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*

-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.