

LinkedIn Campaign Workbook: from brief to qualified conversation



AI concept illustration. Editorial content and working models: Patrick Wings.

A campaign is ready only when marketing and sales expect the same next action. This workbook takes you from a specific buying obstacle through the offer and creative concepts to qualification and evaluation. You produce a testable brief and a workflow another person can actually execute. Every reference to the example company Planwerk, every quantity and every time window is explicitly fictional and used as a planning assumption. These illustrate decisions; they are neither performance evidence nor recommended budgets.

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Implementation support: [request a strategy call](#)

HOW TO USE THIS RESOURCE

For B2B marketing leads, founders and sales teams preparing a LinkedIn campaign together and evaluating it through relevant conversations.

Your practical outputs

- A completed campaign brief with a buying obstacle and exclusion criteria.
- Three distinct creative hypotheses with a controlled comparison.
- An agreed lead definition with handoff and follow-up.
- A decision log for stopping, revising or continuing.

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1. Choose the buying obstacle you will address

Start with a decision a suitable prospect cannot yet make, rather than an advertising idea. Ask sales and customer support about a recurring uncertainty: is the missing piece a shared problem definition, an internal business case or a credible implementation route? Choose one obstacle. A single creative should not attempt category education, product comparison and a demo conversion simultaneously.

In the explicitly fictional running example, Planwerk sells capacity-planning software. Operations leads suspect their spreadsheets contradict one another but cannot quantify the problem internally. The campaign therefore offers a capacity-check worksheet. A product demonstration remains a possible later action. This is an editorial hypothesis to investigate, not established evidence of customer demand.

2. Use a completed brief as the shared working agreement

A brief must settle decisions. Phrases such as more visibility or high-quality leads leave too much unspecified. Describe a person in a working situation, their current alternative and the help you promise. For each assumption, identify the interview, conversation or document that could confirm or reject it later.

The example brief deliberately narrows the campaign. A personal email address does not automatically make someone unsuitable; a business address does not establish buying intent either. Qualification depends on context. Check the settings actually available in the advertising account separately before launch. This workbook makes no claim about a particular current targeting feature or audience size.

Field	Fictional completed brief
Audience	Operations lead at a project-based B2B company
Trigger	Conflicting capacity lists before a prioritisation meeting
Current alternative	Spreadsheets and weekly alignment meetings
Promised help	Identify bottlenecks and missing information in an existing plan
Offer	Editable capacity check with a completed example
Next action	Request worksheet; conversation only if personally relevant
Success criterion	Demonstrably relevant contacts and recorded next steps

3. Validate the offer before producing advertisements

Show the draft to someone familiar with the problem. Ask them to complete a task with it instead of merely rating the document. Observe where they ask questions, misunderstand inputs or cannot interpret the result. Better advertising cannot make an attractive PDF useful if it does not improve a decision.

In the fictional example, Planwerk asks an operations colleague to work through a typical working week. The team observes usability and does not transfer confidential customer information into advertising systems. Before launch, the title, actual content, form promise and delivery process must agree. If the download is unfinished or delivery fails, postpone the launch and repair that dependency.

4. Develop creative hypotheses with a clear difference

A hypothesis links a creative approach to an expected reaction and a possible disconfirming observation. In the first comparison, change the central angle while holding other important elements as steady as practical. If offer, image, form and audience all change, explaining any difference becomes difficult. An observed response is not proof of its cause.

The following approaches keep the same capacity-check offer in the fictional Planwerk case. First build understandable drafts using a genuine excerpt from the worksheet. The comparison should reveal which problem framing attracts relevant people to the offer. It should not claim that one colour or isolated sentence works better in every campaign.

Angle	Creative and hypothesis	Check for disconfirmation
Problem	"Three spreadsheets, three capacity estimates?"; recognition motivates a check.	Many clicks but contacts do not recognise the described task.
Work sample	Show the worksheet; visible usefulness builds confidence.	Contacts expect finished software rather than a template.
Decision	"Which projects still fit?"; decision pressure creates relevance.	Requests concern work unrelated to capacity planning.

5. Connect the advertisement, landing page and form

Read the whole journey from a visitor's perspective. The advertisement introduces a problem, the page explains the help, the form requests information needed for this step and the confirmation delivers what was promised. Record every point where a different service or a greater commitment suddenly appears.

Planwerk's example page includes a preview, required input information and a clearly labelled example outcome. Requesting a download is not silently reclassified as requesting a demo. If a conversation is offered, that choice is separate and clear. Check mobile presentation, input errors and recovery after interruption. A form completion is complete only when processing succeeds.

6. Define a lead without relying on shorthand

Agree before launch which attributes merely establish contactability and which support a business assessment. Downloading, working at a relevant company and wanting a conversation are different states. Separating them protects sales from inappropriate handoffs and prevents marketing from being judged solely on cheap form submissions.

In the example, worksheet access initially signals interest in content. Sales handoff requires additional evidence of a suitable task and an explicitly agreed next step. Record exclusions as well: student research, supplier outreach or an entirely different use case. A rejected contact receives a specific reason rather than a catch-all label such as poor quality.

State	Evidence	Next step
Content contact	Requested worksheet and is reachable	Deliver the promised worksheet
Relevant context	Role and stated task fit the brief	Ask about relevance without assuming meeting intent
Agreed conversation	Contact agrees to a specific discussion	Record owner and appointment
Not suitable	An explicit exclusion reason is established	Record reason; do not force a sales handoff

7. Plan follow-up as a service

The first message delivers the material and briefly explains how to use it. A later message may ask about a specific obstacle. Avoid sequences that pressure someone into a sales appointment they never requested. Check contact permissions, suitable channels and objections within your own process; this workbook is not a legal assessment.

A fictional Planwerk message reads: “Here is the capacity check. Start with your next three projects. If a field is unclear, reply with the relevant section and I can help interpret it.” A later relevance question asks: “Is collecting the information or agreeing on priorities more difficult?” The answer determines useful follow-up rather than a rigid sending calendar.

8. Set limits for spending and team capacity

Derive a test budget from an affordable learning loss rather than an imagined standard cost per lead. Separate media spending, production, technical work and follow-up. Decide who detects an overrun and who can pause the test. Without time to evaluate results and handle contacts, the team mainly purchases an unprocessed workload.

In the example, Planwerk sets an internal cap for the whole experiment and reserves sales capacity. No universal spending amount is recommended. If the available audience does not support a useful comparison, the team reduces the number of simultaneous variants. Small datasets can inform qualitative investigation, but they do not establish a statistically proven winner.

9. Measure the journey rather than a single conversion

Record the period, data source and denominator for every evaluation. A percentage without its underlying population cannot be interpreted. Check for duplicate contacts, test submissions and inconsistent reporting windows. A later conversation should not automatically be attributed entirely to the last advertisement someone clicked.

The fictional team separates platform observations from its own CRM records. It examines transitions: interest to request, request to relevant task and relevant task to agreed conversation. When a transition fails, it investigates that specific step and the associated feedback first. Increasing spending does not repair an unclear worksheet or a missing sales handoff.

10. Make decisions with a disconfirming check

Before reviewing results, write down what would support stopping, revising or continuing. A technical failure or broken offer promise warrants immediate intervention. A small number of contacts does not justify a broad claim about the market. Investigate whether poor relevance comes from the message, the offer or a mistaken starting assumption.

Planwerk would revise a creative that attracts many unsuitable requests even if its form cost appears low. A creative with fewer but demonstrably relevant responses receives closer investigation. Each decision records its rationale, remaining uncertainty and next validation step. A test can therefore produce value even when none of its variants continues immediately.

11. Run a workshop that ends with decisions

Include marketing, sales and delivery perspectives in the first workshop. This agenda is an adaptable working suggestion, not a productivity promise. Use ten minutes to select the buying obstacle, twenty to complete the brief, twenty to specify the offer and creative angles, fifteen to define the lead and handoff, and fifteen to check measurement and approvals.

Every segment ends with a visible document or an open task assigned to an owner. Do not debate endless copy variations while the offer remains unresolved. If a fundamental assumption is still open, end with a research assignment instead of an artificial launch approval. This also protects small teams from frantic production without a shared decision framework.

12. Acceptance: can someone actually execute this campaign?

Give the brief and worksheet to someone who did not create them. They should be able to explain the audience, what will be delivered, which contacts move to sales and when activity stops. If they must invent important rules, preparation is not complete.

Approval requires an accessible download, a successful form test, named responsibilities and a traceable measurement path. The creatives and page use the same offer logic. At least one argument against the central hypothesis is recorded. After the experiment, add actual observations to the brief; assumptions remain visibly labelled even when the apparent outcome is encouraging.

Editable campaign worksheet

Replace these explicitly fictional examples with your own inputs. Attach evidence or label the statement as an assumption. Keep the status open until an owner has checked the acceptance criterion.

[Open the editable worksheet in Excel / Google Sheets](#)

Work item	Fictional completed starting point	Your decision / evidence	Owner / status
Buying obstacle	Conflicting capacity lists before a prioritisation meeting	Add your entry	Add your entry
Person and context	Operations lead managing several parallel projects	Add your entry	Add your entry
Exclusion	Research without a relevant working context	Add your entry	Add your entry
Offer and delivery	Editable capacity check; confirmation and delivery tested	Add your entry	Add your entry
Creative hypothesis A	Problem recognition attracts relevant worksheet requests	Add your entry	Add your entry
Creative hypothesis B	A real preview explains usefulness more clearly	Add your entry	Add your entry
Sales handoff	Relevant task plus an agreed next step	Add your entry	Add your entry
First follow-up	Deliver worksheet and provide a specific usage instruction	Add your entry	Add your entry
Measurement check	Reconcile one test contact across platform and CRM	Add your entry	Add your entry
Stop rule and learning question	Pause broken delivery; investigate reasons for relevance	Add your entry	Add your entry

Application questions

How many creative variants should I test at once?

Only as many as you can distinguish and evaluate meaningfully. Start with a few explicit hypotheses. Limited reach and handling capacity favour fewer variants. A test without clear differences creates numbers but contributes little to a justified next decision.

Is downloading already a qualified lead?

A download initially establishes interest in the material. Whether the role, task and next step fit sales requires additional evidence. Record these states separately and agree with sales which information is necessary for a useful handoff.

What if costs look low but contacts are unsuitable?

First inspect the promised offer, problem framing and recorded exclusion reasons. A cheap contact is not an economic outcome. Read actual feedback, check form entries and address the specific cause rather than simply approving more spending.

When is a campaign ready to launch?

When the offer is complete, delivery and the form work, responsibilities are assigned, and measurement and stop rules are recorded. An independent person should be able to explain the workflow from the brief without inventing important missing rules.