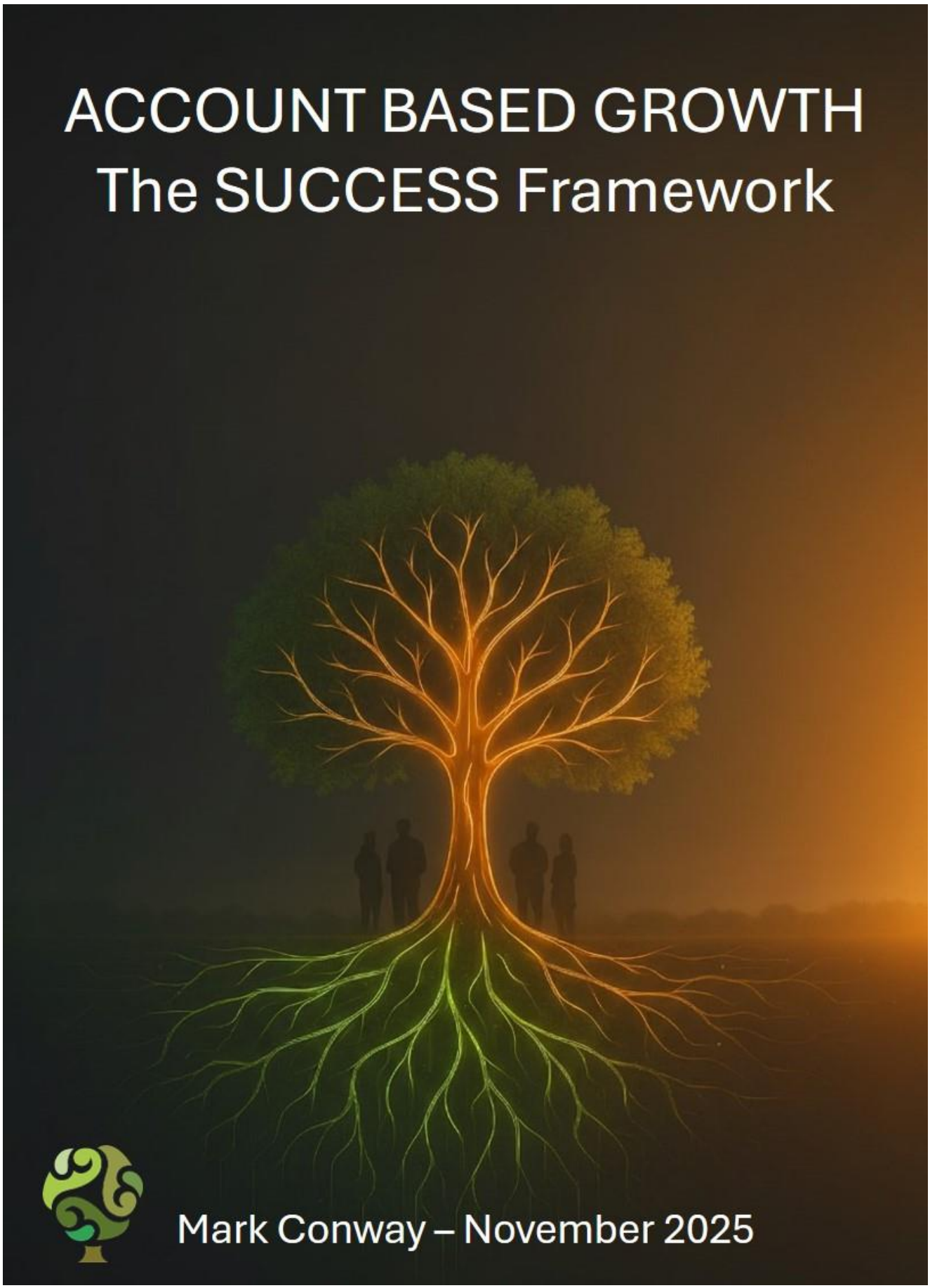
# ACCOUNT BASED GROWTH
# The SUCCESS Framework



Mark Conway – November 2025

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# Foreword

*By Mark Conway, Oak Consult*

Growth is one of the most overused words in business.
Everyone claims to be driving it, transforming it, or unlocking it — yet so few organisations can show how it's governed, measured, or sustained.

Over the last two decades, I've seen every flavour of transformation programme — from marketing-led "account-based" initiatives to grand digital reinventions. Most started with energy, high-level plans, dashboards, and optimism. Far fewer ended with measurable progress.

The reason is simple: growth isn't a campaign. It's a system — and systems fail without governance, alignment, and trust. AND great people to drive it!

At Oak Consult, we've learned that Account-Based Marketing (ABM) only works when it evolves into something bigger: **Account-Based Growth (ABG)**. ABG doesn't belong to one department. It belongs to leadership. It connects board ambition to customer experience, data to decisions, and people to purpose. It creates rhythm where chaos once lived.

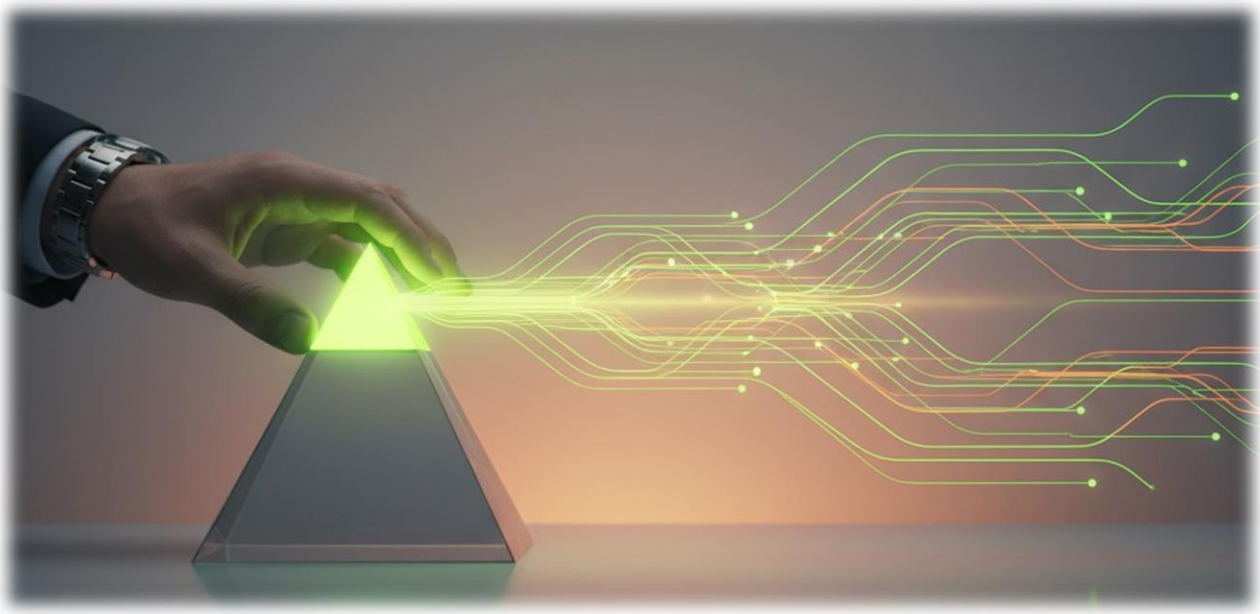
That rhythm is what our **SUCCESS Blueprint** was built to deliver.
SUCCESS turns alignment and accountability into a repeatable operating model for growth. It helps organisations see themselves — and their customers — clearly, to unify data and governance, to focus on the right relationships, and to scale what works.

This paper shares what we've learned from years of client delivery, real-world projects, and lessons that come from fixing what's broken. It's not a theory piece. It's a blueprint for leaders who are tired of hype and ready for clarity.

If you've ever felt your growth programmes are busy but brittle — full of activity yet short on progress — this blueprint is for you. It's practical, it's human, and it's built from the inside out.

"Growth built on governance lasts. Growth built on trust multiplies."

— Mark Conway, Oak Consult



# Executive Summary

After years of investment and expectation, most Account-Based Marketing (ABM) programmes are falling short of their promise.

Across sectors, fewer than **three in ten ABM initiatives deliver measurable ROI** (Forrester, 2024). **Gartner** reports that over **70% of B2B CMOs over-invest in personalisation technology** while under-investing in governance and alignment. In the UK, maturity still lags behind global benchmarks, with most initiatives confined to marketing pilots or short-term campaigns.

The problem isn't ambition — it's integration.
Most ABM efforts stall because they are treated as marketing tactics, not business systems. Sales, Marketing, and Customer Success often work to different definitions of success, on different data, and with conflicting incentives. Technology may connect the platforms, but governance connects the people — and without it, performance plateaus.

Oak Consult's answer is **Account-Based Growth (ABG)** — a leadership-driven model that transforms ABM from a campaign engine into a **governed growth system**. ABG unites strategy, data, governance, and human relationships under one rhythm — linking board ambition to customer experience through alignment and continuous learning.

At the heart of ABG sits the **SUCCESS Blueprint**, Oak Consult's practical operating model for governed growth:

- **S – Strategy & Governance** – Align leadership intent with account focus and decision cadence.
- **U – Understanding & Unification** – Build one version of the truth across data, systems, and teams.
- **C – Customer Segments** – Focus investment where Fit, Value, and Relationship align.
- **C – Customer Spectacles** – See through your customers' eyes to embed empathy and trust.
- **E – Executable Plan** – Turn intent into coordinated delivery through accountable pods and clear metrics.
- **S – Scale** – Codify and replicate what works across functions and regions.

- **S – Sustain & Learn** – Close the loop with governance that learns and adapts.

Independent research shows that organisations which align governance, data, and trust in this way achieve stronger, more predictable growth — including **faster pipeline velocity** and **higher net revenue retention** (Bain, Gartner, 2024-25).

Account-Based Growth isn't about more technology or bigger campaigns. It's about leadership clarity, cross-functional discipline, and measurable trust.
The SUCCESS Blueprint helps organisations turn those principles into performance.

# 1. ABM Plateau — When Campaigns Outpace Capability

**The performance gap**

Over the past decade, Account-Based Marketing (ABM) has become a default growth strategy for B2B organisations. Budgets have expanded, technology stacks have multiplied, and every vendor claims adoption rates approaching 90 per cent. Yet independent evidence tells a different story.

**Forrester (2024)** reports that fewer than 30 per cent of ABM programmes deliver measurable ROI. **Gartner (2025)** finds that more than 70 per cent of B2B CMOs are dissatisfied with the maturity of their ABM execution, despite significant investment in personalisation and automation. **LinkedIn's B2B Institute** shows that UK adoption of mature, enterprise-wide ABM still trails global peers by 12–18 months.

The headline problem is not awareness or ambition. It is capability. Most organisations have out-marketed their operating model: campaigns move faster than the systems, governance, and data foundations beneath them.

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**Root causes of failure**

**Siloed ownership.** ABM often begins in marketing, funded by demand-generation budgets and measured on pipeline creation. Sales and Customer Success are consulted late, if at all, which leads to conflicting definitions of account progress. Account-Based Growth (ABG) replaces this with cross-functional account teams — integrated groups with shared targets and a single governance cadence.

**Weak governance.** Fewer than one in five ABM programmes report to a C-suite steering group. Decisions are typically delegated to campaign teams without a cross-functional review rhythm. Embedding ABG governance means defining explicit decision rights — who owns what data, budget, and customer outcome across Sales, Marketing, and Service.

**Data fragmentation.** ABM relies on unified customer data, but most enterprises operate across multiple CRMs, marketing-automation systems, and service platforms. Forrester notes that 61 per cent of ABM programmes suffer from "data incompleteness severe enough to impair measurement."

**Cultural misalignment.** Incentives still reward short-term pipeline creation rather than account value. Marketing chases leads; Sales chase signatures; Service chases satisfaction. None are measured on sustainable growth. ABG addresses this by building virtual, cross-functional teams anchored by joint KPIs and executive sponsorship, reinforcing shared accountability and collaboration across functions.

**Technology myopia.** Tooling often substitutes for thinking. Platforms automate engagement but not governance. When the system fails, the instinct is to buy more technology rather than strengthen alignment.

**The UK context**

The UK market demonstrates the same enthusiasm but greater structural complexity. Functional silos, legacy systems, and risk-averse governance models slow down integration. Public-sector suppliers, in particular, face long procurement cycles and strict data-compliance constraints, limiting agility. Professional-services and technology firms have embraced ABM language, but delivery often remains campaign-centric.

Most UK ABM initiatives are what Oak Consult calls “name-on-a-list programmes” — campaigns personalised to a handful of accounts but disconnected from account strategy or governance. They create spikes in engagement without sustained commercial lift.

Some UK firms are beginning to counter this by formalising cross-functional ABG teams that bring together Sales, Marketing, Pre-Sales, and Service under a single account plan with executive sponsorship. Early evidence suggests these teams build stronger internal cohesion and deliver measurable trust gains externally.

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**The Turning Point — From Account-Based Marketing to Account-Based Growth**

The shift from Account-Based Marketing (ABM) to Account-Based Growth (ABG) is subtle in language but radical in practice. It moves the organisation from *marketing initiative* to *enterprise operating model* — from campaigns that generate noise to systems that generate trust.

In a traditional ABM world, marketing teams run targeted campaigns to win attention from a handful of named accounts. Success is measured in clicks, leads, and engagement rates. Sales applaud if a few meetings are booked; then everyone moves on to the next wave.
**ABG changes the unit of success.** The focus moves from activity to outcomes — renewal rates, advocacy, and net-revenue retention. Growth stops being a marketing story and becomes a business-system story.

Ownership changes too. ABM typically lives inside Marketing, with dotted-line involvement from Sales or Customer Success. In ABG, the C-suite owns the rhythm. Sales, Marketing, Service, and Finance operate as a single growth team, reviewing progress in a common governance forum where decisions are made collectively and data is shared transparently.

Technology is another tell. In ABM, platforms drive coordination: automation tools schedule the outreach; dashboards track the clicks. In ABG, technology supports human collaboration rather than replacing it. Insight flows across systems and conversations; data doesn’t just inform messaging — it informs management.

And finally, cadence transforms. Campaigns used to start and stop, producing bursts of activity followed by silence. Under ABG, growth runs on a continuous learning loop. Each quarter builds on the last through shared evidence, feedback, and governance. Success isn’t a spike; it’s a rhythm.

In short, **ABM tells stories to customers. ABG writes a shared story with them AND creates new stories.**

**Lessons for Leaders — What's in It for Your Organisation?**

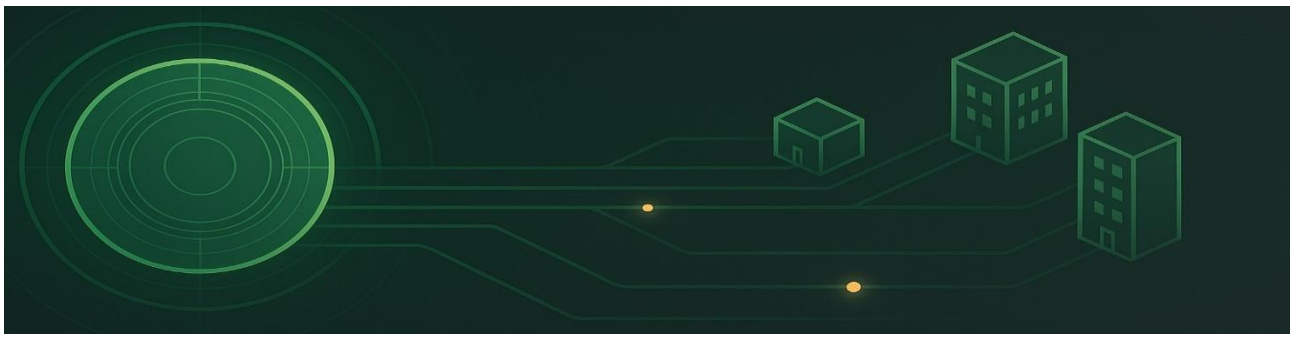
If you recognise any of the failure patterns above, you're not alone — and you're not broken. You're operating with the same structural constraints as most mid-market and enterprise organisations. The difference between those that plateau and those that progress is governance.

**Six lessons to act on now:**

1. **Own growth at the top.** If ABM doesn't sit on the executive agenda, it will always stay tactical. Make it a governance topic, not a marketing report.
2. **Unify data before you automate.** No amount of AI or personalisation will compensate for incomplete or inconsistent account data. Fix the foundations first.
3. **Define shared success metrics.** Revenue, retention, and relationship strength must be owned jointly by Sales, Marketing, and Customer Success.
4. **Reward alignment, not activity.** Shift incentives from campaign volume to collaborative outcomes. Measure how teams perform together, not apart.
5. **Start with one operating rhythm.** You don't need a full transformation programme. A single monthly governance meeting linking data, insight, and decision is enough to build momentum.
6. **Design your ABG team.** Create cross-functional account teams that mirror your top customer segments. Give them joint accountability for insight, delivery, and growth. Reward collaboration over function.

Account-Based Growth doesn't replace ABM — it matures it. It gives leaders a practical path from campaign enthusiasm to commercial reliability. The next section introduces the blueprint that makes that path repeatable: **SUCCESS — Oak Consult's operating system for Account-Based Growth.**

**ABM Chaos to ABG Harmony**



## 2. Shift to Account-Based Growth - A Governance-Led Model

**Why growth models need governance**

For years, B2B organisations have treated growth as a sequence of disconnected functions — marketing to attract, sales to convert, and service to retain. ABM was supposed to close those gaps. Instead, it often exposed them.

As campaigns became more personalised and automated, the cracks in leadership and accountability widened. Most ABM initiatives focused on what to say to customers — not how to govern the teams, data, and decisions behind that message. The result: sophisticated engagement tools operating on shallow foundations.

Account-Based Growth (ABG) reframes the problem. It assumes that sustainable growth is not a marketing outcome but a **governance outcome** — the result of how well leadership aligns strategy, people, and information around the customer.

Not every customer warrants the same investment of time, data, and collaboration. ABG is deliberately selective. It applies only to the accounts where joint growth potential and strategic fit justify deeper governance and cross-functional focus.

For most organisations, this means the top 10–15 per cent of the customer base — those that represent a disproportionate share of margin, influence, or innovation opportunity. The rest of the portfolio should be served efficiently, but not governed at this depth.

In organisations that achieve ABG maturity, marketing is not the driver — it is one engine in a coordinated system led by shared governance, consistent data, and trusted human relationships.

**Governance as the missing growth discipline**

Governance is often treated as administrative overhead: board packs, steering committees, and compliance logs. In ABG, governance takes on a different meaning — it becomes the operating rhythm that links vision to delivery.

Effective ABG governance does three things:

1. **Creates shared ownership.** It unites Sales, Marketing, and Customer Success around one definition of value and one version of the truth.
2. **Sets cadence.** It establishes a predictable rhythm of review and decision — monthly, quarterly, and annually — where progress is examined and priorities are rebalanced.
3. **Builds trust through transparency.** By making data, assumptions, and outcomes visible to all stakeholders, governance removes politics and drives collective accountability.

When growth is governed well, it becomes consistent, not chaotic. Teams stop working in parallel and start working in sequence. Leaders stop reacting to pipeline noise and start steering on customer value.

**The alignment equation**

ABG's strength lies in its ability to connect previously disjointed systems: the strategic direction of the board, the commercial decisions of the C-suite, and the human interactions that happen every day between teams and customers.

At the centre of that equation sits **alignment** — the mechanism that translates strategy into coordinated action. Alignment is where most ABM programmes falter and where ABG succeeds. It's also where Oak Consult's blueprints focus first.

Alignment doesn't mean uniformity. ABG alignment applies where the stakes are highest — to the accounts where both sides benefit from shared governance, not to every transactional relationship.

In an aligned organisation:

- Strategy informs every account plan.
- Data informs every decision.
- Governance informs every meeting.
- Trust informs every relationship.

Alignment isn't achieved through software or slogans. It's built through deliberate structures — cross-functional account teams, shared KPIs, and leadership oversight — that turn growth from activity into rhythm.

**The role of trust and feedback**

Trust is ABG's most undervalued currency. It's what turns transactional relationships into long-term partnerships — both internally and externally.

Externally, customers buy continuity as much as capability. They notice whether a supplier's teams talk to each other and whether promises made in sales are honoured in service. Internally, trust gives teams the confidence to share information, admit issues, and solve problems together rather than defensively.

Feedback is the engine of that trust. Organisations that close the loop — between data, decisions, and customer outcomes — learn faster and recover faster. ABG thrives on feedback: from customers, from teams, from governance cycles. It's how strategy stays alive.

**Introducing SUCCESS — Oak Consult's operating system for ABG**

Through our research and client work, Oak Consult identified a recurring pattern: successful ABG transformations follow the same six disciplines. They don't start with technology. They start with structure, understanding, and governance, and they evolve through deliberate, human-centred practice.

That pattern is captured in the **SUCCESS Blueprint**, Oak Consult's operating system for Account-Based Growth. The SUCCESS Blueprint provides the structural backbone of Account-Based Growth. The bullets below summarises each phase at a conceptual level before we explore the operational model in detail.

- S – Align direction and governance
- U – Build shared understanding
- C – Focus on high-value accounts
- C – Embed empathy and trust
- E – Turn intent into delivery
- S – Scale
- S – Sustain and Learn

The SUCCESS blueprint is designed to scale depth, not volume. It focuses leadership attention and governance energy where it counts most — the strategic accounts that drive long-term enterprise value.

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**Why this matters for leaders**

The shift to ABG is not just a marketing refinement; it's an organisational decision. It redefines how success is measured, who owns it, and how it is governed. The leaders who embrace this change first will not only grow faster but grow better — with customers who stay longer, teams who collaborate better, and boards who finally see marketing and sales as one conversation.

# 3: The SUCCESS Blueprint – Making ABG Real

## 3.1 Setting the Context

Account-Based Growth only works when it stops being an idea and becomes a discipline.
After years of seeing clients struggle to translate strategy into day-to-day practice, Oak Consult developed a simple principle: growth should be **governed, evidenced, and human**.

That philosophy sits at the heart of the **SUCCESS Blueprint** — Oak Consult's operating system for Account-Based Growth (ABG).

SUCCESS is not a campaign checklist or marketing playbook. It is a repeatable system for governing how organisations identify, serve, and grow their most valuable customers. It provides a clear route from **vision to value**, translating leadership intent into operational reality.

Crucially, SUCCESS is **selective**.
It applies only to the *strategic accounts* that genuinely warrant an Account-Based Growth approach — typically the top 10–15 per cent of a customer portfolio where the opportunity, margin, and trust potential justify a deeper organisational investment.

For every other customer, the principles of ABG still hold — clarity, alignment, and respect — but the level of governance and coordination is proportionate. The discipline is depth, not volume.

The blueprint is called SUCCESS for a reason: it describes both the **journey** and the **outcome**. It begins with **Strategy & Governance**, builds understanding and unity, focuses on the right customers, embeds empathy through Customer Spectacles, turns plans into action, and sustains improvement through a feedback loop that keeps learning alive.

In the following sections, each stage of SUCCESS is explored in depth — combining research evidence, Oak Consult's proprietary models, and real-world lessons from UK enterprises that have used this blueprint to turn ABM ambition into ABG reality.


## 3.2 Overview of the Blueprint

The **SUCCESS Blueprint** is Oak Consult's practical blueprint for making Account-Based Growth real. It turns strategic ambition into a governed rhythm — replacing isolated campaigns with a repeatable operating model that balances structure, evidence, and human judgment.

Each of the seven stages builds on the one before it. Together they form a disciplined growth loop that links board-level intent to measurable customer outcomes.

The SUCCESS Blueprint translates strategy into practice through Oak Consult's proprietary models. The table below links each phase to the blueprints that make it actionable.

| | Phase | Focus | Purpose |
|---|---|---|---|
| **S** | **Strategy & Governance** | Define direction, ownership, and cadence | Establish leadership alignment, accountability, and oversight through the Oak **GROWTH Framework** |
| **U** | **Understanding & Unification** | Build a single source of truth | Unify data, people, and systems using the Oak **Data Integrity Radar** |
| **C** | **Customer Segments** | Focus where it counts | Prioritise effort and governance on accounts that truly drive value using the **Fit × Value Matrix** |
| **C** | **Customer Spectacles** | Embed empathy and trust | See, Challenge, Act, Learn, Evangelise — turning insight into visible improvement |
| **E** | **Executable Plan** | Turn intent into action | Equip and enable cross-functional ABG teams with clear metrics, cadence, and ownership |
| **S** | **Scale** | Replicate with refinement | Codify what works, systemise best practice, and expand capability, structure, and culture |
| **S** | **Sustain & Learn** | Keep learning alive | Capture feedback, refresh data integrity, and feed new insight back to Strategy & Governance |

These seven phases are not linear; they operate as an **interlocking governance system**.
When the blueprint runs as intended:

1. **Strategy & Governance** set the compass.
2. **Understanding & Unification** establish shared truth.
3. **Customer Segments (C.O.R.E.)** focus resources.
4. **Customer Spectacles (SCALE)** inject empathy and trust.
5. **Executable Plans** turn design into delivery.
6. **Scale** embeds repeatability.
7. **Sustain & Learn** closes the loop and refreshes the cycle.

The result is a *governed growth engine* that compounds performance over time.
Oak Consult's clients using SUCCESS report three consistent benefits:

- **Visibility —** everyone from the board to the front line sees the same customer truth.
- **Velocity —** decisions accelerate because ownership and evidence are clear.
- **Value —** strategic accounts generate disproportionate growth through partnership and trust.

In short, **SUCCESS** governs growth through clarity, alignment, and disciplined learning.
The following subsections unpack each stage — linking Oak Consult's proprietary tools, data blueprints, and governance models to practical steps leaders can apply immediately.

## 3.3 S – Strategy & Governance


Effective Account-Based Growth begins with governance, not growth targets.
Without clear decision rights, rhythm, and ownership, even the best-intentioned ABG programmes collapse under their own enthusiasm.

Oak Consult's **GROWTH Framework** turns that governance challenge into a repeatable management rhythm — connecting the board's ambition with day-to-day accountability across commercial, delivery, and service teams.

**The Oak GROWTH Framework**

| Element | Core Question | Output | Cadence |
|---|---|---|---|
| **G – Governance** | How is ABG owned and steered? | A defined decision cadence, with one C-suite sponsor accountable for outcomes. | Monthly steering + quarterly board review |
| **R – Responsibility** | Who actually delivers? | Named owners across Sales, Marketing, Service, and Finance; clear RACI for each ABG account. | Continuous |
| **O – Opportunities** | Where will growth come from? | Prioritised expansion plays drawn from the Fit × Value Matrix and Data Integrity Radar. | Quarterly |
| **W – Weaknesses** | What internal gaps block us? | Capability, process, or culture issues flagged with owners and deadlines. | Quarterly |
| **T – Threats** | What external risks could derail us? | Monitored market, competitor, or policy shifts with scenario responses. | Monthly |
| **H – Heatmap** | What needs action now? | A living dashboard linking decisions to delivery; colour-coded by progress and accountability. | Real-time |

The power of **GROWTH** lies in its rhythm. Each review session runs the same disciplined loop:

**Review → Decide → Assign.**

- **Review** data, trust metrics, and account performance.
- **Decide** what stays, what stops, and what changes.
- **Assign** clear actions, owners, and next-review dates.

That rhythm creates what most ABG programmes lack — **governance velocity**.

**Governance as a Growth Enabler**

Governance is often misread as bureaucracy. In practice, it's the opposite: the faster you decide, the faster you grow — provided those decisions are evidence-based and visible.

In high-performing ABG organisations, governance does four things consistently:

1. **Links board ambition to customer reality.**
   Every growth claim must trace to a named customer opportunity and measurable trust signal.
2. **Creates shared ownership.**
   Sales, Marketing, and Customer Success act as one team, not a relay.
3. **Keeps data honest.**
   Metrics are drawn from the Data Integrity Radar; only what the customer would recognise is considered "trusted data."
4. **Maintains focus and cadence.**
   Decisions follow a predictable tempo — preventing drift between meetings and ensuring feedback loops close.

When those conditions hold, governance stops being a reporting exercise and becomes a **leadership behaviour**.

**Embedding Governance in the Organisation**

For governance to stick, it must sit where real decisions happen:

- **Board level:** ABG progress is a standing C-suite agenda item, owned jointly by the Sales and Marketing Directors.
- **Cross-functional ABG Team:** a small, empowered group that meets weekly to align activity, resolve blockers, and feed insights back into the Heatmap.
- **Support Functions:** Finance, Data, and People teams integrated early to ensure ROI, data quality, and incentives align with ABG priorities.

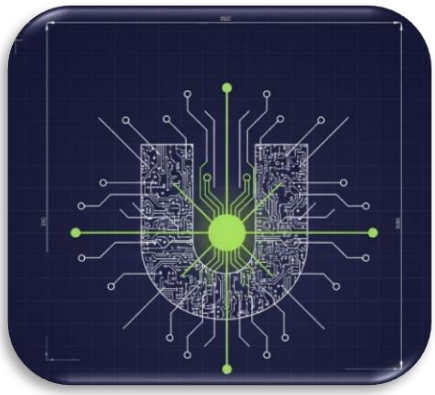
This tiered approach keeps strategy live. Each layer knows what it owns — and what decisions roll upward.

**Key Takeaway**

**Governance is the engine, not the brake.**
Strategy sets the destination, governance keeps the route clear.

When leadership cadence, accountability, and evidence combine, Account-Based Growth stops being a project and becomes a permanent operating rhythm.

## 3.4 U – Understanding & Unification



Every Account-Based Growth programme lives or dies by whether the organisation can see a single, trusted version of the truth.
When data, people, and systems all tell slightly different stories, leadership confidence collapses.
The "U" in SUCCESS is about bringing those stories together — combining data accuracy with human accountability so every decision starts from shared reality.

**The Oak Data Integrity Radar**

Oak Consult's Data Integrity Radar measures how healthy your customer and account data really are. It evaluates five dimensions that together decide whether insight can be trusted:

- **Completeness** – are the right data points captured for meaningful decisions?
- **Consistency** – are standards applied the same way across systems and teams?
- **Accuracy** – are records verified, current, and reflective of customer reality?
- **Accessibility** – can the right people access the right information at the right time?
- **AI Readiness** – is data structured and governed so that analytics and automation can be used responsibly?

The Radar converts these scores into a single **Data Confidence Score (DCS)**, displayed as a simple heatmap.

**Example: Oak Data Integrity Radar — Sample Assessment**

| Dimension | Description | Score (0–10) | RAG Status | Key Observations / Risks |
|---|---|---|---|---|
| **Completeness** | Are the right data points captured for meaningful decisions? | 6.5 | 🟠 **Amber** | Core contact and company data are populated, but opportunity data and market segmentation fields are patchy. |
| **Consistency** | Are standards applied the same way across systems and teams? | 5.0 | 🔴 **Red** | Different teams maintain separate spreadsheets; CRM naming conventions vary widely. |
| **Accuracy** | Are records verified, current, and reflective of customer reality? | 7.5 | 🟢 **Green** | Regular cleansing cycles run; most records reflect live customer positions. |
| **Accessibility** | Can the right people access the right information at the right time? | 8.0 | 🟢 **Green** | Well-configured role-based access; dashboards accessible across Sales, Marketing, and Service. |
| **AI Readiness** | Is data structured and governed so analytics and automation can be used responsibly? | 5.5 | 🟠 **Amber** | Partial field standardisation and missing metadata hinder automation readiness. |

**Average Data Confidence Score (DCS): 6.5 / 10 – Amber Zone (Moderate Confidence)**

**Interpretation**

- **Green (7.5–10):** Trusted — data can safely drive insight and automation.
- **Amber (5–7.4):** Caution — insight directionally valid but needs strengthening.
- **Red (Below 5):** Risk — decisions based on inconsistent or incomplete truth.

**Leadership Note**

A DCS of 6.5 may sound acceptable, but for strategic programmes like Account-Based Growth or AI enablement, it means up to **35% of decisions are based on assumptions, not evidence**.
The goal isn't to chase a perfect 10 — it's to build a rhythm where the truth is regularly tested, trusted, and shared.

**Turning Data Into a Behavioural System**

Oak Consult's toolkit for "U" turns insight from a technical exercise into a living system. The core elements are:

- **Data Integrity Radar** – quantifies data health and produces heatmap actions.
- **Top-100 Programme** – identifies the strategic accounts where information must be 100 per cent accurate.
- **Human–Data Mapping Workshop** – brings every role together to show who touches what information and where confidence breaks down.
- **Market & Competitive Lens** – a light PESTLE + SWOT view of key sectors to add external context.
- **Customer Insight Capture Sheet** – ten structured questions capturing qualitative "Voice of Customer" insight.
- **Insight Extraction Sprint** – a two-week cycle converting data and interviews into "Three Truths and Three Opportunities."
- **Human Discipline Layer** – defines how individuals are recognised for keeping information accurate.
- **Unification Rituals** – short, regular sessions that keep information fresh and alignment continuous.

Together these tools make the pursuit of truth a shared habit, not a quarterly project.

**The Operational Flow**

Understanding & Unification follows an eight-phase rhythm that connects data work to governance cadence:

1. **Scope & Prioritise** – confirm the Top 100 accounts and priority markets.
2. **Baseline Truth** – run the Radar and Human–Data Mapping Workshop to expose gaps.
3. **Listen & Learn** – interview customers using the Insight Capture Sheets.
4. **Market Scan** – complete a brief PESTLE / SWOT snapshot of each priority sector.
5. **Insight Extraction Sprint** – synthesise findings into three customer truths and three growth opportunities.
6. **Human Discipline Activation** – publish responsibilities, recognition schemes, and meeting cadences.
7. **Unification Rituals** – hold monthly "Account Insight Hours" and quarterly Radar reviews.
8. **Govern & Refresh** – feed weak Radar dimensions into the GROWTH Heatmap for tracking and correction.

Each phase strengthens both the technical foundation and the cultural discipline needed for Account-Based Growth to scale.

**The Human Discipline Layer**

“For the Top 100, 100 per cent accuracy is everyone’s job.”

Every person who touches the customer becomes a data steward.
Motivation follows a simple loop: **Visibility → Recognition → Reciprocity → Reinforcement**.
This human layer links directly into **GROWTH (R – Responsibility)** and the **Fit × Value Matrix** through the quality of relationships maintained.

**Unification Rituals**

Small, consistent habits keep the truth alive:

- A monthly *Account Insight Hour* to review new intelligence and relationship shifts.
- A quarterly *Radar Trend Review* to track progress and learning.
- A shared *Customer Truth Board* on Teams or SharePoint so everyone can see updates in real time.

**Motivation and Recognition**

To make these habits stick, performance systems must reward them:

- **KPI:** Data Completeness ≥ 95 per cent for Top 100 accounts; Trust Score improving quarter on quarter.
- **Incentive:** data accuracy and insight capture included in bonus or review metrics.
- **Recognition:** quarterly “Data Hero” awards presented in Steering Group meetings.

**Transition Checklist → Customer Segments**

The organisation moves from “U” to “C” only when:

1. Radar coverage reaches ≥ 90 per cent of Top 100 accounts.
2. Every account has a named Executive Sponsor and Data Owner.
3. Weak Radar dimensions have assigned actions within GROWTH.
4. Customer Insight Sheets are complete for all Top 100 accounts.
5. The Market Lens summary is approved by the Steering Group.

**Oak Guidance**

“Understanding & Unification is where strategy meets reality.
You can’t grow what you can’t see clearly — and you can’t see clearly without people who care enough to tell the truth.”
— Oak Consult

## 3.5 C – Customer Segments (C.O.R.E.)

Not all customers are created equal — and not every account is ready for Account-Based Growth.
The purpose of segmentation in SUCCESS is focus.
By grounding decisions in evidence, organisations invest time and attention where relationships can truly grow, rather than spreading energy across every logo in the CRM.

The **Customer Segments** stage is where analysis becomes prioritisation. It translates clean data and insight from *Understanding & Unification* into a dynamic portfolio view of who to co-create with, who to nurture, who to serve efficiently, and who to let go gracefully.

**The Oak Fit × Value Matrix**

Oak Consult's **Fit × Value Matrix** helps leadership see where commercial logic and human trust meet. Each account is evaluated on two core dimensions:

- **Fit** — how well the account aligns to where the business *should* win.
- **Value** — how much mutual economic and strategic benefit exists or can be realised.

Where the two intersect, insight becomes strategy. The Matrix helps teams make confident decisions on tiering, investment, and governance.

To keep it practical, Oak uses a structured yet simple scoring system:

- **Fit** is scored against criteria such as problem–solution match, delivery capability, sector adjacency, and partnership potential.
- **Value** considers current contribution, margin quality, expansion potential, pricing power, and cost-to-serve.

The result is a clear visual map of the portfolio, supported by data but interpreted through judgement and conversation — not just metrics.

**Adding the Human Lens**

Numbers tell only half the story.
The **People & Trust Overlay** adds the relationship dimension — the "third leg of the stool" that defines whether the partnership can grow.

Oak's shorthand for this is simple but powerful:

- 🟢 **Trusted** – multi-threaded, open dialogue, named executive sponsors on both sides.
- 🟠 **Transactional** – functional relationships exist but lack depth or shared ambition.
- 🔴 **Fragile** – single point of contact, reactive behaviour, or recent tension.

Accounts marked amber or red aren't necessarily bad — they're opportunities for human repair.
This visual overlay transforms segmentation from static reporting into a live relationship conversation.

Data confidence from the Radar stage ensures the picture is real; the trust overlay ensures it's human.

**The C.O.R.E. Portfolio Model**

Oak's segmentation tiers reframe how leaders think about their customer base — not by size, but by strategic purpose.

| Tier | Description | Strategic Intent |
|---|---|---|
| **Co-Creators (C)** | Deep, strategic partnerships that shape mutual growth. | Invest in co-innovation, joint planning, and executive alignment. |
| **Opportunities (O)** | High-fit accounts with headroom to grow. | Focus on expansion plays, cross-sell, and relationship deepening. |
| **Reliables (R)** | Stable, profitable accounts that deliver steady value. | Maintain efficiency, quality, and satisfaction at scale. |
| **Edge (E)** | Low-fit or low-value accounts on the edge of the portfolio. | Serve efficiently or plan an exit with integrity. |

The acronym C.O.R.E. reminds leaders where to concentrate their energy:
**Keep the core strong, and growth follows.**

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**Promotion and Demotion Cadence**

Segmentation isn't permanent.
Every six to twelve months, Oak recommends re-tiering the portfolio using three triggers:

1. **Fit or Value movement** (new contracts, industry change, innovation potential).
2. **Trust shift** (improved or eroded relationship health).
3. **Data Confidence** (Radar scores improving or deteriorating).

Accounts can move up or down the tiers based on evidence and conversation, not assumption.
This creates a living system where attention and investment track genuine change.

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**Linkages to the Wider Blueprint**

- **From "U" to "C"** — The Radar and Insight work feed directly into the Fit × Value assessment.
- **Into "C – Customer Spectacles"** — SCALE methods then explore how each tier experiences the business and where friction exists.
- **Back to "S – Strategy & Governance"** — Tier movement and relationship trends feed into the GROWTH Heatmap for leadership review.

Together, this keeps segmentation at the centre of governance, not buried in CRM filters.

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**Key Takeaway**

"Segmentation isn't about who you can serve.
It's about who you can serve best — and who believes in you enough to grow together."
— Oak Consult

## 3.6 C – Customer Spectacles (SCALE)

Customer centricity isn't a slogan — it's a discipline.
Most organisations claim to be customer-focused, yet their systems and incentives say otherwise.
The "Customer Spectacles" stage of SUCCESS brings empathy back into leadership by balancing what the customer values with what the business needs to deliver sustainably.

Oak Consult's **SCALE Blueprint** turns that principle into practice.
It provides leaders with a repeatable cycle to see, test, act, learn, and embed customer perspective into every growth decision.

**The SCALE Blueprint - See, Challenge, Act, Learn, Evangelise.**
It's the rhythm that keeps customer understanding alive inside Account-Based Growth.

**1. See — Map the Reality**

The first step is to see the business as customers experience it — not as internal reports describe it. This means mapping the real customer journey, identifying the *moments that matter*, and tracing how each one feels from the outside in.

Typical practice includes journey mapping workshops, call listening, and "day-in-the-life" walkthroughs of key processes. Oak's clients often discover that friction hides in the smallest things — duplicative forms, inconsistent updates, slow approvals — the things customers never forget.

**Evidence:** research shows that organisations managing end-to-end journeys rather than touchpoints deliver materially higher satisfaction and retention.
**Risk:** mapping without action breeds cynicism.
**Upside:** small fixes can unlock disproportionate loyalty.

**2. Challenge — Test Assumptions**

Seeing is not enough. The next discipline is to challenge what's taken for granted.
Are priorities based on customer outcomes or internal convenience? Are KPIs measuring impact or activity? The Challenge phase shines a light on the habits and metrics that undermine trust.

**Example:** a wholesale business discovered that "on-time delivery" metrics were being gamed — products shipped on time but incomplete. After Challenge workshops, they redefined delivery around "complete and correct first time," transforming both customer experience and efficiency.

**Evidence:** expectation management is one of the strongest predictors of advocacy.
**Upside:** challenging early prevents costly rework later.

**3. Act — Close the Loop Visibly**

Customers don't expect perfection; they expect to be heard. Acting on insight shows that feedback matters — and builds belief that change is real. This is where *Customer Spectacles* connects to the governance rhythm of GROWTH: decisions made, actions owned, outcomes reviewed.

**Example:** a SaaS provider used the Act phase to streamline onboarding after recurring feedback about confusion. Churn dropped 12 per cent within a quarter.

**Risk:** acting on everything creates noise and dilution.
**Upside:** acting selectively and visibly on high-impact issues creates loyalty and confidence.

**4. Learn — Measure and Improve**

Every cycle must generate learning. This means tracking both the metrics customers care about (accuracy, responsiveness, empathy) and the ones the business must protect (margin, cost-to-serve). Oak encourages clients to share results openly — including where improvement is slow. Transparency builds trust faster than slogans.

**Example:** a manufacturing client began measuring "time from customer query to resolution" alongside NPS. Within six months, both improved — because the metric focused attention on what mattered to customers and the business alike.

**Evidence:** advocacy and loyalty are stronger predictors of growth than satisfaction alone.
**Risk:** vanity metrics breed false confidence.
**Upside:** honest metrics accelerate learning.

**5. Evangelise — Make Centricity Contagious**

The final step of SCALE ensures customer understanding doesn't fade into business-as-usual. Celebrate the wins, share stories of improvement, and publicly recognise people who make customers' lives easier.
This cultural reinforcement converts isolated fixes into long-term habit.

**Example:** a local authority used internal storytelling — "one customer, one change, one impact" — to sustain morale and reinforce purpose after major process reform.

**Evidence:** high employee engagement links directly to loyalty and profitability.
**Upside:** evangelising wins keeps people proud and progress visible.

**Anchoring SCALE in Evidence**

Independent research supports the link between empathy, governance, and growth:

- **KPMG's Six Pillars** — Integrity, Resolution, Expectations, Time & Effort, Personalisation, and Empathy — align directly with SCALE's five steps.
- **Bain & Co.** and **Forrester** both show that organisations acting visibly on feedback see stronger retention and higher advocacy.
- **Journey-led improvement** correlates with both cost efficiency and satisfaction gains, particularly in manufacturing and service industries.

In short: empathy is measurable — and when disciplined, it delivers ROI.

**Integration Across the SUCCESS Blueprint**

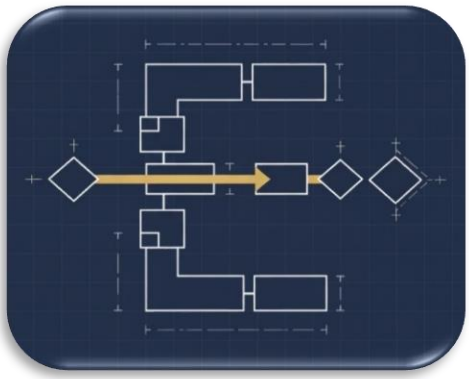
- **Feeds from "C.O.R.E."** — each customer tier applies SCALE at the right depth and frequency: Co-Creators quarterly, Opportunities bi-annually, Reliables annually.
- **Feeds into "E – Executable Plan"** — SCALE insights shape Customer Success Plans, playbooks, and Heatmap priorities.
- **Feeds back to "S – Strategy & Governance"** — key customer themes appear in board-level reviews, keeping leadership grounded in reality.

This ensures the customer voice is never treated as an anecdote — it becomes a governing input.

**Key Takeaway**

"Customer Spectacles sharpen the view, but balance keeps you moving.
See through the customer's eyes — then walk in their shoes."
— Oak Consult

## 3.7 E – Executable Plan



Insight without execution is just theatre.
At this stage of SUCCESS, the goal is to turn strategic understanding and customer empathy into repeatable, accountable delivery.

The **Executable Plan** is where alignment meets action — where leadership intent, team discipline, and customer value flow through the same rhythm.
It's not a Gantt chart or a list of tasks; it's the *operating model* that keeps Account-Based Growth alive day to day.

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**Building the ABG Operating Model**

Every successful growth system has three elements in balance:

- **Structure** – the teams, cadence, and forums that keep the work moving.
- **Clarity** – who owns what, how decisions are made, and what success looks like.
- **Energy** – visible leadership and shared accountability that sustain momentum.

Oak Consult captures this balance through the **ABG Operating Model**, which builds on three proven layers of rhythm and discipline.

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**Governance Rhythm**

Every Executable Plan needs a heartbeat.
Without a clear decision cadence, teams default to firefighting or drift.
The **Governance Rhythm** ensures every insight, action, and risk finds a home.

| ***Cadence*** | **Focus** | **Owner** | **Output** |
|---|---|---|---|
| *Weekly* | Tactical delivery – updates, blockers, quick wins | Account Teams | Status summary and Heatmap update |
| *Monthly* | Steering – progress vs plan, risks, opportunities | Steering Group / Sponsor | Updated Heatmap and agreed escalations |
| *Quarterly* | Executive review – impact, outcomes, adjustments | C-suite Sponsors | Refreshed ABG priorities and resource decisions |

This rhythm converts the abstract idea of "alignment" into a living management process.
It also provides a safe mechanism for escalation — so customer issues surface early and trust isn't eroded by silence.

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**Role Clarity and the RACI Spine**

As ABG matures, silos must dissolve — but accountability cannot. The most successful programmes establish a **RACI Spine** that keeps roles distinct but connected:

- **Responsible** – Account or Customer Success Lead (owns execution)
- **Accountable** – Executive Sponsor or C-suite owner (ensures impact)
- **Consulted** – Subject matter experts (operations, marketing, finance)
- **Informed** – Supporting teams who need awareness, not control

Oak's guidance is simple: name the people, not the roles. Relationships drive results; titles don't. Each key account should have a visible *RACI card* — a shareable view of who's doing what and when.

**Success Plans and Heatmaps**

Execution requires both direction and feedback. The **Success Plan** turns each key account's growth ambition into a visible playbook, linking commercial targets with customer outcomes.

Each plan includes:

- Objectives – growth, satisfaction, retention, advocacy
- Key Plays – concrete actions (cross-sell, renewal, improvement projects)
- Metrics – leading (activity) and lagging (results) indicators
- Governance Links – how progress feeds into the GROWTH Heatmap

The **Heatmap** then visualises progress and risk across all priority accounts — red for issues, amber for risk, green for on-track. Unlike static dashboards, Heatmaps are decision tools: every red cell must lead to a conversation, not a slide.

**People Before Process**

The human factor remains the multiplier. Without motivated, empowered people, even the best plans decay into admin. Oak's approach keeps people at the centre through three reinforcing mechanisms:

- **Visibility** – every team member sees how their work affects customer outcomes.
- **Recognition** – individuals who resolve friction or drive growth are celebrated, not just those who close deals.
- **Learning** – each cycle ends with a short "What did we learn?" reflection, embedding *Sustain & Learn* before the final S.

This maintains trust, pride, and personal connection — the true fuel of sustainable performance.

**From Plan to Practice – Cultural Reinforcement**

Account-Based Growth is as much cultural as operational. The Executable Plan stage is often where change either sticks or slides back into old habits.

- **Monday 15's:** quick alignment huddles on customer priorities.
- **Friday Wins:** one short story of progress shared company-wide.
- **Monthly Truths:** one-slide narrative on what the customer would say today.

These micro-cadences create rhythm, visibility, and ownership. Actions that keep the big picture alive.

**Key Takeaway**

"Execution isn't about more activity. It's about clarity, rhythm, and accountability — turning good intent into great outcomes."
— Oak Consult

## 3.8 S – Scale

Scaling is where many Account-Based Growth initiatives lose their balance.
Too often, organisations take early success as a green light to expand everywhere — spreading the model too thin, before the foundations are ready.

Oak Consult's principle is simple: **scale only what's proven, and scale it with purpose.**
Growth without governance is just chaos in a nicer suit.

Scaling ABG isn't about doing more; it's about repeating success consistently — turning working practices into habits, and habits into systems.

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**From Experiment to System**

The first signal that an organisation is ready to scale isn't enthusiasm — it's repeatability.
If the operating rhythm works across three or four accounts without relying on heroics, it can likely work across thirty or forty.
The pattern Oak sees in successful scaling efforts is consistent:

1. **Stabilise** – prove the model in controlled conditions.
2. **Systemise** – codify the structures, metrics, and behaviours that drive results.
3. **Scale** – extend carefully into new teams, segments, or regions.

This approach avoids the classic pitfall of "spreading the gospel" before the congregation is ready.

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**1. Structural Scaling**

As ABG matures, new layers of governance and support emerge naturally.
Structure must evolve, but lightly.

Oak's guidance: **build scaffolding, not bureaucracy.**

Structural scaling often involves:

- Expanding from pilot teams into a cross-functional ABG *team of teams* model.
- Creating a single Centre of Excellence to maintain consistency in playbooks and metrics.
- Using shared tools — CRM dashboards, customer health trackers, and Heatmaps — that keep all teams aligned.

Crucially, scaling structure must never dilute ownership.
Every new team needs a clear line of sight to its customers, sponsors, and decision rights — otherwise ABG reverts to "project mode" instead of becoming the way the business operates.

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**2. Capability Scaling**

ABG thrives on human capability as much as process maturity.
Scaling requires investment in people, not just technology.

Oak recommends three capability pillars:

- **Enablement:** structured ABG onboarding for new roles — account leads, data stewards, sponsors.
- **Coaching:** regular one-to-one or group sessions focused on applied skills — influencing, value articulation, trust building.
- **Community:** internal sharing forums for teams to learn from one another's customer stories.

This keeps the organisation's intellectual capital alive and adaptive.
The best ABG programmes evolve as living communities, not static blueprints.

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**3. Cultural Scaling**

Culture is the most fragile element of growth.
If people don't believe in the purpose of ABG — alignment, governance, and trust — they'll see scaling as "more work," not "better work."

To scale successfully, leadership must nurture:

- **Clarity of intent:** everyone understands *why* ABG exists and what success means.
- **Consistency of behaviour:** trust-building actions, visible recognition, and shared accountability.
- **Curiosity as default:** teams continually ask, "What's changed for the customer?"

Scaling culture takes patience.
It's not about slogans — it's about making customer focus habitual and rewarding.

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**4. Codify, Then Multiply**

Oak Consult uses a simple rule for sustainable scaling:
**"Codify before you multiply."**

Codification means capturing what worked — not in theory, but in observable practice:

- What meetings drove clarity?
- What metrics predicted success?
- What actions built trust fastest?
- What handoffs failed and why?

Once codified, the playbook becomes the blueprint for expansion.
But scaling still requires discipline — leaders must guard against overextension, ensuring that every new phase starts with clear sponsorship, agreed data standards, and an active feedback loop.

**Key Takeaway**

"Scale isn't about doing more of everything.
It's about doing more of what works — consistently, confidently, and with care."
— Oak Consult

## 3.9 S – Sustain & Learn

Every growth system risks fatigue. After the energy of launch and the intensity of scaling, many programmes lose rhythm — meetings slip, dashboards gather dust, and the organisation moves on to the next big thing.

Sustain & Learn prevents that slide. It turns Account-Based Growth from a time-bound initiative into an enduring business discipline.

Sustain isn't maintenance; it's momentum.
It's the deliberate act of keeping the wheel turning — feeding insights, lessons, and data back into governance and planning.

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**Continuous Feedback Loop**

Sustain & Learn operates through a disciplined cycle:

1. **Review:** assess outcomes, trust signals, and customer health every quarter.
2. **Extract:** identify what worked, what didn't, and what's changed in the customer's world.
3. **Update:** refresh Success Plans, Heatmaps, and Fit × Value tiers accordingly.
4. **Re-align:** feed the learning back into Strategy & Governance through the GROWTH Framework.

This keeps ABG alive, adjusting itself as customers, markets, and technology evolve.

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**Learning as a Leadership Discipline**

The best learning cultures don't rely on post-mortems; they build curiosity into leadership.

Oak encourages three habits:

- **Start with truth, not blame.** Ask "What did the customer experience?" not "Who dropped the ball?"
- **Share insights widely.** One account's challenge is another's prevention.
- **Reward learning as much as success.** Celebrate honest reflection and course correction.

This builds psychological safety and accountability in equal measure — the essential ingredients for long-term ABG health.

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**Governance Integration with Teeth**

Sustain & Learn must have ownership, not aspiration.
Without a defined keeper of the rhythm, the blueprint decays the moment attention shifts elsewhere.

Oak's rule: **if everyone owns Sustain, no one owns it.**

Sustain must sit within formal governance, with explicit accountability at two levels:

| Level | Role | Accountability |
|---|---|---|
| **C-suite Sponsor** | Usually the Sales, Marketing or Customer Director | Owns ABG as a standing board-agenda item. Accountable for maintaining cadence, approving resets, and securing resources. |
| **Owner of SUCCESS** | Drawn from Strategy, Transformation, or Commercial Operations | Ensures reviews happen, insights are recorded, and actions tracked through the GROWTH Heatmap. If cadence stops, this person explains why. |

Together, they're the **Leadership Pair for SUCCESS** — one strategic, one operational — responsible for keeping the rhythm alive and learning visible.

Failure to do so should carry the same weight as missing a major revenue or compliance target.

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**Embedding Sustain into Governance Rhythm**

To keep momentum real, Sustain must live *in the calendar*, not *on the slides*.

- **Monthly / Quarterly GROWTH Reviews** – chaired by the C-suite Sponsor; Owner of SUCCESS presents outcomes, customer-trust metrics, and next-wave actions.
- **Annual ABG Reset Session** – structured reflection where the executive team decides what to scale, stop, or strengthen.
- **Board Reporting Line** – ABG metrics (Heatmap trend, NRR, Trust Index) appear in board packs alongside financials.

These touch-points give Sustain permanence.
They make it impossible for ABG to fade quietly without accountability.

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**Key Takeaway**

"Sustain & Learn is the quiet discipline that keeps growth alive.
It's how organisations turn insight into improvement — and improvement into advantage."
— Oak Consult


## 3.10 SUCCESS in Motion

**How to Start, Prove, and Build Momentum**

Most organisations like the idea of SUCCESS. Few have the readiness to run it end-to-end on day one.

That's not a weakness — it's reality. The maturity of data, systems, and culture varies wildly between companies. Some have solid CRM foundations and clear governance; others are still wrestling spreadsheets and silos. You don't need to boil the ocean to build momentum. SUCCESS can start small, run lean, and still deliver solid impact. The first version of SUCCESS is often built by hand.

**Phase 1 – Prove the Concept (Manual but Meaningful)**

Start with a manageable set of accounts — the *Top 5 or 10 that really matter* — and commit to running the cycle manually.

- Capture data directly from the people who know it best.
- Hold short cadence reviews (weekly or fortnightly).
- Track progress visibly on a shared Heatmap or dashboard.
- Focus the metrics on truth and traction, not perfection.

This is the **"training-wheels" stage** — slow but stable, designed to prove the rhythm works.

**Phase 2 – Build the Core (Lightly Systemised)**

Once the rhythm sticks, codify it. Turn what worked manually into repeatable practice:

- Create templates for Success Plans and account reviews.
- Automate only the friction points (e.g., data pulls, reminders).
- Nominate your first **Owner of SUCCESS** to maintain discipline.
- Begin formalising links to the GROWTH Heatmap and C-suite reviews.

This is the inflection point where ABG starts to feel less like a project and more like a way of operating.

**Phase 3 – Embed and Expand (Fully Integrated)**

Now it's time to scale with confidence. Automation, dashboards, and advanced analytics have a place *only* once the human rhythm is proven. At this stage:

- Roll out the cadence company-wide, keeping governance tight.
- Integrate data and reporting across CRM, finance, and customer success systems.
- Link incentives and recognition to customer outcomes.
- Feed Sustain & Learn directly into Strategy & Governance.

**From Pilot to Permanence**

**We find that the first 90 days** determine whether ABG becomes a habit or a headline. Most teams see tangible gains: clearer customer ownership, improved data quality, and higher confidence in forecast accuracy.  A few more 90 day cycles, they don't remember working any other way.

# 4. The Evidence for SUCCESS

Every blueprint looks convincing on a whiteboard. What separates theory from transformation is **evidence** — hard proof that alignment, governance and trust produce measurable, repeatable results.

This section turns the spotlight from *how* SUCCESS works to *why* it works. It examines the data, the patterns and the outcomes that show Account-Based Growth isn't just a smarter version of marketing — it's a more reliable way to grow. We'll look at:

- **Why evidence matters** in board-level decision-making.
- **How traditional ABM compares** with ABG when measured by real performance metrics.
- **What the evidence looks like in practice** through Oak's PARTY blueprint.
- And finally, **what leaders can learn** from organisations already running SUCCESS at scale.

Because in the end, growth without evidence is faith — and faith won't make your next quarter.

## 4.1 Why Evidence Matters

Boards don't invest in enthusiasm; they invest in proof.

For years, Account-Based Marketing promised precision and ROI, yet most boards still ask the same question: *"Can we actually prove it's working?"* The uncomfortable truth is that many ABM programmes measure activity, not progress. Impressions, opens, and reach may look busy, but they rarely prove that customers are more loyal, profitable, or trusting.

Account-Based Growth demands tougher evidence. It treats data as a decision instrument, not decoration. Success isn't defined by marketing metrics — it's defined by verifiable movement in revenue, retention, and reputation.

Oak Consult's rule is simple:
**If you can't measure it, govern it, and learn from it, it's not growth — it's noise.**

Real evidence shows up in three dimensions:

- **Performance** – the commercial proof: margin, pipeline velocity, net-revenue retention.
- **Perception** – what customers actually feel and say when they deal with you.
- **People** – how your own teams behave when no one's watching; whether alignment has become habit.

When all three improve together, you're not running campaigns — you're changing capability.
That's what separates Account-Based Growth from traditional ABM, and why evidence is the currency that sustains momentum long after the first wave of enthusiasm fades.

## 4.2 Traditional ABM vs ABG: The Numbers

For all the noise around Account-Based Marketing, the numbers tell a quieter story.
Most ABM programmes still stall before they scale. Research from Forrester and Gartner shows that **fewer than one-third of B2B organisations achieve measurable ROI from ABM**. Campaigns often start strong but fade under the weight of siloed ownership, inconsistent data, and shifting priorities.

Account-Based Growth changes the unit of measurement.
Where ABM counts marketing activity, **ABG measures organisational maturity** — alignment, governance, and trust expressed in financial and behavioural outcomes.

| *Dimension* | Traditional ABM (Tactical Focus) | Account-Based Growth (Operational Model) |
|---|---|---|
| ***Purpose*** | Generate leads or engagement from named accounts. | Drive sustainable revenue, retention, and advocacy across a defined account base. |
| ***Ownership*** | Primarily Marketing, supported by Sales. | Joint C-suite mandate (Sales, Marketing, Customer Success, Finance). |
| ***Governance*** | Campaign meetings; inconsistent accountability. | Formal cadence through GROWTH Framework – Review → Decide → Assign. |
| ***Data Foundation*** | Fragmented CRM/MarTech stack; activity metrics dominate. | Unified data integrity via Radar model; shared single-view of the customer. |
| ***Customer Insight*** | Persona-based assumptions; limited voice-of-customer feedback. | Continuous capture through SCALE and Insight Sheets; empathy embedded. |
| ***Measurement*** | Campaign KPIs: opens, clicks, MQLs. | Commercial KPIs: margin, NRR, Trust Score, Relationship Index. |
| ***Duration*** | Short-term campaign bursts. | Continuous operating rhythm with Sustain & Learn loop. |

**Oak Consult Perspective**
Traditional ABM remains useful for tactical engagement — but it can't create the systemic alignment required for real growth. ABG succeeds because it builds shared truth and shared accountability. When governance, data quality, and customer empathy rise together, commercial outcomes follow.

**Evidence Snapshot**
Across Tier-1 and UK mid-market studies:

- Programmes rated *high* in cross-functional governance deliver **1.7× higher revenue growth** (Bain 2025).
- Firms with unified customer data achieve **23 % faster pipeline velocity** (Gartner 2024).
- Organisations tracking trust or relationship health as KPIs show **lower churn and higher referral rates** (LinkedIn B2B Institute 2024).

## 4.3 The Evidence for SUCCESS — The PARTY Effect

Not every business transformation ends with champagne. (Although the great ones do!)
But when the work of alignment, governance, and trust starts to deliver real results, it should *feel* like progress — measurable, visible, and worth celebrating.

At Oak Consult, we call that moment **the PARTY effect**.
It's not about noise; it's about evidence.
Each letter captures a form of proof that shows SUCCESS has taken hold — from hard metrics to human behaviour.

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**P — Proof**

*The evidence that what you're doing works.*

Boards don't want slogans; they want numbers.
Proof means measurable, verifiable improvement — the kind that holds up under audit or investor scrutiny.

- **Customer metrics:** higher satisfaction scores, fewer complaints and escalations.
- **Operational metrics:** shorter cycle times, clearer forecasts, cleaner data.
- **Cultural metrics:** lower turnover, better cross-team engagement scores.

It's where the theory of SUCCESS meets the cold light of the KPI dashboard.

**A — Alignment**

*The visible shift from departments to direction.*

Alignment is the tell-tale sign of maturity — when Marketing, Sales, and Service stop fighting for credit and start sharing wins.

- Fewer hand-offs, more joint accountability.
- Meetings that start with the customer truth, not internal politics.
- Teams who enjoy their work because they're rowing the same way.

Leaders feel this before they measure it: the air in the room changes.

**R — Revenue**

*The commercial proof point that makes everything else sustainable.*

Revenue is the language of credibility.
When ABG takes hold, you see not just more sales — but *better* ones.

- Customers buy more often and expand faster.
- Margins improve because trust replaces discounting.
- Forecasts stabilise as relationships deepen.

It's not about chasing every pound; it's about earning consistent, compounding value.

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**T — Trust**

*The multiplier that underpins it all.*

Trust turns alignment into advocacy.
It's the difference between a customer who renews and one who recommends.

- Net Promoter Scores trend up quarter after quarter.
- Escalations drop as customers share concerns earlier.
- Senior buyers start inviting your teams to shape their thinking — not just respond to tenders.

When trust grows, cost of sale drops, and opportunity grows quietly in the background.

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**Y — Yield**

*The long-term return that makes the PARTY worth having.*

Yield captures the compounding benefit of sustained SUCCESS — retention, advocacy, and reputation.

- More inbound opportunities from existing networks.
- Strategic customers driving referrals and joint wins.
- Employer brand strengthening as teams see purpose and progress.

This is the outcome of doing the right things, consistently, over time.
You don't need fireworks — the metrics light up on their own.

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**Oak Consult insight**

"You can't fake a PARTY. When Proof, Alignment, Revenue, Trust, and Yield all move in the right direction, it's not hype — it's health…and growth"
— Oak Consult

## 6 Conclusion

**Seeing growth differently. Governing it better. Sustaining it longer.**

Account-Based Growth isn't a campaign. It's a discipline — one that demands courage, clarity, and commitment from leadership. The research is clear: most ABM initiatives fail not because the market moves too fast, but because organisations move too slowly to align behind a single version of the truth.

Oak Consult's *SUCCESS Blueprint* gives leaders a way to fix that. It replaces noise with rhythm, complexity with cadence, and activity with accountability. It asks the hard questions — not just "what are we selling?" but "why should this customer stay?" and "how do we prove we've earned their trust?"

When done right, ABG becomes more than a revenue engine. It becomes the cultural operating system of a high-performing organisation — one where data and empathy coexist, governance drives learning, and success compounds with every iteration.

Oak Consult's approach is deliberately human. We know blueprints don't transform businesses — people do. That's why our tools, from the **GROWTH Governance Blueprint** to the **Fit × Value Matrix**, are designed to spark real conversations, not just dashboards. They help leaders see where the strategy is fragile, where relationships are thin, and where data hides uncomfortable truths.

We've seen it in practice. When leadership aligns around clear governance, when teams share a single understanding of their customers, and when everyone knows how their work contributes to trust and growth — the transformation is visible. Sales stop chasing volume and start nurturing value. Marketing stops broadcasting and starts orchestrating. Service stops firefighting and starts forecasting.

This is what makes Account-Based Growth sustainable:
Governance that endures.
Teams that align.
Customers that stay.

For some, ABG will start as a pilot — a cautious test, a few accounts, a few months of discipline. For others, it becomes the backbone of how they operate and grow. Either way, the direction is the same: towards clarity, trust, and measurable impact.

At Oak Consult, we don't promise effortless success. We promise shared responsibility, sharper insight, and blueprints that work in the real world — where governance, empathy, and delivery meet.

So, if you're ready to see your customers' world differently, to rebuild growth on trust, and to make alignment more than a slogan — we're ready too.

**See clearly. Align decisively. Govern growth.**
That's SUCCESS.
That's Oak Consult.

# Appendix – References

| Source | Year | Key finding (short) | Why it matters for ABG/SUCCESS |
|---|---|---|---|
| **Momentum ITSMA & ABM Leadership Alliance, Global ABM Benchmark** | 2023 | Identifies a cohort of **ABM Leaders** delivering significantly higher business impact across reputation, relationships and revenue; heavy emphasis on AI readiness and orchestration. (HubSpot) | Validates that **aligned, mature ABM programs** outperform, reinforcing SUCCESS phases around **Strategy & Governance** and **Executable Plan**. |
| **Demandbase, 2024 ABM Benchmark** | 2024 | Reports that top B2B marketers achieve up to **81% higher ROI** with ABM; sample 300+ marketers. (Demandbase) | Quantifies the **ROI case** for ABG, strengthening the **Customer Segments** and **Scale & Sustain** phases. |
| **Momentum (sponsored by Demandbase), Global ABM Benchmark 2024/25** | 2024/25 | Survey of 300+ B2B marketers on budgets, outcomes; contrasts "leaders" vs "laggards." (MomentumABM) | Confirms current-state ABM maturity patterns your roadmap addresses in **Understanding & Unification** and **Scale & Sustain**. |
| **Forrester, Account-Based Marketing Delivers Higher ROI Across Regions** | 2024 | Majority of ABM decision-makers report **21%–50%+ higher ROI** vs non-ABM; some report **51%–200%** higher. (Forrester) | Independent validation that **account focus** beats generic demand gen; supports **Customer Segments** and **Executable Plan**. |
| **Forrester, Frontline Marketing (Marketing Survey, 2024)** | 2024 | **75%** of B2B marketers say buyers take longer to commit; buying groups are complex → orchestration needed. (Forrester) | Underlines the need for **shared data/decisioning** in **Understanding & Unification**. |
| **Forrester, 56% of opportunities handed to Sales stall** | 2025 | In 2024 survey data, **56%** of opportunities passed to Sales fail to close; need adaptive, cross-team recovery. (Forrester) | Strengthens your point about **handoff friction** and the **Customer Spectacles** phase to close value leaks. |
| **LinkedIn B2B Institute, The 95-5 Rule** | n.d. | **~95% of buyers are out-of-market** at any time; brand building primes long-term demand. (LinkedIn Business Solutions) | Justifies **brand + demand balance** across **Strategy & Governance** and **Scale & Sustain**. |
| **LinkedIn B2B Institute, How B2B Tech Brands Grow** | 2024 | Reiterates the 95:5 dynamic and long-term brand effects in B2B. (LinkedIn Business Solutions) | Supports your emphasis on **consistent, account-level narratives** and **sustained enablement**. |

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|---|---|---|---|
| **Edelman × LinkedIn, B2B Thought Leadership Impact** | 2024 | Thought leadership materially shifts buyer perceptions and pipeline when it's quality, not volume. (Edelman) | Backs your **Executable Plan** guidance to align content with buying-group needs. |
| **McKinsey, The multiplier effect: How B2B winners grow** | 2023 | Some B2B firms grow share **>10% annually** by combining data, orchestration and disciplined operating models. (McKinsey & Company) | Evidence for the operating-model lens in **Strategy & Governance** and the **SUCCESS** cadence. |
| **McKinsey, Unlocking profitable B2B growth through gen AI** | 2025 | Gen-AI boosts revenue productivity across the seller journey when grounded in data governance. (McKinsey & Company) | Aligns with your **AI-readiness and data integrity** stance within **Understanding & Unification**. |
| **Gartner MQ for ABM Platforms (market maturity)** | 2024 | Market leaders (e.g., 6sense, ZoomInfo) cited as **Leaders** in 2024 MQ; signals category maturity and convergence. (Business Wire) | Validates the **platform layer** that underpins your **Executable Plan** and **Scale & Sustain** phases. |

Note: Some Forrester and Gartner materials are behind paywalls; citations above reference publicly accessible summaries or press announcements where the full report is subscription-only.