



WORKSHEET

ABM brief for logistics and supply chain sellers

Logistics and Supply Chain ABM Agencies Compared by Case Evidence (2026)

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Send the same brief to every agency you speak to. Answers in writing are easier to compare, and the stage definitions in it become the basis of the contract.

EXHIBIT 1

Field	What to write	Your answer
Company and offer	Legal name, what you sell (software, 3PL, transport or warehouse services) and the contract value of a typical new account	
Target account list	How many named accounts, how they were chosen, and which existing customers must be left out	
Tiers	Which accounts get 1:1 work, which are grouped for 1:few, and which sit in a 1:many layer	
Buying group	The roles that decide inside a target account, such as supply chain, operations, IT, finance and procurement, and who signs	
Regions and languages	Countries, sales teams and languages each tier must cover	
Stage definitions	What counts as an engaged account, a sales accepted lead, a qualified opportunity and closed-won, agreed by sales in writing	
Handoff rules	Who follows up an engaged account, how fast, and how sales hands an account back to marketing	

Field	What to write	Your answer
Channels	Which of paid LinkedIn, programmatic display, search, email, events, direct mail and sales outreach are in scope, and who runs each	
Data and software	CRM, intent data and ABM platform; who pays the licences and who owns the data	
Ad accounts	Whose name the ad accounts and payment cards sit in, and what happens to them if the contract ends	
Reporting	Account progress, pipeline and closed-won reported separately, each with the period it covers	
Commercial model	Retainer, project or payment per accepted lead; minimum term; media spend and licences listed apart from the fee	
Time from your team	Hours each month needed from sales leaders for content, profiles, calls and account reviews	

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