RS-T02 / WORKBOOK

ICP & Account Prioritization Workbook

Decide who to sell to first, and why.

BUILT FOR

Founders & Revenue Leaders, Sellers

STAGE

Build

YOU LEAVE WITH

A tiered target list of your first 50 accounts

INSIDE

01 Understand

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01 UNDERSTAND

Selling to everyone is the most expensive way to sell.

Small teams have a fixed number of hours. Every hour spent on an account that will never buy is an hour not spent on one that will. This workbook turns a vague market into a short, ranked list you can act on this week.

THE PROBLEM

Outreach is spread thin, the message stays generic, and pipeline fills with deals that stall or never close.

WHO IT'S FOR

Founders and early sellers choosing where to focus, and leaders entering a new segment.

WHEN TO USE IT

Before starting outbound, when win rates drop, or when the team cannot agree on who the customer is.

What a useful ICP does

A USEFUL ICP IS	A WEAK ICP IS
Narrow enough that a new seller could build a list from it in an hour.	"Mid-market B2B companies." Accurate, and useless for picking accounts.
Based on why customers buy, not only on what they look like.	A list of firmographics with no problem attached.
Clear about who you will **not** sell to.	Silent on disqualifiers, so everything looks like a fit.
Revisited every quarter as you learn.	Written once for a pitch deck and never touched again.

How to use this workbook

1. **Define the ideal customer** from your best existing customers or strongest conversations.
2. **Choose the signals** that show fit and timing, and where you can find them.
3. **Score and tier** a working list of accounts with a simple, consistent model.
4. **Build your first-50 list** and agree on how each tier will be worked.

TIME NEEDED

Plan two working sessions of about 90 minutes each: one for Parts 1 and 2, one for Parts 3 and 4. A spreadsheet helps for the scoring once you pass 20 accounts.

Define the ideal customer.

Start from evidence: your best customers, or the conversations that went furthest.

Your best five

Bought quickly, use it well, would buy again. Not just the biggest names.

ACCOUNT	WHY THEY BOUGHT (THEIR WORDS)	WHAT CHANGED BEFORE THEY BOUGHT	SHARED TRAIT

The profile

DIMENSION	YOUR ANSWER
Company Industry, size band, model, geography	
Situation What is true about them right now	
Problem The pain you solve, in their words	
Who feels it User, champion, economic buyer	
Disqualifiers Why you would walk away	

Write it in one sentence

TEMPLATE

We help _type of company_ that _situation_ and struggle with _problem_, so they can _outcome_.

EXAMPLE

"We help B2B software companies with 20 to 80 sellers that have just added a second sales team and struggle with inconsistent forecasting, so they can call the quarter with confidence."

Signals that matter.

Fit tells you who could buy. Timing tells you who is likely to buy now. You need both, and you need to know where to find them.

SIGNAL TYPE	WHAT IT TELLS YOU	EXAMPLES
Fit Stable traits	The account matches the profile.	Industry, headcount band, business model, tools already in use, team structure.
Timing Recent change	Something just made the problem more urgent.	New leader in the buying function, funding or acquisition, hiring for related roles, a tool being replaced.
Access Your way in	You can reach the right person with context.	Existing relationship, warm introduction, past conversation, community overlap, current user of a partner.

RULE OF THUMB

Timing signals usually beat fit signals for deciding what to work this week. A good-fit account with no recent change can wait; a decent-fit account with a strong trigger often cannot.

Your signals

Pick three fit signals and three timing signals. If you cannot name a reliable source, it is not a usable signal yet.

TYPE	SIGNAL	WHERE TO FIND IT	WHY IT MATTERS TO THE BUYER
Fit			
Fit			
Fit			
Timing			
Timing			
Timing			

EXAMPLE

A B2B SaaS team selling onboarding software. **Fit:** 200 to 2,000 employees; hires 20+ people a quarter. **Timing:** new Head of People in the last six months; ten or more open roles. **Sources:** careers pages, job boards, press releases.

Score and tier accounts.

Use a simple model you can apply in two minutes per account. Consistency matters more than precision.

CRITERION	0	1	2
Fit (score each of your three fit signals)	Not present	Partly	Clearly present
Timing (score each of your three timing signals)	None seen	Older than 6 months	In the last 6 months
Access	No path in	Cold, but a named contact	Warm path or existing relationship
Problem evidence	None	Likely, based on profile	Stated publicly or to us

Maximum score: 6 fit + 6 timing + 2 access + 2 problem = **16**.

TIER	SCORE	HOW YOU WORK IT
A	12 to 16	Account-level research, a tailored first touch, and multiple contacts. Weekly attention.
B	8 to 11	Persona-level messaging with light personalization. Sequenced outreach.
C	0 to 7	No active outreach for now. Re-score when a timing signal appears.

Scoring grid

ACCOUNT	FIT /6	TIMING /6	ACCESS /2	PROBLEM /2	TOTAL	TIER

Your first-50 list.

Fifty accounts is enough to see patterns and small enough to research properly. Treat it as a learning set, not a permanent territory.

SUGGESTED MIX	COUNT	PURPOSE
Tier A	15	Your best bets. Deep research, tailored outreach.
Tier B	25	Volume to learn which messages and personas respond.
Test segment	10	An adjacent segment you suspect could fit. Keeps you learning.

#	ACCOUNT	TIER	WHY NOW (TRIGGER)	WHO TO REACH	FIRST TOUCH	STATUS
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

Continue the list in a spreadsheet using the same columns. Review it every two weeks: move accounts between tiers as signals change.

03 LEARN

A worked example, and what to avoid.

> **EXAMPLE**
>
> A two-founder B2B SaaS company selling scheduling software to field-service businesses. Their best customers had 50 to 300 technicians and had recently grown by acquisition.
>
> **ICP sentence:** "We help field-service companies with 50 to 300 technicians that have just acquired another business and are running two scheduling systems, so they can dispatch from one view."
>
> **Result:** a first-50 list built on one timing signal (a recent acquisition) and one fit signal (technician count), with one message about consolidating systems.

Common mistakes

- **Defining the ICP by who might like you** rather than who has bought, or is likely to buy now.
- **Skipping disqualifiers.** Without them, every account looks worth a try.
- **Over-engineering the score.** A 40-factor model nobody updates is worse than a 4-factor one everyone uses.
- **Treating the list as fixed.** Re-score as signals change.

04 EVALUATE

Check your work.

- [ ] Your ICP fits in one sentence and names a problem.
- [ ] You have at least three written disqualifiers.
- [ ] Each signal has a source you can check.
- [ ] Two people would score the same account within two points.
- [ ] Each tier has a defined way of being worked.
- [ ] A review date for the list is in the calendar.

05 GO FURTHER

GTM SPRINT

Want to work through this on a live deal?

In a GTM Sprint we build the ICP, signals, and first target list with you, then turn it into messaging and an outreach plan your team can run.

Book a strategy call: cal.com/revseries/strategy-call

Prefer email? advisor@revseriesadvisory.com