ABM Reporting & Results

Target Account List (TAL)

Metric	Description	Goal (#)	Actual (#)
TAL Opportunities	Total number of opps generated from TAL		
TAL Pipeline Value	The dollar value of net new opps generated from the TAL		
TAL Velocity	The speed at which an account moves through the pipeline to generate revenue		
% of TAL Pipeline vs. Total Pipeline (in period)	TAL Pipeline Value divided by Total Pipeline Value within defined period.		
TAL ARR Pipeline Value	The dollar value of net new ARR opps generated from the TAL		

Account Progression

- TAL Progression Stages
    - Unaware (no web visits, or 1-to-1 interactions of record)
    - Aware (web visits within defined period e.g. last 90 days)
    - Engaged (Downloaded content, viewed HS Doc, responded to email/call)
    - Opportunity (Open opportunity/deal/quote)
    - Close Won (TAL site is now a customer)
- Metric: Total # of progressed accounts in period (30, 60, 90)
- Metric: Total # of regressed accounts in period (30, 60, 90)

Metric	Definition	# of Accounts (start date)	# of Accounts (end date)
Unaware	no web visits, or 1-to-1 interactions of record		
Aware	web visits within defined period e.g. last 90 days		
Engaged	Downloaded content, viewed HS Doc, responded to email/call		
Opportunity	Open opportunity/deal/quote		
Close Won	TAL site is now a customer		

Channel Performance

- Define channels to be utilized in period
  - Gifting/E-Gifting
    - Direct Mail
    - Vendor(s)
  - Digital Advertising
    - Google
    - Meta
    - LinkedIn
  - Email
    - HubSpot
  - Web Personalization
    - HubSpot
    - Zoom (Webinar, Custom Technical Session, etc.)
    - HubSpot Documents
  - Direct Sales Outreach
    - HubSpot
    - LinkedIn
    - SMS
    - Phone