

The B2B ICP Playbook

Define, Validate, and Activate Your Ideal Customer Profile — a step-by-step framework for building an ICP that drives pipeline, not PowerPoints.

18 Pages · 4 Parts · Templates Included

ICP Definition

Win/Loss Analysis

Persona Mapping

Outbound Activation

What's Inside

This playbook is structured in four parts. Each part builds on the previous one, taking you from raw data to an activated outbound motion in 30 days.

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HOW TO USE THIS PLAYBOOK

Read the introduction first, then work through each part sequentially. The templates in the appendix can be copied into a spreadsheet or Notion doc and completed as you go. Budget roughly 3–4 hours for the full exercise.

Why Most ICPs Fail

Most B2B tech companies have an ICP document. Almost none of them use it to drive daily sales decisions.

The reason is simple: their ICP was built top-down — who we want to sell to — instead of bottom-up — who actually buys and gets value. The result is a persona doc full of demographic assumptions that collects dust in a shared drive while reps keep calling whoever they feel like.

"A real ICP is not a description of your dream customer. It is a precise, data-backed profile of the buyer who closes fastest, pays most, and churns least — built from your actual history."

The three most common ICP mistakes

- Built by marketing, not sales. The people who close deals have the data. If ICP definition happens in a conference room with no win/loss analysis, the output is fiction.
- Too broad by design. Teams fear missing opportunities, so they make their ICP wide enough to include almost any company. A wide ICP means no focus, no message resonance, and thin pipeline.
- Never validated against outcomes. Most ICPs are never tested against actual sales data. If your Tier 1 accounts close at the same rate as your Tier 3 accounts, your ICP has no predictive power.

What a working ICP looks like

A working ICP is specific enough that a rep can look at a new prospect and immediately know whether to pursue them. It identifies firmographic characteristics (size, industry, geography), technographic signals (what tools they use), trigger events (what makes them look for a solution), and the internal champion profile (who drives the decision).

The bottom-up approach

This playbook uses a bottom-up methodology. You start with your best existing customers and reverse-engineer what made them buy, stay, and expand. Then you use those patterns to define who you should be targeting next.

TOP-DOWN ICP (BROKEN)

Starts with assumptions about who you want to sell to. Based on market size, perceived opportunity, and executive intuition. Rarely matches reality.

BOTTOM-UP ICP (THIS PLAYBOOK)

Starts with your actual closed-won data. Identifies patterns in your best customers. Builds a scoring model from evidence, not intuition.

What you'll have at the end

- A tiered ICP with 3 clearly defined account tiers and the scoring criteria for each.
- A champion profile with the title, department, pain, and trigger events of your best buyers.
- An outbound activation guide — how to translate your ICP into prospecting lists and messaging.
- A quarterly review template to keep your ICP current as your market evolves.

BEFORE YOU START

You'll need access to your CRM to pull closed-won deals from the last 12–24 months, and ideally some churn or closed-lost data too. If your CRM data is messy, block 30 minutes to clean the fields you'll need: company size, industry, ACV, time to close, and champion title.

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PART ONE

The Win/Loss Audit

Before you can define who to target, you need to understand who already buys from you — and why. This section walks you through pulling and analyzing your historical deal data.

Step 1: Pull Your Deal Data

Start by pulling your last 20–30 closed-won deals from your CRM. For each deal, you want to capture the following data points.

Required fields for each closed-won deal

- Company size (headcount)
- Annual revenue (estimated)
- Industry and sub-vertical
- Geography / region
- Tech stack (key tools)
- Champion title and department
- Trigger event (why they bought now)
- Time to close (days)
- Annual contract value (ACV)
- Expansion or churn since?

COMMON DATA GAP

Most CRMs have poor data on trigger events. If you don't have this, schedule 3–5 brief calls with your best customers and ask directly: "What was happening in your business that made you start looking for a solution like ours?"

Then pull your lost and churned deals

Pull your last 10–15 closed-lost deals and any customers who churned in the past 12 months. Capture the same fields. The contrast between won and lost deals is where your ICP starts to emerge.

Step 2: Find the Pattern

With your data pulled, start looking for clusters. Sort your closed-won deals by ACV, then by time-to-close. What do the top 20% have in common?

Questions to answer from your data

- Is there a company size range where you win more consistently and close faster?
- Are there 2–3 industries where you have a disproportionate win rate?
- Is there a tech stack pattern — tools your best customers use alongside yours?
- What trigger events appear most frequently in your fastest closes?
- What champion title closes the most deals and drives the most expansion?

The pattern that emerges from this analysis is your real ICP. Not who you hope to sell to — who actually buys, stays, and grows with you.

Red flags in your data

- Deals that took 3x longer than average to close — even if they closed, this signals poor fit.
- Customers who bought but never expanded — may indicate the wrong use case, not the right segment.
- Lots of churned customers in a specific segment — remove that segment from your ICP.

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PART TWO

The ICP Scoring Matrix

Turn your data patterns into a repeatable scoring system your entire team can use to qualify accounts in seconds — not gut feel.

Building Your Tier System

Once you have the pattern, translate it into a scoring matrix any rep can apply to a new account in under 60 seconds.

The three-tier model

TIER 1 — PERFECT FIT

Matches 80%+ of your ICP criteria. Highest priority for outbound. Expected to close fastest with highest ACV. Reps should spend 70% of their prospecting time here.

TIER 2 — GOOD FIT

Matches 50–79% of criteria. Worth pursuing after Tier 1 pipeline is healthy. May require more education and a longer cycle.

TIER 3 — POSSIBLE FIT

Matches some criteria but missing key signals. Only pursue reactively — if they come inbound or a referral introduces them.

Scoring variables to weight

- Firmographics: company size, revenue, industry — weight 30%
- Technographics: key tools in their stack — weight 25%
- Trigger events: signals of in-market timing — weight 30%
- Champion profile: right title and department — weight 15%

Applying the Matrix

Example scoring rubric

Replace the example variables below with your own data patterns from Part 1.

Company size: 50–500 employees	3 pts	Tier 1 signal
Industry: B2B SaaS or tech	3 pts	Tier 1 signal
Uses Salesforce or HubSpot	2 pts	Tier 1 signal
Recent funding round (Series A–C)	3 pts	Trigger event
Champion is VP Sales or CRO	2 pts	Champion profile
Company size: 20–50 employees	1 pt	Tier 2 signal
Industry: professional services	1 pt	Tier 2 signal

SCORING THRESHOLD

Tier 1: 10+ points. Tier 2: 6–9 points. Tier 3: below 6. Adjust thresholds based on your data — you want roughly 20–30% of your TAM to fall in Tier 1.

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PART THREE

Translating ICP to Outbound

An ICP that doesn't change what your reps do every day is worthless. This section shows you exactly how to activate your ICP in your prospecting motion.

Building ICP-Driven Prospect Lists

The first activation step is replacing generic prospecting lists with ICP-filtered lists.

List-building filters to apply

- Industry: Apply your top 2–3 industry filters from your win/loss analysis. Don't add more.
- Company size: Use the headcount range that matches your Tier 1 ICP. Be strict.
- Tech stack: Use tools like BuiltWith, G2, or Bombora to filter by technographics.
- Geography: If you close faster in specific markets, weight your lists there.
- Trigger events: Use LinkedIn signals, news alerts, and intent data to surface in-market accounts.

Recommended list-building tools

FIRMOGRAPHIC FILTERS

Apollo, ZoomInfo, or LinkedIn Sales Navigator. Filter by industry, headcount, and revenue.

INTENT & TRIGGER SIGNALS

Bombora for intent data, G2 for buyer activity, LinkedIn for job postings and leadership changes.

COMMON MISTAKE

A focused list of 200 Tier 1 accounts worked deeply will outperform a generic list of 2,000 accounts sprayed with templated email every time.

Writing ICP-Driven Messaging

Your ICP tells you who to contact. Your messaging tells you what to say. ICP-driven messaging is specific to the trigger event, the industry pain, and the champion's title.

The four-line outbound formula

Line 1 — The trigger: Reference something specific about their company or industry. "I noticed you just raised a Series B..."

Line 2 — The pain: Name the specific problem your ICP champion feels. Not features — their pain.

Line 3 — The proof: One sentence of evidence. A customer name, a result, a number.

Line 4 — The ask: A low-commitment ask, not a demo request. "Worth a 15-minute call this week?"

Personalisation at scale

Write 3–4 templates per ICP segment (by industry or trigger event) and personalise Line 1 and Line 2 for each prospect. This is where AI can genuinely help — researching trigger events and personalising the opening line at scale.

Sequencing Your Outbound

A well-structured sequence across multiple channels over 3–4 weeks outperforms a single email every time. Here is the sequence structure we recommend for Tier 1 ICP outbound.

Day 1	Email	Trigger-based intro email (4-line formula). Personalised opening.
Day 3	LinkedIn	Connection request with a short personal note. No pitch in the request.
Day 6	Email	Follow-up with a different pain angle. Reference a relevant stat.
Day 9	LinkedIn	Engage with a post they made or share something relevant.
Day 14	Email	The 'breakup' email. Short, direct, last attempt. Often the highest reply rate.
Day 21	Phone	Cold call referencing the email sequence. Keep to 30 seconds if voicemail.

SEQUENCE METRIC TO TRACK

Measure positive reply rate. A healthy Tier 1 outbound sequence should generate 8–15% positive reply rates when ICP and messaging are dialed in.

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PART FOUR

Keeping the ICP Current

An ICP built once and never revisited becomes stale within 6 months. This section gives you a lightweight quarterly review process to keep it sharp.

The Quarterly ICP Review

A 90-minute quarterly review keeps your ICP grounded in current reality rather than last year's data.

The quarterly review agenda

0–20 min

Pull the last quarter's closed-won and closed-lost data. Add it to your running deal database.

20–40 min

Rerun the pattern analysis from Part 1. Has anything shifted? New industry cluster?

40–60 min

Update the scoring matrix if any variables have become stronger or weaker predictors.

60–80 min

Review outbound metrics by tier. Is Tier 1 still outperforming? If not, adjust.

80–90 min

Update messaging templates to reflect new trigger events or customer proof points.

Who should be in the review: the sales leader, 1–2 top-performing reps, and ideally a customer success representative. CS will surface patterns in why customers expand or churn that sales data alone won't show.

Template: Deal Analysis Worksheet

Copy this table into a spreadsheet. Complete one row per closed-won deal from the last 12–24 months.

Field	Your Data	Notes
Company Name	_____	
Company Size (headcount)	_____	
Industry / Sub-vertical	_____	
Annual Revenue (est.)	_____	
Geography	_____	
Tech Stack (key tools)	_____	List top 3–5 tools
Champion Title	_____	
Champion Department	_____	
Trigger Event	_____	What made them look?
Time to Close (days)	_____	
ACV	_____	
Expanded since close?	_____	Y / N / Churned
ICP Tier (post-analysis)	_____	1 / 2 / 3

Ready to put this into practice?

This playbook gives you the framework. SalesSquads gives you the execution. We work with B2B tech companies to implement everything in this guide as part of our GTM strategy + AI execution service.

Book a Free Strategy Review

In 30 minutes, we'll review your current ICP, identify the biggest gaps, and give you 3 specific actions you can take this week to improve your pipeline quality.

calendly.com/arno-salessquads/30min

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