Account-Based Growth

and the SUCCESS Framework

A practical guide to governing and growing
B2B customer relationships



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Oak Consult
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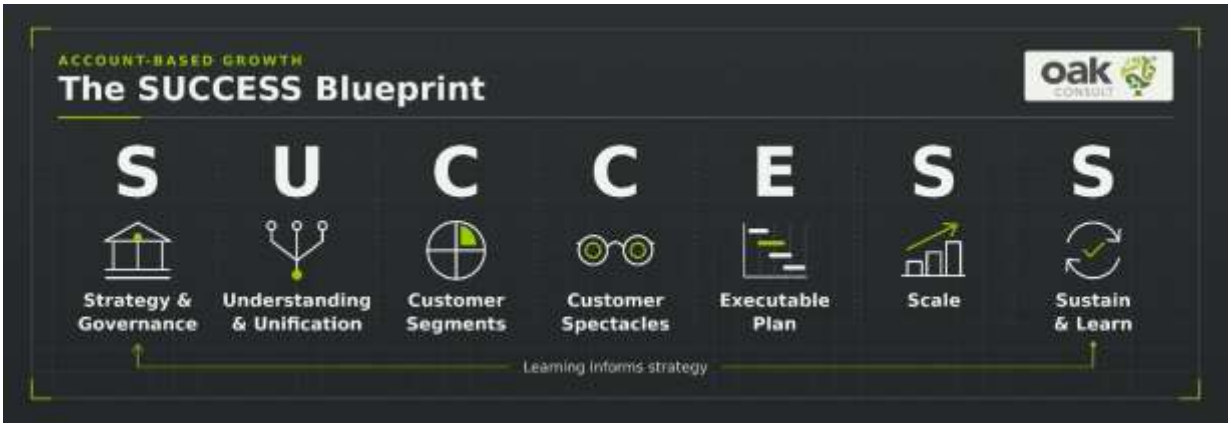
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Foreword

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.

When I took over Business Services at a telecoms company, I inherited a customer account that was already in trouble. Their mobile service had been beset by billing errors and service problems. They had to chase for updates, and too often we failed to do what we'd said we would. We had a strong offer and I had a good relationship with the customer, but by then they had lost confidence in our ability to follow through. They moved their mobiles, voice services and equipment to a competitor.

What stayed with me was the customer's parting observation. They hoped losing their business might change how we valued our customers. I've thought about that often. From our side, a billing error, a service fault and a missed update could each belong to a different team. The customer experienced them all as one supplier. It's why I believe a named account owner needs the authority to bring those teams together, agree what gets fixed first and make sure the customer sees it through.

Since then, 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 use Account-Based Growth (ABG) to connect account-focused marketing with the decisions that shape customer relationships before and after the sale.

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

Account-Based Marketing (ABM) can help suppliers earn attention and build familiarity with the accounts they want to win. That work matters early. In 6sense's 2026 research on completed B2B purchases, the eventual winner was on the initial shortlist in 92 per cent of the UK and Ireland purchases studied. [1]

Earning a place on the shortlist is one part of growing an account. A supplier also has to understand what different people in the buying group need, carry commitments from sales into delivery and act on what customers experience after the sale. When marketing, sales, service and finance work from different account priorities, those decisions can pull in different directions.

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** – Use FOCUS to decide where to invest and how to serve, informed by Fit × Value and the People & Trust Overlay.
- **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.

The SUCCESS Blueprint gives leaders a way to govern those decisions and test whether they are working. The evidence comes from the accounts themselves, including how customers experience delivery, whether teams act on what they learn and what happens to retention, margin and profitable expansion over time.

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

Account-Based Marketing is an established way to focus marketing effort on named accounts. In Forrester's 2024 survey, the most commonly reported result among ABM decision-makers was a return on investment 21 to 50 per cent higher than for their non-ABM marketing. Those figures reflect respondents' comparisons of their own marketing programmes. [2]

The performance gap Oak Consult is concerned with appears when the supplier earns attention but struggles to carry what it learns into account decisions. Marketing may know which issues draw interest, sales may know what the buyer has been promised, and service may know where the relationship is under strain. The account team needs to bring that evidence together and decide what to do with it.

Root causes of failure

Weak governance. Account decisions can stall when a campaign team has no clear route to resolve a delivery constraint, secure budget or change an account priority. ABG makes those decision rights explicit and gives teams a regular forum for using them.

Data fragmentation. Account evidence often sits across CRM, marketing and service systems, as well as in conversations people have never recorded. Agree which evidence the account team needs, who maintains it and how discrepancies will be resolved before the next decision.

What the UK and Ireland buyer research tells us

In 6sense's 2026 study, the average buying group in the UK and Ireland had 10.5 people and the average cycle lasted 9.7 months. Just over half of that cycle had elapsed by first contact. The buyer's organisation had prior experience with the eventual winner in 78 per cent of the completed purchases studied. The survey covered purchases worth at least US$25,000 annually. [1]

For a supplier, that makes the time between buying cycles important. Prospective customers need to find credible evidence before they speak to sales. Existing customers already have evidence of their own. What they remember about an implementation, a service failure or how a supplier responded can inform the next buying decision. Marketing, sales and service each contribute to what the buying group knows about the business.

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

Account-Based Marketing helps suppliers focus their marketing effort on named accounts. Account-Based Growth extends that focus into decisions about which relationships warrant investment, what the supplier can commit to and how it follows through.

Marketing, sales, service and finance bring different evidence to those decisions. A named account owner drives the agreed actions, and leadership resolves trade-offs the team cannot settle on its own.

Campaign measures can show where interest is building. Account reviews also need to show whether customers are getting what was promised and whether the relationship is commercially sustainable. That means looking at service performance, retention, margin and opportunities for mutual growth.

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.**

What we sold vs what we could deliver





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.

Different customer relationships call for different levels of investment and oversight. Use FOCUS to decide where joint growth potential and strategic fit justify deeper account governance, and where dependable service through an established model is the right approach.

The number of accounts receiving closer oversight depends on the opportunities in the portfolio and the business's capacity to follow through.

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. Alignment shows up in the decisions teams make together. When customer needs, delivery capacity and commercial priorities compete, the account team needs to agree what takes priority and who will act. 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.

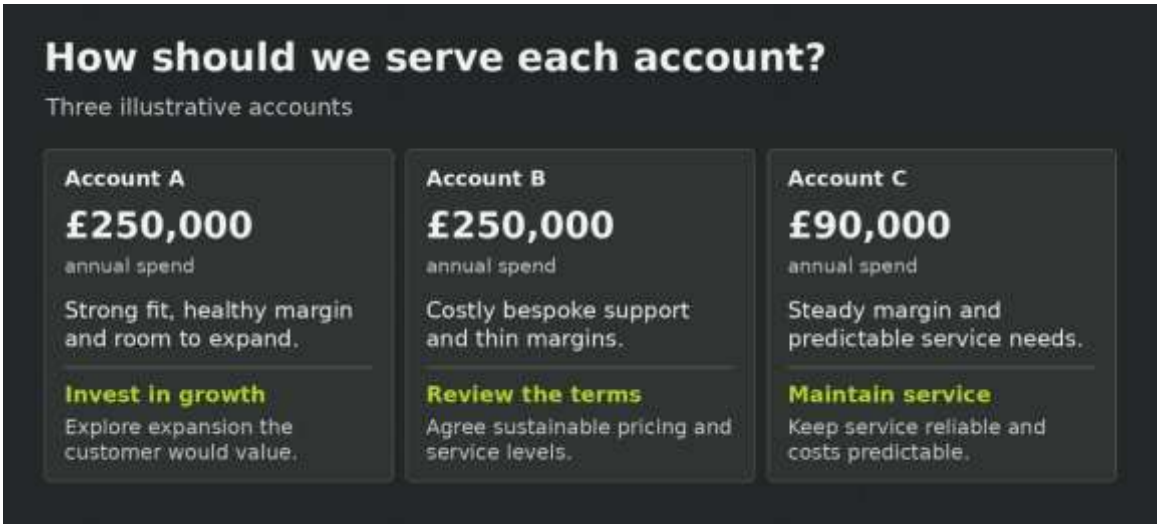
Alignment isn't achieved through software or slogans. It's built through deliberate structures — cross-functional account teams, shared KPIs, and leadership oversight — that turn growth from activity into rhythm.

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.

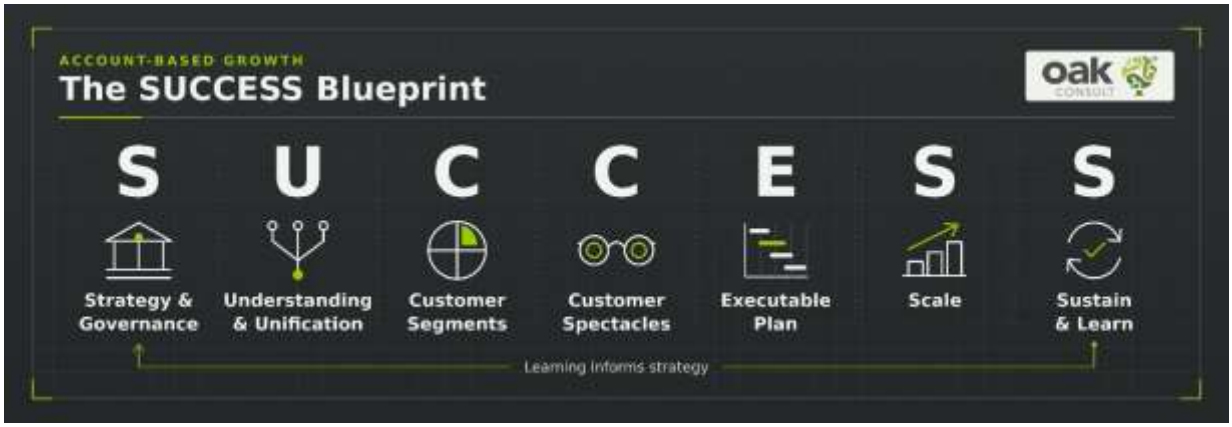


Why this matters for leaders

The shift to Account-Based Growth changes what leaders are accountable for. They need to decide which customer relationships warrant more investment, who owns each account and how teams will act when customer needs, delivery capacity and commercial priorities compete. The SUCCESS Blueprint turns those responsibilities into a practical way of working.



3: The SUCCESS Blueprint – Making ABG Real



3.1 Setting the Context

The SUCCESS Blueprint is Oak Consult's operating model for Account-Based Growth. Its seven disciplines help leaders set direction, decide where to invest in customer relationships, turn those choices into commitments and review the results. The depth of oversight and coordination should reflect what each relationship needs and what the business can deliver.

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. SUCCESS applies different levels of attention across the customer portfolio.

FOCUS helps leaders decide which relationships warrant closer oversight and more cross-functional effort, taking into account strategic fit, mutual value and relationship health. Section 3.5 explains how to make and revisit those decisions.

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 infographic shows the focus and purpose of each phase.



The seven phases work together as a cycle. A service review may reveal that a customer spends too much time chasing updates. The account owner checks what is happening with the customer and the delivery team, agrees who will fix the handover and reviews whether the change has helped. If the same issue appears across several accounts, leaders can use the GROWTH review to decide whether to change how the business handles those handovers. Look for three signs that the cycle is working.

Visibility means teams can see what the customer is experiencing and what has been promised.

Velocity means someone with the authority to act makes a decision while it can still make a difference.

Value means the change helps the customer and makes the account more sustainable for the business.



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

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, with a 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:

- **Executive level.** ABG progress is a standing item on the executive agenda. A named executive sponsor is accountable for progress and brings decisions on priorities, resources and escalations to the leadership team.
- **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.

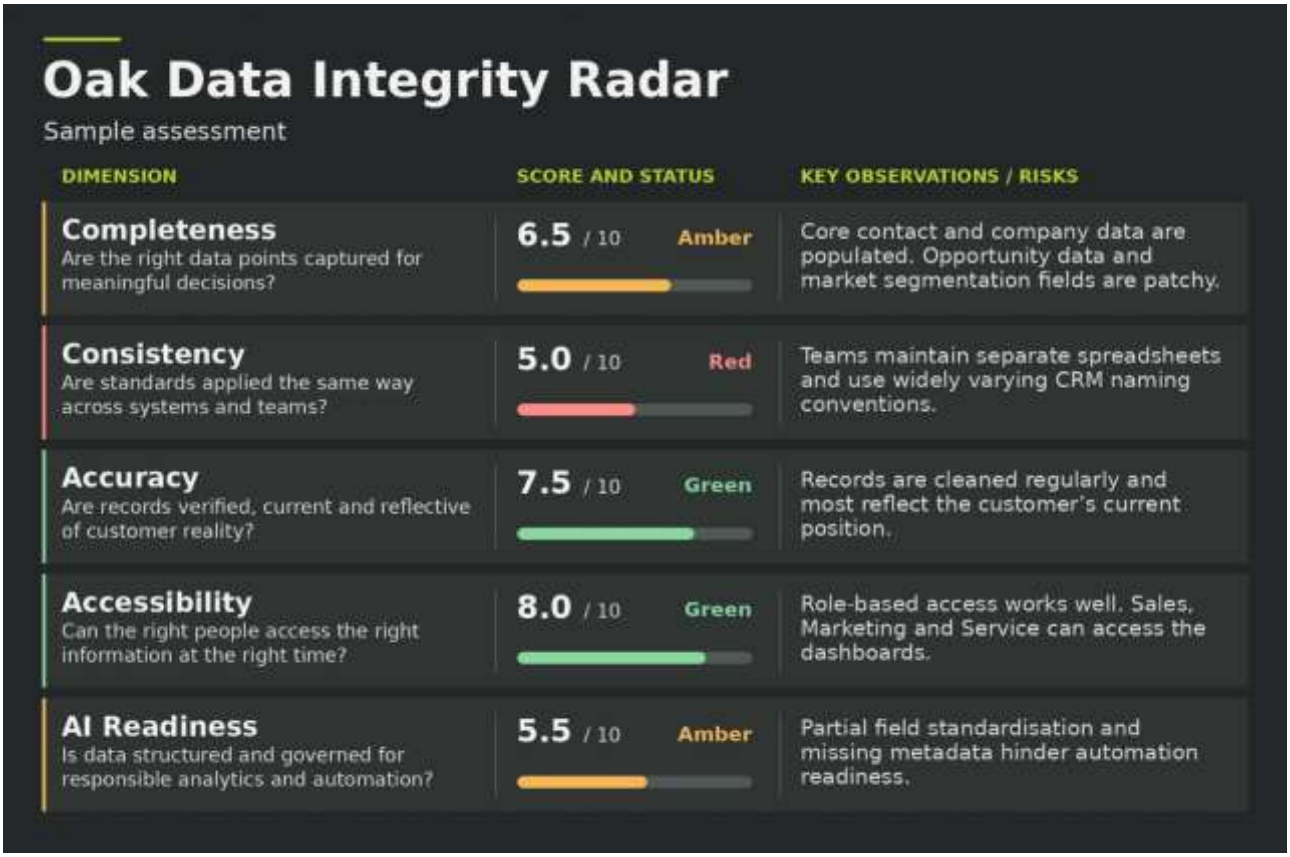
The Oak Data Integrity Radar

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



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

Interpretation

- **Green (7.5–10):** Check that the evidence is suitable for the decision or automation being considered.
- **Amber (> 5– < 7.5):** Identify the gaps and check which decisions depend on them.
- **Red (5 or <):** Verify the underlying data before relying on it for a material decision.

Leadership Note

A Data Confidence Score of 6.5 should prompt the team to ask which evidence is missing or unreliable and which account decisions depend on it. If the team is considering expansion but has weak evidence on cost to serve, assign someone to verify the figures before committing resources. Revisit the score as the evidence improves and record any gaps that still affect the decision.

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** – The Top 100 is an example of a priority-account cohort. Use FOCUS and the team's capacity to decide how many accounts to include.
- **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 (FOCUS)

The purpose of customer segmentation in SUCCESS is to decide where to invest time, attention and resources across the customer portfolio. Which customers should we build something with? Where is there a credible opportunity to grow? Which accounts need dependable service, and where should we simplify or plan an exit?

Understanding & Unification gives the team a shared view of each account. FOCUS turns that evidence into a decision about how to manage it. That decision should shape the account plan, the people involved and the time the business commits.

The Oak Fit × Value Matrix

Start by assessing each account on two dimensions.

- **Fit** is how well the customer's needs align with what the business can deliver well and where it wants to compete. Consider the problem the customer needs to solve, the capabilities required to serve them and the scope for working together.
- **Value** is the economic and strategic benefit both sides get today or could realistically achieve. Consider what the customer gains alongside revenue, margin, cost to serve and the evidence for future growth.

An account can be large and still be a weak fit. A smaller account may have a stronger case for investment if the customer has a clear need, the supplier can meet it well and both sides stand to benefit. The matrix gives the team a way to explain those choices and challenge them when the evidence is thin.

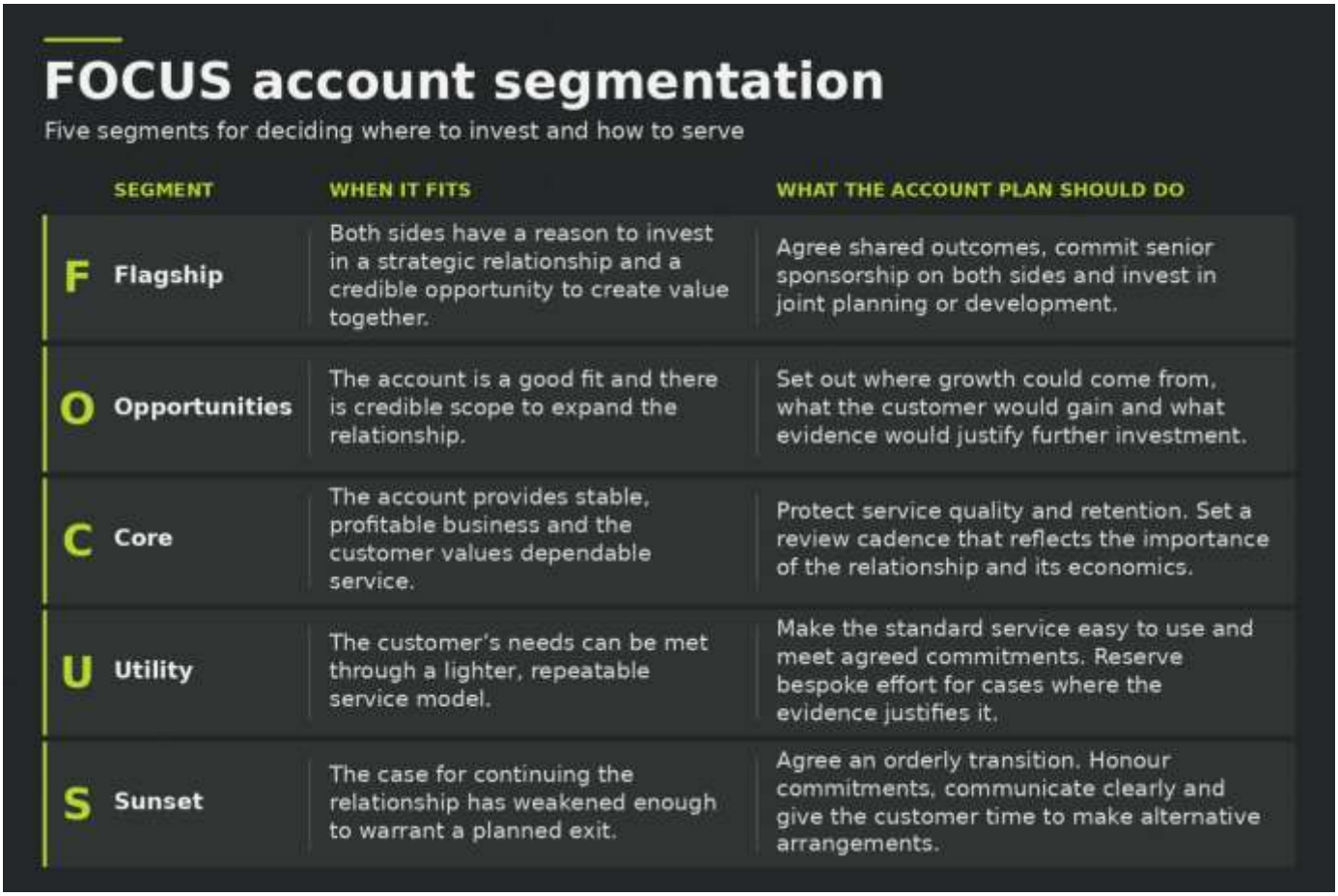
Adding the People & Trust Overlay

The People & Trust Overlay shows whether the relationship can support the approach the team is considering.

- **Trusted.** There is open dialogue, relationships span several roles and both sides can raise difficult issues early.
- **Transactional.** The working relationship is functional, with limited access beyond day-to-day contacts or little evidence of shared ambition.
- **Fragile.** The relationship depends heavily on one person, communication is reactive or recent problems have weakened confidence.

A high-fit account with credible expansion potential may belong in Opportunities even when the relationship is fragile. The immediate priority could be to resolve a service issue and rebuild access before opening an expansion conversation. Use the Radar to check how much confidence the team can place in its evidence, and make gaps explicit in the account review.

The FOCUS customer segments



FOCUS account segmentation

Five segments for deciding where to invest and how to serve

	SEGMENT	WHEN IT FITS	WHAT THE ACCOUNT PLAN SHOULD DO
F	Flagship	Both sides have a reason to invest in a strategic relationship and a credible opportunity to create value together.	Agree shared outcomes, commit senior sponsorship on both sides and invest in joint planning or development.
O	Opportunities	The account is a good fit and there is credible scope to expand the relationship.	Set out where growth could come from, what the customer would gain and what evidence would justify further investment.
C	Core	The account provides stable, profitable business and the customer values dependable service.	Protect service quality and retention. Set a review cadence that reflects the importance of the relationship and its economics.
U	Utility	The customer's needs can be met through a lighter, repeatable service model.	Make the standard service easy to use and meet agreed commitments. Reserve bespoke effort for cases where the evidence justifies it.
S	Sunset	The case for continuing the relationship has weakened enough to warrant a planned exit.	Agree an orderly transition. Honour commitments, communicate clearly and give the customer time to make alternative arrangements.

Marketing and data teams can still use detailed sub-segments by geography, product, sector or channel.

Those views help with analysis and campaigns. For account planning, use FOCUS so sales, service, finance and leadership can work from the same decision about what each account needs.

Reviewing the decision

Treat each segment as a working hypothesis. Record why the account sits there, what the decision means for the account plan and what evidence would change it. Review the portfolio every six to twelve months and revisit individual accounts sooner when fit, value, trust or confidence in the evidence changes.

For example, a Core account may move to Opportunities when the customer confirms that a second site has the same problem the supplier already solves at the first. The account team can then test the customer's appetite, the likely value and the supplier's delivery capacity before committing resources.

How FOCUS feeds the SUCCESS Blueprint

The Radar and Customer Insight Sheets from **Understanding & Unification** inform the Fit × Value assessment.

Customer Spectacles then uses SCALE to test what the customer sees and values, at a depth and frequency that suits the relationship.

Material changes in account priority, relationship health or resource commitments feed back into **Strategy & Governance** through the GROWTH Heatmap.



3.6 C – Customer Spectacles (SCALE)

FOCUS gives the account team a view of where to invest and how to serve each customer. Customer Spectacles tests that view against the customer's experience. An account may look healthy in the review pack while the customer is chasing updates, fixing incomplete orders or relying on one person to get things done. Customer Spectacles keeps two perspectives in view. The **customer lens** asks what the customer is trying to achieve, where they encounter friction and what they would value most. The **business lens** asks what it takes to deliver reliably, what it costs and whether the business can sustain the commitment. The SCALE framework turns those questions into a five-step cycle.

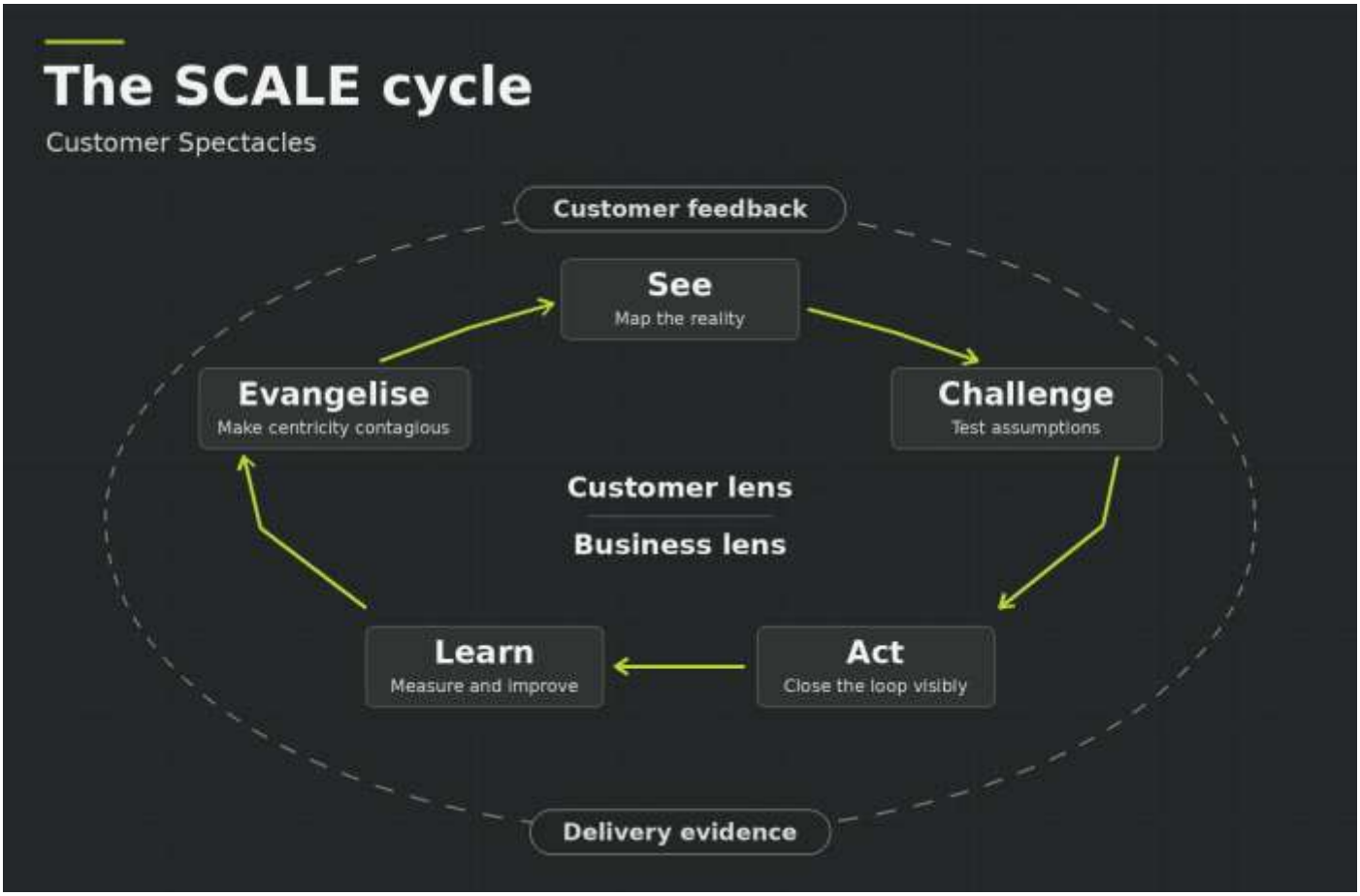
1. See — Map the reality
Follow the journey as the customer experiences it. Walk through a recent order, implementation or service issue with the customer and the people who handled it. Look at the handovers, the points where the customer had to chase and the moments that mattered most to their work. On a key account, speak to the people who use the service as well as the people who buy it. A sponsor may see a supplier that meets its commitments while the customer's operations team spends time working around recurring problems.

2. Challenge — Test assumptions
Compare what customers tell you with what your systems and teams report. Ask what the measures capture and what they leave out. A wholesaler may record an order as dispatched on time while the customer still has to chase missing items. Measuring whether the order arrived complete and correct first time brings the customer's outcome into the review. Challenge the proposed fix too. What would improve the customer's experience? What would it cost to deliver consistently? Where would it affect other commitments? Those questions help the team choose what to act on.

3. Act — Close the loop visibly
Choose a change the team can deliver, give it an owner and agree when the customer will see the difference. For example, recurring queries during SaaS onboarding might point to one unclear handover. Fix the handover, explain what has changed and check with the next customers through it. Some decisions need action across teams. Where a change requires delivery capacity, investment or a trade-off between accounts, bring it into the GROWTH governance review. Record the agreed action in the Customer Success Plan.

4. Learn — Measure and improve
Check whether the change improved the outcome the customer cares about and whether the business can sustain it. If the problem was slow resolution, ask whether customers are getting answers sooner and having to chase less. Check whether the new process has added work elsewhere or can be repeated reliably. Share the result with the customer, including anything that still needs attention. Use what you learn to update the account plan and, where it changes the case for investing in the relationship, revisit the FOCUS decision.

5. Evangelise — Make centricity contagious
Share what changed, what customers noticed and what others can repeat. Recognise the people who made the improvement happen, including those who raised the issue or helped fix a handover across teams. A short example from a real account can give another team a practical starting point.



Applying SCALE across the FOCUS segments

Use FOCUS to set the depth of the review. Use the health of the relationship and what is happening in the account to decide when it needs attention.

FOCUS segment	How to apply SCALE
Flagship	Review the experience jointly, involve sponsors and operational teams on both sides, and track progress against shared outcomes.
Opportunities	Test whether the customer sees the same opportunity for growth. Address service or relationship issues that could undermine it.
Core	Use routine reviews and service evidence to spot recurring friction and protect the reliability the customer values.
Utility	Use feedback and service patterns across accounts to improve the standard experience. Follow up directly when an individual issue warrants it.
Sunset	Agree what a successful transition looks like from the customer's side. Check that commitments are met and resolve problems that could disrupt the handover.

A service failure, a change of sponsor or an approaching renewal can bring a review forward. Capture account-specific actions in the **Executable Plan** and raise recurring issues or resource decisions through the **GROWTH Heatmap**. That gives leaders a way to act when the same problem shows up across several accounts.



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.
The plan sets out who owns each commitment, when it is due and how the team will review progress.

Building the ABG Operating Model

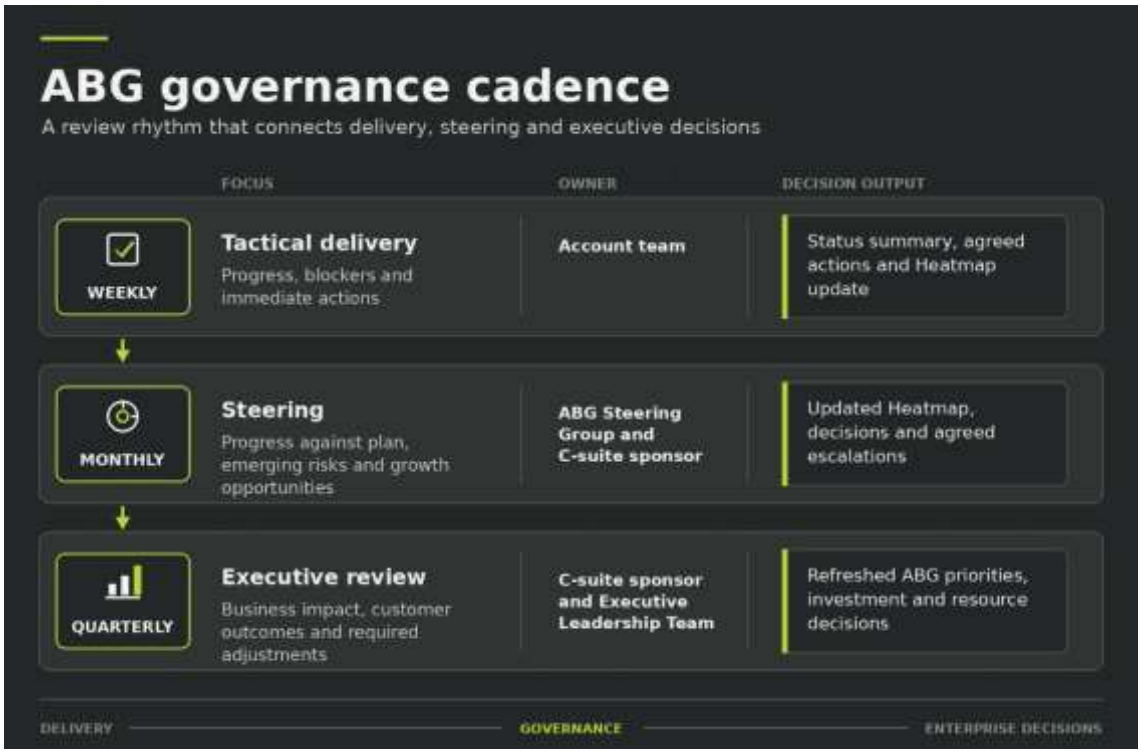
Every successful growth system has three elements in balance:

- **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.

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.



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.

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.

From Experiment to System

The first signal that an organisation is ready to scale isn't enthusiasm — it's repeatability.
If the approach works across a small group of accounts without exceptional effort, test it with the next group.
Check whether the team can maintain service quality, ownership and review discipline as the workload increases.
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.

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.

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.

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.

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.

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 Customer Success Plans and the GROWTH Heatmap. Revisit the account's FOCUS segment when the evidence changes the case for how you invest in or serve that customer.
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.

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.

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	Keeps ABG on the board's standing agenda, maintains the review cadence, approves resets and secures resources.
OWNER OF SUCCESS	Typically drawn from Strategy, Transformation or Commercial Operations	Ensures reviews take place, records what teams learn and tracks agreed actions through the GROWTH Heatmap. If the review cadence lapses, 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.

Embedding Sustain into Governance Rhythm

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

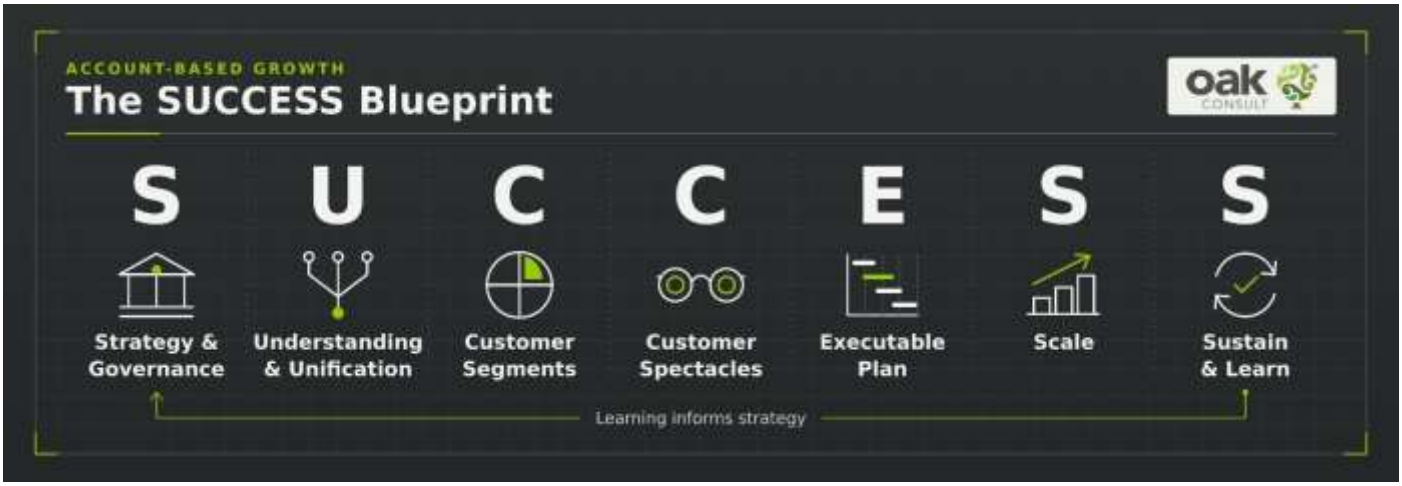
- **Monthly / Quarterly GROWTH Reviews** – chaired by the C-suite Sponsor; Owner of SUCCESS presents outcomes, customer-trust metrics, and next-wave actions.
- **Annual ABG Reset Session** – structured reflection where the executive team decides what to scale, stop, or strengthen.
- **Board Reporting 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.

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 small set of accounts, the top *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

Use the first 90 days to review what the pilot has changed. Check whether ownership is clearer, whether the team has better evidence for account decisions and whether agreed actions are getting done. Use that review to decide what to strengthen and whether the team has capacity to extend the approach.



4. The Evidence for SUCCESS

This section looks at the evidence leaders need to judge whether Account-Based Growth is working. It starts with what to measure, then considers what buyer research tells us about the demands on suppliers. It closes with how to assess progress in your own accounts and recognise improvements worth repeating.

4.1 Why Evidence Matters

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 What the research tells us about ABM and ABG

Account-Based Marketing helps suppliers focus their marketing effort on particular accounts. Account-Based Growth extends that focus into decisions about which customer relationships warrant investment, how teams act together and what happens after the sale. The research below explains why that wider scope matters.

Several people shape the decision. Edelman and LinkedIn's research identifies stakeholders in functions such as finance, operations, legal and procurement who may have little direct contact with sales. Give the people who champion your offer evidence they can share with colleagues. What will implementation take? How will risk be managed? What has the supplier delivered in comparable circumstances? [3]

Buyers form preferences before first contact. The pre-contact favourite ultimately won in 77 per cent of the UK and Ireland purchases studied by 6sense. Its separate Continental Europe research found that 71 per cent reported using large language models during evaluations, while internal discussions and existing knowledge were the most frequently cited influences on impressions of shortlisted suppliers. Give buyers clear, verifiable information they can find and discuss with their colleagues. [1, 4]

Buyers encounter the same supplier through different channels. McKinsey's 2026 Global B2B Pulse surveyed nearly 4,000 decision-makers across 13 countries. Buyers reported using an average of ten channels during the purchasing journey. The survey identified inconsistent information and difficulty getting knowledgeable support among the leading reasons buyers switch suppliers. For an account team, a practical test is whether the customer gets a consistent answer when they move from the website to sales, and from sales to delivery or support. [5]

These studies explain buying behaviour and the demands it places on suppliers. **Section 4.3 sets out how to judge the results of ABG in your own accounts**, using evidence from commercial performance, customer experience and how teams work together.

4.3 How to tell whether SUCCESS is working

The test of Account-Based Growth is whether the way you manage accounts leads to better outcomes for customers and a healthier business. Some changes show up early. A customer raises a concern sooner, or sales and service agree who will resolve a recurring problem. The commercial results may take longer to show up in renewals, profitable expansion or a lower cost to serve.

Look for evidence in three places

Commercial performance. Are the accounts you chose to invest in renewing and growing on terms the business can sustain? Look at retention, expansion, margin and cost to serve together. An account that grows through discounts and repeated commitments to bespoke work may contribute less than its revenue suggests.

Customer experience and trust. Can the customer point to something that has improved? Look for fewer repeat problems, less chasing and clearer ownership when something goes wrong. Pay attention to how the relationship changes too. A customer who shares concerns earlier or invites you into a planning discussion is giving you evidence you can explore in the next review.

How teams work together. Are sales, service, delivery and finance making better decisions about the account? Look for a named owner who drives action across teams, clear priorities when commitments compete and evidence that agreed actions were followed through. A shared account view earns its place when it helps someone decide what changes, who acts and what takes priority.

Judge progress against the account plan

Start with the outcome agreed in the account plan and the position before action was taken. The evidence should reflect the account's FOCUS segment. A Flagship account might be judged against a shared outcome. For a Core account, dependable service and a sound margin may be the result you want. For a Sunset account, success may be an orderly handover with commitments met.

Take a Core account where orders are dispatched on time but frequently arrive incomplete. The team uses Customer Spectacles to check what is happening, assigns an owner to fix the handover and tracks complete and correct deliveries alongside repeat customer calls and rework. The next review can ask whether the customer has noticed the difference and whether the fix is holding up in day-to-day delivery. If the account later renews, the team can ask what drove that decision and what part the service improvement played. Bring the evidence into the GROWTH review. Use it to decide whether to continue the approach, adjust it or make it standard practice across other accounts. Check results over a period that suits the outcome you are measuring. A process fix may show up within weeks, while its effect on a renewal may only become clear at the next contract decision.

Celebrate progress worth repeating

When a team makes a measurable difference, give people credit and tell the story plainly. What was getting in the customer's way? Who helped resolve it? What improved, and what could another team repeat? A customer's confirmation that a long-running problem is finally fixed is worth sharing. It recognises the people who did the work and gives other teams a specific practice to learn from.



5. 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. Account-Based Growth gives leaders a way to agree where to invest, coordinate what teams do for each account and review whether those decisions are working for customers and the business.

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.

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