|  |  |  |  |
| --- | --- | --- | --- |
| **Campaign** | Enter attraction campaign name. | **Updated** | Click to enter a date. |

**Campaign Overview**

Describe the campaign here.

**Goals**

|  |  |  |  |
| --- | --- | --- | --- |
| **Meetings** | Enter number of meetings / time period. | **Revenue** | Enter revenue goal. |

**Target Profile**

|  |  |
| --- | --- |
| **Buyers** | * Enter titles and departments of target buyers. |
| **Influencers** | * Enter titles of individuals able to influence buyer decisions. |
| **Size of Company** | * Enter revenue range and/or number of employees. |
| **Geography** | * Enter regions to include and exclude. |
| **Industry** | * Enter industries to include and exclude. |
| **Other** | * Enter any business-specific criteria such as common trigger events. |

**Initial Meeting**

|  | **Why Act?** | **Why Now?** |
| --- | --- | --- |
| **Core Value Offer  for the Meeting** |  |  |

Additional value for generating meetings:

| **Why Us?** | **Why Trust?** |
| --- | --- |
|  |  |

| **Desired Outcome** | Enter desired outcome for the initial meeting. |
| --- | --- |

**Touch Sequence**

|  | **Method** | **Key Messaging Points** |
| --- | --- | --- |

|  | Choose one. | * List key messaging points and outreach approach. |
| --- | --- | --- |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |
|  | Choose one. | * List key messaging points and outreach approach. |

\*For all tables with rows, insert cursor in last row and click **+** icon to create more rows.

**Referrals**

| **Referral Strategy** |
| --- |
| * Enter strategy action list |

**Pushback**

| **Common Pushback** | **Response Strategy** |
| --- | --- |
| Enter buyer pushback. | Enter response strategy. |

**Notes and Resources**

| **Collateral and support available** |
| --- |
| List all available resources |

**Other Notes**

| **Additional Notes** |
| --- |
| Insert any additional information |

**Messaging Detail – Touch Sequence**

As you fill out messaging specifics below, keep in mind:

| **All Touches** | **Email & LinkedIn** | **Phone** |
| --- | --- | --- |
| * Value offer for the meeting   + Resonate (Why Act?  Why Now?)   + Differentiate (Why Us?)   + Substantiate (Why Trust?) * Intrigue and delight * Customize * Call to action | * 3-4 word subject line * 50-125 words (email) * <100 words (LinkedIn) * Trigger event line early * Use bullets; use numbers (1,2,3) * 3rd grade reading level * Ask 1-3 questions | * Clear reason why you are calling * Questions to engage and prequalify * Schedule time and date * 15-30 sec (voicemail) |

|  | **Method** | **Messaging Specifics** |
| --- | --- | --- |

|  | Choose one. | Enter complete touch template/script. |
| --- | --- | --- |
|  | Choose one. | Enter complete touch template/script. |
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|  | Choose one. | Enter complete touch template/script. |

**Messaging Detail – Referrals**

| **Referral Request Template** |
| --- |
| Enter referral request template; include target profile and the value offer for the meeting. |

| **Introduction Template** |
| --- |
| Enter introduction template for your contact to use when introducing you. |