

Education ICP Checklist

An internal checklist to build and validate education ICPs before turning them into lists, territories, and plays. Use this to confirm a target segment is truly "best-fit," not just broadly relevant.

Define the Segment

- K-12, higher ed, early childhood, public/private, grade bands, region
- Enrollment range, size, hierarchy complexity, and geography match your strongest customers
- Funding, performance, technology use, climate, or program priorities support a real need

Validate Readiness & Contacts

- Institution is planning, evaluating, or under pressure to act now
- Contacts include executives, program owners, IT/data roles, and frontline influencers


Message, Systems & Disqualifiers

- Team can articulate a clear, segment-specific value proposition and proof story
- RevOps can tag, filter, and route these accounts in CRM and marketing tools
- Remove stale contacts, weak funding fit, misaligned programs, or out-of-scope institutions
- Set a regular cadence to revisit ICP assumptions as data and market conditions change

Quick Scorecard

Run each account through this yes/no screen before assigning to reps. If an account cannot clear most of these checks, it belongs in nurture—not a high-priority sales motion.

Question	Yes / No
Does the institution match our target segment?	
Does it show a clear program or performance need?	
Is there likely funding or budget alignment?	
Can we identify the real buying committee?	
Does it resemble current successful customers?	
Do we have a segment-specific message and proof point?	

 If an account cannot clear most of these checks, it probably belongs in **nurture**—not in a high-priority sales motion.

Review Cadence

Revisit ICP assumptions regularly as data, buying signals, and market conditions change.

Review Date	Owner	Changes Made

Sign-Off

Role	Name	Date
Sales Lead		
RevOps		
Marketing		