



HOW TO HAVE A SUCCESSFUL TERMINUS ONBOARDING

Building Your ABM Team

By defining a core team of Terminus users and champions before onboarding begins, you're likely to experience a more streamlined onboarding process and reduce project management time.

Here's a list of critical personas for a successful onboarding, as well as important partners for your ABM program success.

NOTE:

Some of these personas may fall under a single user, like Web Admin and Terminus Admin.



*critical members of your onboarding team

MARKETING



Terminus Admin*

These users are primarily responsible for the care and maintenance of Terminus. They will help us fill out information to create your custom intelligence models, make decisions on which features to promote to partners, and build the segments you'll use to understand how your ABM program is evolving.

Web Admin*

A website admin is usually responsible for adding the Terminus tracking pixel to your website. This powers much of the data intelligence required to take advantage of an ABM approach. This role may sit in Operations or Marketing, and could be the same as your primary Terminus Admin.

Additional Terminus Stakeholders

Depending on your package and team structure, you may also have several stakeholders (such as digital, field, or channel marketers) that should be involved in the planning and execution of your ABM programs. These are good attendees for all ABM strategy workshops.

Executive Sponsor

While not needed for the onboarding process, your marketing leader is critical to the success of your ABM program. They will help define your KPIs, work with sales leadership on account selection, and push for buy-in across your go-to-market organization.

Additional Content for Marketing:

[A Blueprint to Account-Based Marketing](#)

[Everything You Know About Leads is Wrong](#)

[6 Ways Your Marketing Team Can Help Sales](#)

OPERATIONS



CRM Admin*

Your CRM admin needs to have knowledge about the data structure of your CRM. They were likely brought in during the sales process as part of your technical review to discuss system setup.

Additional System Leads

Include these system admins in the event that you've purchased Email Experiences, Web Experiences, or have goals to integrate with additional systems in your MarTech stack.

87%

of customers who don't obtain CRM integrations approvals in advance of Terminus onboarding experience a delay in set up. [Learn more about our integrations.](#)

SALES AND CS



Sales Manager

Sales leaders that directly oversee your sales and account development team are a critical piece to building trust, buy-in, and feedback for your ABM programs. They should be involved early and often in your strategic process, and should be mandatory attendees for your final enablement session at the end of onboarding.

Sales Champions

In an effort to prove immediate value to sales, it's a good idea to select a small number of sales reps and/or account development reps to test your programs. They can get early access to dashboards, data, and can serve as a testing bed for more sophisticated programs down the line.

Customer Success Champions

Account-based marketing is all about creating a full-funnel experience for your customers, and that includes retention and expansion. Customer success champions are critical stakeholders on programs that impact customers, and should be consulted on dashboards and data early in the onboarding process.

Additional Content for Sales and Customer Success:

[A Sales Guide to Terminus](#)

[The Modern Guide to Outbound Sales and Marketing](#)

[Account-Based Deal Coaching Guide](#)

**We look forward to
working with you!**

