The
CRM Campaign
Architecture
Brief

A creative operating system for CRM teams
who believe the best campaigns start with the best questions.

Initiative
Owner
Date
Version

Before you begin.

This is not a form to fill in. It is a thinking tool.

The best campaigns are not born from templates. They are born from the right questions asked at the right moment. This document exists to help you ask those questions, and to make sure the answers travel clearly to every person involved in bringing the work to life.

CRM is not a channel that sends messages. CRM is the architect of how people experience your product over time. Every email, every notification, every in product moment is a brick in a larger structure. This brief helps you design that structure before you start laying bricks.

How This Works

Not every initiative needs the same depth of thinking. A flash sale and a lifecycle redesign require very different levels of architecture. That is why this system has three speeds.

Tier 1: Snapshot	For quick campaigns, promotions, reactive moments. Six fields. Five minutes. Go.
Tier 2: Journey	For activation sequences, return journeys, feature adoption. The engine room where most CRM work lives. One to two pages. Fifteen minutes.
Tier 3: Architecture	For lifecycle design, onboarding systems, strategic initiatives. The full blueprint. This is where you do the deep thinking once, so everything else moves faster.

Pick the tier that fits. Start there. You can always go deeper.

Tier 1 Snapshot Campaign Brief

For the campaigns that need to move fast but still move with intention.

A snapshot brief should take five minutes. If it takes longer, you are overthinking it. The point is not to capture everything. The point is to capture the one thing that matters: why this message deserves to exist in someone's day.

Campaign Name
What are we calling this?

Outcome
What single result are we trying to produce? Not the activity. The result.

Audience
Who is this for? Not a segment name. A person. What are they doing right now?

The Moment
What is happening in this person's life when they receive this? Are they commuting? Working? Browsing at midnight? The moment shapes the message.

Touchpoints
Which channels will carry this? And more importantly, why those channels for this moment?

Success Metric
One number. The number that tells you whether this worked.

The discipline of a snapshot brief is restraint. If you cannot explain why this campaign exists in one sentence, it probably should not exist yet. Simplify the thinking. Then send it.

Snapshot in Action

A real example of how a snapshot brief works.

Campaign Name: The Weekend Comeback

Outcome: Re-engage lapsed users who haven't opened the app in 14 days.

Audience: Active users who dropped off in the last two weeks. They liked the product. Something else got in the way.

The Moment: Saturday morning. Coffee. Phone in hand. Low pressure. This is not a workday interruption. This is a gentle reminder that something they enjoyed is still here.

Touchpoints: Push notification. One line. Warm. No urgency.

Success Metric: 12% reactivation rate within 48 hours.

Tier 2 Journey Campaign Brief

The engine room. Where most CRM work lives.

A journey brief maps a sequence of moments that guide someone from where they are to where you want them to be. The difference between a journey and a batch of emails is intention. A journey has a direction. Each touchpoint knows about the one before it and prepares for the one after.

01 Outcome

Start here. Always. What measurable result does this journey need to produce?

Not "send an onboarding sequence." That is an activity. What changes in the business if this journey works?

The outcome we are driving

Current baseline

Target we are aiming for

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02 Behaviour

Outcomes are produced by behaviours. What do you need this person to do differently? Be precise. Vague behaviour goals produce vague experiences.

> *Test your behaviour statement: Could you watch someone do it?*
> *If not, it is too abstract. "Feel more engaged" is invisible.*
> *"Open the Workspace feature and create their first project"*
> *is something you can see, measure, and design for.*

What the customer does now

What we need them to do instead

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03 Audience

Describe a person, not a segment. Segments are useful for targeting. But designing a journey requires empathy. What does this person want? What is standing in their way? Where are they in the lifecycle?

Who is this person?

What are they trying to accomplish?

What is stopping them?

Where are they in the lifecycle?

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04 Journey Map

Walk through the experience from the customer's perspective. For each stage, ask: What are they thinking? What is the friction? Where is the opening?

Stage	What they're thinking	The friction	The opening
Awareness			
Consideration			
Action			
Reinforcement			

05 Touchpoints

Every touchpoint must earn its place. If you cannot say why a particular channel belongs in this journey, remove it. More channels is not better. The right channels at the right moments is better.

Timing	Channel	What it does	Why this channel	Emotional tone

06 Creative Direction

Creative teams do their strongest work when they understand the feeling you are designing for, not just the message to deliver. Tell them the emotion. The energy. The world this campaign lives inside.

Tone of voice

The story we are telling

What this should feel like

Try this: describe the campaign as if it were a scene in a film. Where is the character? What just happened? What do they need to hear next? That specificity transforms creative output.

07 System Triggers

What must exist in the system for this journey to run? Events to track, segments to build, automations to configure. This is where the experience meets the infrastructure.

Events that trigger this journey

Segmentation logic

Suppression rules (who should NOT enter)

Dependencies (features, data, integrations)

08 Measurement

A journey without measurement is just a sequence of messages. Measurement tells you whether the journey is working and, more importantly, where it is breaking.

Primary metric

Supporting signals

What will you test?

Review cadence

Journey in Action

A worked example showing how these eight sections come together.

Outcome: Increase Workspace feature activation from 23% to 40% within 60 days of signup.

Behaviour: New users create their first Workspace within 72 hours and invite at least one collaborator within 7 days.

Audience: Someone who signed up last week. They completed basic onboarding and liked what they saw, but they have not yet discovered the feature that makes the product indispensable. They are busy. They are evaluating. They need a reason to come back.

Journey:
Day 1 — In product tooltip after onboarding. Curiosity. Low effort.
Day 2 — Email showing how real teams use Workspaces. Social proof.
Day 3 — Guided creation flow with a pre built template. Quick win.
Day 5 — Push notification to invite a collaborator. One tap.
Day 7 — Email summarising their activity and suggesting next steps.

Creative Direction: Warm, encouraging, never urgent. This is not a countdown. It is a welcome. The tone is like a colleague who says "hey, you should try this, I think you'd love it."

System Triggers: onboarding_complete event starts the journey. workspace_created event suppresses remaining activation messages.

Measurement: Workspace creation rate, collaborator invite rate, 7 day return rate. Weekly review. A/B test the Day 3 template options in the first two weeks.

Tier 3 Lifecycle Architecture Brief

The full blueprint. Used when you are designing the system itself.

A Tier 3 brief is not a campaign brief. It is a system design document. You use it when building something foundational: a new onboarding lifecycle, a retention architecture, a product led growth engine. You do this thinking once. Then every Tier 1 and Tier 2 campaign operates inside the architecture you built here.

This tier includes everything in Tier 2, plus the following expanded sections. Each section is designed to answer a question that, if left unanswered, will create problems downstream.

01 **Campaign Overview**

Why does this initiative exist? What business context created the need? What opportunity or problem does it address? Be specific. The clearer the context, the better the decisions that follow.

02 **Desired Outcome**

Everything in Tier 2, plus: success metrics with baselines and targets, a measurement timeline, and the connection between this outcome and the broader business strategy.

03 **Customer Behaviour**

Everything in Tier 2, plus: a behaviour mapping table showing current behaviour alongside desired behaviour, frequency patterns, and the triggers or contexts that surround each.

04 **Audience Definition**

Everything in Tier 2, plus: lifecycle stage, emotional state, previous touchpoint history, and the full context of use. The best audience definitions answer the question: What is this person trying to accomplish and what is stopping them?

05 **Customer Journey Architecture**

The structural backbone. Map every stage from Discovery through Retention. For each stage: customer mindset, friction points, opportunity moments. This is where the thinking lives.

06 **Experience Design**

Define the experience flow, not individual campaigns. Product interactions, messaging moments, emotional tone, and timing. Design principle: the best experience is the one the customer barely notices because the next step always feels obvious.

07 **Touchpoint Strategy**

Full channel mapping with rationale. Every touchpoint earns its place by explaining why it exists in the journey, not just what it delivers.

08 **Creative Direction**

Tone, narrative, messaging principles, visual style. Creative teams produce stronger work when they understand the behaviour you are designing for, not just the message to send.

09 **Product and System Requirements**

Everything that must exist for the experience to function: product features, tracking events, segmentation logic, automation workflows, data requirements, integration dependencies. Distinguishes between existing capability and what must be built.

10 **Stakeholder Ownership**

CRM leads the engagement architecture. Product delivers feature capability. Design delivers experience assets. Development delivers system functionality. Marketing supports amplification. Clear names. Clear responsibilities.

11 **Delivery Plan**

Timeline, dependencies, assets required, launch sequence. The discipline of naming dependencies early prevents them from becoming surprises later.

12 **Measurement Framework**

Metrics by category, measurement methods, review cadence. Plus a learning loop: what you will test, how frequently you will review, and the process for turning data into action.

The Engagement Architecture

This is the model that sits behind every brief, every tier, every campaign. Five layers. CRM orchestrates across all of them. Other teams contribute components. CRM connects the system.

Outcome Layer	The business goal. What changes if this works? Revenue, retention, activation, lifetime value. Start here. Everything else follows.
Behaviour Layer	The human action. What does the customer need to do differently? If you cannot describe it as something you could watch someone do, sharpen it.
Experience Layer	The designed flow. The sequence of interactions that makes the desired behaviour feel natural, easy, even enjoyable. This is where craft lives.
Delivery Layer	The channels, systems, and assets. Email, push, in product, SMS, content. Each touchpoint earns its place by serving the experience, not the calendar.
Measurement Layer	The feedback loop. Metrics tell you if the system is working. Insights tell you how to make it better. Measurement without a learning loop is just reporting.

CRM is not a channel. CRM is the architect.

One last thing.

The best brief is the one your team actually uses.
If it lives in a folder no one opens, it is not a framework.
It is a document.

Make it easy. Make it fast. Make it something people
want to return to.

The CRM Campaign Architecture Brief
A framework by Animated Imagination