bombora

Foundational GTM Checklist
Churn Prevention | Bombora Playbook

Use this checklist to set the foundation for the Playbook for Churn Prevention.

You should already know or document as many of the following as possible. Not all are necessary, but the more that can be provided, the stronger signal you'll be able to create, and the more successful Playbook you'll run.

Basic Needs:

- ❑ 100+ closed/won accounts associated with the products driving each of the core sales signals.
- ❑ A list of competitors and/or associated partners.
    - ❑ Within the list of competitors, provide the products or services that you compete with each directly.
    - ❑ Within the list of partners, provide the products or services that your partners support or are integrated with.
- ❑ Web content that has a laser focus on the product/messaging for each product/service.
- ❑ A list of top organic keywords associated with each product/service/persona

Technical Information:

- ❑ Where will your intent data live? CRM or MAP, Bombora UI, etc.
- ❑ How do your Customer Account Managers (CAM) use this tool for customer management? (ex: They use accounts + contacts in SFDC; They work out of List views, dashboards, tasks; Etc.)
- ❑ Are accounts assigned to your CAMs in your CRM/MAP platform? At what stage? Is it manual or automated?

Go-To-Market Strategy:

In this section you will establish or compile information about your GTM strategy and resources that will help us execute as we move through this playbook.

Market & Product Information:

❑ List your product/service portfolio as it pertains to existing customers.

  ❑ Do you have multiple products? What are their features that stand apart from your competitors?

  ❑ Do you have a core product, and supporting add-ons (upsell)? Or multiple core products for different organizations within a business (crossell)?

❑ What is your market share against your competitors? Has that grown or declined in the last 2-5 years, and why?

  ❑ List key areas you directly compete with against your competitors (specific to products, features, pain points, needs)

  ❑ List key areas your competitors thrive on and are pushing in their marketing that competes with your products (specific to products, features, pain points, needs)

Customer Management Team:

❑ Are your Customer Account Managers aligned to products? To Industries? To size of customers?

  ❑ For example: "We have 3 products, but our CAM team serves all products and is split by company size, Enterprise vs SMB." Or "We have 2 products and two unique teams that support them."

❑ Do your CAMs act as managed services - or are they only focused on contracts and renewals?

❑ What percentage of time your CAMs are following up on a customer that "did something" vs. reaching out unsolicited? (cold calling versus a cadence of predictable account management)

❑ How are they measured? (NPS, client growth, renewal rate, specific products, other?)

❑ Are there any strategic products or initiatives your CAMs are focused on right now?

❑ Do you have defined "Customer Success Plays"?

  ❑ If Yes do the Sales Plays have defined Content/Talk Tracks/Nurture cadences?

  ❑ Discuss how you track your CAM upsell/crossell effort today and "what good looks like" (ex: Meetings set, opps set, length of sales cycle, etc.) (WHY: Will help us establish measurement)

❑ Discuss how you identify, track, and mitigate churn risk and competitive threats to your customers today?

❑ Do you have a customer marketing team? If so, what are their goals and objectives? How are they aligned with your CAMs?