

INITIAL CLIENT BRIEF

Client:		Date:	
Campaign:		Version:	
Author:		Signed off by client:	

Objective of the document: To provide the background material to plan an integrated marketing campaign. The information gathering in this document is quite extensive but will provide the basis for all additional briefs thereafter.

Objectives

Strategic goals

(What are the strategic sales and marketing objectives?)

Targets

(What targets are we aiming for? E.g. type/size of opportunity, number of leads/meetings, £pipeline, £deals)

Timeline

(Over what period are we aiming to achieve our goals?)

The proposition and sales cycle

What is it

(What are we selling? Is it a product, service or solution sell?)

Entry point

(How do organisations typically buy? All at once or piece-by-piece? Is there a Trojan Horse?)

Sales cycle

(What does the typical sales cycle look like?)

Target organisations

Type

(What type of organisations are we targeting? E.g. industry, size, maturity, style, geography)

Customer/prospect

(Are we targeting new business or existing clients? What's the balance?)

Size/number

(What is the size of the market / number of target organisations?)

Business pains

(What business challenges/pains are they experiencing, that relate to the proposition?)

Ideal prospect

(What does the ideal prospect or client look like?)

Target audience**Job roles**

(What functions, job roles, areas of responsibility are we targeting?)

Decision-making

(How does the decision-making process work? Who are the decision-makers and who are the influencers?)

Insight

(What do we know about the audience and their business challenges? Is there any research?)

Proposition and key messages**Key messages**

(What are the key benefits? By audience?)

Sit up/so what

(What is resonating with the audience currently? What makes them sit up and listen?)

Elevator pitch

(What is the two-minute sales pitch?)

Proof points

(Do we have any proof points? Case studies or customer stories? Can we show benefits realisation?)

Competition

(Who are they? How are they positioned?)

U.M.P

(Is there a unique element to the proposition? What have we got to say that's interesting and valuable to the audience?)



Planned activity, content and calls to action

Previous activity

(What previous activity has there been in the last 12 months? What results were achieved?)

Planned activity

(What other activity is planned in the next 12 months? What about PR activity?)

Supporting material

(What assets, collateral or content exist that would be of interest to the audience? Eg brochures, sales material, research, videos, tools, etc.)

Calls to action

(What can we offer our contacts as a next step, that will be valuable to them? How do we make a face-to-face meeting enticing?)

Competition

(Who are they? How are they positioned?)

U.M.P

(Is there a unique element to the proposition? What have we got to say that's interesting and valuable to the audience?)

Data and systems

Current state

(What current data sources exist? How clean/new/detailed is it? Number of organisations and contacts per sector/market?)

Data management

(Where is the data held? Who manages it? How often is it refreshed?)

Data rules

(Are there any corporate rules regarding data? Any opt-in requirements, for example?)

Systems

(What CRM and other systems are used for sales and marketing purposes? Can we access them?)

Sales integration



Sales force

(Size and number of the current sales force we are supporting? How many leads/bids can they manage at any given time?)

Marketing support

(What are their current attitudes towards and expectations of marketing support?)

Current knowledge

(How well do they know the proposition? How comfortable are they selling it?)

Sales tools

(What sales tools do they require? What already exists?)

Internal communication

(What communications are required pre-, during and post-campaign?)

Sales and marketing handover

(How are leads handed from marketing to sales currently? What regular contact points exist?)

Nuts and bolts**Budget**

(What's the current budget?)

Timescales

(Deadlines and key milestones?)

Further training

(Is there any product training or demonstrations we can have access to?)

Purple**What does brilliant look like**

(What will delight the client?)

