

# irsmarketing.

## A Campaign Guide



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At IRSMarketing we believe that the successful delivery of a campaign is achieved through a structured process, to ensure all aspects are covered and both you as the Client and IRS have an agreed understanding of the campaign deliverables and the schedule for achieving them prior to starting.

As a new IRS client, you will be assigned a Campaign Delivery Manager (CDM) who is responsible for the management of the campaign and communication with you from the first stage to completion.

# Step 1: Training and Briefing Meeting

The Training and Briefing meeting entails two elements.

The First part (Training) is for you as the Client to give an overview of your solution(s), the key selling points and the proposition you are taking to market. All this information equips the Campaign Delivery Manager (CDM) with the tools required to train the Business Development Executives (BDEs) to successfully deliver the message to the required prospects.

Secondly, the briefing element of the meeting allows both sides to discuss, define and agree all aspects of the campaign, such as campaign objectives, target market, data, criteria, the required outcomes, measures and processes.

# Step 2: Campaign Specification Document

After the training and briefing meeting the CDM completes a Campaign Specification Document (CSD) which outlines all the key details of the campaign as agreed in the meeting. This document is presented in the format below for you to sign off so that both parties can proceed with an agreed understanding of the campaign and its deliverables. An example of the CSD can be seen on page 7.

# Step 3: Call Guide

At the same time as the CSD is written, a Call Guide is produced for telemarketing campaigns, as a tool to lead the BDE's through their conversations and engage with prospects. This document contains a concise overview of your company and solution(s) with relevant profiling questions and objection handling examples.

Each BDE at IRSMarketing has their own calling style and is therefore not scripted, rather allowing the conversations to develop naturally at a speed that is suitable for the prospect. The sales engagement experience and technical knowledge of our BDE's mean they are able to adopt the most effective method to engage the prospect and convert to an opportunity. An example of the Opportunity Report can be seen on pages 8 & 9.

## Step 4: Weekly Management Dashboard

Throughout a campaign there is regular contact between you, your team and the IRS CDM to ensure you are always aware of the latest situation. As an opportunity is identified and a prospect accepts an emailed meeting request, you will receive an Opportunity Report detailing the prospect and project status.

An 'all-hands' weekly review call allows all interested parties to join and discuss the progress of the campaign, understand current and expected pipeline levels, as well as agree on any actions for the coming week. A Weekly Management Dashboard report with both headline and detailed figures from the campaign is also provided for your own onward reporting requirements. An example of the Weekly Management Dashboard can be seen on page 6.

## Step 5: End of Programme Presentation

At the end of a campaign, or campaign phase, a face-to-face meeting, or call if more appropriate, is scheduled with you and your team, IRS CDM and IRS Account Manager. The purpose of this review is to assess the key statistics from the campaign, understand which sectors or job functions were most fruitful and why, and share our findings from the collated prospect feedback, particularly in respect of awareness of branding, responsiveness to your solution etc.

IRS will also make recommendations on next steps for the campaign and how we can further maximise your return on investment. This includes highlighting both short and long term potential pipeline which would benefit from ongoing nurture as well as the remaining potential from any unprocessed data.








# Who are IRS?

Run by Marketing professionals for Marketing professionals, IRS delivers outstanding new business marketing results everyday for the global IT enterprise and channel community. Using real-world digital, social, telemarketing and data expertise backed by robust processes, IRS are truly The Pipeline Generators.

# What's next? Call us!

If you would like to discuss your campaigns or find out more about IRSMarketing call us on **+44 (0)1869 321800** or contact us on [www.irsmarketing.com/contact](http://www.irsmarketing.com/contact).

Client Name	Total Invested	Pipeline Value to Date	ROI	Total Days Budget	Days Used	Days to go	Projects Target	Projects Actual	Target Contacts	Actual Contacts	Target Regis-trations	Actual Regis-trations
	£25,000	£1,610,000	64x	83	78	5	45	48	120	138	40	52

Campaign	Type	Pipeline Value	Com-panies	Days Budget	Days Used	Days to go	Projects Target	Projects Actual	Target Contacts	Actual Contacts	Target Regis-trations	Actual Regis-trations
 Campaign 1 *	Demand Generation	£90,000	106	14	12	1	6	2	0	32	0	0
 Campaign 2 *	Demand Generation	£195,000	550	15	15	0	6	4	0	37	0	0
 Campaign 3 *	Demand Generation	£305,000	227	15	15	0.5	6	7	1	30	0	0
 Campaign 4 *	Event	£595,000	115	14	16	0	6	14	0	10	0	0
 Campaign 5	Event	£425,000	129	25	20	6	12	9	0	29	0	0
 Campaign 6		£0	0	0	0	0	0	0	0	0	0	0
 Campaign 7		£0	0	0	0	0	0	0	0	0	0	0

\* = Completed

 Projects Transferred

 Billing

# XZY - Campaign Specification Document

Client Company Details	Campaign Objectives	Quality Control
<p>XYZ Company 1 The Road Town County Postcode</p> <ul style="list-style-type: none"> <li>01234 567899</li> <li>www.xyz.com</li> </ul>	<p>IRSMarketing has been tasked with contacting each prospect to determine what their interest in enterprise capture is and identify any opportunities for further XYZ engagement. This will be executed using the XYZ proposition, which forms the basis of the Call Guide and has been agreed between XYZ and IRSMarketing.</p> <p>When engaged with a contact, IRSMarketing will also ask whether they are happy to be 'opted-in' to receive emails from XYZ in the future. This information will be recorded and fed back to the client at the end of the campaign.</p> <p>Where there is no opportunity for current engagement, the reason for this will be captured and recorded and fed back to XYZ at the end of the programme.</p> <p>The campaign is initially scheduled to run for a total of 15 man-days.</p> <p>Throughout the course of the campaign, IRSMarketing will keep XYZ up to date regarding progress made on the campaign. All contact data will be captured and exported back to XYZ at the end of the campaign.</p>	<p>Each Opportunity generated is checked by the designated CDM to confirm that the opportunity meets the agreed criteria (listed below). The agent then sends the Prospect a confirmation email, in the form of an Outlook Meeting Request detailing the nature of the conversation, the Prospects requirements and the agreed follow-up action. Where the Prospect does not use Exchange this will be noted and a standard email sent.</p> <p>Once IRS receives the acceptance notification, the Opportunity is then checked by the QC team to reconfirm the Prospect's details are accurate and that the correct spelling and grammar have been used.</p>
Client Contact Details	Required Outcome	What is the campaign target?
<ul style="list-style-type: none"> <li>Peter Jones Manager, Field Marketing EMEA North peter.jones@xyz.com/ +44 1234 567101</li> <li>Louise Davies Marketing Specialist louise.davies@xyz.com/ +44 1234 567123</li> <li>Mark Allen Director, Field Marketing - EMEA mark.allen@xyz.com/ +32 123456789</li> <li>Reporting to be sent to Mark Allen and Peter Jones</li> <li>Frequency - weekly</li> <li>Format - Management Dashboard</li> <li>Opportunities to be sent to Peter Jones and Mark Allen</li> </ul>	<p>Face-to-face or Telephone Appointments.</p> <p>Each opportunity will be sent to Peter Jones and Mark Allen using the relevant campaign name, once they have completed our QC process. Peter Jones will then send the opportunity onto his Sales Team to follow up the next action.</p>	<p>Target marketing value pipeline for IRS to achieve is £240,000.</p> <p>Depending on the quantity of data available, IRSMarketing usually expects to see a run rate of 2 Opportunities per 5 man-days demand generation calling.</p>
Campaign Type	Data	What are the Opportunity criteria?
<ul style="list-style-type: none"> <li>Demand Generation</li> <li>15 man-days</li> <li>Wednesday, 30th May</li> <li>XYZ EMEA North</li> <li>Assigned CDM - Susan Taylor</li> </ul>	<ul style="list-style-type: none"> <li>Data has been sourced by XYZ and is made up of contacts that have either attended a webinar or downloaded a whitepaper</li> <li>No. of unique companies 1361</li> <li>2486 contacts have been provided which consist of the following job functions; Chief/Directors/Managers of Finance, Documents, Accounts, Records, Analyst, Architects, Solutions, Marketing, Development, Brands, Information, Pensions, Projects and Administration</li> <li>Target Sectors include; Finance, Banking, Insurance, Government, Energy &amp; Utilities, Transport, Healthcare and Telecoms</li> <li>Data Quality - 356 contacts do not contain job functions and telephone numbers have been provided, if these are found to be incorrect IRS are not tasked with gathering the correct number</li> <li>Contacts are based in the following countries; Belgium, United Kingdom, Denmark, Finland, Ireland, Luxembourg, The Netherlands, Sweden.</li> </ul>	<p>BANT Qualified Opportunities</p> <ul style="list-style-type: none"> <li>Budget</li> <li>Authority</li> <li>Need</li> <li>Timescale</li> <li>NA- Next Action</li> </ul>
		Opportunity Value
		<p>The average order value for XYZ Solution is £40,000.</p>

# Example Opportunity Report Page 1

**Programme:** UK\_SP\_ClientName\_Jun18  
**Caller:** Ian Ryan Smith  
**Company:** XYZ Industries Ltd  
XYZ House  
123 XYZ Street  
London  
AB1 2CD  
United Kingdom  
**Switchboard:** 01234 567890  
**Website:** www.xyz.com  
**Sector:** Manufacturing  
**Contact:** Mr John Smith  
Head of Global Networks  
**Email:** John.smith@xyz-it.com  
**DDI:** 01234 567899  
**Mobile:** 07890 123456  
**Overview:** Opportunity Summary

This is a Pre-Project Opportunity for Client to deliver a WebEx demonstration of their network analysis solution. XYZ Industries operate in more than a 100 countries and provides world-class solutions across a range of sectors, although they tend to specialise in defence contracts.

## **Who:**

I spoke to John Smith, the Head of Global Networks on the 5th July 2018. He explained that he has overall responsibility for network planning, delivery and maintenance. He has a team of 50 people globally, and reports directly to Mrs Jane Jones, VP Global Networks, based in New York.

## **What:**

John is currently looking at network analysis tools and says that he needs something that is able to work seamlessly with their existing network monitoring tools. He also needs it to be able to operate globally, rather than having regional silos. Ideally he would like a solution that offers different language options, but feels this is a like-to-have rather than a necessity. They have operations in over 100 countries, with a region HQ for each continent which house the majority of their infrastructure.

## **Why:**

John said that the company has tasked him with consolidating their existing network, which has grown organically and via acquisition. They believe that they are spending too much on maintaining the network and feel that it is disproportionate to the value they receive. He needs to provide a clear plan for what changes need to be made and so feels that he needs a way to analyse existing traffic, forecast future traffic loads and then model changes in order to make the right choices. This needs to be done at a local level but also globally.



# Example Opportunity Report Page 2

## When:

The initial plan needs to be presented by the end of the year. If approved he expects a 3-5 year timescale for the changes, but expects this may be reduced.

## Timescale:

I have arranged an online demonstration with a technical consultant from Client to run through the features and show John how he can achieve his goals. If successful he has agreed to provide test data from his network for modelling purposes.

Meeting is scheduled for 1 hour at 1pm on 19th July 2018. John said he will invite Jane, VP Global Networks, to join.

**Agreed action:** WebEx

**Action date:** 19/07/18

Opportunity Score					
Who	Not involver	Influencer	Department Head	Technical Decision Maker	C-Level /Director/Board
	0	2	3	3	5
What	No Interest	Interested in looking at new ideas	Believes product/solution could improve current set-up	Already looking into this area	Has a brief to implement solution
	0	1	3	5	5
Why	Not aware of problem	Aware of problem but no project scoping not started	Aware of problem and scoping has started	Some requirement defined	All requirements defined
	0	3	5	5	3
When	Timeframe uncertain	Outside 12 months or not defined	Within 12 months	Within 6 months	Within 3 months
	0	1	3	5	3