

Client acquisition 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, Kenneth Brown

Agenda

Introduction and objectives (10 mins):

[Overview of the project purpose and what the team aims to achieve]

Who's presenting: **Michael Jones** ▾

- The campaign aims to increase qualified leads by 25% over the next quarter.
- Emphasis on improving personalization and outreach efficiency.

Roles and responsibilities (10 mins):

[clarifies who is responsible for which parts of the project]

Who's presenting: **Michael Jones** ▾

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- Annette: Campaign oversight and client communication.
- Mark: Email strategy and execution.
- Misha: Performance tracking and reporting.
- Kenneth: Technical setup and automation workflows.

Project timeline (15 mins):

[key phases, milestones, and deadlines]

Who's presenting: **Michael Jones** ▾

- Planning phase: July 5–9
- Launch: July 15
- Mid-campaign review: August 12
- Wrap-up and reporting: September 30

Resources and tools (10 mins):

[tools, platforms, and assets the team will use]

Who's presenting: **Michael Jones** ▾

- Using HubSpot for email automation and lead tracking.
- Shared project hub in Notion for documentation and updates.
- Analytics dashboards built in Looker.

Risk management (10 mins):

[potential issues and how to prevent or handle them]

Who's presenting: **Michael Jones** ▾

Risk	Mitigation
Delayed design approvals	Use pre-approved templates
Low lead quality	Refine targeting and weekly check-ins

Q&A and next steps (5 mins):

[open floor for questions and outline immediate actions]

Who's presenting: **Michael Jones** ▾

- Questions around list segmentation clarified by Annette.
- Team to finalize tasks and confirm timeline by Monday.

Action items:

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

Mark	Deliver email draft samples by July 8
Misha	Confirm automation triggers by July 9
Annette	Create initial reporting template by July 10
Kenneth	Coordinate with design on final assets by July 7

Additional notes:

[any extra points or reminders]

- Weekly check-in meetings scheduled for Wednesdays at 10 AM.
- Client to be looped in for feedback post-launch.