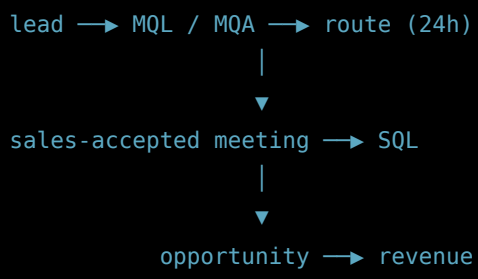
INSIGHTS ABM



INSIGHTS ABM GUIDE · 2026 EDITION

Pipeline, not leads: building a demand engine sales trusts

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THE STEPS

01	02	03	04	05	06
Define every stage	**Set up the CRM**	**Score fit and intent**	**Route with an SLA**	**Run meeting programs**	**Report pipeline**

SHORT ANSWER

A demand engine that sales trusts measures sales-accepted meetings, not leads. Define each funnel stage in writing, set up the CRM so every contact is matched to an account, score accounts on fit and intent, and route ready accounts to a named owner with a 24-hour follow-up rule. Then report weekly on meetings, SQLs and pipeline by source.

Who this guide is for

This guide is for founders, heads of marketing and RevOps leaders at seed to Series C B2B companies whose marketing produces activity that sales does not act on. It also covers teams with no CRM or sales team yet.

The pressure to prove value is real. Gartner's 2026 CMO Spend Survey of 401 marketing leaders found marketing budgets flat at 7.8% of company revenue, and 56% of CMOs saying they lack the budget to deliver their strategy. Money moves to programs that can show pipeline.

Why lead volume misleads

Buyers decide most of their purchase before they talk to anyone. 6sense's 2025 Buyer Experience Report, based on about 4,000 buyers, found that the vendor a buyer already favors before first contact wins about 80% of deals. A form fill from someone early in research is not a buyer. A meeting with the right people at a target account usually is.

Counting leads rewards volume. Counting sales-accepted meetings rewards the right accounts, the right roles and fast follow-up.

Step 1: Define every stage in writing

Sales and marketing must use the same words for the same things. Put these definitions in the CRM as lifecycle stages.

STAGE	DEFINITION	WHO DECIDES
Lead	A known contact with no qualification yet	System
MQL	A contact that meets the fit and engagement score threshold	Scoring model
MQA	An account with two or more engaged contacts in buying roles	Scoring model
Sales-accepted meeting	A held meeting with an ICP account that sales agrees was qualified	Sales, within 5 business days
SQL	A sales-accepted meeting where sales confirms need, authority and timing	Sales
Opportunity	An SQL with a defined deal amount and close date	Sales

The sales-accepted meeting is the most important handoff. It is the first point where sales confirms that marketing's work produced a real conversation.

Step 2: Set up the CRM foundations

Most demand engines break in the CRM, not in the campaigns. Before launching programs, make sure HubSpot or Salesforce can answer three questions: which account is this person from, who owns that account, and where did they come from.

- **Lead-to-account matching:** every new contact is attached to its company record automatically, by email domain or enrichment.
- **Territories and ownership:** every target account has one named owner.
- **Source tracking:** first-touch and last-touch source fields are filled on every contact and copied to the opportunity.
- **Lifecycle stages:** the stages from Step 1 exist as fields and move automatically where they can.
- **Meeting outcome field:** sales marks each meeting as accepted or rejected, with a reason.

No CRM yet? HubSpot's starter tiers are enough for most seed-stage teams. Insights ABM sets up the CRM and runs meeting follow-up until a company hires its first sales reps.

Step 3: Score fit and intent

A score decides who gets sales attention. Keep the first version simple enough to explain in one sentence.

SIGNAL	EXAMPLE	POINTS
Fit: industry and size match the ICP	B2B SaaS, 50–1,000 employees	+30
Fit: buying role	VP, Director or Head of the relevant team	+20
Intent: high-value page visit	Pricing, demo or comparison page	+15
Intent: multiple contacts engaged	Two or more people from the account in 14 days	+20
Intent: third-party or product signal	Research surge or product sign-up	+15
Decay	No activity for 30 days	−20

Set the MQL or MQA threshold at a score that sales agrees deserves follow-up, often 60 to 70 points. Review rejected meetings monthly and adjust the weights.

Step 4: Route with a follow-up SLA

Speed decides whether interest turns into a meeting. Buyers now reach out earlier: 6sense found the point of first contact moved from 69% to 61% of the buying journey. When they reach out, someone has to answer fast.

Write a routing rule for each path:

1. **Demo or contact request:** assign to the account owner instantly and alert them; first response within 1 business hour.
2. **MQA from target accounts:** assign to the owner and start a sequence to two or three buying roles; first touch within 24 hours.
3. **MQL outside target accounts:** send to a nurture track unless the score passes a higher threshold.

Track SLA breaches weekly. Missed follow-ups are the cheapest pipeline to recover.

Step 5: Run programs that create meetings

Pick the programs that fit your stage, and judge each by meetings and pipeline.

PROGRAM	BEST FOR	WHAT TO MEASURE
Warm outbound on intent or product signals	Seed–Series C with a clear ICP	Meetings per 100 accounts touched
Paid media to target accounts	Teams with a defined account list	Cost per sales-accepted meeting
Content that answers buyer questions (AEO and SEO)	All stages; compounds over time	Demo requests and AI-referred traffic
Events and webinars with follow-up plays	Series A+ with sales capacity	Meetings booked within 14 days
Customer expansion plays	Companies with an installed base	Expansion pipeline

Multithreading improves outcomes at every stage. Gong Labs found that won deals involve twice as many buyer contacts as lost deals, so design programs to reach several people per account.

Step 6: Report what sales and finance care about

A weekly one-page report should answer five questions:

1. How many sales-accepted meetings did we hold, and from which sources?
2. What share of meetings became SQLs?
3. How much pipeline did marketing source and influence?
4. What did each meeting cost by channel?
5. Which follow-up SLAs did we miss?

Use the pipeline calculator to set the monthly meeting target your revenue goal requires, then track against it.

Your first 90 days

WEEKS	FOCUS	OUTPUT
1–2	Definitions	Written funnel stages and qualified-meeting rule, signed by sales
3–5	CRM	Matching, ownership, source fields, lifecycle automation
6–7	Scoring and routing	First scoring model, routing rules, SLA alerts
8–9	Programs	Two or three programs live
10–12	Reporting	Weekly meetings report and first pipeline review

FAQ

What is the difference between an MQL and a sales-accepted meeting? An MQL is a contact that meets a scoring threshold. A sales-accepted meeting is a held conversation that sales confirms was qualified. Insights ABM measures programs by sales-accepted meetings.

What is a good meeting-to-SQL rate? Many B2B teams plan around 50%, but your own CRM history is the right benchmark. Track it weekly and investigate when it drops.

Can we do this without a sales team? Yes. A founder can take the meetings, and Insights ABM can implement the CRM and run follow-up while you hire.

How long until pipeline improves? Most teams see more sales-accepted meetings within 90 days of fixing definitions, routing and follow-up.

How does Insights ABM help? Insights ABM builds the CRM foundations, scoring, routing and programs, then runs them alongside your team. Engagements start with a four-week GTM audit.

Want this built for your team? Insights ABM builds and runs demand engines for seed to Series C B2B companies. Book a 30-minute consult at calendly.com/joe-cantu/30-minute-meeting or email contact@insightsabm.com.