



The following are required and must be done for each account regardless of the product or service they sell.



STRATEGY: A written marketing strategy is required for each of your accounts.



CAMPAIGN PLANNING: Every campaign you run requires you to fill out a campaign planning form.



AD OPTIMIZATION: Ads need to be reviewed daily. Ads need to be optimized correctly. Split testing needs to occur and negative comments in ads must be deleted on a daily basis.



DELIVERABLES: All the deliverables that are promised to the client must be executed each and every single month.



CREATIVES: New creatives must be constantly requested, especially if the ads are not working. Holiday creatives are also required to be utilized unless otherwise stated by the client specifically.



DATA SCIENCE: Account data analysis must be kept on ClickUp for seniors to review.



MONTHLY AD BUDGET: The account manager must be aware of the client's monthly budget. The budget is set on a monthly basis, not a weekly basis.



KEY PERFORMANCE INDICATORS: Account managers need to know what the KPIs for their accounts are and these KPIs must be noted in the ClickUp file card.



GRAPHS: Weekly graphs are required to be graphed each week on Friday mornings. This is what we use for the weekly reports.



WEEKLY REPORTS: Every client needs a written weekly report. Even if you meet with the client via Zoom, a weekly report needs to be sent and follow up with the client to ensure it's read.



MONTHLY MEETINGS: You are required to have at least one video call meeting with your client each month. Reports are sent out weekly and video calls are done at least once a month.



SURVEYS: A weekly survey sent by the CMO needs to be sent. Account managers need to encourage clients to fill it out.