ABM and Sales Service Level Agreement

Agreement Overview:

This SLA is an agreement between the marketing and sales teams at [Company Name] to drive deeper engagement and accelerate pipeline with ABM programs and tactics.

Goals and Objectives:

- Educate the sales organization on key buying signals and advise on 1:1 programs
- Accelerate pipeline and meet revenue goals
- Improve alignment between sales and marketing on target accounts in pipeline

Stakeholders:

- [CMO]
- [CRO]
- [VP of Business Development]
- [VP of Customer Success]
- [Head of ABM]

Deliverable	Scope of Work	Occurrence
ABM Overview Session	The ABM Team will schedule an ABM Overview Session for all new hires and broader team as needed. Session Objective: ● Overview of ABM at [Company Name] ● Review Target List of ABM Accounts ● Walkthrough Reports & Dashboards ● Define Intent Data & Key Buying Signals ● 1:1 Program Overview ● SLA & Expectations ABM Office Hours will be held monthly for all revenue teams to drop-in and ask specific ABM questions, account questions, campaign specifics, etc. The ABM team will always plan to have a particular topic or subject to be highlighted if no one has any particular one to work on together.	As Needed

Bi-Weekly Acknowledgment of Target Account Activity & Engagement Data	The ABM team will meet with account owners to review account engagement, web activity, spikes, and intent data on a bi-weekly basis. The Sales team will still have access to [Reference Tools, Reports, and Dashboards] and account-level data which is available in the CRM and direct [email/slack] alerts.	Bi-Weekly
1:1 ABM Campaign	Once your account has reached [Sales Stage], you'll be able to receive additional, personalized campaigns for your account. The ABM Team will set up a meeting to review, please ensure you have: ● Determined key pain points across the account ● Secured initial demo/meeting ● Identified key stakeholders across the account	Ongoing
Sales Outreach from ABM Alerts	The Sales team will review the behavior that has triggered the alert and determine whether the activity is indicative of an account in the market. Once determined, they will do account research before reaching out to the engaged and target contacts.	Within 1 Business Day of Alert
Prioritize ongoing outreach efforts to Target Accounts during active ABM campaigns	Additional focus, research, and outreach on Target Accounts: ● The Sales team agrees that accounts in active ABM campaigns take priority focus from other ABM outreach. ● 2-5 contacts in the campaign must be touched [X number of times] via calls, emails, LinkedIn tasks, [additional channels].	Weekly as campaigns are active
Setting Meetings With ABM Accounts	The Sales team is committed to setting: ● [X%] of their outbound meetings with ABM accounts.	Monthly
Contact Coverage Per Account	Target Contacts For Target accounts: The outbound team is committed to prospecting [X number] of valuable contacts per ABM accounts (that they can touch) that align with [Company Name] target buyer personas. ● High-value contacts such as [Titles] ● The remainder may be with [Titles]	Monthly
Account Changes	Changing ABM Accounts:	Quarterly/Bi-Quarterly/Annu

	If a target account is no longer considered a qualified account, the ABM team will confirm with the account owner that they are no longer a fit and will be removed and replaced by a qualified account from the control list in the account owner's territory at the end of each quarter. Depending on certain circumstances, the ABM Team will also approve or deny a request. Reasons why an account change may be denied are as follows: ● The account is in an active campaign ● The account has not been identified as an "ABM Account" long enough to determine success/failure ● The lack of engagement with the account correlates with the lack of sales activity from reps	ally
Missed SLAs	For any missed SLAs, the account team will be alerted via [Relevant Channels]. The owner of the SLA will then be required to submit a reason for why the SLA was missed and actions taken to remedy. Please reference this report which outlines the account and potential contact in which the SLA was missed.	Ongoing

Additional Materials:

These are the agreed to resources that have been approved by all parties including but not limited to:

- ABM Definitions and Resource Library
- Reports and Dashboards
- Training and Onboarding Materials
- Technology Access Request Form
- Budget Request Form
- [Company Name] Roles & Responsibilities