Order of Operations

Account-based selling opens teams up to more potential strategies than they had before.

A Plethora of Signals

Sellers are given a lot of different signals to parse. Intent, engagement, account scores, technographics. A previously hidden world of insight becomes rapidly visible.

New Strategies Emerge

Accounts with high predictive score. Accounts with specific product page visits. Accounts that use Competitor X showing intent for Competitor Y.

SDRS FIRST TIME

SEEING DEMANDBASE

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As new strategies emerge, SDRs are not given clear priorities, and outbound becomes a haphazard collection of plays.

Analysis Paralysis

With so much data available, SDRs get bogged down in evaluating minutiae, as though they can "see through the Matrix" by staring at individual intent activities long enough.

Competing Priorities

Emergent strategies start to overwhelm existing strategies. A hot new angle can have SDRs running in a different direction every week.

Doubt and Fallback

Without consistent effort and focus, results weaken. Teams start to distrust the information they are getting.

Too many options leads to a "go after everything, all the time" mindset. Strategy should extend from who to when and why.

The Go After Everything Mistake
When everything provides a signal, it seems like everything should be worked. This leaves SDRs in the same position they were in without these signals.

Assessing the When
Not every account is ripe for an opportunity. Journey Stages are one yardstick for understanding that ripeness. Lists should help SDRs assess when the right time is, and timing should influence messaging strategy.

Assessing the Why
Every list should be tied to a meaningful strategy on the reason for the account to be pursued. It should not require significant SDR analysis.

Lead and account prioritization can be streamlined to activate across all necessary actions and strategies.

1. Critical SLAs

- Demo / Pricing Requests
- Hot Programs
- Top-Scored Leads
- MQAs / High Pipeline Predict

2. Low-Hanging Fruit

- Re-Engaged Closed / Lost
- All Other Inquiries
- Highly Engaged Prospects
- Engaged Prospects by Persona

3. Creative / Competitive

- Intent w/o Competitors
- Competitive Intent
- Value-Adds / Special Offers
- Churned Customers w/ Intent / Eng
- Accounts in ABM programs

4. Focused Prospecting

- Accounts by Journey Stage
- Accounts with Specific Intent
- Customers with Whitespace Intent
- Accounts with Page Visits
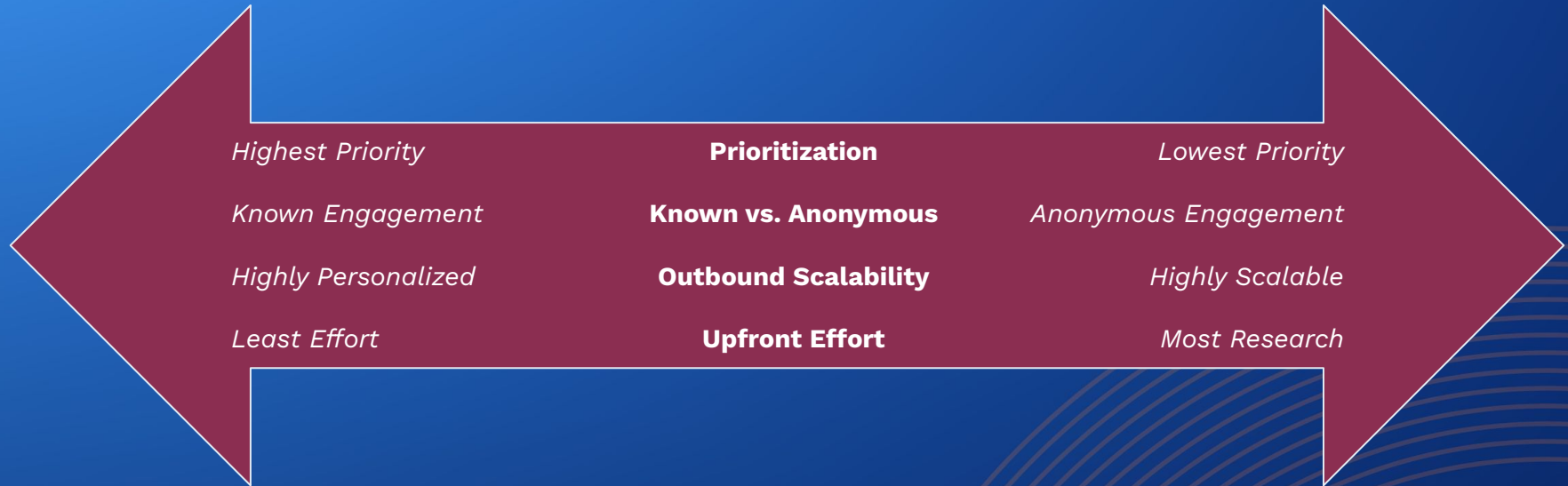- Engaged Accounts by Industry
- High Qual Score

Order flows across areas of priority, quality of engagement, required effort, and scalability.

1. Critical SLAs **2. Low-Hanging Fruit** **3. Creative / Competitive** **4. Focused Prospecting**

Highest Priority	**Prioritization**	*Lowest Priority*
Known Engagement	**Known vs. Anonymous**	*Anonymous Engagement*
Highly Personalized	**Outbound Scalability**	*Highly Scalable*
Least Effort	**Upfront Effort**	*Most Research*

1. Act Nows
No Sales Touches

Record Count

Account Owner
- Mary Benfield
- Strat Open 2

		0	2	4
Conrad...	Mary B...			
John L...	Strat O...			

(Account Owner > Related Record Owner)
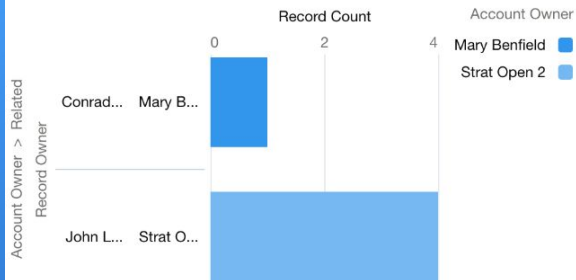
View Report (Report 1 Act Nows)

2. MQLs
No Sales Touches

Record Count

Contact Status
- Qualified

		0	1	2
Conrad ...	Qualified		1	
John Lea...	Qualified			2

(Contact Status > Contact Owner)
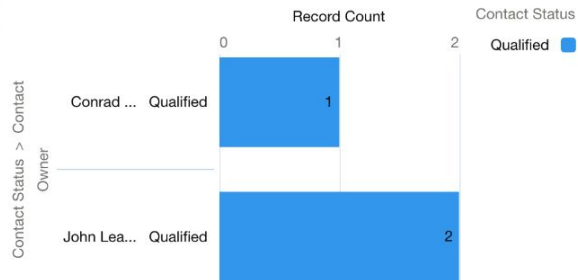
View Report (Report 2 MQLs)

3. Inquiry Report
No Sales Touches

Related R...	Compa...	Fir...	La...	Title	Campaign Name
Andrew Brey					
Conrad Sloand					
Conrad Sloand					
Conrad Sloand					

View Report (Report 3 Inquiries)

4. MQAs with No Known Competitors
No sales touches. Work or nurture

SDR Owner ↑	Account Name	Acc...	Pipeline Pre...
Andrew Brey		Tier 1	30
Conrad Sloand		Tier 1	66
Conrad Sloand		Tier 3	68
Conrad Sloand		Tier 1	71
Conrad Sloand		Tier 1	86
Conrad Sloand		Tier 1	67
Conrad Sloand		Tier 1	73

View Report (Report 4 MQA no Comp)

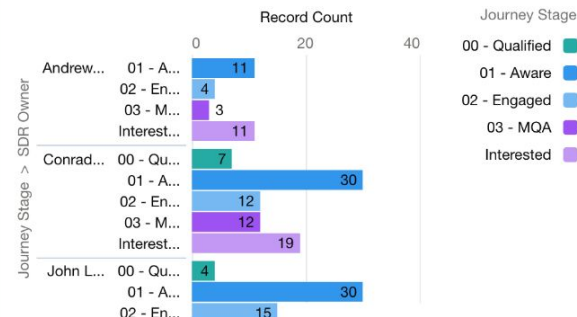## 5. MQA with Known Competitors
No sales touches. Work or nurture

SDR Owner ↑	Account Name	Account Tier	Pipeline Predict Score
Conrad Sloand		Tier 2 (ICP)	90

View Report (Report 5 MQA w Comp)

Closed/Lost Reengaging

Record Count

Journey Stage
- 00 - Qualified
- 01 - Aware
- 02 - Engaged
- 03 - MQA
- Interested

		0	20	40
Andrew...	01 - A...	11		
	02 - En...	4		
	03 - M...	3		
	Interest...	11		
Conrad...	00 - Qu...	7		
	01 - A...		30	
	02 - En...	12		
	03 - M...	12		
	Interest...		19	
John L...	00 - Qu...	4		
	01 - A...		30	
	02 - En...	15		

(Journey Stage > SDR Owner)

View Report (Report 14 C/L Reengaging)

Customers - No ABX, with Intent

Record Count — SDR Owner

- Anthony Yee: 4
- Clay Carpenter: 6
- Omar Hossain: 4
- Reilly Barry: 7
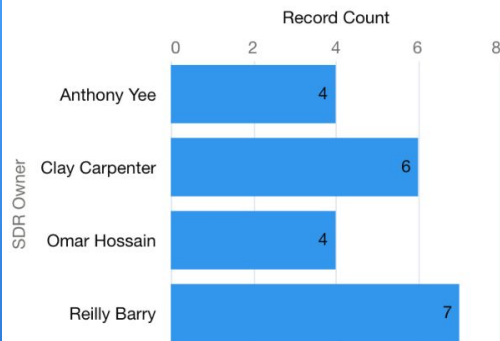
View Report (GSDR - OoO - No ABX, with Intent)

Customers - No Ads, with Intent

Record Count — SDR Owner

- Anthony Yee: 6
- Clay Carpenter: 9
- Omar Hossain: 12
- Reilly Barry: 15
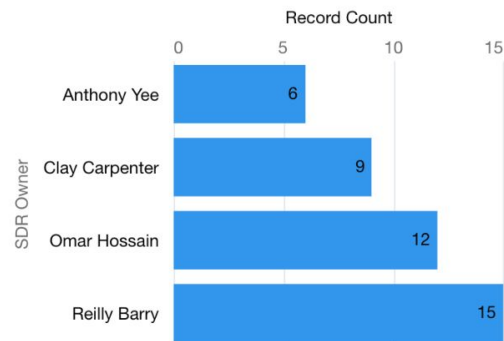
View Report (GSDR - OoO - No Ads, with Intent)

Customers - No SI, with Intent

Record Count — SDR Owner

- Anthony Yee: 8
- Clay Carpenter: 13
- Omar Hossain: 18
- Reilly Barry: 15
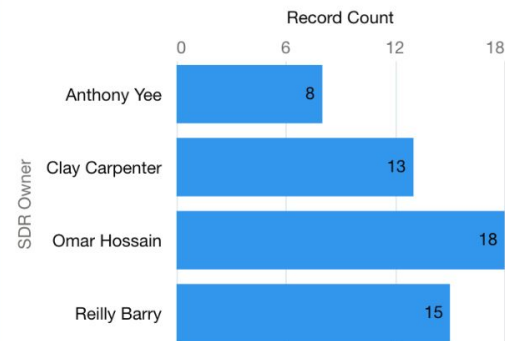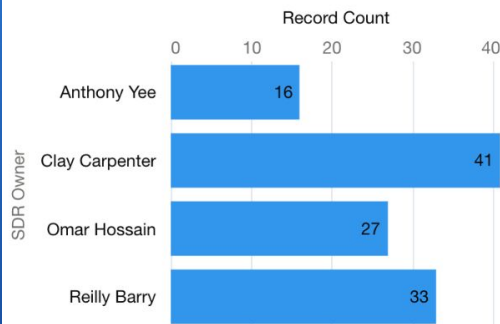
View Report (GSDR - OoO - No SI, with Intent)

ABX Customers, No Orchestration
Not based on intent; Cannot zero out

Record Count — SDR Owner

- Anthony Yee: 16
- Clay Carpenter: 41
- Omar Hossain: 27
- Reilly Barry: 33

View Report (GSDR - ABX Customer, No Orchestration)

ABX Customers, No Personalization
Not based on intent; Cannot zero out

Record Count — SDR Owner

- Anthony Yee: 19
- Clay Carpenter: 60
- Omar Hossain: 48
- Reilly Barry: 42
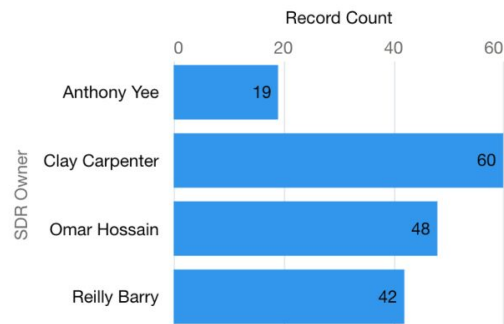
View Report (GSDR - ABX Customer, No Personalization)

SI Customers w/ Sales Seats
List to dig through for upsell potential

Sum of Total Active SI Cloud Products — SDR Owner

- Anthony Yee: 33
- Clay Carpenter: 45
- Enrique Mustieles: 1
- Omar Hossain: 59
- Reilly Barry: 36
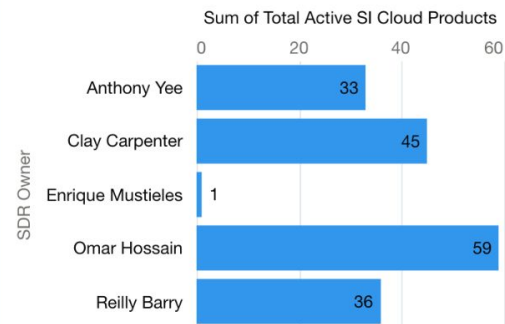
View Report (GSDR - SI Customers w/ Sales Seats)

Dashboardization allows for both reps and managers to work from a single resource for accountability across strategies.

Accountability

- "Sales Touches" metric allows for reports to be zeroed-out.

- Creates a clear picture of where reps stand with execution.

- No need to "go digging." Just review what hasn't been touched.

Show Me
All accounts

MQA Date
Current and Previous FQ (Oct 1, 2024 - Mar 31, 2025)

Demandbase Journey Stage
equals MQA

Sales Touches (1 mo.)
less than 5

Creating lists alone does not drive revenue. Playbooks must be in place. Taking action must be accessible.

Guidance More Than *Go After It*

Providing a lot of lists to reps is great but they also need to know how they are taking action on each list.

Consider Every Step

Does a list of accounts fit for a specific program require some research to personalize and contextualize? Do you have persona-based messaging written for competitive takedowns?

Make It Visible

One benefit with Demandbase for Sales is also making an Order of Operations accessible elsewhere—set up email digests, use the Prescriptive Sales Dashboard, etc.

Outcomes

By saving time and aligning priority actions, SDRs have the ability to focus on impactful tasks that drive valuable outcomes.

Time Saved

Create a one-stop shop for strategy.

One dashboard vs. individualized reports.

SDRs spend less time digging through territories.

Clear Priorities

Lists made in order of priority help reps take the highest value actions more quickly.

Dashboardization makes it easy to show what's left to do—hold reps accountable.

Broad Execution

Your entire team is on the same page.

All strategies are activated.

Clear visibility into execution.

Sales Expertise

Access and visibility into all strategies means SDRs struggle less to make decisions.

Effort goes into improving outcomes. Better emails, better calls, better opps.