Structured breakout: groups of 4–5 discuss one question each. Facilitator circulates. AEs listen and take notes — do NOT lead discussions. Reconvene for 10-min group share-out.
6	1:10 — Insight synthesis (15 min)	Facilitator synthesises themes from the table. Shares one proprietary data point or research insight from GTMBench.co (this is your only credibility play).
7	1:25 — Next steps (10 min)	Offer: 1:1 diagnostic briefing for any exec who wants to explore their specific situation. Book on the spot using printed QR code to scheduling page.
8	T+0 — Close & networking	Remain available for 30–45 minutes. AE goal: schedule 1:1 follow-up with every Tier-1 account before leaving the venue.

Post-Event Follow-Up Sequence

Day	Action	From	To	Content
Same day	Personal thank-you email	AE	Each attendee	1 insight from their comment in the

				room + 1:1 follow-up offer
Day 1	LinkedIn connection	AE	All attendees	Reference specific conversation point
Day 2	Key insights document	Marketing	All attendees	2-page summary of roundtable themes (no product)
Day 3	Buyer Hub activation	AE	Tier-1 attendees only	Send personalised Hub with exec summary tailored to discussion
Day 5	1:1 follow-up meeting	AE + SE	Tier-1 accounts	Diagnostic: map their situation to roundtable themes
Day 7	Blog / LinkedIn post	Marketing	Public (organic)	Anonymous insights from roundtable — generates FOMO for next event
Day 14	Pipeline review	Sales Manager	Internal	Count meetings booked, opps created, Tier upgrades from event

6

Private Dinner Playbook

Your highest-touch, highest-ROI play for big-bet Tier-1 accounts

When to Run a Private Dinner

Private dinners are reserved exclusively for Tier-1 accounts where the ACV justifies the investment (typically > \$250K potential). The format is 6–10 people maximum, including your executive sponsor. The dinner is a relationship play, not a pitch event.

Run a Private Dinner When...	Do NOT Run a Private Dinner When...
Deal is in late-stage qualification or early-stage negotiation	Account is still in prospecting with no confirmed interest
Champion has confirmed economic buyer will attend	Only the champion (single stakeholder) is available
Multiple competing vendors are in the deal	Account has already selected another vendor
Relationship has stalled despite strong fit	ACV is < \$150K (use roundtable instead)
Executive sponsor from your side is available and briefed	Your exec sponsor has not been briefed on the account

Guest List & Seating Strategy

The dinner's success is 80% determined by the guest list. Apply these rules strictly.

Composition Formula (8-person dinner)

Prospect side (4): Economic Buyer + Champion + 1 Technical Influencer + 1 Business Influencer (not IT)

Your side (3): AE + Executive Sponsor (C-level or VP+) + CSM / Solutions Consultant

Optional (1): Senior customer reference exec who can speak peer-to-peer with the EB

Seating: Alternate prospect/vendor. Economic Buyer seated next to your Executive Sponsor.

Do not seat two of your own people together.

Dinner Planning Timeline (T-4 Weeks)

#	Step	Detail
1	T-4 Weeks: Venue	Select private dining room (not semi-private). Target: Michelin-recommended, known for exceptional service. Confirm wine list and dietary requirements form. Budget: £150–£300 per head.
2	T-4 Weeks: Executive Briefing	Brief your exec sponsor: 1-page account briefing (background, deal stage, stakeholders, key objectives, what NOT to say). Exec

		sponsor approves guest list.
3	T-3 Weeks: Invitations	AE calls each prospect exec personally to extend the invitation. Frame as exclusive peer dinner, not a vendor event. Send written invite from your CEO/VP to EB.
4	T-2 Weeks: Confirmation	Confirm all RSVPs. For any Tier-1 exec who declines, AE follows up to understand objection and re-invite if appropriate.
5	T-1 Week: Pre-Briefs	AE 1:1 call with champion: align on objectives, any sensitivities in the room, topics to avoid, topics to explore. Share exec briefing doc with customer reference (if attending).
6	T-1 Day: Logistics	Confirm restaurant. Prepare welcome cards at each seat (printed name, company, title — no agenda). Pre-order wine and amuse-bouche. Agree on who pays without it being discussed at table.
7	Day of: Pre-Brief	30-minute team huddle: AE + exec sponsor + CSM. Review attendees, objectives, red flags, conversation starters. Confirm who owns which relationship at the table.

Dinner Conversation Flow

Phase	Timing	Topic	Who Leads	Goal
Arrivals	Pre-dinner drinks	Welcome, introductions, light industry news	AE	Set warm, confident tone
Starters	First 30 min	Peer conversation: what's top of mind in their world	Exec Sponsor	Build rapport, listen for strategic priorities
Main course	Middle 45 min	Strategic discussion: industry challenge tied to your value prop	Customer Reference (if present)	Create peer-to-peer credibility moment
Dessert	Last 30 min	Future vision: where do they see themselves in 18 months?	AE	Plant the seed for your solution as an enabler
Close	Coffee / after-dinner	1:1 moments — exec sponsor with EB, AE with champion	All	Book the next specific step before leaving

Post-Dinner Actions (48-Hour Window)

The 48 hours after a dinner are the most critical. Act immediately.

- AE sends handwritten or highly personal email within 2 hours of dinner ending
- Reference 1 specific conversation point from each stakeholder in their individual thank-you

- Exec sponsor sends personal note to Economic Buyer (email or LinkedIn — AE drafts, exec approves)
- AE updates CRM: dinner attendees, key insights heard, next steps agreed
- Buyer Hub activated or updated with post-dinner context within 24 hours
- DealRoom MAP updated with agreed next steps from dinner conversation
- Book follow-up meeting within 48 hours (ideally agreed verbally at dinner)
- Debrief with exec sponsor: what did you hear, what shifted, revised deal strategy

7

ROI Analysis & PoV Document Templates

Give your champion the artefacts to build an internal business case

Why Templates Win Deals

Your champion is selling internally on your behalf. They need professionally constructed documents they can forward to the CFO, COO, or Procurement — not talking points. These templates are designed to be customised in under 30 minutes per account.

TEMPLATE 1: Point of View (PoV) Document

TEMPLATE Point of View (PoV) Document
Document Title: [AccountName] Point of View: [Strategic Challenge / Initiative Name]
Prepared By: [AE Full Name], GTMBench.co [Date]
Prepared For: [Champion Name, Title] [AccountName]
Section 1 — Executive Summary (2–3 sentences): State the strategic challenge, why it matters now, and what outcome is possible. Use their language, not yours.
Section 2 — Situational Assessment: What we heard in discovery: [3 specific pain points in their words, sourced from call notes]
Section 3 — Cost of Inaction: Quantify what not changing costs: [\$ estimate per year / per quarter]. Include time, revenue, risk dimensions.
Section 4 — Recommended Approach: Describe your solution in terms of the business outcome, not the feature set. Map to their stated priorities.
Section 5 — Projected Business Impact: 3 financial outcomes with ranges: [Outcome 1: \$X–\$Y / year]. Source your assumptions from call notes or industry benchmarks.
Section 6 — Why Now: Reference their trigger event / initiative / deadline that makes this decision time-sensitive.
Section 7 — Proposed Next Steps: Owner Action Due Date [3 rows max]. Make it easy for them to say yes to the next step, not the whole deal.

TEMPLATE 2: ROI Analysis Framework

TEMPLATE ROI Analysis — Input Variables
Company: [AccountName]
Date: [Date of analysis — update quarterly]

Prepared By: [AE Name] in collaboration with [Champion Name]
A — Current State Cost: Time spent on [pain area] per week: [X hrs] × [headcount] × [£/hr fully-loaded cost] = £[Y]/year
B — Error / Rework Cost: Estimated error rate [X%] × [affected volume] × [cost per incident £Z] = £[Y]/year
C — Revenue Opportunity Cost: Deals delayed / lost due to [pain area]: [X deals/year] × [average deal value £Y] × [estimated % attributable] = £Z/year
D — Total Cost of Inaction: A + B + C = £[Total]/year — confirm this number with champion before including in exec summary
E — Projected Efficiency Gain: [X%] reduction in time spent (sourced from customer benchmark data) = £[Y] recovered/year
F — Projected Revenue Impact: [X%] improvement in [metric]: based on [Customer Reference] data, conservative estimate £[Y]/year
G — Total Annual Benefit: E + F = £[Total Benefit]/year
H — Investment (Annual): License + Implementation + Training = £[Total Investment]
ROI: ((G - H) / H) × 100 = [X]% ROI
Payback Period: H / (G/12) = [X] months to break-even

TEMPLATE 3: DealRoom Champion Invite Message

TEMPLATE DealRoom Invitation Email
Subject: Your private workspace — [AccountName] x GTMBench.co
Opening: Hi [First Name], I've set up a private workspace for our evaluation — one place for everything we're building together.
What's inside: • Our shared action plan with owners and dates on both sides • The ROI model pre-seeded with your numbers • Case studies from [Peer Company 1] and [Peer Company 2] • The interactive product demo personalised to your workflows
Ask: You can also invite your colleagues directly — when you're ready, I'd suggest looping in [name of IT / Procurement / Finance contact] so they have access too.
CTA: → [Open Your Workspace] (button link to DealRoom URL)
Sign-off: Happy to walk you through it in 10 minutes — just grab time here: [Calendly link]

TEMPLATE 4: Executive Roundtable Invitation

TEMPLATE Executive Roundtable Invitation (AE → Prospect Exec)
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Subject: Invitation: [Theme] — Private Executive Roundtable, [Date], [City]

Paragraph 1: I'm hosting a small, invitation-only roundtable for [Title] leaders in [Industry] on [Date] in [City]. Given your work on [their strategic initiative], I thought you'd bring a valuable perspective to the room.

Format: 10 executives, Chatham House Rules, peer discussion — no presentations, no vendor pitches. We'll explore [Theme] and what it means for [Industry] organisations over the next 18 months.

Who's attending: Your peers from [Company 1], [Company 2], and [Company 3] will be in the room. [Customer Name, Title] will open with a 10-minute perspective from their experience.

Ask: Can I reserve a seat for you? The conversation starts at [Time] with drinks at [Time-30]. Happy to share the discussion agenda in advance.

A

Appendix: Sequence Calendars & Quick-Reference Cards

Portable one-page guides for daily execution

Tier-1 90-Day ABM Campaign Calendar

Week	Marketing Plays	SDR Plays	AE Plays	Exec Plays
Wk 1–2	Hub launched, intent alert on	Enrol in 15-touch sequence	Signal research + first touch	Exec briefed on account
Wk 3–4	ROI model delivered to Hub	Voicemail + email cadence	PoV document sent	Exec LinkedIn engagement
Wk 5–6	Case study push (2 new)	Roundtable invite sent by SDR	Discovery call attempt	Exec exec intro email
Wk 7–8	Hub update: new case study	Follow-up sequence continues	Discovery call (goal)	Exec joins discovery call
Wk 9–10	Post-discovery: custom content	Re-engage cold contacts	Demo / deep-dive (goal)	Exec sponsors demo call
Wk 11–12	Business case collateral	Sequence: technical stakeholders	Business case + PoV revision	Dinner or roundtable
Wk 13	Win announcement prep	Champion re-engagement touch	Negotiation support	Exec closes with EB

ABM Metrics Dashboard — Key KPIs

Metric	Target Benchmark
Tier-1 accounts with active Buyer Hub	> 90% of named accounts
Buyer Hub engagement score \geq 50 (Active)	> 60% of Hubs within 30 days
Intent signal \rightarrow sequence enrolment SLA met	> 95% within required SLA
Roundtable \rightarrow 1:1 meeting conversion rate	> 50% of Tier-1 attendees
Private dinner \rightarrow qualified opportunity created	> 70% of dinners
Tier-1 pipeline coverage (vs. quota)	4 \times qualified pipeline
Average days to first meeting (ABM accounts)	< 14 days from Hub launch
Win rate: ABM Tier-1 vs. non-ABM accounts	ABM \geq 2 \times non-ABM
Champion share rate (Hub shared internally)	> 40% of Hubs
DealRoom MAP task completion rate (buyer	> 65% before proposal

side)	
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ABM Roles & Responsibilities RACI

Activity	AE	SDR	Field Mktg	RevOps
ICP scoring & tier assignment	A	I	C	R
Intent signal monitoring	I	C	I	R
Buyer Hub creation & updates	R	I	A	C
Sequence enrolment & management	C	R	I	I
Roundtable planning & execution	C	C	R	I
Private dinner logistics	R	I	A	I
PoV document creation	R	I	C	I
ROI model creation	R	I	C	I
DealRoom management	R	C	I	I
ABM metrics reporting	I	I	C	R

R = Responsible A = Accountable C = Consulted I = Informed