Post-mortem meeting – Q3 client outreach campaign

*[meeting title]*

### Date:

*[the calendar date on which the meeting takes place]*

1st of July, 2025

### Time:

*[start time of the meeting]*

10.30 AM

### Meeting duration:

*[indicates the scheduled length of the meeting]*

60 minutes

### Attendees:

*[a list of individuals present at the meeting]*

Michael Jones, Annette Wilson, Mark O’Neil, Misha Bilson

## Agenda

### Project overview *(10 mins):*

*[a quick summary of the project purpose, timeline, and scope]*

*Who’s presenting: Mark O'Neil*

-The campaign ran from April 1 to June 30, aimed at acquiring 100 new B2B leads via email and LinkedIn outreach.

-Scope included three campaign waves, reporting, and weekly adjustments based on performance.

### Successes *(10 mins):*

*[what went well and why]*

*Who’s presenting: Annette Wilson*

-Surpassed lead goal: 127 qualified leads acquired.

-LinkedIn messages had a 38% response rate—highest of the year.

-Collaboration between Sales and Marketing was seamless.

### Challenges *(10 mins):*

*[what didn’t go as planned]*

*Who’s presenting: Michael Jones*

-Email deliverability issues during Wave 2 due to flagged subject lines.

-Delays in creative approval held back one outreach push by four days.

-Limited engagement from clients in the manufacturing segment.

### Lessons learned *(15 mins):*

*[insights gained that can improve future efforts]*

*Who’s presenting: Mark O'Neil*

-Personalization was a key driver of engagement—mass messages underperformed.

-Earlier client feedback loops could’ve prevented misalignment in Campaign 1.

-Pre-campaign testing of email content would’ve reduced delivery issues.

### Areas for improvement *(10 mins):*

*[specific things to change next time]*

*Who’s presenting: All*

-Improve compliance checklist timing to avoid approval delays.

-Diversify outreach channels for underperforming segments.

-Centralize creative approvals via one designated platform.

### Open discussion *(5 mins):*

*[any other comments, questions, or perspectives]*

*Who’s presenting: All*

-Mark suggested involving client reps in pre-launch meetings.

-Misha recommended adding a “pause check” mid-campaign to evaluate direction.

### Action items:

*[list of tasks, who’s responsible, and when they’re due]*

| Mark | Draft new A/B-tested email templates |
| --- | --- |
| Misha | Create a pre-launch testing checklist for campaign assets |
| Annette | Set up client review milestones for future campaigns |
| Kenneth | Coordinate client-side input earlier in campaign timeline |

### Additional notes:

*[any extra points or reminders]*

-Next campaign planning session scheduled for July 15.

-Post-mortem summary deck to be shared by July 7.