New business — 12 accounts and inbound triage

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Drawn from what has worked · fictional document

> **Fictional document — demonstration example**
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> **Fictional document**, produced for demonstration. **The account profile comes from the agency's most profitable advertisers**, compared with the accounts it lost — not from an idea of what a good client looks like.

The three traits that separate

Trait	Among the 9 most profitable	Among the 5 lost
Industry or healthcare	**8 of 9**	1 of 5
50 to 300 staff	**7 of 9**	2 of 5
Communication manager in post	**9 of 9**	**1 of 5** — without one the cycle doubles and the margin falls

What is prepared for each of the 12

Element	Content
Dated, verifiable fact	A recent campaign, an announced hire, a website rebuild — with the page and the date
Approach angle	**Drawn from comparable work the agency has done**
Citable references	Two, chosen in the account's sector
Decision	**The agency reviews and sends**

Inbound enquiries — the most profitable subject

Finding	Before	After one month
Enquiries received per month	≈ 20	≈ 20
Average time to first reply	**3.2 days**	**Under one hour**
Enquiries qualified	As they came	**12**
Meetings booked in the account team's calendar	—	**7**, two of them on accounts matching the profile of the twelve
Deals lost at first contact last year	**5**	**4 had gone to a competitor who replied the same day**

The route an inbound enquiry takes

Step	Timing	Who decides
Qualification on arrival — stated budget, sector, deadline	immediate	Rules set by the agency
Acknowledgement asking two useful questions	**within the hour**	Template approved by the agency
Three slots in the account team's calendar	when criteria are met	**The meeting happens between the agency and the prospect**

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Step	Timing	Who decides
CRM record created and filled in	immediate	**Nothing to re-enter for the account team**

The framework, which is also a sales argument

Point	Answer
Hosting	**France, processing in the EU targeted**
Advertisers' briefs and creative work	**Hosted in France — sovereign model as an option**
Training of a public model	**None**
Publication	**Never without human approval**

> **Keep this page for the end of your meetings.** Three of your advertisers already require it in their framework contract; few agencies can show it in writing.

For the agency to settle

Qualification criteria for an inbound enquiry: _____

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