

# Your Account-Based Marketing Pilot Program Checklist

***Ready to roll out your own ABM pilot program?  
Use this checklist to cover all the critical steps.***

<input type="checkbox"/>	<p><b>Define Your Program Team</b></p> <p>My project lead is _____. Also include the following:</p> <ul style="list-style-type: none"><li>• Data analyst responsible for all reporting (baseline &amp; monthly KPI tracking)</li><li>• Executive sponsor / sales leader who will be your primary sales champion</li><li>• Account managers and sales representatives assigned to pilot accounts</li><li>• Marketing programs specialist to coordinate program execution</li></ul>
<input type="checkbox"/>	<p><b>Document Pilot Program Goals</b></p> <ul style="list-style-type: none"><li>• Measure the impact account-based marketing has on opportunities (Target revenue lift of _____%)</li><li>• Identify the triggers that most impact opportunity progression</li><li>• Document system &amp; skill gaps that will limit scaling the program beyond pilot accounts</li></ul> <p><b>Tip:</b> Run your pilot program through at least two full sales cycles to fully test the impact of programs</p>
<input type="checkbox"/>	<p><b>Select Pilot Accounts</b></p> <ul style="list-style-type: none"><li>• Select a sufficient volume of accounts to get representative results</li><li>• Eliminate accounts that are high-risk or otherwise likely to skew results</li><li>• Conduct a data audit and work with sales to fill in missing contact level data for the full buying committee (include email &amp; physical mailing addresses)</li></ul> <p><b>Tip:</b> Don't forget to assign a control group to measure pilot conversion against</p>
<input type="checkbox"/>	<p><b>Identify and Program Automated Triggers</b></p> <ul style="list-style-type: none"><li>• Identify the last activity that was executed right before key contacts, at the accounts, moved from one stage of the sales process to the next. <i>These are your initiators.</i></li><li>• Look for activities that engaged 3+ contacts at the accounts. For example, participated in a meeting, attended an event, downloaded a piece of content. <i>These are your engagers.</i></li><li>• Program marketing automation to trigger activity for each stage of the sales process using initiators and engagers as guides. Include a combination of campaign actions and sales tasks</li></ul>
<input type="checkbox"/>	<p><b>Define Nurture Programs</b></p> <ul style="list-style-type: none"><li>• In addition to the triggered activity above, define at least one activation program per stage of the sales process</li></ul> <p><b>Tip:</b> Be sure to consider in-person and virtual events, as well as selective direct mail</p>
<input type="checkbox"/>	<p><b>Schedule Sales Training</b></p> <ul style="list-style-type: none"><li>• One-hour pre-pilot workshop (review account selection &amp; KPIs)</li><li>• Two-hour pilot roll-out workshop (review program calendar, trigger notifications &amp; SLA response expectations)</li><li>• One-hour check-in monthly (to review against goals, solicit feedback)</li></ul>

## Questions?

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