Account Based Framework

The critical elements of a world-class account based organization

Introduction

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The Gartner Account Based Framework provides an overview of the elements needed to create and manage a successful account based strategy. This note covers the recent changes in account based attributes and the categories of the framework.

Over the last five years, many of today's highest performing B2B organizations have adopted an account based strategy. This coordinated, cross-functional effort to drive engagement and progress target accounts throughout the entire customer lifecycle has become the most effective go-to-market (GTM) approach for many of these organizations.

Today, what organizations expect from their account based initiatives, and what is possible thanks to data and technology advancements, has significantly evolved. Figure 1 presents the key attributes of an account based strategy and how each of these attributes has changed.

Account Based Attributes (Figure 1)

Attribute	In 2016	In 2021
Targeted	Identified accounts with the highest potential value to the organization	Use data to identify accounts that can create the most value for the business today
Insight Driven	Created manual or pre-defined segments based on market insights	Structured, real-time data enables scalable segmentation and improved messaging
Delivering Extreme Value	Focused on a single touchpoint (workshop or assessment)	Enablement drives delivery of value through every interaction
Orchestrated	Tightly planned joint marketing and sales development outbound programs	Orchestrated, end-to-end process enables marketing, inbound, and outbound programs
Measured	Measurement followed demand generation models	Gartner Double Funnel provides a holistic solution for GTM measurement

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Framework

The updated Gartner Account Based Framework (see Figure 2) reflects today's modern account based strategy. In particular, it reflects the increasingly critical role of data and technology that has allowed account based initiatives to become more timely and more scalable, expanding the role that an account based strategy takes in an organization's overall go-to-market plan.

- **Market:** Define and agree on target accounts and target stakeholders
- **Go-to-Market Strategy:** Develop an aligned go-to-market strategy across the revenue organization
- **Process:** Integrate account based processes with existing end-to-end revenue processes
- **Data:** Provide the data required for planning, managing, and optimizing account based investments
- **Technology:** Build a technology stack to drive scale, automation, and efficiency
- **Planning:** Develop a holistic account based program
- **Program Development:** Design and develop high-performing account based programs and plays
- **Execution:** Execute programs in an orchestrated manner across functional teams and channels
- **Analysis:** Review the process, metrics, and analytics required to plan, measure, and optimize all account based activities and outcomes
- **Organization:** Establish the required organizational infrastructure to enable the account based go-to-market

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Account Based Framework (Figure 2)

Market	Go-To-Market Strategy	Process	Data	Technology

Define and agree on target accounts and target stakeholders
 	
• Market analysis
• Ideal Customer Profile (ICP)
• Target account list
• Persona identification
	Develop an aligned go-to-market strategy across the revenue organization
	
	• Revenue model
	• Segment strategy
	• Internal stakeholder alignment
	• Account selection and prioritization
	• Sales coverage model
	• Budget and resource planning
		Integrate account based processes with existing end-to-end revenue processes
		
		• Account based process design
		• Orchestration management
		• Milestone definitions
		• Handoff processes
		• Process enablement
			Provide the data required for planning, managing, and optimizing account based investments
			
			• Data strategy and governance
			• Account insights
			• Engagement
			• Intent
			• Contact data
			• Scoring and propensity model
				Build a technology stack to drive scale, automation, and efficiency
				
				• Tech stack design
				  – Account Based Platform
				  – Data sourcing and management
				  – Execution channels (e.g., advertising)
				  – Reporting and analytics
				  – Workflow automation
				• Usage and enablement

Planning	**Program Development**	**Execution**	**Analysis**	**Organization**

Develop a holistic account based program
 	
• Program objectives
• Budget allocation
• Programs
  – Always-on programs
  – Triggered programs
• Specific account/ segment
	Design and develop high-performing account based programs and plays
	
	• Program brief
	• Research and insights
	• Program messaging
	• High value offer selection
	• Orchestration plan
	• Content development
	• Sales enablement and training
		Execute programs in an orchestrated manner across functional teams and channels
		
		• Advertising
		• Marketing email
		• Live and virtual experiences
		• Direct mail and gifting
		• Personalization
		• High value offer delivery
		• One-to-one
		  – Email, phone, and social
		  – Executive outreach
			Review the process, metrics, and analytics required to plan, measure, and optimize all account based activities and outcomes
			
			• Reporting process
			• TOPO Double Funnel
			• Campaign performance
			• Account activity reporting
			• Pipeline and revenue analysis
			• Process and SLA reporting
				Establish the required organizational infrastructure to enable the account based go-to-market
				
				• Organizational design
				  – Account teams
				  – Center of Excellence
				• Skills development

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About this research

The insights in this document were originally produced by TOPO, now Gartner. Gartner and TOPO together creates the leading research and advisory company equipping sales and marketing executives to advance strategic initiatives with impactful insights, data tools and one-on-one guidance so that they achieve repeatable, scalable revenue growth.

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