

Campaign Brief

Agent briefing document for new campaigns, products, or initiatives



HOW TO USE THIS TEMPLATE

Complete this brief before the campaign goes live and distribute it to all agents who will be handling calls. Walk through the talking points and compliance notes during a team briefing. Agents should keep this document to hand as a reference during the campaign period.

CAMPAIGN NAME		PREPARED BY
START DATE	END DATE	DEPARTMENT / TEAM

Objective

Target Audience

Key Talking Points

1

2

3

4

Compliance Notes — What agents must / must not say

FAQs

QUESTION	ANSWER

Escalation Path

NAME

ROLE

CONTACT

NAME

ROLE

CONTACT

NAME

ROLE

CONTACT

Success Metrics

How will performance be measured?

Additional Notes

APPROVED BY

DATE

DISTRIBUTION LIST