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Manage to Lead Workplan

ICP Design, Implementation, and Application for
Strategic Account Development and New Sales

1. Designate a Process Leader and Build the ICP Team

- Identify a senior individual to oversee and drive the ICP development, customer scoring, account management, and marketing alignment process. This person will be responsible for ensuring that all steps are executed consistently and effectively.
- Define a cross-functional team to support the process leader, including members from sales, marketing, customer success, account management, and data/analytics. Each team member should have clearly defined roles to support ICP development, account prioritization, data management, and marketing efforts.

2. Align on Core Offering and Customer Value (W-W-W Assessment)

- Use an IntelliVen Manage to Lead (MtL) WHAT-WHO-WHY (W-W-W) assessment and consolidation process to align on:
    - WHAT the company provides.
    - WHO they serve.
    - WHY customers buy from the company.
- Vet results with stakeholders to establish a shared understanding of the company's value proposition and ideal customer attributes.

3. Define Objectives

- Clarify the purpose of developing the ICP and scoring model, such as enhancing lead quality, supporting account development, and optimizing resource allocation.
- Set goals for targeting both new customers and opportunities for growth within existing accounts.

4. Analyze and Segment Current Customers

- Identify and examine the current clients that are the biggest and most profitable to determine their characteristics and behaviors.

- Consider using methods like regression analysis to uncover patterns and correlations that inform ICP elements.
- Focus on customers with the most growth potential.
- Highlight accounts with potential for cross-selling or deeper engagement.

5. Design and Build the Prospect and Customer Database

- Determine key data points needed to score and rank prospects and customers (e.g., industry, size, revenue, engagement).
- Set up or optimize a CRM to store, track, and analyze these data points.
- Implement protocols to ensure consistent and accurate data entry and updates across teams.

6. Establish an Account Development Process

- Create custom development plans for high-potential accounts, focused on building relationships and expanding services.
- Implement plans through regular engagement and tailored outreach.
- Regularly assess progress, adjusting plans to capitalize on new opportunities.

7. Identify Key Characteristics of the Ideal Customer

- Demographics and Firmographics: Include company size, industry, revenue range, and location.
- Behavioral Traits: Define behaviors typical of ideal customers, such as frequent service needs and openness to engagement.
- Pain Points and Needs: Outline common challenges that align with the company's solutions.

8. Implement Scoring and Ranking for Prospects and Customers

- Develop a scoring model using ICP attributes to score prospects and customers on factors like revenue potential and strategic alignment.
- Rank accounts and prospects based on scores to identify high-priority accounts.
- Set thresholds for action to guide resource allocation (e.g., top 20% for strategic management).

9. Assign Sales and Account Management Resources

- Allocate resources by score, assigning high-ranking accounts to skilled account managers.
- Designate executive sponsors to strategic accounts to enhance engagement and support.
- Identify account managers by matching each account with a dedicated manager based on expertise and relationship skills.

10. Develop and Drive Marketing Messages and Communication Strategies

- Define marketing goals aligned with ICP insights, focusing on lead generation, brand awareness, and customer retention.
- Create key messaging for each customer segment based on their specific pain points and needs.
- Develop content and channels:
  - **Customer Success Stories:** Write and publish case studies to showcase successful engagements.
  - **Social Media and Website:** Share content on platforms and update the website to reflect ICP-aligned messaging.
  - **Hosted Events and Conferences:** Identify key industry events and opportunities for hosting webinars or seminars.
  - **Email Campaigns:** Launch targeted email campaigns to engage high-potential leads and nurture existing accounts.
- Coordinate with sales and account teams to ensure messaging is consistent across marketing and sales channels, and leverage feedback from these teams to refine outreach.

11. Conduct Customer Interviews and Gather Team Insights

- Interview top customers to understand their needs, goals, and buying behavior.
- Gather insights from sales and customer success teams about account potential and client behavior.

12. Define Decision-Maker Profiles

- Identify key roles by documenting profiles of typical decision-makers (e.g., Operations Managers, Customer Service Leads).
- Build profiles that include motivators, challenges, and key purchasing considerations for each role.

13. Compile and Refine the ICP

- Draft the ICP document, summarizing findings and including key attributes such as size, industry, pain points, and decision-makers.
- List red flags by defining traits that may indicate a poor fit to help prioritize high-value prospects.

14. Validate and Adjust the ICP

- Test against current accounts to validate the ICP against existing high-value customers.
- Adjust based on feedback, modifying the ICP as needed based on team insights and evolving customer needs.

15. Document and Share ICP and Scoring Model

- Create a shared resource by documenting the ICP and scoring model in a format accessible to all teams.
- Integrate with CRM to ensure scoring data is integrated into the CRM for easy segmentation and tracking.

16. Establish Ongoing Review and Refinement Process

- **Account Development Reviews:** Schedule regular reviews for top accounts to assess progress and refine strategies.
- **Periodic ICP and Database Review:** Continuously update the ICP and scoring model based on new customer insights, market trends, and sales team feedback.

This approach ensures that the ICP is data-driven and accurately reflects the most profitable and growth-oriented segments.