**Tier 1 Account Campaign Brief**

Account name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Team:

|  |  |
| --- | --- |
| Account Executive |  |
| Inside Sales Rep/SDR |  |
| Marketing Liaison |  |
| … |  |

Last updated: (insert date)

WHO

Who are the key members of the buying/selection committee?

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Role/Title | Name | Contact Profile Status | | | | | Level of Engagement | Buying Journey Stages | | | | | |
|  |  | LI | TW | EM | PH | A |  | PI | NA | VC | BA | N | A |
| System Administrator | Bob Smith |  |  |  |  |  |  |  | X | X |  |  | X |
| Director of IT | Alicia Jackson |  |  |  |  |  |  | X |  | X | X |  |  |
| Security Director | Sonya Zhu |  |  |  |  |  |  |  |  | X |  |  |  |
| Purchasing Agent |  |  |  |  |  |  |  |  |  |  |  | X |  |
| … | … |  |  |  |  |  |  |  |  |  |  |  |  |

PI = Problem Identification

LI = LinkedIn

TW = Twitter ID

EM = Email Address

PH = Phone

A = Mailing Address

NA = Needs Assessment

VC = Vendor Comparison

BA = Budget Approval

N = Negotiation

A = Advocacy

WHERE & HOW OFTEN

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| CHANNEL | FREQUENCY BY ROLE | | | | | OWNER |
|  | Sys Admin | Director IT | Security Director | Purchase Agent | … |  |
| Twitter | 1x Week | 1 X Month |  |  |  | SDR |
| LinkedIn |  |  |  |  |  | Acct Exec |
| Email – Nurture Stream |  |  |  |  |  | Marketing |
| Email - Personalized |  |  |  |  |  | Acct Exec |
| Direct Mail | 1 x Qtr | 1 x Qtr | 1 x year |  |  | Marketing |
| Phone Call |  |  |  |  |  | … |
| In Person Meeting |  |  |  |  |  | … |
| Online Event |  |  |  |  |  | … |
| Retargeting Ads |  |  |  |  |  | …. |

WHAT & WHEN

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Jan | Feb | Mar | April | May | June | July | Aug | Sept | Oct | Nov | Dec |
| Online Event |  |  |  |  |  |  |  |  |  |  |  |  |
| Physical Event |  |  |  |  |  |  |  |  |  |  |  |  |
| Digital Content |  |  |  |  |  |  |  |  |  |  |  |  |
| Direct Mail |  |  |  |  |  |  |  |  |  |  |  |  |
| … |  |  |  |  |  |  |  |  |  |  |  |  |
| … |  |  |  |  |  |  |  |  |  |  |  |  |

I like to include:

* Activity
* Date
* Targeted Role

WHY

What KPIs do you want to measure for this account?

|  |  |  |  |
| --- | --- | --- | --- |
| KPI | Last Fiscal Year | Goal | Current |
| Revenue $$$ |  |  |  |
| Number of Opportunities |  |  |  |
| % of Buying Committee Engaged |  |  |  |
| Propensity to Purchase from Us (Brand Affinity) |  |  |  |
| … |  |  |  |
| … |  |  |  |

**Campaign approval process**

|  |  |  |  |
| --- | --- | --- | --- |
| **Stage** | **Approval Committee** | **Due Date** | **Status** |
| Campaign brief |  |  |  |
| Editorial calendar |  |  |  |
| Storyboards |  |  |  |
| Media plan |  |  |  |
| Individual assets |  |  |  |