

# EOS Core Process: Campaign Planning and Execution

Process Owner: [Person from EOS Accountability Chart]

Last Updated: [Date]

Review Date: [Next quarterly review date]

## EOS Integration

Connected EOS Tools:

Related EOS Rocks: [Current quarter Rocks that improve this process]

EOS Scorecard Metrics: [Weekly numbers tracked for this process]

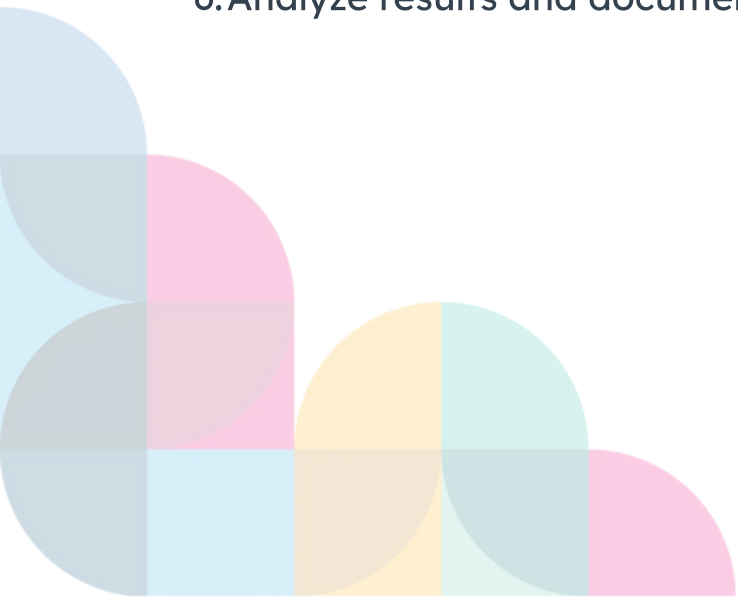
Accountability Chart Connection: [Which seat owns this process]

## Process Overview

Purpose: Plan, launch, and manage integrated marketing campaigns that drive specific business outcomes

## High-Level Steps

1. Define campaign objectives and strategy
2. Develop campaign assets and messaging
3. Set up tracking and measurement
4. Launch campaign across channels
5. Monitor and optimize performance
6. Analyze results and document learnings



# Core Process Detailed Steps

## Step 1: Define Campaign Objectives and Strategy

- Align campaign goals with business objectives
- Define target audience and buyer personas
- Set specific, measurable campaign KPIs
- Determine budget allocation by channel
- Create campaign timeline and milestones

## Step 2: Develop Campaign Assets and Messaging

- Create core campaign messaging and value proposition
- Develop creative assets (ads, landing pages, emails)
- Write copy for each channel and touchpoint
- Design campaign-specific landing pages
- Create supporting content and resources

## Step 3: Set Up Tracking and Measurement

- Implement UTM parameters for link tracking
- Set up conversion tracking in analytics tools
- Create campaign-specific forms and CTAs
- Configure attribution modeling
- Establish reporting dashboard and schedule

## Step 4: Launch Campaign Across Channels

- Execute pre-launch checklist and QA testing
- Launch paid advertising campaigns
- Send email announcements to database
- Publish social media content
- Activate sales team with campaign materials

## Step 5: Monitor and Optimize Performance

- Review daily performance metrics
- Conduct A/B testing on key elements
- Adjust targeting and bidding strategies
- Optimize underperforming creative assets
- Scale successful campaign elements

## Step 6: Analyze Results and Document Learnings

- Compile comprehensive performance report
- Calculate campaign ROI and cost per acquisition
- Identify successful tactics and areas for improvement
- Document key learnings for future campaigns
- Present results to stakeholders

# Quality Standards & Success Metrics

Must-Have Standards:

- [ ] Standard 1 (measurable)
- [ ] Standard 2 (measurable)
- [ ] Standard 3 (measurable)

EOS Scorecard Metrics:

Weekly Metric 1: [Target number]

Weekly Metric 2: [Target number]

Monthly Metric: [Target number]

Accountability: Marketing team owns all steps, Sales team supports step 4

Frequency: Campaign-dependent (typically 4-12 weeks)

Success Metrics: Campaign ROI, cost per lead, conversion rate, pipeline generated

## Process Connections

Receives From: [Which EOS core process feeds into this one]

Hands Off To: [Which EOS core process this feeds into]

Dependencies: [Other processes or resources needed]



# Tools & Resources

## Required Systems/Tools:

Tool 1

Tool 2

## Template/Document links

Training Materials:

Link to training video

Link to detailed SOPs (if needed)

Onboarding checklist

## Troubleshooting & Common Issues

If [Problem], Then [Solution]:

Problem 1 → Solution 1

Problem 2 → Solution 2

Problem 3 → Solution 3

Escalation: [When to involve process owner or leadership team]



# Process Improvement

Last Quarter's Improvements: [What was changed and why]

Current Issues to Address: [Items for next EOS Rock or Level 10 discussion]

Issue 1

Issue 2

Ideas for Next Quarter: [Potential improvements to consider]

Approval & Sign-Off

Process Owner Approval: [Name + Date]

Leadership Team Review: [Date reviewed in Level 10 or quarterly]

Next Review Date: [Align with EOS quarterly cycle]



# Quick Reference Card

[One-page summary of key steps for daily use]

## The 5 Key Steps:

[Step 1 summary]

[Step 2 summary]

[Step 3 summary]

[Step 4 summary]

[Step 5 summary]

Key Metrics: [2-3 most important numbers to track]

Emergency Contacts: [Who to call if process breaks down]

