PERSONAL GTM PLAYBOOK

The Account Manager Expansion Engine

How GTM Engineers help Account Managers reach more relevant people inside existing accounts.

- Account list segmentation
- ICP contacts identification
- Account based Ads Creation
- Messaging tiering
- Signals and Alerts
- Automated Outreach
- Campaign Reporting

THE PROBLEM

Account expansion does not fail because AMs are lazy.

It usually fails because the motion depends too much on memory, manual effort, and disconnected tools.

- The Account Manager knows the portfolio.
- Marketing knows which personas to reach.
- Sales tools can automate the touchpoints.
- Reporting can show what is working.

The pieces exist. The system often does not.

THE ROLE

A GTM Engineer does not replace the Account Manager.

They build the system around them.

Account list segmentation › Account cluster research › ICP mapping › Contact Segmentation › Contact Data Cleanup

Tiered Messaging › Account based Ads › Intent signal Alerts › Sales Outreach Automation › Campaign Reporting

The goal is simple: Increase the number of contacts that know their dedicated account manager withing his account portfolio.

STEP 1

Start with the accounts worth activating.

Whether the focus is a specific industry, account cluster, or language market, the first step is to clarify where expansion potential exists and which accounts deserve priority.

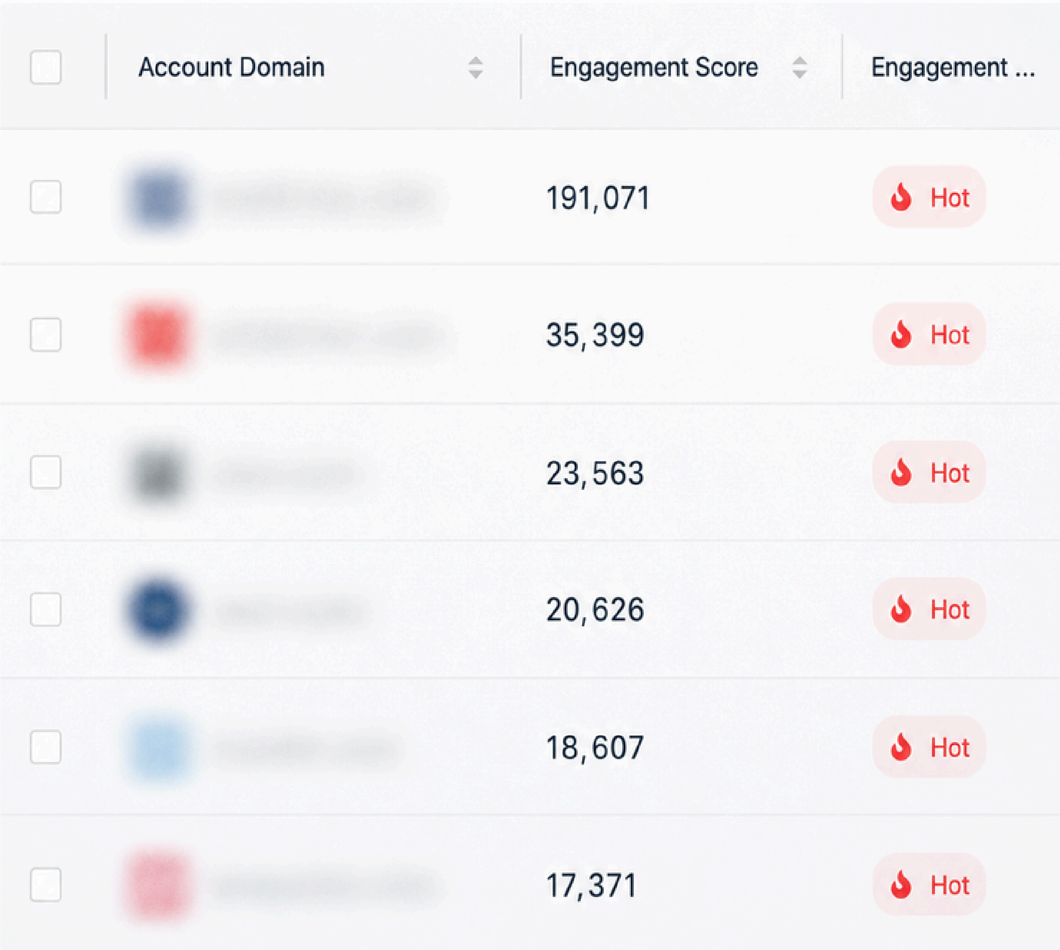
The goal is not to contact every account. The goal is to identify where activation has the highest chance of creating revenue.

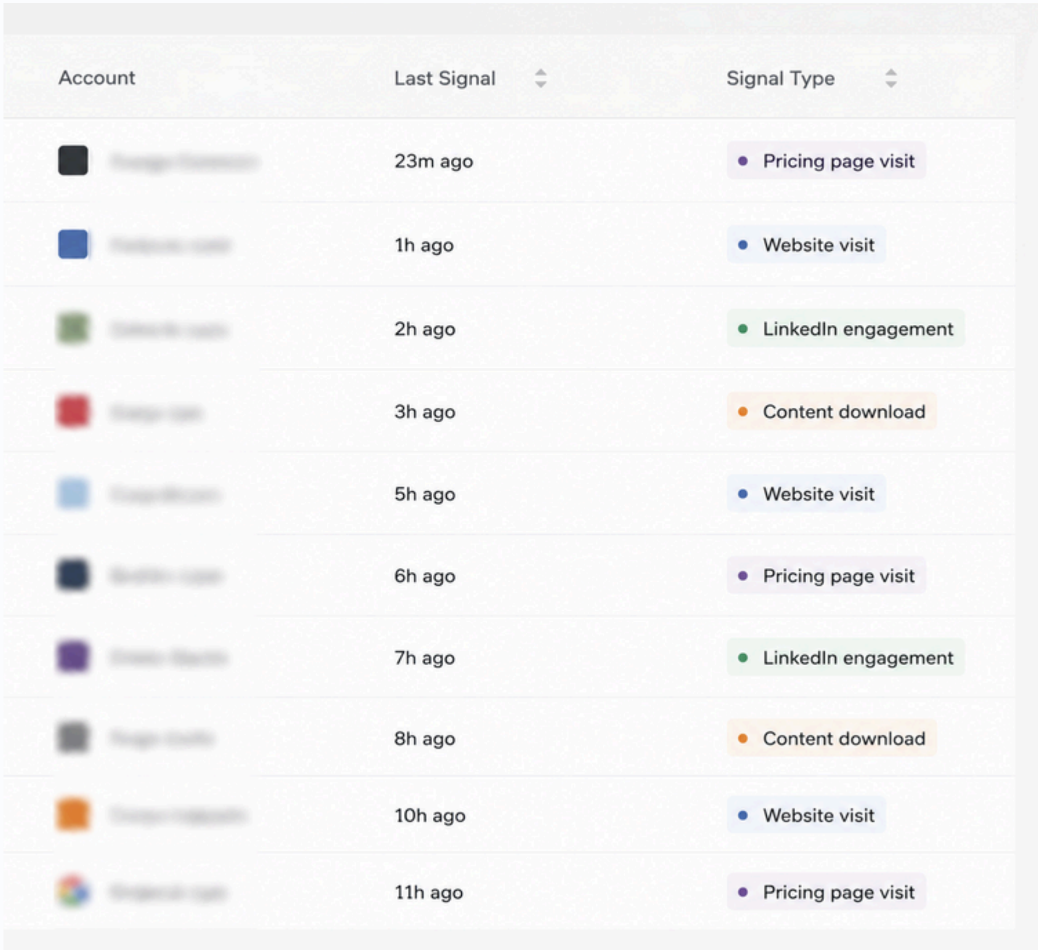
Account	Expansion reason	Priority
Account A	Existing relationship	High
Account B	New buying center	Medium
Account C	Past activity	Medium
Account D	Strategic fit	High

STEP 2

Group accounts by what they have in common.

Clustering accounts helps turn a broad account list into focused plays, so messaging, targeting, and activation can be more relevant from the start.





STEP 3

Map the people who can influence expansion.

Once account clusters are defined, the next step is to map the right people inside them.
Using data enrichment, GTM teams can identify relevant contacts, uncover missing personas, and help Account Managers expand conversations beyond their existing relationships.

Persona	Role in the account	Why they matter
Technical user	Uses or evaluates the solution	Understands project needs
Project owner	Manages the initiative	Drives internal priority
Buyer / procurement	Controls supplier and cost topics	Influences purchasing process
Decision-maker	Owns budget or approval	Validates expansion opportunity

STEP 4

Segment contacts by priority within the CRM and campaign.

Once the right contacts are identified, the next step is to segment them inside the CRM based on their level of relevance and readiness.

Active Focus

Contacts linked to current opportunities and active account expansion efforts

Future Pipeline

Leads within these accounts in our CRM who may support future opportunities

Low Awareness

newly enriched contacts from 3rd party platforms who are relevant, but not yet engaged

STEP 5

Enrich contacts before activating them.

Once contacts are segmented, the next step is to enrich each tier with updated data. The objective is to avoid activating outdated data and give Account Managers a clearer view of who is still relevant, who changed role, and who should be contacted next.

Active Focus

Current role, email, LinkedIn, seniority

Future Pipeline

Role changes, buying committee fit

Low Awareness

New contacts, job titles, contact details

STEP 6

Build tiered messages for each contact segment.

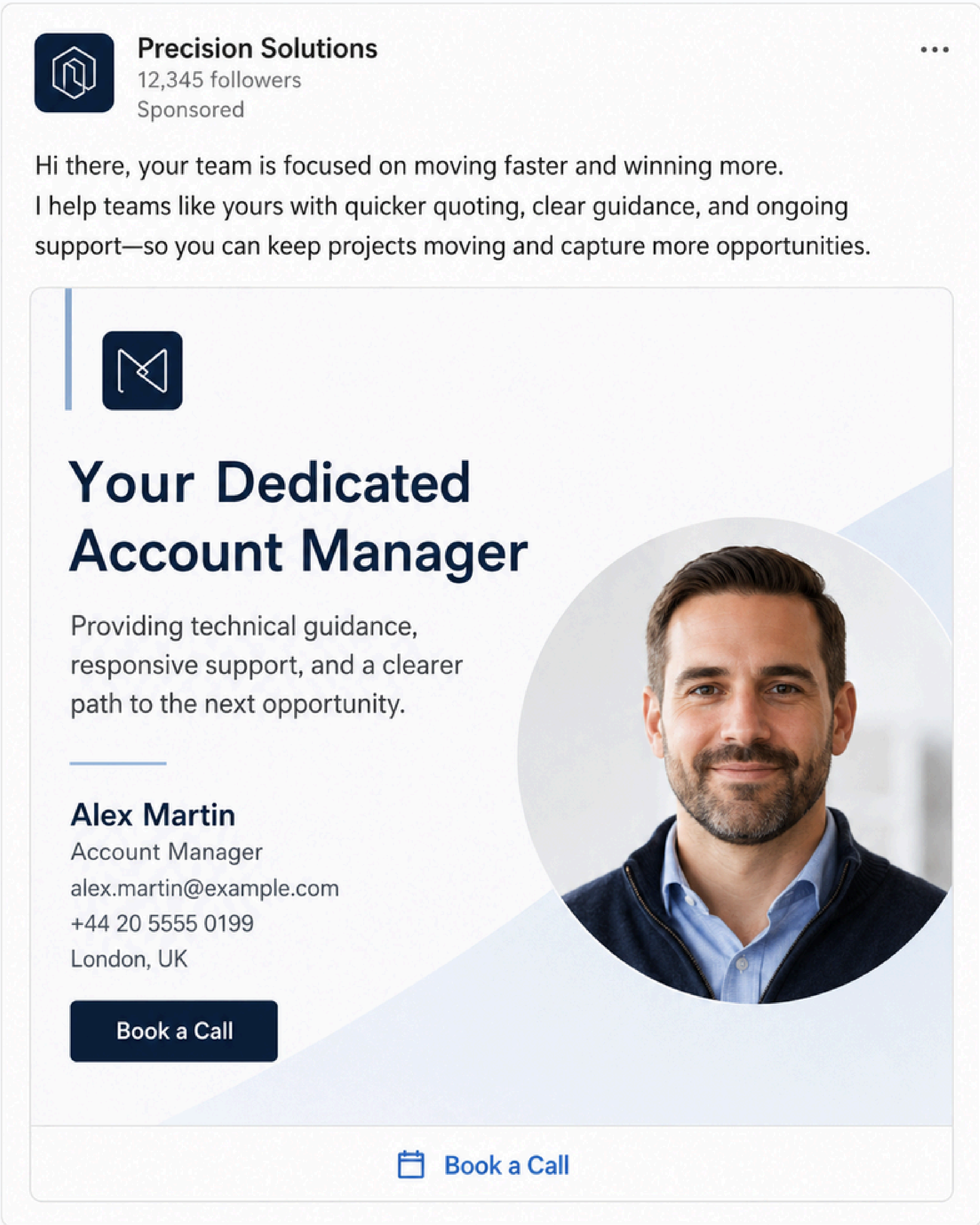
Once the contact data is enriched, the next step is to adapt the messaging to each tier. Not every contact should receive the same message, content, or proof point. The objective is to support outreach with relevant case studies, content, use cases, and messaging that match the contact's context.

Segment	Message angle	Supporting content
Active Focus	Direct and account-specific	Case studies, account context, use cases
Future Pipeline	Educational and value-led	Guides, webinars, industry content
Low Awareness	Light introduction	Simple proof points, introductory content, awareness assets

STEP 7

Warm the account with ads before outreach.

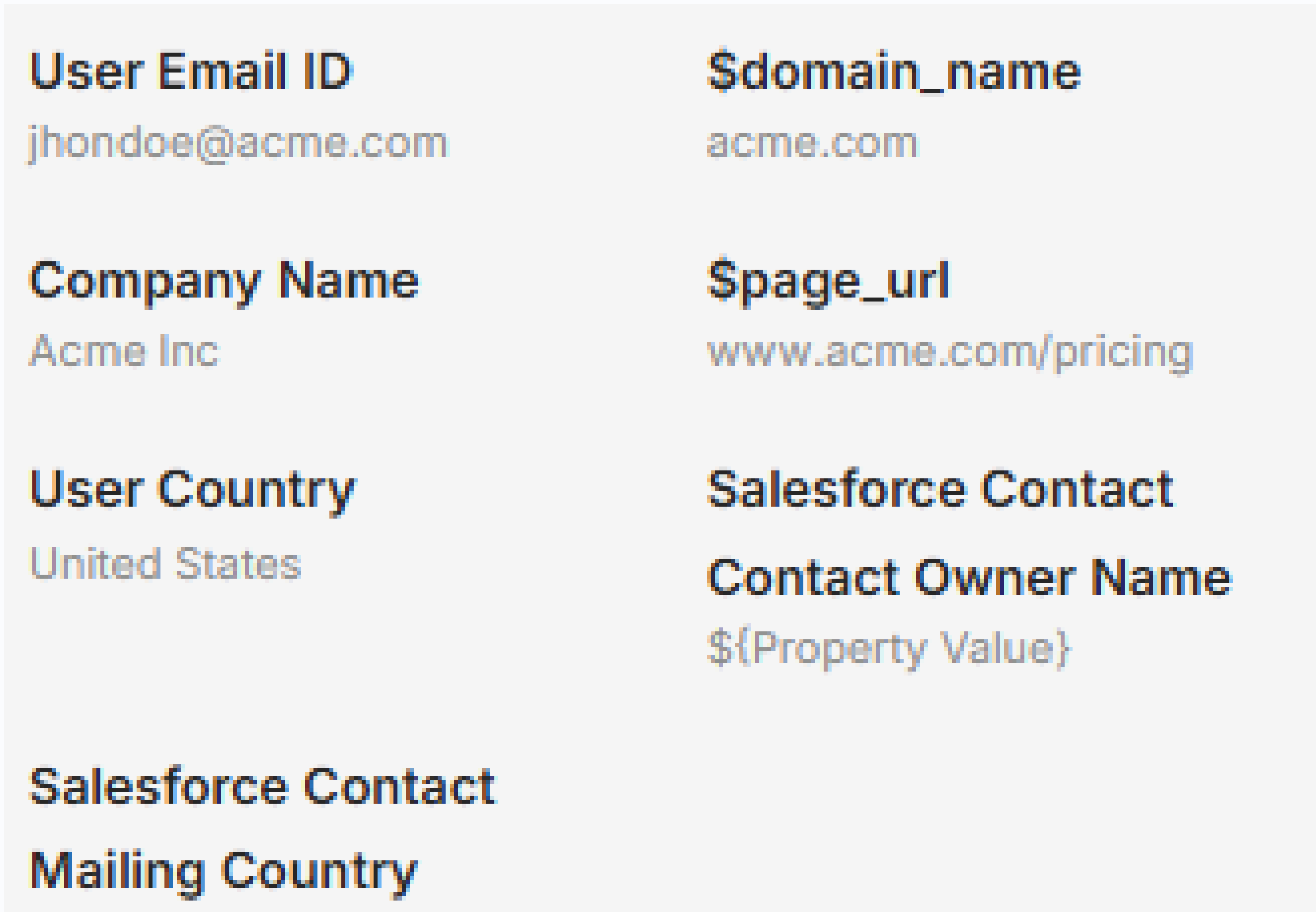
When people inside the account see the Account Manager’s name, face, value proposition, or relevant use case before receiving an email or LinkedIn message, the outreach feels less cold.



STEP 8

Trigger alerts when accounts and contacts show intent.

The goal is not to alert Account Managers for every click. The goal is to highlight meaningful activity: repeated visits, content engagement, key page views, or multiple contacts showing interest from the same account.



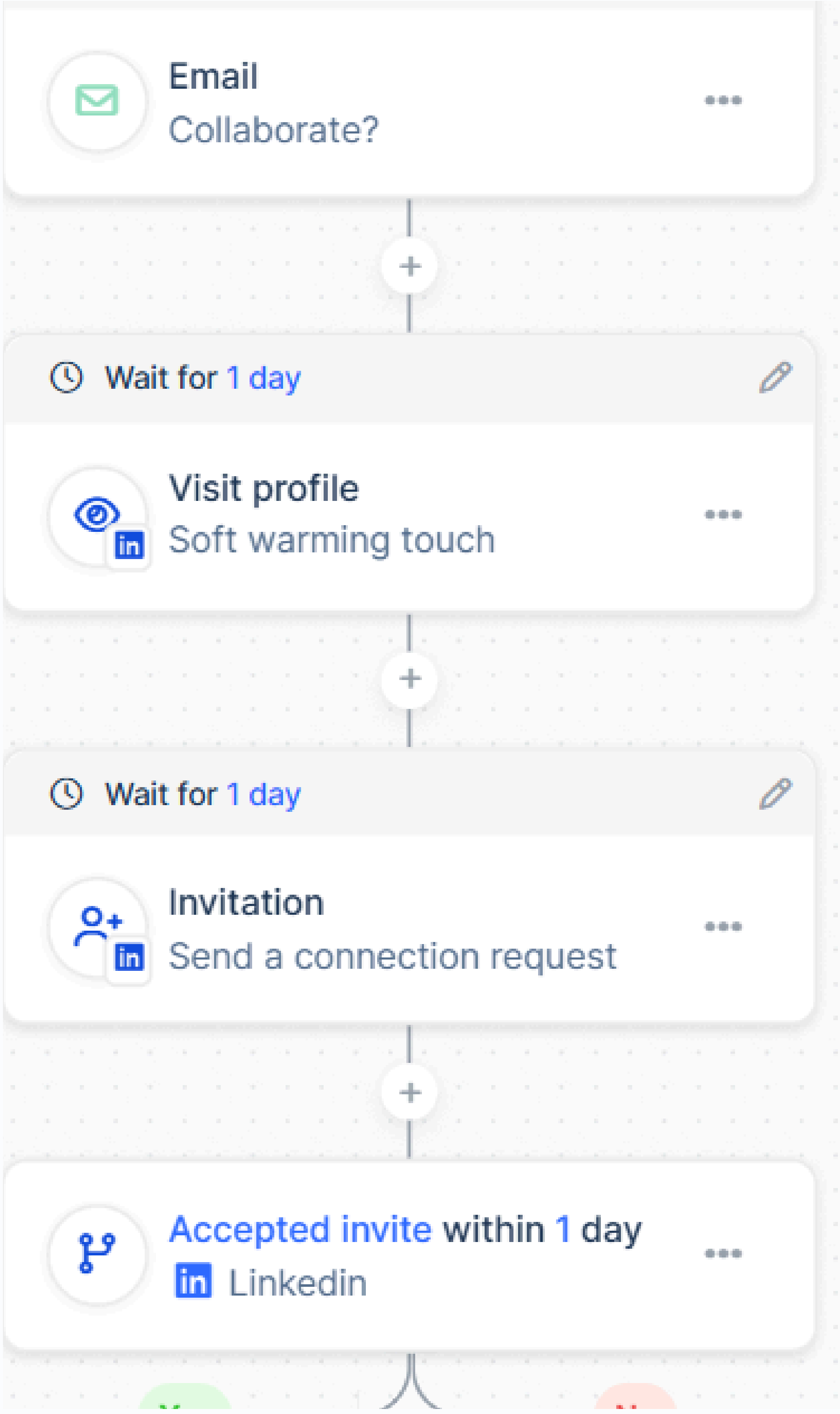
STEP 9

Automate the outreach, not the relationship.

Once the right contacts are segmented and the messaging is ready, outreach automation helps activate email and LinkedIn touchpoints at scale.

Each tier should have its own sequence, timing, and message angle.

The goal is to make sure relevant contacts are reached consistently, while replies and real conversations are handed back to the Account Manager.

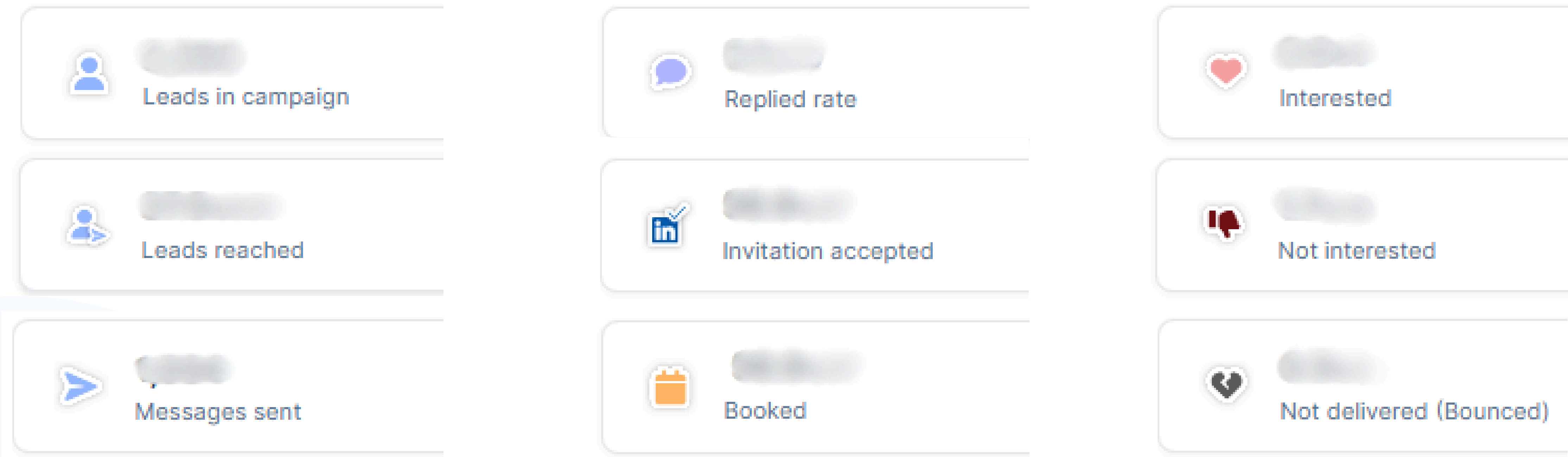


STEP 10

Measure what moved the account forward.

Reporting should show whether the campaign created useful movement inside the account.

The real value is understanding which contacts replied, who showed interest, which accounts became warmer, and where Account Managers should focus next.



Account expansion is not more outreach. It is a system.

Not more random outreach.
Not more disconnected campaigns.
Not more tools for the sake of tools.

The Account Manager owns the relationship.
The GTM Engineer builds the system around it.