



Suhas Bhairav

AI Account Based Marketing ABM Campaign Checklist

Practical, AI-driven ABM for enterprise accounts

Turn AI capabilities into repeatable, personalized
ABM campaigns.

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ABM AI Playbook: Scope & Roles

Define what to automate vs. what requires human review within ABM. This page lays out start-ready guardrails, data needs, and tools.

Key move Pilot with 1-2 accounts; extract learnings before scale.

PRACTICAL CHECKLIST

- 01** Define high-value accounts using ICP, firmographics, and intent signals; document criteria in a shared, version-controlled sheet.
- 02** Automate drafting for email, InMail, and ads with AI templates; enforce tone, length, and compliance guardrails.
- 03** Centralize data: CRM, technographics, firmographics, contact roles, engagement history, and intent signals feeding AI prompts.
- 04** Tools and orchestration: AI agents, marketing automation, CRM, and targeted ad platforms connected via simple workflows.
- 05** Human review points: brand voice, legal/compliance, and final executive-level approval for key assets.
- 06** Data governance: consent, retention, PII minimization, and audit trails for audits and accountability.
- 07** KPIs to track: account engagement, meetings, pipeline velocity, and time-to-first-response.

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Automation Scope: What to Automate vs What to R

Explicitly separate automatable tasks from human review, mapping data to each task. This page links concrete data, tools, and examples to ensure fast, safe adoption.

Key move Ensure compliance review threshold for any non-standard outreach.

PRACTICAL CHECKLIST

- 01** Automate: account-specific email sequences for top three roles across two channels.
- 02** Automate: AI-generated ad copy variants tailored to each account segment and stage.
- 03** Review: final emails and high-risk messages require human sign-off.
- 04** Data you need: ICP criteria, account lists, roles, company data, tech stack, engagement signals.
- 05** Tools: CRM, AI drafting templates, content library, and ad platform audiences.
- 06** Weekly milestones: Week 1 data readiness; Week 2 automates first sequence; Week 3 expands; Week 4 assesses.
- 07** Guardrails: limit automated messages to nurture, with clear escalation.

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Coordinating AI Messages and Ads: Practical Work

This page describes the end-to-end workflow from data to delivery and feedback. It emphasizes guardrails, ownership, and measurable outcomes.

Key move **Ownership: assign a single ABM AI owner for accountability.**

PRACTICAL CHECKLIST

- 01** Step 1: load target accounts with ICP signals into CRM; tag priority accounts.
- 02** Step 2: generate content: emails, InMails, and ad headlines using account context.
- 03** Step 3: run guardrails: tone, length, compliance; require reviewer sign-off for executives.
- 04** Step 4: schedule deployment across channels via a unified calendar.
- 05** Step 5: monitor dashboards; sales owner reviews weekly and collects feedback.
- 06** Step 6: close feedback loop with product/marketing to refine prompts.
- 07** Step 7: data refresh and prompt retraining monthly.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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