

Vendor Name:

Deadline:



Company	Yes / No / 3rd Party	Comments
SOC2 Type-1		
SOC2 Type-2		
GDPR Compliant		
CCPA Compliant		
Privacy Shield Framework		
Office Locations		
Customer Count		
Customer Success	Yes / No / 3rd Party	Comments
Dedicated Customer Success Manager		
Dedicated Onboarding Resources		
ABM Certification Courses		
ABM Strategic Workshops		
Full-day Strategic Workshops		
Free Customer Support		
Platform Foundations	Yes / No / 3rd Party	Comments
Account Selection & Prioritization		
Dynamic list segmentation		
Advanced list segmentation logic (and/or/parenthesis groupings)		
Unify fragmented data from marketing and sales systems		
Engagement score for individuals that measures known activity		
Automatic account stage classification		
Customer-defined account stages		
Post-sales account stages for cross/up-sell		
Aggregate sales activities of leads and contacts		
Track activities based on marketing v. sales touch		
Sync custom metrics into Marketo		
Sync custom metrics into SFDC		
Present "deal analysis"?		
SFDC application within SFDC using SSO		
Tiebreaker rules for matching leads to accounts		
Auto-Convert Leads to Contacts in SFDC		
Roles & Permissions for platform users		
Predictive Models	Yes / No / 3rd Party	Comments
Predictive Model: Propensity to buy		
Predictive Model: Qualification/Fit		
Fast Predictive Model training/build time		
Customer-defined inputs for models		
Cost per model		
How are changes/iterations/updates to predictive models made		
Factors in predictive model:		
CRM data/activity		
MAS data/activity		

Email data (directly from gmail or exchange servers)		
Proprietary intent (bidstream or other)		
Third Party Intent		
Advertising data		
Website activity (known & anonymous)		
Product categories (what products each account offers used in models)		
Technographics (what technologies each account owns used in models)		
Data	Yes / No / 3rd Party	Comments
Client-side anonymous web activity identification (IP + Cookie)		
Server-side anonymous web activity identification (IP + Cookie)		
Identify known web activity (marketing automation sync)		
Multiple tag deployment methods (js, pixel, etc.)		
Web Analytics integration (Google Analytics & Adobe Analytics)		
Technographic Data		
Firmographic Data		
People Data (contact imports)		
Global database		
Lead to account matching		
Data management/audit Tool (matching 1st party accounts)		
Custom fields within ABM Solution		
Auto-creation of account lists for AE's and SDR/BDR's		
Identify engaged contacts outside of SFDC or Marketo		
Automatic Contact creation in SFDC from sales activity		
Automatic contact creation in Marketo		
Data sync to Cloud Storage providers		
Upload custom activity and/or Intent Data		
AI-Driven intent-data classification (low, medium, high)		
Unlimited intent data segments		
Tracking offline activities		
Intent Data	Yes / No / 3rd Party	Comments
Quality of Intent		
Intent Sources		
All Intent Signals		
Sales Insights/Alerts	Yes / No / 3rd Party	Comments
SFDC Application		
Browser Extension		
Email Insights		
Sales actionability		
Customizable insights (by sales reps)		
Automatic logging of emails and calendar activities into ABM Platform		
SFDC custom sales views/reports/dashboards		
Easy actionability with salesloft/outreach/HVS		
Advertising	Yes / No / 3rd Party	Comments
Account-Based DSP		
IP-Based Advertising		
Cookie-Based Advertising		

Display/Native/Pre-roll Video Advertising		
AI-Driven Bid Optimization		
AI-Driven Frequency Capping		
Intent-based advertising		
People-based advertising (known contacts)		
People-based advertising (personas)		
Unlimited ad campaign segments		
Unlimited # of accounts available for advertising		
Dynamic audiences/segments for advertising campaigns		
Dynamic advertising creatives		
Impressions and Clicks at the account-level		
Account lift metrics		
Custom advertising reports		
Account stage progression metrics for advertising campaigns		
3rd party pixels allowed in advertising		
Advertising activities used in predictive models		
Social Media Integration		
Web Personalization	Yes / No / 3rd Party	Comments
Proprietary Web Personalization		
In-platform segment and personalization builder		
Web form(s) integration for lead enrichment		
Dynamic segmentation lists that account for real-time changes		
Custom data available for segmentation		
Prioritization logic		
Auto-publish personalization experiences		
Google Analytics event creation		
Unlimited personalization campaigns		
Orchestration/Automations	Yes / No / 3rd Party	Comments
Orchestrate email campaigns with accounts/leads/contacts		
Orchestrate ad campaigns with leads/contacts		
Automatically add/remove people from Marketo Campaigns		
Automatically add/remove people from Salesloft/Outreach/SFDC Campaigns		
Change lead/contact status within SFDC campaign		
Change person/contact status within Marketo campaign		
Change/update people/account/opportunity data within SFDC		
Create SFDC tasks		
Create Marketo Alerts		
Orchestrate Sales Alerts		
Automatically update LinkedIn segments based on any criteria defined		
Define the segment based on all available data from across CRM/MAS/Inbox activities		
Advanced scheduled/reoccurring options		
History/log of all scheduled orchestration actions		
Measurement	Yes / No / 3rd Party	Comments
Account Layer Analytics		
People Layer Analytics		
Account Engagement		

Advanced BI Capabilities for ABM		
Social Influence		
Visualize # of historical activities by Sales v. Marketing		
Visualize historical intent		
Account Stage timeframe analysis		
Volume, Velocity, Conversion metrics for each stage		
Account-Based Attribution Dashboards		
Account-Based multi-touch attribution dashboards		
People/account based heatmaps		
Opportunity dashboards		
Type of custom reporting within platform		
Integrations	Yes / No / 3rd Party	Comments
CRM (e.g. Salesforce, MS Dynamics, etc.)		
B2B data providers (e.g. InsideView, Reachforce, Bombora)		
Marketing Automation (e.g. Marketo, Eloqua, Pardot)		
Content Marketing Platforms (e.g. NewsCred, Contently, Upland)		
Sales Enablement Automation (e.g. Seismic, Outreach, Salesloft)		
Cloud Storage (e.g. Google Cloud, AWS, MS Azure)		
BI Solutions (e.g. Tableau, Domo)		
Strategy		Comments
Product Roadmap		
Product Vision		
Market Approach		