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.

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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]

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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.

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