

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

Questions?

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“ Rarely do you find a practical, accessible resource that seamlessly combines sales and marketing into a coherent and motivating call to action as Samantha has written here. Highly recommended read by those new (and old) to B2B sales and marketing (yes both sides of the aisle and funnel!). ”



Matt Heinz President | Heinz Marketing Inc.

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