RAIN ROCKS
WEB DESIGN

CLIENT PROPOSAL / CALGARY + WESTERN CANADA

Integra Partners

2027 growth programme

One connected ecosystem.

Website, marketing, Ruddr sales workflow and Power BI reporting - supported by a clear monthly delivery programme.

Prepared by RainRocks | 10 November 2026

Attract. Connect. Follow up. Improve.

January - December 2027 | All fees shown in CAD unless marked EUR

Strategy, scope, investment and complete campaign execution appendices

rainrocks.ie

Inside this proposal

The proposal covers scope, investment and monthly delivery. Execution appendices include campaign briefs, weekly social prompts, keywords, email drafts and resources. Use the PDF bookmarks to navigate.

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01 / THE RECOMMENDATION

The programme at a glance

Connect marketing activity to a clear sales process and a useful management view.

RainRocks will build Integra a new website, connect enquiry capture to its Ruddr sales workflow, and bring marketing, sales and delivery measures together in Power BI. Our monthly service maintains the content, campaigns, lead handoff and reporting needed to keep that system useful.

Your investment	CAD
One-time implementation	13,505.90
Monthly managed service	4,362.47
Monthly paid media, separate	2,000.00
First-year service + media, including setup	89,855.54

Service fees include the agreed 20% discount. Third-party software, hosting, connector charges and applicable tax are additional. The programme begins following agreement and onboarding.

What arrives every month

Content and campaigns	Connected operations
2 blog articles + 2 email campaigns	Website/form checks and lead-routing monitoring
3 LinkedIn posts + 2 Facebook posts each week	Ruddr pipeline exception reviews
LinkedIn and Google advertising management	Power BI monitoring, monthly reporting and next actions

CAD $2,000 monthly paid media



LinkedIn $1,200/month Google $800/month Facebook paid $0

Review enquiry quality monthly and accepted opportunities over 90 days. The plan does not assume a guaranteed lead volume or revenue return.

02 / BUSINESS VALUE

One connected growth ecosystem

01 ATTRACT

Website, LinkedIn, Google, social and email

02 CAPTURE

Saved enquiry, campaign source and assigned owner

03 PROGRESS

Ruddr qualification, next action and opportunity

04 UNDERSTAND

Power BI acquisition, pipeline and delivery view

See where enquiries come from

Campaign links, website forms and lead records share source identifiers. Compare channels using relevant enquiries and accepted opportunities, alongside clicks and reach.

Give each enquiry a next step

Saved form submissions, owner routing and the Ruddr workflow connect marketing to sales. Review unassigned requests, next actions and overdue follow-ups in one agreed process.

Keep a consistent market presence

Articles, email and LinkedIn/Facebook posts follow one approved service-led calendar. Build a useful content library and give prospects a clear route to a consultation.

Improve advertising with sales feedback

LinkedIn and Google results are reviewed with qualification outcomes. Make budget decisions using enquiry fit and pipeline progress over a 90-day view.

Connect sales to delivery

Won opportunities link to Ruddr clients and projects where supported. Understand delivery demand, revenue and margin without confusing forecasts with actuals.

Get a clear management view

Power BI brings acquisition, content, sales and delivery measures together. Use a monthly review to decide what to continue, improve or stop.

03 / IMPLEMENTATION SCOPE

Website and enquiry capture

Sitemap: Home; About and team; information governance; Microsoft 365 and SharePoint; digitisation and scanning; energy and engineering information; customer stories; insights and blog; resources and webinars; contact and project enquiry; privacy and cookie information; and a useful 404 page. Confirm the final service structure with Integra before design.

Deliverables: mobile-first RainRocks design for Integra, reusable service and campaign landing-page templates, an editable CMS, approved copy and imagery, resource and webinar templates, site search where justified, accessible navigation, fast images, metadata, canonical URLs, sitemap and structured data where applicable. Migrate approved existing content and preserve valuable URLs through a tested redirect map.

Forms: consultation request, project brief, resource or webinar registration, and separate newsletter signup. Show a clear next step after submission. Notify the assigned owner and retain the enquiry even if a downstream system is unavailable. Do not treat a resource download as a sales opportunity automatically.

Before launch: test forms, routing, duplicate handling, consent controls, keyboard access, mobile layouts, analytics events, redirects and search indexing. Train editors, document ownership, take a backup and agree a reversible launch plan.

Included website scope
Up to 15 core pages, four reusable service/campaign templates, four form types, migration of up to 20 approved articles or case stories, and two consolidated design revision rounds.

A dependable route into sales

Every valid form submission is saved before it is sent onward. The workflow records its source, assigns an owner and makes delivery exceptions visible. This gives Integra an accountable handoff instead of relying on an inbox notification alone.

Capture name, business email, company, service interest and enquiry details, with phone optional. Capture consent separately for newsletters. Store submission time, consent wording version, landing page, referrer, original and latest UTMs, and permitted advertising click identifiers. Collect only fields that have a defined use.

Use server-side validation, spam protection, a unique submission ID and a durable queue. Match companies and contacts carefully, retain multiple enquiries from the same person, and make retries idempotent. Keep a delivery audit, retry failures and alert an owner when intervention is needed. Keep API credentials on the server.

Send a receipt only after the enquiry has been saved. Route by service and account ownership, with a fallback sales owner. Test successful delivery, duplicates, an existing client, invalid fields, spam, a Ruddr outage and a failed retry. A failed CRM delivery must remain visible in an intake queue rather than silently losing the lead.

Acceptance test: one website enquiry produces one saved intake record, one appropriate contact or company match, an assigned owner, a recorded source and a visible sales next step. A replay must not create a duplicate. Keep personal information out of GA4 event parameters and URLs.

04 / FROM ENQUIRY TO PROJECT

Ruddr sales workflow

Build on Integra's existing Ruddr system with a sales workflow that connects contacts, opportunities and delivery projects. Confirm the existing plan and access during onboarding so only necessary licence changes are proposed. [S26 S31]

Proposed workflow: Incoming enquiry > Qualified > Discovery > Scoping > Proposal sent > Negotiation > Won or Lost. Keep unqualified, spam and nurture records outside the active opportunity forecast. Confirm which stages and fields can be configured in the workspace before migration.

Incoming: validate the request, source and owner. Qualified: sales confirms company fit, a relevant need and a next action. Discovery: record the business problem and stakeholders. Scoping: agree the proposed engagement and delivery input. Proposal: record the value, issue date and follow-up. Negotiation: record the decision date and blockers. Won: confirm the agreement and hand over to a delivery project. Lost: capture a reason; nurture only with an appropriate communication basis.

Require a company, contact, owner, service interest, source campaign, next action and due date. Add estimated CAD value and expected close date once the engagement is scoped. Use sales-approved probabilities for weighted pipeline, and distinguish estimated contract value from recognised revenue. Keep campaign attribution in the linked intake store when native fields are unavailable.

Sales responds within one business day, reviews overdue next actions weekly, and reviews stage ageing and lost reasons monthly. Link a won engagement to the client and project so delivery can plan capacity and finance can report actual revenue and margin.

Integration setup includes validation of supported company, contact and opportunity updates. Where automatic opportunity creation is unavailable, a tracked sales task and a reconciled opportunity link provide the agreed handoff. Access and connector requirements are confirmed during onboarding. [S32]

Included sales scope
One Ruddr workspace, one agreed pipeline with up to eight stages, owner and next-action rules, and a cleaned import of up to 1,000 supplied company/contact records. Integra owns sales calls, proposals, qualification decisions and stage accuracy.

05 / MANAGEMENT VISIBILITY

Connected reporting in Power BI

Six report pages provide a consistent view of performance. Advertising and social metrics flow into the reporting layer directly; relevant enquiries and sales progress link through the Ruddr workflow.

Report page	The management question it answers
Executive growth	What did we spend, what enquiries did we receive and what progressed commercially?
Paid advertising quality	Which campaigns are producing relevant enquiries and accepted opportunities?
Website and content	Which pages and sources help visitors take the next step?
Organic social and email	Which posts and campaigns generate engagement, visits and explicit requests?
Sales pipeline	Which opportunities need action, what is ageing and what is expected to close?
Delivery and finance	How do won projects relate to capacity, actual revenue, costs and agreed margin?

Connected sources

Website forms; Ruddr; GA4; Google Search Console; Google Ads; LinkedIn advertising and company-page insights; Facebook Page insights; and one email platform. The scope covers one agreed business account/property per source. Access approvals and platform data availability are confirmed during onboarding.

Trust and access

Initial reporting refresh target is daily. Reports show the actual last successful refresh and data coverage. Unique leads, overlapping platform conversions, estimated pipeline and recognised revenue remain distinct. Financial detail is shared through restricted access, with appropriate Power BI licensing.

Included reporting scope
One semantic model, six report pages, shared date/channel/service filters, metric definitions, source reconciliation and role-appropriate distribution. Where direct access is unavailable, a documented approved export may be used.

06 / TRANSPARENT PRICING

Your investment

All amounts are CAD unless marked EUR. Service fees include a flat 20% discount. Conversion: EUR 1 = CAD 1.5852, dated 10 November 2026. Published packages and project-specific services are identified below.

Implementation

Service	EUR	CAD before discount
Website	€4,150.00	$6,578.58
CRM and automations	€2,500.00	$3,963.00
Power BI and extended integration delivery [custom scope]	€4,000.00	$6,340.80

Subtotal	20% saving	Your fee
$16,882.38	$3,376.48	$13,505.90

Published service packages: RainRocks pricing. Custom scope: the project-specific integration/reporting or managed service component. Pricing sources S36-S37.

Monthly managed service

Service	EUR	CAD before discount
Social management	€1,000.00	$1,585.20
Online ads	€500.00	$792.60
SEO	€500.00	$792.60
Email production and automation [custom scope]	€640.00	$1,014.53
Power BI and integration monitoring [custom scope]	€480.00	$760.90
Website maintenance and improvements [custom scope]	€320.00	$507.26

Subtotal	20% saving	Your fee
$5,453.09	$1,090.62	$4,362.47

Published service packages: RainRocks pricing. Custom scope: the project-specific integration/reporting or managed service component. Pricing sources S36-S37.

Payments and annual commitment

Setup payments: $5,402.36 on commencement; $5,402.36 at implementation review; $2,701.18 on acceptance and handover. Monthly managed service is $4,362.47; paid media is $2,000 separately.

First year: setup $13,505.90 + managed service $52,349.64 + media $24,000 = $89,855.54. Ongoing annual service and media after setup: $76,349.64. Third-party software, hosting, connectors and applicable tax are additional and confirmed before commitment.

07 / MANAGED SERVICE

What we deliver every month

The monthly fee covers both market activity and the connected operations behind it. Integra receives a visible delivery checklist, a maintained reporting view and a monthly discussion of what to improve.

Timing	RainRocks activity	What Integra receives
Week 1	Review results, agree priorities and prepare the approval pack	Performance summary, campaign priorities and next actions
Week 2	Publish content, optimise ads and review sales exceptions	Published assets and a campaign/handoff change log
Week 3	Publish the second article/email and check forms/data	Second content release and tested improvements
Week 4	Reconcile spend and outcomes; plan the next month	Dashboard snapshot and completed service checklist
Throughout	Scheduled social, twice-weekly ad checks and weekly operational reviews	A maintained acquisition-to-sales process

Quarterly decisions

Review the 90-day opportunity picture, service mix and media allocation. Refresh the competitor/content watchlist and agree the next quarter’s priorities. Four proposed webinars are promoted through the existing content/email slots; Integra supplies the presenter and approved source material.

08 / DELIVERABLES AND ACCOUNTABILITY

Monthly service checklist 1 of 4

Planning and approvals

MONTHLY, BEFORE PUBLISHING

A clear plan and fewer last-minute approvals.

Confirm the campaign offer, audience and service capacity with Integra; hold one 45-minute planning/performance meeting; maintain the next four weeks of content, owners and approval dates.

What Integra receives
Approved calendar, meeting notes and action register.

Blogs and SEO

TWO ARTICLES EACH MONTH

Useful service content that supports discovery and enquiry conversion.

Interview the service reviewer where needed; research intent; draft, edit and publish two useful articles; add metadata, headings, internal links, images and a relevant enquiry CTA. Review Search Console queries, indexing and priority service pages.

What Integra receives
Two published URLs and a dated SEO change log.

LinkedIn organic

THREE POSTS EACH WEEK

A consistent professional presence with useful routes to the website.

Write and schedule company-page posts using consultant insights, service explanations, document/carousel assets and approved proof. Adapt the monthly articles into platform copy. Keep links tagged and route relevant comments or messages to Integra.

What Integra receives
156 planned annual post placements, asset files and post-level results.

08 / DELIVERABLES AND ACCOUNTABILITY

Monthly service checklist 2 of 4

Facebook organic

TWO POSTS EACH WEEK

An active company presence and a clear handoff for relevant enquiries.

Adapt the approved content for Facebook with clear language, team content and useful explanations. Review company-page comments/messages twice weekly during working days; escalate sales enquiries and sensitive responses.

What Integra receives
104 planned annual post placements and an enquiry handoff log. Paid Facebook remains $0.

Email campaigns

TWO CAMPAIGNS EACH MONTH

Relevant follow-up that helps interested contacts take the next step.

Prepare copy, template layout, segmentation, links and test previews; obtain approval before sending; check suppression/unsubscribe handling and record engagement. Maintain existing resource follow-up flows within the monthly improvement allowance.

What Integra receives
Two approved campaigns, test checklist and delivery/click/unsubscribe summary.

LinkedIn advertising

TWICE-WEEKLY CHECKS AND MONTHLY OPTIMISATION

Paid activity refined against audience fit and sales outcomes.

Manage the $1,200 media allocation, one core audience and one principal offer. Prepare up to two new creative/copy variants per month; check delivery, audience fit, frequency, form quality and spend; update targeting or creative using sales feedback.

What Integra receives
Campaign change log, spend pacing, qualified-lead and opportunity outcomes.

08 / DELIVERABLES AND ACCOUNTABILITY

Monthly service checklist 3 of 4

Google Search advertising

TWICE-WEEKLY CHECKS; WEEKLY QUERY REVIEW

Focused coverage of relevant searches with less irrelevant traffic.

Manage the $800 allocation; review search terms, negatives, geography, ads, destinations and conversions. Maintain focused service-intent campaigns and test up to two ad-copy variants monthly.

What Integra receives
Search-term decisions, budget pacing and landing-page/conversion checks.

Website and form health

MONTHLY END-TO-END TEST; WEEKLY HEALTH REVIEW

Working conversion paths and visible exceptions before they become lost opportunities.

Submit one labelled test enquiry through every active form, verify receipt and owner routing, check duplicate handling and review failure queues. Check broken priority links, backups and key mobile pages. Apply up to two hours of minor website/content improvements each month.

What Integra receives
Dated test IDs, issue log, backup confirmation and completed improvement list.

Ruddr pipeline hygiene

WEEKLY CHECKS; MONTHLY SALES REVIEW

Clearer ownership and fewer enquiries left without an agreed next action.

Review failed syncs, unassigned enquiries, duplicates and missing source fields. Present stale opportunities and overdue next steps to the sales owner. Agree qualification outcomes and loss reasons; reconcile won projects against linked opportunities.

What Integra receives
Exception report and agreed follow-up list. Integra owns prospect calls, deal decisions and stage accuracy.

08 / DELIVERABLES AND ACCOUNTABILITY

Monthly service checklist 4 of 4

Power BI and data quality

AUTOMATED DAILY REFRESH TARGET; WEEKLY REVIEW

Reports that remain usable and show when data needs attention.

Review refresh status, expired permissions and connector errors. Reconcile platform spend, unique intake leads and Ruddr opportunities; check that joins do not multiply records. Maintain existing report pages and include up to one hour of minor report adjustments monthly.

What Integra receives
Refresh history, reconciliation log, data coverage notes and visible last-refresh dates.

Monthly performance pack

ONCE EACH MONTH

A clear explanation of results and practical decisions for the next month.

Deliver the six dashboard views plus a short written explanation of spend, website conversions, social engagement, email engagement, qualified leads, meetings, pipeline and won outcomes. Distinguish platform conversions, unique leads and assisted touchpoints.

What Integra receives
Dashboard access, month-end snapshot and three prioritised next actions.

Quarterly improvement review

EVERY THREE MONTHS, INCLUDED

A campaign programme that changes as commercial evidence develops.

Review accepted opportunities over 90 days, service mix and the paid allocation. Refresh the competitor/content watchlist. Support the four planned webinars through the existing content and email slots; Integra provides the presenter and approved source material.

What Integra receives
Quarterly recommendations and updated next-quarter campaign priorities.

09 / LAUNCH PLAN

Delivery, ownership and acceptance

Indicative eight-week sequence, subject to discovery and content approval: week 1 confirms scope, licences, access, data fields and baseline; weeks 2-3 approve design, sitemap and copy; weeks 3-5 build the website and intake; weeks 4-6 configure and test the Ruddr workflow; weeks 5-7 build the data model and Power BI pages; week 8 reconciles results, trains owners and launches with monitoring. API approval or content delays can extend this.

RainRocks owns web delivery and integration implementation; Integra appoints a sales process owner, service reviewers and a finance reporting owner. The Microsoft administrator approves access and dashboard distribution. Agree ongoing support, incident response and connector ownership before handover.

Go-live evidence: approved website pages and redirects; successful and replayed test enquiries; outage recovery; source attribution matched across forms and sales; one test opportunity progressed to a linked project; authorised dashboard access; daily refresh and failure alert tested; platform spend reconciled; and finance totals agreed. Use synthetic records for testing and remove or label them before production reporting.

Working together

RainRocks supplies implementation, content production, campaign management, monitoring and the reporting process described here. Integra supplies account access, subject-matter input, approved case-study evidence, one consolidated review contact and timely approvals. Integra’s sales team handles enquiries, discovery calls, proposals and opportunity updates.

The monthly service includes two articles, two email campaigns, three LinkedIn posts each week and two Facebook posts each week, together with paid campaign management, website checks, pipeline reviews and dashboard monitoring. The annual plan contains 260 social post placements, 24 articles and 24 email campaigns. Content is adapted across channels to make effective use of approved expertise and assets.

Included maintenance covers the existing implementation and stated minor changes. New pages beyond the agreed template allowance, new data sources, major automation changes, historical data reconstruction, video shoots, travel, webinar hosting/presentation and extensive copy rewrites are separately scoped. Critical issues are triaged during working days; a 24/7 response SLA is not included.

The retainer begins when the marketing and tracking foundation is ready for managed delivery; phase the website, reporting and campaigns together. Quarterly webinar promotion uses that month’s existing email/social allocation, with a recording edited only if separately agreed. Keep a shared issue and approval log so work and dependencies are visible.

10 / MARKET APPROACH

Audience and offers

Buyer	Buying trigger	First useful offer
CIO or IT director	Copilot pilot, M365 sprawl, migration or poor search	Information health check or M365 discovery
Records or governance leader	Audit finding, unclear ownership, retention backlog	Records programme assessment
Energy operations or engineering leader	Acquisition, office move, asset handover or missing technical records	Energy records discovery or handover review
Finance or operations manager	Repeated approvals, document rework and manual handoffs	One-workflow discovery
Existing client or warm account	Backlog, recurring work, new site or annual planning	Managed-service or roadmap review

Offer names are proposed campaign packaging, not confirmed existing products. Before promotion, define scope, delivery owner, turnaround, outputs and price or qualification process. A discovery call can be free if Integra agrees; do not advertise a free assessment or fixed delivery promise without that agreement.

Lead journey

Useful article or expert post leads to a checklist, webinar or service page. A relevant enquiry goes to a discovery call. Sales qualifies the need and creates an opportunity. Won work becomes a project and is measured through delivery and margin. Resource downloads remain enquiries until their business fit and need are established.

Build four main resource assets: Q1 information risk and readiness checklist; Q2 digitisation scope and ROI worksheet; Q3 engineering information handover checklist; Q4 annual information-services planning template. Supporting worksheets in other months should reuse these assets where possible.

Account focus

Sales should nominate about 50 priority organisations across energy, utilities, mining and public-sector operations. Use this as a working account list for content relevance and relationship tracking. It is not a purchased email list. Include IT, information-management and operations stakeholders, and respect each organisation's procurement process.

11 / CONTENT AND DISTRIBUTION

Channel playbooks

LinkedIn

Publish three company posts each week: a practical tip or document carousel on Tuesday, an expert viewpoint or short video on Wednesday, and a proof point, FAQ or service example on Thursday. Start by testing 8:30 am and midday in America/Edmonton time, then use actual account results. These times are hypotheses, not proven best times.

Each month should include a useful checklist, a consultant perspective, a process demonstration and an approved customer lesson. Give one clear next step. Use real delivery photographs or diagrams where approved. Use two to four relevant hashtags when helpful, such as #InformationGovernance, #SharePoint or #DocumentManagement; hashtags are not the keyword strategy.

Invite one executive or SME to write one original personal post per week. Supply prompts and approved facts, but retain their voice. Spend three short sessions weekly responding to questions and joining relevant industry discussions. Do not automate unsolicited sales messages or copy the same post across every employee account.

Facebook

Publish two posts weekly: a plain-language process or useful visual on Wednesday, and a people, community or behind-the-scenes story on Friday. Rewrite LinkedIn ideas for a broader audience. Keep employer-brand content separate from lead-generation results. Use captions on video and alternative text on images.

One example topic across both channels

LinkedIn hook: Before you scan a records room, agree how people will find the information afterwards. Explain document types, indexing, permissions and acceptance checks, then link to the planning worksheet. Facebook version: show a simple illustrated journey from a paper file to a searchable record and invite readers to the same resource.

Production and moderation

The weekly workbook supplies 156 LinkedIn and 104 Facebook post concepts. Marketing turns each into copy and artwork two weeks before use. The service SME checks technical statements within two business days. Marketing answers normal comments within one business day and routes service enquiries to sales. Never publish client documents, identifying metadata or invented results.

Publish two substantive articles each month. Aim for 1,000 to 1,400 useful words where the topic needs them, with a concise answer near the top, one worked example or diagram, practical steps, FAQs and a service-specific CTA. Length is an editorial guide, not a ranking requirement.

Keyword family	Use	Example
Local scanning	Initial Google Search and service page	document scanning calgary
Information governance	Initial Google Search and advisory page	information governance consulting
M365 and migration	SEO and controlled paid tests	sharepoint governance consulting

Keyword family	Use	Example
Energy and handover	Sector content and narrow tests	well file scanning services
Copilot and AI governance	Education first and qualified-intent tests	copilot information governance
Records lifecycle and workflow	SEO and email education	records retention programme

The workbook contains 96 candidate terms, including brand/comparison monitoring terms. These are derived from public service language and observed pages. They are not verified competitor ranking keywords. Search volume, CPC, bid ranges and SEO difficulty have not been measured. Validate Calgary and Alberta demand in Keyword Planner and review Search Console before launch. [S22]

Start paid search with a shortlist of roughly 10 to 15 exact/phrase keywords across scanning and governance. Keep the rest as an editorial and test backlog. The document-control category is especially prone to recruitment traffic. Add negatives such as jobs, salary, resume, internship, course, certification and home scanner where clearly irrelevant. Do not apply negatives that block a service Integra actually sells.

Website requirements

Use existing live service URLs where suitable. Create focused pages for governance, M365 information management, digitisation and energy information only when needed. Proposed paths in the workbook are placeholders. Each page should state who the service is for, the problem addressed, what the first engagement produces, relevant proof and a working enquiry form. Avoid many near-duplicate city pages.

Link each article to its relevant service and one related article. Check indexability, titles, mobile usability, canonical URLs and page speed. Refresh six existing articles or service pages during the year where evidence supports an improvement. Review product terminology and licensing before publishing Microsoft technical guidance. [S21]

12 / ENGAGEMENT AND DEMAND

Email and paid acquisition

Send two planned campaigns each month: a useful insight or newsletter around the second week, and one focused resource, service story or webinar invitation around the fourth week. Segment by M365 and IT, records and governance, energy and engineering, and existing clients. A recipient receives the relevant version rather than all segment variants.

In webinar months, move the invitation early enough to allow registration. Invite the relevant consented segment about two weeks before the event; replace that month's focused campaign rather than adding a third general blast. Send reminders only to registrants and separate requested event logistics from unrelated promotions.

Flow	Timing	Action
Resource request	Immediately	Deliver requested asset and confirm the next step; record consent separately.
Consented nurture	Day 3	Send one practical lesson relevant to the requested resource.
Consented nurture	Day 8	Share an approved example or related checklist.
Consented nurture	Day 15	Offer a scoped discovery conversation; stop if sales takes over.
Webinar follow up	Within 2 business days	Send recording to eligible attendees and registrants; sales contacts people who requested a discussion.
Service enquiry	Within 1 business day	Named sales owner responds, qualifies and records outcome.

Use a recognisable sender, one main CTA, descriptive links, readable mobile layout and a text alternative. Test subject clarity rather than clickbait. Use unique clicks, relevant replies, meetings and opportunities as primary measures. Opens are a secondary signal because privacy features and automation can distort them.

For Canadian commercial email, establish a valid consent basis, identify the sender and provide an unsubscribe mechanism. Record source, consent type, timestamp, applicable expiry and suppression. Do not assume a downloaded guide, public email address or webinar registration automatically authorises unrelated marketing. Have the responsible owner review the actual workflow against CRTC guidance. [S25]

Google Search receives CAD $800 every month and $9,600 annually, 40% of paid media. Start a narrow set of high-intent terms and relevant service pages. Do not spend beyond qualified demand.

Initial structure

Use one service-focused Search campaign with two tightly themed ad groups: document scanning and information governance. Start in Calgary using presence-based geography. Expand to Alberta only after delivery coverage and lead quality are confirmed. Keep service keywords without a city modifier within the same geographical targeting. [S23]

Use exact and phrase match initially. Keep Search Partners and display expansion off during the initial measurement period. Avoid competitor-name bidding, broad AI queries and Performance Max at this budget until evidence supports

a controlled change. Swap weak terms for migration or energy terms before creating more always-on campaigns.

Creative and destination

Build two responsive search-ad variants per group, with several distinct headlines and descriptions. Examples include Document Scanning Calgary, Searchable Business Records and Information Governance. Use the matching service page and CTA. Do not promise savings, security certification, pricing or turnaround without verified evidence. The workbook includes draft ad copy and destination requirements.

Conversion and optimisation

Count a valid service enquiry or booked discovery as a primary conversion. Track downloads, video views and webinar registrations separately as secondary actions. Review search terms weekly and check actual lead quality with sales. Record spam, job seekers and vendors as rejected with reasons rather than treating every form as a qualified lead.

For the first month use a controlled bidding approach with a CPC ceiling based on account estimates. Evaluate conversion-based bidding only after the account has trustworthy conversion history. Set campaign pacing from the monthly allocation, monitor spend twice weekly and respect the CAD 2,000 cross-platform cap.

After 30 days, pause clearly irrelevant search terms and fix poor destination pages. After 60 to 90 days, compare qualified lead cost, opportunity creation and sales feedback by service. At small volumes, a single missed conversion or long sales cycle can distort the result; do not scale on click-through rate alone.

LinkedIn receives CAD $1,200 every month and $14,400 annually, 60% of paid media. Start with one focused professional audience and one principal offer. Keep creative tests small enough to learn within this budget. Review qualified enquiries monthly and accepted opportunities over 90 days. Lead quality remains a hypothesis until measured.

Facebook paid media is paused at CAD $0. Keep two organic Facebook posts per week. Review any future remarketing proposal against evidence, eligible audience size and the combined CAD $2,000 monthly cap.

13 / REPORTING DEFINITIONS

Measurement and commercial progress

Use one campaign ID across website links, email, ads and the opportunity record, for example ip_2027_03_copilot. Keep the initial source separate from the latest campaign interaction. UTM source identifies the platform, medium identifies paid versus organic, campaign identifies the offer and content identifies the creative.

Stage	Definition	Owner
Enquiry	A unique person requests information or submits a valid form	Marketing
Qualified lead	Sales confirms company fit, a relevant need and a credible next step	Sales
Opportunity	Sales accepts a scoped potential engagement with stage and estimated value	Sales
Won project	Agreement accepted and project created	Sales and delivery
Delivered value	Recorded revenue, delivery costs and margin for the agreed period	Finance and delivery

Capture lead ID, company, business contact, service interest, original source, original campaign, latest campaign, landing page, consent evidence, owner, status, rejection reason and relevant opportunity ID. Record estimated opportunity value separately from won revenue. Do not send confidential form content into analytics platforms.

Ruddr supports companies, contacts, opportunities and custom API integrations. Verify which fields and write endpoints are available in their actual workspace before choosing the integration. Keep consent, detailed attribution and email suppression in a marketing system or companion database if Ruddr cannot hold them. [S26 S27]

Suggested integration: website form creates a deduplicated lead in the lead store, sends an internal notification and creates or updates the relevant Ruddr record when qualified. Email stays in an email platform. Ads and analytics data join the lead and opportunity data in a reporting dataset, which can feed Power BI or a simpler dashboard.

Report spend, clicks, valid leads, qualified leads, meetings, accepted opportunities, pipeline value and won revenue. Cost per qualified lead equals spend divided by qualified leads. Paid ROAS equals attributed revenue divided by paid spend; it is not profit or total marketing ROI. Count each opportunity and sale once. Keep first-touch, last-touch and assisted views separate. Reconcile a 30-day acquisition report with 90-day opportunity follow-up.

14 / RESEARCH AND POSITIONING

Competitive landscape 1 of 4

Twelve direct, adjacent or regional providers form the defined planning set. Public service positioning and selected content were reviewed; this is not a measured market-share, search-ranking or advertiser-spend audit.

Gravity Union

Direct specialist | Calgary office listed

Service overlap: M365 governance, SharePoint, records and AI

Observed approach: Articles, webinars, resource library and LinkedIn promotion

Planning lesson: Teach a practical topic, then offer a workshop

> **Integra response**
> Use energy-specific examples and a clear implementation scope

Sources: S03 S04 S05 S06 S30

WCD

Direct operations competitor | Calgary-based public profile

Service overlap: Scanning, ECM, workflow and managed back office

Observed approach: Public energy case story reused on LinkedIn; quote-led services

Planning lesson: Show the business trigger and documented outcome

> **Integra response**
> Connect scanning to metadata, governance and user adoption

Sources: S07 S08

Tesseract Solutions

Direct technical specialist | Primarily Calgary per website

Service overlap: OpenText, SharePoint Online, scanning and BI

Observed approach: Service-led site with consultation contact

Planning lesson: Make service pages concrete and technical

> **Integra response**
> Explain the full governance-to-managed-service journey

Sources: S09

14 / RESEARCH AND POSITIONING

Competitive landscape 2 of 4

Access

Direct records competitor | Multiple Calgary facilities

Service overlap: Scanning, records lifecycle and energy information

Observed approach: Local service pages and named Energy offering

Planning lesson: Make geography and sector use cases easy to find

Integra response
Differentiate advisory and M365 delivery from storage

Sources: S10

Ricoh Canada

National enterprise competitor | Canadian provider; Calgary delivery evidenced previously

Service overlap: Information governance, RIM, ECM and education

Observed approach: Consulting brochure, maturity assessment and roadmap

Planning lesson: Use an assessment to create a next step

Integra response
Make senior access, local delivery and energy knowledge tangible

Sources: S11

Johal Consulting

Local advisory specialist | Calgary stated

Service overlap: Records health checks, digitisation advice and procurement

Observed approach: Named health-check and fractional records support offers

Planning lesson: Package a small starting engagement clearly

Integra response
Show depth of delivery team and ongoing service options

Sources: S12

14 / RESEARCH AND POSITIONING

Competitive landscape 3 of 4

Copyseis

Adjacent energy specialist | Calgary warehouses and data centre

Service overlap: Seismic and geological data, corporate records storage

Observed approach: Local ownership, industry expertise and contact CTA

Planning lesson: Speak in the language of energy records

Integra response
Focus on engineering and corporate information governance

Sources: S13

Iron Mountain Canada

National enterprise alternative | Canada-wide offer; Calgary facility not verified in scan

Service overlap: Enterprise scanning, intelligent capture and content platform

Observed approach: Demo-led digitisation and AI-ready data messaging

Planning lesson: Connect physical records to usable digital information

Integra response
Explain repository choice and practical M365 integration

Sources: S14

Cadence Solutions

Regional specialist to monitor | Canadian regional competitor; Calgary office not verified

Service overlap: M365, Purview, OpenText and legacy ECM migrations

Observed approach: Named health checks, governance playbook, workshops and training

Planning lesson: Offer a clearly bounded diagnostic with useful outputs

Integra response
Prove sector expertise and adoption after migration

Sources: S15

14 / RESEARCH AND POSITIONING

Competitive landscape 4 of 4

Long View Systems

Broader technology competitor | Calgary office linked

Service overlap: Modern Workplace, AI, cloud and managed services

Observed approach: AI positioning, events, blog and broad solution portfolio

Planning lesson: Connect technical delivery with business adoption

Integra response
Stay specific on document-intensive operations and governance

Sources: S16

ARC Calgary

Adjacent local scanning provider | Calgary location verified

Service overlap: Document and construction scanning, archives and OCR

Observed approach: Local quote page, scanning services and estimator links

Planning lesson: Make project intake easy and local

Integra response
Sell indexing, governance and managed handover beyond image capture

Sources: S17

DHQ Imaging Centre

Adjacent local scanning provider | Downtown Calgary address

Service overlap: Document and large-format scanning, OCR and archiving

Observed approach: Service-led local page and free-quote CTA

Planning lesson: Answer file-format and project-preparation questions

Integra response
Emphasise complex enterprise records and delivery programmes

Sources: S18

15 / JANUARY - DECEMBER 2027

The annual campaign calendar

Month	Theme and audience	Offer / next step
January	Know what information you have IT leaders and records managers	Information health check Request a discovery call
February	Make Microsoft 365 easier to govern IT directors and Microsoft 365 owners	M365 governance discovery Discuss your M365 priorities
March	Prepare information for Copilot CIOs, IT managers and governance leads	Copilot information readiness workshop Register for the readiness webinar
April	Give records a practical lifecycle Records, compliance and information managers	Records programme assessment Discuss your records programme
May	Make energy records usable Energy operations, land and engineering leaders	Energy records discovery Discuss a records backlog
June	Turn paper into searchable information Operations leaders and records managers	Digitisation scoping consultation Register for the digitisation webinar
July	Move to SharePoint with a plan IT and information-management leaders	Migration discovery and roadmap Discuss a migration pilot
August	Remove manual document work Finance, operations and IT managers	Document workflow discovery Bring one manual workflow
September	Get engineering information ready for operations Engineering managers and project information leads	Asset information handover review Register for the handover webinar
October	Keep AI information governance practical IT, privacy and information-governance leads	Governance roadmap conversation Request a governance review
November	Plan the next year of information services CIOs, operations directors and existing clients	2028 information services planning session Register for the planning webinar
December	Review results and agree the next step Clients, warm opportunities and partners	2028 discovery or client review Book a January planning discussion

Two articles and two emails each month; three LinkedIn posts and two Facebook posts each week. Paid media remains LinkedIn $1,200 and Google $800 monthly, with Facebook paid paused.

APPENDIX A / EXECUTION DETAIL

Monthly campaign briefs

Each monthly brief sets out the audience, offer, editorial topics, social direction and paid activity. These are proposed campaigns for approval before publication. Confirm service capacity, evidence and live destinations before launch.

The source campaign ID is retained through website links, email and the lead record. Marketing and sales review enquiry quality each month and accepted opportunities over at least 90 days.

January 2027: Know what information you have

Audience	Offer and next step
IT leaders and records managers	Information health check Request a discovery call

Campaign ID: ip_2027_01_baseline

Articles and email

Article 1: How to assess information risk before your next technology project

Email 1: Where is your information creating avoidable work?

Article 2: What an information governance roadmap should include

Email 2: Start with a practical information health check

Organic social direction

LinkedIn: Governance self-check carousel; consultant introduction; process explainer; roadmap FAQ

Facebook: Meet the team; plain-language records tips; behind-the-scenes process; checklist reminder

Paid activity

Google Search - $800: Core governance and scanning searches; validate terms and conversion tracking

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Information risk and readiness checklist. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

February 2027: Make Microsoft 365 easier to govern

Audience	Offer and next step
IT directors and Microsoft 365 owners	M365 governance discovery Discuss your M365 priorities

Campaign ID: ip_2027_02_m365

Articles and email

Article 1: SharePoint permissions review for document-intensive teams

Email 1: Can your team find the right version?

Article 2: How to reduce duplicate files and unmanaged Teams workspaces

Email 2: Five questions for your next SharePoint review

Organic social direction

LinkedIn: Permissions demonstration; Teams ownership checklist; SME viewpoint; approved migration lesson

Facebook: Short searchability explainer; team story; workflow illustration; useful checklist

Paid activity

Google Search - $800: Test SharePoint governance terms within the core consulting group

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Reuse Q1 readiness checklist. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

March 2027: Prepare information for Copilot

Audience	Offer and next step
CIOs, IT managers and governance leads	Copilot information readiness workshop Register for the readiness webinar

Campaign ID: ip_2027_03_copilot

Articles and email

Article 1: Copilot readiness starts with permissions and content quality

Email 1: Before your next Copilot rollout check the information foundation

Article 2: A practical information governance checklist for AI adoption

Email 2: Join our practical Copilot readiness session

Organic social direction

LinkedIn: Webinar invitation; permissions myth; speaker video; checklist excerpt; recording follow-up

Facebook: Simple AI-readiness explainer; speaker introduction; event reminder; recording excerpt

Paid activity

Google Search - $800: Keep service-intent core; small Copilot consulting term test only if demand qualifies

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Q1 checklist and webinar recording. Proposed event: Webinar 1 proposed.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

April 2027: Give records a practical lifecycle

Audience	Offer and next step
Records, compliance and information managers	Records programme assessment Discuss your records programme

Campaign ID: ip_2027_04_records

Articles and email

Article 1: Records retention works better when ownership is clear

Email 1: Who owns the next step in your records lifecycle?

Article 2: How to build a defensible disposal workflow without deleting too early

Email 2: A practical worksheet for retention ownership

Organic social direction

LinkedIn: Retention workflow diagram; legal-hold review question; records-manager interview; common ownership gap

Facebook: Lifecycle illustration; expert introduction; records FAQ; worksheet reminder

Paid activity

Google Search - $800: Governance and retention consulting queries; exclude legal-advice-only searches

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Retention ownership worksheet. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

May 2027: Make energy records usable

Audience	Offer and next step
Energy operations, land and engineering leaders	Energy records discovery Discuss a records backlog

Campaign ID: ip_2027_05_energy

Articles and email

Article 1: Planning a land and well records digitisation project

Email 1: What is hidden in your land and well records backlog?

Article 2: Engineering document control handover checklist for energy teams

Email 2: Plan your next records project before the office move

Organic social direction

LinkedIn: Energy document example; anonymised case lesson; land-record taxonomy; delivery-team interview

Facebook: Approved scanning process photos; energy records explainer; staff spotlight; project preparation tips

Paid activity

Google Search - $800: Prioritise commercial scanning and energy records terms within service area

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Digitisation scope and ROI worksheet. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

June 2027: Turn paper into searchable information

Audience	Offer and next step
Operations leaders and records managers	Digitisation scoping consultation Register for the digitisation webinar

Campaign ID: ip_2027_06_digitise

Articles and email

Article 1: Document scanning costs what drives the scope and price

Email 1: Scanning is one step in a useful digital records project

Article 2: OCR metadata and quality control what makes a digital record useful

Email 2: Join our session on planning a digitisation project

Organic social direction

LinkedIn: Webinar invite; preparation demonstration; quality-control checklist; worksheet walk-through

Facebook: Short scanning video; team profile; event reminder; searchable-record demonstration

Paid activity

Google Search - $800: Core scanning searches; add quote-focused copy and scope questions

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Q2 digitisation scope and ROI worksheet. Proposed event: Webinar 2 proposed.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

July 2027: Move to SharePoint with a plan

Audience	Offer and next step
IT and information-management leaders	Migration discovery and roadmap Discuss a migration pilot

Campaign ID: ip_2027_07_migration

Articles and email

Article 1: Shared drive to SharePoint migration what to decide before moving files

Email 1: Move the right information with the right controls

Article 2: Metadata and permissions mapping for a controlled migration

Email 2: Plan a small migration pilot before scaling

Organic social direction

LinkedIn: Migration checklist; metadata example; permissions lesson; pilot acceptance criteria

Facebook: Migration explained simply; consultant story; diagram; template reminder

Paid activity

Google Search - $800: Swap weak terms for high-intent SharePoint migration consulting if qualified demand supports it

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Migration inventory template. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

August 2027: Remove manual document work

Audience	Offer and next step
Finance, operations and IT managers	Document workflow discovery Bring one manual workflow

Campaign ID: ip_2027_08_workflow

Articles and email

Article 1: How to scope a document approval workflow in Microsoft 365

Email 1: Which document process keeps coming back to email?

Article 2: What to measure before automating journal voucher documentation

Email 2: Map one workflow before choosing the automation

Organic social direction

LinkedIn: Approval workflow diagram; approved journal-voucher lesson; SME video; measurement checklist

Facebook: Simple before-and-after process diagram; team story; worksheet tip; client-safe demonstration

Paid activity

Google Search - $800: Maintain proven service groups; test document workflow consulting only by replacing weak terms

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Workflow mapping worksheet. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

September 2027: Get engineering information ready for operations

Audience	Offer and next step
Engineering managers and project information leads	Asset information handover review Register for the handover webinar

Campaign ID: ip_2027_09_handover

Articles and email

Article 1: What a usable engineering information handover looks like

Email 1: Is your asset information ready for handover?

Article 2: How to find gaps in asset records before operations take over

Email 2: Join our engineering information handover session

Organic social direction

LinkedIn: Webinar invite; handover checklist; metadata example; case lesson and follow-up

Facebook: Engineering records explainer; expert introduction; webinar reminder; checklist demonstration

Paid activity

Google Search - $800: Test narrow document-control services terms; exclude recruitment searches

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Q3 engineering handover checklist. Proposed event: Webinar 3 proposed.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

October 2027: Keep AI information governance practical

Audience	Offer and next step
IT, privacy and information-governance leads	Governance roadmap conversation Request a governance review

Campaign ID: ip_2027_10_ai_governance

Articles and email

Article 1: Governance questions to ask before introducing an AI agent

Email 1: Your AI pilot needs an information owner

Article 2: How to maintain ownership permissions and retention after an AI pilot

Email 2: Build governance into the work people already do

Organic social direction

LinkedIn: AI governance questions; SME opinion; permissions example; policy-to-workflow illustration

Facebook: Plain-language AI explanation; staff expertise; governance tip; useful worksheet

Paid activity

Google Search - $800: Keep highest-converting service groups; AI queries only with consulting intent

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

AI information ownership worksheet. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

November 2027: Plan the next year of information services

Audience	Offer and next step
CIOs, operations directors and existing clients	2028 information services planning session Register for the planning webinar

Campaign ID: ip_2027_11_planning

Articles and email

Article 1: How to build a business case for managed information services

Email 1: What should your 2028 information roadmap include?

Article 2: Budgeting for records migration and governance in 2028

Email 2: Join our practical information services planning session

Organic social direction

LinkedIn: Business case framework; webinar invitation; managed-service example; planning template; executive perspective

Facebook: Team and service story; planning tips; event reminder; approved results recap

Paid activity

Google Search - $800: Proven service-intent searches; route managed-service enquiries to clear scope

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Q4 information services planning template. Proposed event: Webinar 4 proposed.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX A / MONTHLY BRIEF

December 2027: Review results and agree the next step

Audience	Offer and next step
Clients, warm opportunities and partners	2028 discovery or client review Book a January planning discussion

Campaign ID: ip_2027_12_review

Articles and email

Article 1: The information management questions we heard most in 2027

Email 1: The most useful information management resources from this year

Article 2: A 90 day information improvement plan for the new year

Email 2: Your next 90 days of information improvement

Organic social direction

LinkedIn: Approved lessons from the year; team thanks; resource roundup; practical January priorities

Facebook: People and community recap; useful resource; year-end thanks; January planning tip

Paid activity

Google Search - $800: Maintain best intent groups; reduce waste during low-demand periods and retain cap

LinkedIn - $1,200: one focused professional audience and the monthly service or webinar offer; measure qualified enquiries and opportunities over 90 days.

Facebook paid - $0: retain organic activity; review any future paid proposal within the combined media cap.

Resource and review

Reuse Q4 planning template and best recordings. Use the relevant quarterly worksheet.

Marketing prepares the assets; the service SME reviews accuracy; sales follows up on valid enquiries within one business day. Review valid leads, qualification outcomes, meetings and accepted opportunities.

APPENDIX B / 52-WEEK EXECUTION CALENDAR

Weekly social schedule

The following schedule expands the annual publishing cadence into weekly prompts. LinkedIn posts are planned Tuesday, Wednesday and Thursday; Facebook posts Wednesday and Friday. Review timing in America/Edmonton and adapt around local holidays. Each brief still requires approved copy and assets.

Social weeks 1-4

Week 1 | 2027-01-04 | Inventory the repositories

LinkedIn: Practical tip carousel: inventory the repositories; SME viewpoint or 45 second explanation: inventory the repositories; Proof or FAQ: connect inventory the repositories to information health check.

Facebook: Plain-language visual: inventory the repositories; People or process story supporting inventory the repositories.

Next step: Request a discovery call

Week 2 | 2027-01-11 | Assign information owners

LinkedIn: Practical tip carousel: assign information owners; SME viewpoint or 45 second explanation: assign information owners; Proof or FAQ: connect assign information owners to information health check.

Facebook: Plain-language visual: assign information owners; People or process story supporting assign information owners.

Next step: Request a discovery call

Week 3 | 2027-01-18 | Identify the highest-risk records

LinkedIn: Practical tip carousel: identify the highest-risk records; SME viewpoint or 45 second explanation: identify the highest-risk records; Proof or FAQ: connect identify the highest-risk records to information health check.

Facebook: Plain-language visual: identify the highest-risk records; People or process story supporting identify the highest-risk records.

Next step: Request a discovery call

Week 4 | 2027-01-25 | Choose one measurable pilot

LinkedIn: Practical tip carousel: choose one measurable pilot; SME viewpoint or 45 second explanation: choose one measurable pilot; Proof or FAQ: connect choose one measurable pilot to information health check.

Facebook: Plain-language visual: choose one measurable pilot; People or process story supporting choose one measurable pilot.

Next step: Request a discovery call

APPENDIX B / WEEKLY PROMPTS

Social weeks 5-8

Week 5 | 2027-02-01 | Review sharing practices

LinkedIn: Practical tip carousel: review sharing practices; SME viewpoint or 45 second explanation: review sharing practices; Proof or FAQ: connect review sharing practices to m365 governance discovery.

Facebook: Plain-language visual: review sharing practices; People or process story supporting review sharing practices.

Next step: Discuss your M365 priorities

Week 6 | 2027-02-08 | Find duplicate versions

LinkedIn: Practical tip carousel: find duplicate versions; SME viewpoint or 45 second explanation: find duplicate versions; Proof or FAQ: connect find duplicate versions to m365 governance discovery.

Facebook: Plain-language visual: find duplicate versions; People or process story supporting find duplicate versions.

Next step: Discuss your M365 priorities

Week 7 | 2027-02-15 | Give every workspace an owner

LinkedIn: Practical tip carousel: give every workspace an owner; SME viewpoint or 45 second explanation: give every workspace an owner; Proof or FAQ: connect give every workspace an owner to m365 governance discovery.

Facebook: Plain-language visual: give every workspace an owner; People or process story supporting give every workspace an owner.

Next step: Discuss your M365 priorities

Week 8 | 2027-02-22 | Agree a content cleanup sequence

LinkedIn: Practical tip carousel: agree a content cleanup sequence; SME viewpoint or 45 second explanation: agree a content cleanup sequence; Proof or FAQ: connect agree a content cleanup sequence to m365 governance discovery.

Facebook: Plain-language visual: agree a content cleanup sequence; People or process story supporting agree a content cleanup sequence.

Next step: Discuss your M365 priorities

APPENDIX B / WEEKLY PROMPTS

Social weeks 9-12

Week 9 | 2027-03-01 | Explain inherited access

LinkedIn: Practical tip carousel: explain inherited access; SME viewpoint or 45 second explanation: explain inherited access; Proof or FAQ: connect explain inherited access to copilot information readiness workshop.

Facebook: Plain-language visual: explain inherited access; People or process story supporting explain inherited access.

Next step: Register for the readiness webinar

Week 10 | 2027-03-08 | Review sensitive content

LinkedIn: Practical tip carousel: review sensitive content; SME viewpoint or 45 second explanation: review sensitive content; Proof or FAQ: connect review sensitive content to copilot information readiness workshop.

Facebook: Plain-language visual: review sensitive content; People or process story supporting review sensitive content.

Next step: Register for the readiness webinar

Week 11 | 2027-03-15 | Invite questions for the webinar

LinkedIn: Practical tip carousel: invite questions for the webinar; SME viewpoint or 45 second explanation: invite questions for the webinar; Proof or FAQ: connect invite questions for the webinar to copilot information readiness workshop.

Facebook: Plain-language visual: invite questions for the webinar; People or process story supporting invite questions for the webinar.

Next step: Register for the readiness webinar

Week 12 | 2027-03-22 | Share the recording and next steps

LinkedIn: Practical tip carousel: share the recording and next steps; SME viewpoint or 45 second explanation: share the recording and next steps; Proof or FAQ: connect share the recording and next steps to copilot information readiness workshop.

Facebook: Plain-language visual: share the recording and next steps; People or process story supporting share the recording and next steps.

Next step: Register for the readiness webinar

APPENDIX B / WEEKLY PROMPTS

Social weeks 13-16

Week 13 | 2027-03-29 | Answer the hardest readiness question

LinkedIn: Practical tip carousel: answer the hardest readiness question; SME viewpoint or 45 second explanation: answer the hardest readiness question; Proof or FAQ: connect answer the hardest readiness question to copilot information readiness workshop.

Facebook: Plain-language visual: answer the hardest readiness question; People or process story supporting answer the hardest readiness question.

Next step: Register for the readiness webinar

Week 14 | 2027-04-05 | Identify records owners

LinkedIn: Practical tip carousel: identify records owners; SME viewpoint or 45 second explanation: identify records owners; Proof or FAQ: connect identify records owners to records programme assessment.

Facebook: Plain-language visual: identify records owners; People or process story supporting identify records owners.

Next step: Discuss your records programme

Week 15 | 2027-04-12 | Map the retention workflow

LinkedIn: Practical tip carousel: map the retention workflow; SME viewpoint or 45 second explanation: map the retention workflow; Proof or FAQ: connect map the retention workflow to records programme assessment.

Facebook: Plain-language visual: map the retention workflow; People or process story supporting map the retention workflow.

Next step: Discuss your records programme

Week 16 | 2027-04-19 | Check disposal approvals

LinkedIn: Practical tip carousel: check disposal approvals; SME viewpoint or 45 second explanation: check disposal approvals; Proof or FAQ: connect check disposal approvals to records programme assessment.

Facebook: Plain-language visual: check disposal approvals; People or process story supporting check disposal approvals.

Next step: Discuss your records programme

APPENDIX B / WEEKLY PROMPTS

Social weeks 17-20

Week 17 | 2027-04-26 | Measure retrieval and rework

LinkedIn: Practical tip carousel: measure retrieval and rework; SME viewpoint or 45 second explanation: measure retrieval and rework; Proof or FAQ: connect measure retrieval and rework to records programme assessment.

Facebook: Plain-language visual: measure retrieval and rework; People or process story supporting measure retrieval and rework.

Next step: Discuss your records programme

Week 18 | 2027-05-03 | Map land and well records

LinkedIn: Practical tip carousel: map land and well records; SME viewpoint or 45 second explanation: map land and well records; Proof or FAQ: connect map land and well records to energy records discovery.

Facebook: Plain-language visual: map land and well records; People or process story supporting map land and well records.

Next step: Discuss a records backlog

Week 19 | 2027-05-10 | Identify critical asset documents

LinkedIn: Practical tip carousel: identify critical asset documents; SME viewpoint or 45 second explanation: identify critical asset documents; Proof or FAQ: connect identify critical asset documents to energy records discovery.

Facebook: Plain-language visual: identify critical asset documents; People or process story supporting identify critical asset documents.

Next step: Discuss a records backlog

Week 20 | 2027-05-17 | Estimate backlog scope

LinkedIn: Practical tip carousel: estimate backlog scope; SME viewpoint or 45 second explanation: estimate backlog scope; Proof or FAQ: connect estimate backlog scope to energy records discovery.

Facebook: Plain-language visual: estimate backlog scope; People or process story supporting estimate backlog scope.

Next step: Discuss a records backlog

APPENDIX B / WEEKLY PROMPTS

Social weeks 21-24

Week 21 | 2027-05-24 | Explain indexing and quality checks

LinkedIn: Practical tip carousel: explain indexing and quality checks; SME viewpoint or 45 second explanation: explain indexing and quality checks; Proof or FAQ: connect explain indexing and quality checks to energy records discovery.

Facebook: Plain-language visual: explain indexing and quality checks; People or process story supporting explain indexing and quality checks.

Next step: Discuss a records backlog

Week 22 | 2027-05-31 | Link access to operational needs

LinkedIn: Practical tip carousel: link access to operational needs; SME viewpoint or 45 second explanation: link access to operational needs; Proof or FAQ: connect link access to operational needs to energy records discovery.

Facebook: Plain-language visual: link access to operational needs; People or process story supporting link access to operational needs.

Next step: Discuss a records backlog

Week 23 | 2027-06-07 | Prepare records for capture

LinkedIn: Practical tip carousel: prepare records for capture; SME viewpoint or 45 second explanation: prepare records for capture; Proof or FAQ: connect prepare records for capture to digitisation scoping consultation.

Facebook: Plain-language visual: prepare records for capture; People or process story supporting prepare records for capture.

Next step: Register for the digitisation webinar

Week 24 | 2027-06-14 | Demonstrate OCR and indexing

LinkedIn: Practical tip carousel: demonstrate ocr and indexing; SME viewpoint or 45 second explanation: demonstrate ocr and indexing; Proof or FAQ: connect demonstrate ocr and indexing to digitisation scoping consultation.

Facebook: Plain-language visual: demonstrate ocr and indexing; People or process story supporting demonstrate ocr and indexing.

Next step: Register for the digitisation webinar

APPENDIX B / WEEKLY PROMPTS

Social weeks 25-28

Week 25 | 2027-06-21 | Explain quality acceptance

LinkedIn: Practical tip carousel: explain quality acceptance; SME viewpoint or 45 second explanation: explain quality acceptance; Proof or FAQ: connect explain quality acceptance to digitisation scoping consultation.

Facebook: Plain-language visual: explain quality acceptance; People or process story supporting explain quality acceptance.

Next step: Register for the digitisation webinar

Week 26 | 2027-06-28 | Share webinar answers

LinkedIn: Practical tip carousel: share webinar answers; SME viewpoint or 45 second explanation: share webinar answers; Proof or FAQ: connect share webinar answers to digitisation scoping consultation.

Facebook: Plain-language visual: share webinar answers; People or process story supporting share webinar answers.

Next step: Register for the digitisation webinar

Week 27 | 2027-07-05 | Inventory before migration

LinkedIn: Practical tip carousel: inventory before migration; SME viewpoint or 45 second explanation: inventory before migration; Proof or FAQ: connect inventory before migration to migration discovery and roadmap.

Facebook: Plain-language visual: inventory before migration; People or process story supporting inventory before migration.

Next step: Discuss a migration pilot

Week 28 | 2027-07-12 | Map metadata and access

LinkedIn: Practical tip carousel: map metadata and access; SME viewpoint or 45 second explanation: map metadata and access; Proof or FAQ: connect map metadata and access to migration discovery and roadmap.

Facebook: Plain-language visual: map metadata and access; People or process story supporting map metadata and access.

Next step: Discuss a migration pilot

APPENDIX B / WEEKLY PROMPTS

Social weeks 29-32

Week 29 | 2027-07-19 | Pilot one business area

LinkedIn: Practical tip carousel: pilot one business area; SME viewpoint or 45 second explanation: pilot one business area; Proof or FAQ: connect pilot one business area to migration discovery and roadmap.

Facebook: Plain-language visual: pilot one business area; People or process story supporting pilot one business area.

Next step: Discuss a migration pilot

Week 30 | 2027-07-26 | Check adoption after the move

LinkedIn: Practical tip carousel: check adoption after the move; SME viewpoint or 45 second explanation: check adoption after the move; Proof or FAQ: connect check adoption after the move to migration discovery and roadmap.

Facebook: Plain-language visual: check adoption after the move; People or process story supporting check adoption after the move.

Next step: Discuss a migration pilot

Week 31 | 2027-08-02 | Map the manual handoffs

LinkedIn: Practical tip carousel: map the manual handoffs; SME viewpoint or 45 second explanation: map the manual handoffs; Proof or FAQ: connect map the manual handoffs to document workflow discovery.

Facebook: Plain-language visual: map the manual handoffs; People or process story supporting map the manual handoffs.

Next step: Bring one manual workflow

Week 32 | 2027-08-09 | Name the process owner

LinkedIn: Practical tip carousel: name the process owner; SME viewpoint or 45 second explanation: name the process owner; Proof or FAQ: connect name the process owner to document workflow discovery.

Facebook: Plain-language visual: name the process owner; People or process story supporting name the process owner.

Next step: Bring one manual workflow

APPENDIX B / WEEKLY PROMPTS

Social weeks 33-36

Week 33 | 2027-08-16 | Choose an approval control

LinkedIn: Practical tip carousel: choose an approval control; SME viewpoint or 45 second explanation: choose an approval control; Proof or FAQ: connect choose an approval control to document workflow discovery.

Facebook: Plain-language visual: choose an approval control; People or process story supporting choose an approval control.

Next step: Bring one manual workflow

Week 34 | 2027-08-23 | Measure effort before automation

LinkedIn: Practical tip carousel: measure effort before automation; SME viewpoint or 45 second explanation: measure effort before automation; Proof or FAQ: connect measure effort before automation to document workflow discovery.

Facebook: Plain-language visual: measure effort before automation; People or process story supporting measure effort before automation.

Next step: Bring one manual workflow

Week 35 | 2027-08-30 | Review exceptions and adoption

LinkedIn: Practical tip carousel: review exceptions and adoption; SME viewpoint or 45 second explanation: review exceptions and adoption; Proof or FAQ: connect review exceptions and adoption to document workflow discovery.

Facebook: Plain-language visual: review exceptions and adoption; People or process story supporting review exceptions and adoption.

Next step: Bring one manual workflow

Week 36 | 2027-09-06 | Define handover requirements

LinkedIn: Practical tip carousel: define handover requirements; SME viewpoint or 45 second explanation: define handover requirements; Proof or FAQ: connect define handover requirements to asset information handover review.

Facebook: Plain-language visual: define handover requirements; People or process story supporting define handover requirements.

Next step: Register for the handover webinar

APPENDIX B / WEEKLY PROMPTS

Social weeks 37-40

Week 37 | 2027-09-13 | Check document completeness

LinkedIn: Practical tip carousel: check document completeness; SME viewpoint or 45 second explanation: check document completeness; Proof or FAQ: connect check document completeness to asset information handover review.

Facebook: Plain-language visual: check document completeness; People or process story supporting check document completeness.

Next step: Register for the handover webinar

Week 38 | 2027-09-20 | Test search and access

LinkedIn: Practical tip carousel: test search and access; SME viewpoint or 45 second explanation: test search and access; Proof or FAQ: connect test search and access to asset information handover review.

Facebook: Plain-language visual: test search and access; People or process story supporting test search and access.

Next step: Register for the handover webinar

Week 39 | 2027-09-27 | Turn webinar questions into next steps

LinkedIn: Practical tip carousel: turn webinar questions into next steps; SME viewpoint or 45 second explanation: turn webinar questions into next steps; Proof or FAQ: connect turn webinar questions into next steps to asset information handover review.

Facebook: Plain-language visual: turn webinar questions into next steps; People or process story supporting turn webinar questions into next steps.

Next step: Register for the handover webinar

Week 40 | 2027-10-04 | Name accountable owners

LinkedIn: Practical tip carousel: name accountable owners; SME viewpoint or 45 second explanation: name accountable owners; Proof or FAQ: connect name accountable owners to governance roadmap conversation.

Facebook: Plain-language visual: name accountable owners; People or process story supporting name accountable owners.

Next step: Request a governance review

APPENDIX B / WEEKLY PROMPTS

Social weeks 41-44

Week 41 | 2027-10-11 | Review information access

LinkedIn: Practical tip carousel: review information access; SME viewpoint or 45 second explanation: review information access; Proof or FAQ: connect review information access to governance roadmap conversation.

Facebook: Plain-language visual: review information access; People or process story supporting review information access.

Next step: Request a governance review

Week 42 | 2027-10-18 | Plan ongoing governance

LinkedIn: Practical tip carousel: plan ongoing governance; SME viewpoint or 45 second explanation: plan ongoing governance; Proof or FAQ: connect plan ongoing governance to governance roadmap conversation.

Facebook: Plain-language visual: plan ongoing governance; People or process story supporting plan ongoing governance.

Next step: Request a governance review

Week 43 | 2027-10-25 | Measure useful adoption

LinkedIn: Practical tip carousel: measure useful adoption; SME viewpoint or 45 second explanation: measure useful adoption; Proof or FAQ: connect measure useful adoption to governance roadmap conversation.

Facebook: Plain-language visual: measure useful adoption; People or process story supporting measure useful adoption.

Next step: Request a governance review

Week 44 | 2027-11-01 | Review recurring information work

LinkedIn: Practical tip carousel: review recurring information work; SME viewpoint or 45 second explanation: review recurring information work; Proof or FAQ: connect review recurring information work to 2028 information services planning session.

Facebook: Plain-language visual: review recurring information work; People or process story supporting review recurring information work.

Next step: Register for the planning webinar

APPENDIX B / WEEKLY PROMPTS

Social weeks 45-48

Week 45 | 2027-11-08 | Cost the manual process

LinkedIn: Practical tip carousel: cost the manual process; SME viewpoint or 45 second explanation: cost the manual process; Proof or FAQ: connect cost the manual process to 2028 information services planning session.

Facebook: Plain-language visual: cost the manual process; People or process story supporting cost the manual process.

Next step: Register for the planning webinar

Week 46 | 2027-11-15 | Prioritise the 2028 roadmap

LinkedIn: Practical tip carousel: prioritise the 2028 roadmap; SME viewpoint or 45 second explanation: prioritise the 2028 roadmap; Proof or FAQ: connect prioritise the 2028 roadmap to 2028 information services planning session.

Facebook: Plain-language visual: prioritise the 2028 roadmap; People or process story supporting prioritise the 2028 roadmap.

Next step: Register for the planning webinar

Week 47 | 2027-11-22 | Share planning webinar answers

LinkedIn: Practical tip carousel: share planning webinar answers; SME viewpoint or 45 second explanation: share planning webinar answers; Proof or FAQ: connect share planning webinar answers to 2028 information services planning session.

Facebook: Plain-language visual: share planning webinar answers; People or process story supporting share planning webinar answers.

Next step: Register for the planning webinar

Week 48 | 2027-11-29 | Invite a scoped planning discussion

LinkedIn: Practical tip carousel: invite a scoped planning discussion; SME viewpoint or 45 second explanation: invite a scoped planning discussion; Proof or FAQ: connect invite a scoped planning discussion to 2028 information services planning session.

Facebook: Plain-language visual: invite a scoped planning discussion; People or process story supporting invite a scoped planning discussion.

Next step: Register for the planning webinar

APPENDIX B / WEEKLY PROMPTS

Social weeks 49-52

Week 49 | 2027-12-06 | Review outcomes with clients

LinkedIn: Practical tip carousel: review outcomes with clients; SME viewpoint or 45 second explanation: review outcomes with clients; Proof or FAQ: connect review outcomes with clients to 2028 discovery or client review.

Facebook: Plain-language visual: review outcomes with clients; People or process story supporting review outcomes with clients.

Next step: Book a January planning discussion

Week 50 | 2027-12-13 | Answer recurring questions

LinkedIn: Practical tip carousel: answer recurring questions; SME viewpoint or 45 second explanation: answer recurring questions; Proof or FAQ: connect answer recurring questions to 2028 discovery or client review.

Facebook: Plain-language visual: answer recurring questions; People or process story supporting answer recurring questions.

Next step: Book a January planning discussion

Week 51 | 2027-12-20 | Share the best practical resources

LinkedIn: Practical tip carousel: share the best practical resources; SME viewpoint or 45 second explanation: share the best practical resources; Proof or FAQ: connect share the best practical resources to 2028 discovery or client review.

Facebook: Plain-language visual: share the best practical resources; People or process story supporting share the best practical resources.

Next step: Book a January planning discussion

Week 52 | 2027-12-27 | Set a realistic January priority

LinkedIn: Practical tip carousel: set a realistic january priority; SME viewpoint or 45 second explanation: set a realistic january priority; Proof or FAQ: connect set a realistic january priority to 2028 discovery or client review.

Facebook: Plain-language visual: set a realistic january priority; People or process story supporting set a realistic january priority.

Next step: Book a January planning discussion

APPENDIX C / SEARCH PRIORITIES

Keyword strategy and library

Start with a narrow group of high-intent scanning and information-governance searches. Validate Calgary demand first, then test adjacent migration, engineering and energy terms where service fit is clear.

The 96 terms are candidates derived from public service language. Search volume, CPC, SEO difficulty and rankings have not been measured. Validate demand in Keyword Planner and Search Console before forecasting. Use exact/phrase targeting initially, match landing pages to intent and review recruitment or consumer queries for exclusions.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 1-16

Candidate term	Intent	Recommended use	Service / geography
document scanning calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
document scanning services calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
bulk document scanning calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
business document scanning calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
records digitization calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
document digitization services alberta	High	Google launch	Digitisation scoping Calgary / Alberta initially
document imaging calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
secure document scanning calgary	High	Google launch	Digitisation scoping Calgary / Alberta initially
information governance consulting	High	Google launch	Information health check Calgary / Alberta initially
information governance consulting calgary	High	Google launch	Information health check Calgary / Alberta initially
information management consulting calgary	High	Google launch	Information health check Calgary / Alberta initially
records management consulting calgary	High	Google launch	Information health check Calgary / Alberta initially
information governance assessment	High	Google launch	Information health check Calgary / Alberta initially
records management assessment	High	Google launch	Information health check Calgary / Alberta initially
information governance roadmap	High	Google launch	Information health check Calgary / Alberta initially
enterprise information management consulting	High	Google launch	Information health check Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 17-32

Candidate term	Intent	Recommended use	Service / geography
sharepoint governance consulting	High	Google test	M365 governance discovery Calgary / Alberta initially
sharepoint consulting calgary	High	Google test	M365 governance discovery Calgary / Alberta initially
microsoft 365 governance consulting	High	Google test	M365 governance discovery Calgary / Alberta initially
sharepoint permissions review	High	Google test	M365 governance discovery Calgary / Alberta initially
sharepoint information architecture consulting	High	Google test	M365 governance discovery Calgary / Alberta initially
m365 governance assessment	High	Google test	M365 governance discovery Calgary / Alberta initially
teams governance consulting	High	Google test	M365 governance discovery Calgary / Alberta initially
sharepoint records management consulting	High	Google test	M365 governance discovery Calgary / Alberta initially
sharepoint migration services calgary	High	Google later test	Migration discovery Calgary / Alberta initially
shared drive to sharepoint migration	High	Google later test	Migration discovery Calgary / Alberta initially
file share to sharepoint migration services	High	Google later test	Migration discovery Calgary / Alberta initially
sharepoint online migration consulting	High	Google later test	Migration discovery Calgary / Alberta initially
document migration services alberta	High	Google later test	Migration discovery Calgary / Alberta initially
opentext to sharepoint migration	High	Google later test	Migration discovery Calgary / Alberta initially
legacy ecm migration services	High	Google later test	Migration discovery Calgary / Alberta initially
sharepoint migration planning	High	Google later test	Migration discovery Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 33-48

Candidate term	Intent	Recommended use	Service / geography
oil and gas document management	High	Google narrow test	Energy records discovery Calgary / Alberta initially
land records digitization	High	Google narrow test	Energy records discovery Calgary / Alberta initially
well file scanning services	High	Google narrow test	Energy records discovery Calgary / Alberta initially
energy records management calgary	High	Google narrow test	Energy records discovery Calgary / Alberta initially
engineering records digitization	High	Google narrow test	Energy records discovery Calgary / Alberta initially
pipeline records management	High	Google narrow test	Energy records discovery Calgary / Alberta initially
asset information management consulting	High	Google narrow test	Energy records discovery Calgary / Alberta initially
oil and gas records scanning	High	Google narrow test	Energy records discovery Calgary / Alberta initially
engineering document control services	High	Google narrow test	Handover review Calgary / Alberta initially
document control consulting calgary	High	Google narrow test	Handover review Calgary / Alberta initially
engineering information management	High	Google narrow test	Handover review Calgary / Alberta initially
asset information handover	High	Google narrow test	Handover review Calgary / Alberta initially
project document control services	High	Google narrow test	Handover review Calgary / Alberta initially
technical document management services	High	Google narrow test	Handover review Calgary / Alberta initially
engineering drawing management	High	Google narrow test	Handover review Calgary / Alberta initially
operations handover documentation	High	Google narrow test	Handover review Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 49-64

Candidate term	Intent	Recommended use	Service / geography
copilot readiness assessment	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
copilot information governance	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
microsoft 365 copilot readiness consulting	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
sharepoint copilot readiness	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
copilot permissions review	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
copilot data readiness	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
ai readiness consulting calgary	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
copilot governance workshop	Mixed	SEO first	Readiness workshop Calgary / Alberta initially
records retention programme	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
records retention schedule consulting	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
records classification scheme	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
defensible disposition process	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
records lifecycle management	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
records management policy implementation	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
document retention workflow	Mixed	SEO first	Records programme assessment Calgary / Alberta initially
records governance training	Mixed	SEO first	Records programme assessment Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 65-80

Candidate term	Intent	Recommended use	Service / geography
document scanning cost factors	Informational	SEO	Scoping worksheet Calgary / Alberta initially
ocr vs document scanning	Informational	SEO	Scoping worksheet Calgary / Alberta initially
how to prepare documents for scanning	Informational	SEO	Scoping worksheet Calgary / Alberta initially
metadata indexing best practices	Informational	SEO	Scoping worksheet Calgary / Alberta initially
document scanning quality control	Informational	SEO	Scoping worksheet Calgary / Alberta initially
searchable pdf business records	Informational	SEO	Scoping worksheet Calgary / Alberta initially
digitisation project checklist	Informational	SEO	Scoping worksheet Calgary / Alberta initially
paper records migration plan	Informational	SEO	Scoping worksheet Calgary / Alberta initially
document workflow automation consulting	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
power automate document approvals	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
sharepoint document approval workflow	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
managed information services	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
outsourced document control services	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
managed records services	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
document process improvement	Mixed	SEO first	Workflow discovery Calgary / Alberta initially
information management managed services	Mixed	SEO first	Workflow discovery Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX C / KEYWORD LIBRARY

Candidate terms 81-96

Candidate term	Intent	Recommended use	Service / geography
ai information governance framework	Mixed	SEO first	Governance review Calgary / Alberta initially
ai records management	Mixed	SEO first	Governance review Calgary / Alberta initially
information governance for ai agents	Mixed	SEO first	Governance review Calgary / Alberta initially
sharepoint oversharing review	Mixed	SEO first	Governance review Calgary / Alberta initially
content quality for copilot	Mixed	SEO first	Governance review Calgary / Alberta initially
metadata for enterprise ai	Mixed	SEO first	Governance review Calgary / Alberta initially
ai ready document management	Mixed	SEO first	Governance review Calgary / Alberta initially
information ownership framework	Mixed	SEO first	Governance review Calgary / Alberta initially
integra partners calgary	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
integra partners information management	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
integra partners microsoft 365	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
gravity union governance	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
wcd document scanning	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
access records management calgary	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
ricoh information governance	Navigational	Monitor only	Relevant service page Calgary / Alberta initially
cadence sharepoint governance	Navigational	Monitor only	Relevant service page Calgary / Alberta initially

Volume and CPC remain unvalidated. Source references and the editable validation fields are available in the campaign workbook.

APPENDIX D / 24 PROPOSED CAMPAIGNS

Email draft library

These drafts support the monthly briefs. Confirm the sender, segment, offer and live destination, then obtain approval before sending. Unsubscribe and suppression handling remain in the selected email platform. Event dates and hosts are confirmed before invitations are issued.

January email drafts

Campaign 1: January · Where is your information creating avoidable work?

Hello,

If your team is losing time searching for information, start by finding out where the important records live and who owns them.

Three questions are worth asking:
• Which information causes the most searching or rework?
• Who can own a small first improvement?
• How would we measure the change?

This month’s articles explain the decisions and preparation involved. The accompanying information risk and readiness checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Request a discovery call.

The Integra Partners team

Campaign 2: January · Start with a practical information health check

Hello,

To help your team plan its next step, the information risk and readiness checklist provides a useful structure.

Use it to work through:
• Which information causes the most searching or rework?
• Who can own a small first improvement?
• How would we measure the change?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Request a discovery call.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

February email drafts

Campaign 1: February · Can your team find the right version?

Hello,

A useful Microsoft 365 workspace needs clear ownership, practical permissions and a reliable way to find the right version.

Three questions are worth asking:
• Which workspaces have an accountable owner?
• Can teams identify the current document version?
• Are sharing permissions reviewed?

This month’s articles explain the decisions and preparation involved. The accompanying information risk and readiness checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Discuss your M365 priorities.

The Integra Partners team

Campaign 2: February · Five questions for your next SharePoint review

Hello,

To help your team plan its next step, the information risk and readiness checklist provides a useful structure.

Use it to work through:
• Which workspaces have an accountable owner?
• Can teams identify the current document version?
• Are sharing permissions reviewed?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Discuss your M365 priorities.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

March email drafts

Campaign 1: March · Before your next Copilot rollout check the information foundation

Hello,

Before expanding a Copilot pilot, it is worth reviewing the information it will rely on: permissions, content quality and accountable owners.

Three questions are worth asking:
• Who owns the pilot content?
• Have sharing permissions been reviewed?
• What would make a useful first use case?

This month’s articles explain the decisions and preparation involved. The accompanying information risk and readiness checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Register for the readiness webinar.

The Integra Partners team

Campaign 2: March · Join our practical Copilot readiness session

Hello,

We are preparing a practical session: Prepare your information for Copilot.

The discussion will cover:
• Explain how permissions and information quality affect the usefulness of a pilot.
• Identify ownership and content issues worth assessing first.
• Leave with a short list of practical readiness actions.

The supporting information risk and readiness checklist gives your team a useful starting point for its own review.

If the topic is relevant to your team, the next step is to register once the session details are confirmed.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

April email drafts

Campaign 1: April · Who owns the next step in your records lifecycle?

Hello,

A retention rule is easier to apply when the records owner, review process and approval responsibilities are clear.

Three questions are worth asking:
• Who approves the retention approach?
• How are holds and exceptions handled?
• Who records the disposal decision?

This month’s articles explain the decisions and preparation involved. The accompanying digitisation scope and roi worksheet provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Discuss your records programme.

The Integra Partners team

Campaign 2: April · A practical worksheet for retention ownership

Hello,

To help your team plan its next step, the digitisation scope and roi worksheet provides a useful structure.

Use it to work through:
• Who approves the retention approach?
• How are holds and exceptions handled?
• Who records the disposal decision?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Discuss your records programme.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

May email drafts

Campaign 1: May · What is hidden in your land and well records backlog?

Hello,

Land, well and engineering records are more useful when people can find them in the context of the asset or decision they support.

Three questions are worth asking:
• Which asset records are critical?
• What metadata makes them findable?
• Who maintains the authoritative version?

This month’s articles explain the decisions and preparation involved. The accompanying digitisation scope and roi worksheet provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Discuss a records backlog.

The Integra Partners team

Campaign 2: May · Plan your next records project before the office move

Hello,

To help your team plan its next step, the digitisation scope and roi worksheet provides a useful structure.

Use it to work through:
• Which asset records are critical?
• What metadata makes them findable?
• Who maintains the authoritative version?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Discuss a records backlog.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

June email drafts

Campaign 1: June · Scanning is one step in a useful digital records project

Hello,

A successful scanning project starts with the information people need afterwards, not just the number of pages going through a scanner.

Three questions are worth asking:
• Which records need to be captured?
• What indexing and quality checks are required?
• Where will users retrieve the finished files?

This month’s articles explain the decisions and preparation involved. The accompanying digitisation scope and roi worksheet provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Register for the digitisation webinar.

The Integra Partners team

Campaign 2: June · Join our session on planning a digitisation project

Hello,

We are preparing a practical session: Plan a useful digitisation project.

The discussion will cover:
• Define the backlog, destination and acceptance requirements.
• Understand how OCR indexing and metadata support retrieval.
• Prepare a useful scope for a supplier conversation.

The supporting digitisation scope and roi worksheet gives your team a useful starting point for its own review.

If the topic is relevant to your team, the next step is to register once the session details are confirmed.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

July email drafts

Campaign 1: July · Move the right information with the right controls

Hello,

Moving files to SharePoint is an opportunity to agree metadata, access and ownership before the migration begins.

Three questions are worth asking:
• What should move and what needs review first?
• How will metadata and permissions map?
• What will the pilot acceptance test include?

This month’s articles explain the decisions and preparation involved. The accompanying engineering information handover checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Discuss a migration pilot.

The Integra Partners team

Campaign 2: July · Plan a small migration pilot before scaling

Hello,

To help your team plan its next step, the engineering information handover checklist provides a useful structure.

Use it to work through:
• What should move and what needs review first?
• How will metadata and permissions map?
• What will the pilot acceptance test include?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Discuss a migration pilot.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

August email drafts

Campaign 1: August · Which document process keeps coming back to email?

Hello,

Repeated email approvals and document handoffs are useful places to look for avoidable manual work.

Three questions are worth asking:
• Where does the work return to email?
• Who owns approvals and exceptions?
• What effort should we measure before automation?

This month’s articles explain the decisions and preparation involved. The accompanying engineering information handover checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Bring one manual workflow.

The Integra Partners team

Campaign 2: August · Map one workflow before choosing the automation

Hello,

To help your team plan its next step, the engineering information handover checklist provides a useful structure.

Use it to work through:
• Where does the work return to email?
• Who owns approvals and exceptions?
• What effort should we measure before automation?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Bring one manual workflow.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

September email drafts

Campaign 1: September · Is your asset information ready for handover?

Hello,

An engineering information handover should be designed around what the receiving operations team needs to find, trust and maintain.

Three questions are worth asking:
• What does operations need to receive?
• Which documents or metadata are missing?
• Who approves the final acceptance?

This month’s articles explain the decisions and preparation involved. The accompanying engineering information handover checklist provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Register for the handover webinar.

The Integra Partners team

Campaign 2: September · Join our engineering information handover session

Hello,

We are preparing a practical session: Get asset information ready for operations.

The discussion will cover:
• Agree what a receiving team needs from a handover.
• Find gaps in completeness metadata and access.
• Create a practical exception and acceptance workflow.

The supporting engineering information handover checklist gives your team a useful starting point for its own review.

If the topic is relevant to your team, the next step is to register once the session details are confirmed.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

October email drafts

Campaign 1: October · Your AI pilot needs an information owner

Hello,

Introducing an AI agent creates another reason to keep information ownership, access and ongoing review practical.

Three questions are worth asking:
• Who is accountable for the information?
• How are access and content quality reviewed?
• What needs to continue after the pilot?

This month’s articles explain the decisions and preparation involved. The accompanying annual information services planning template provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Request a governance review.

The Integra Partners team

Campaign 2: October · Build governance into the work people already do

Hello,

To help your team plan its next step, the annual information services planning template provides a useful structure.

Use it to work through:
• Who is accountable for the information?
• How are access and content quality reviewed?
• What needs to continue after the pilot?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Request a governance review.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

November email drafts

Campaign 1: November · What should your 2028 information roadmap include?

Hello,

The next annual information plan should separate recurring support from one-off improvements and make the capacity assumptions visible.

Three questions are worth asking:
• Which work recurs every month?
• Where is a project more useful than ongoing support?
• What can the delivery team realistically commit to?

This month’s articles explain the decisions and preparation involved. The accompanying annual information services planning template provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Register for the planning webinar.

The Integra Partners team

Campaign 2: November · Join our practical information services planning session

Hello,

We are preparing a practical session: Build your 2028 information roadmap.

The discussion will cover:
• Distinguish recurring support from one-off project work.
• Build a business case using measured effort and actual costs.
• Choose a feasible first-quarter improvement plan.

The supporting annual information services planning template gives your team a useful starting point for its own review.

If the topic is relevant to your team, the next step is to register once the session details are confirmed.

The Integra Partners team

APPENDIX D / READY FOR EDITORIAL REVIEW

December email drafts

Campaign 1: December · The most useful information management resources from this year

Hello,

A review of the year is most useful when it identifies one realistic improvement for the next 90 days.

Three questions are worth asking:
• What caused the most rework this year?
• Which improvements have evidence behind them?
• What should the first January priority be?

This month’s articles explain the decisions and preparation involved. The accompanying annual information services planning template provides a practical way to capture your own priorities.

If this is a current challenge for your team, we can discuss a manageable next step.

Book a January planning discussion.

The Integra Partners team

Campaign 2: December · Your next 90 days of information improvement

Hello,

To help your team plan its next step, the annual information services planning template provides a useful structure.

Use it to work through:
• What caused the most rework this year?
• Which improvements have evidence behind them?
• What should the first January priority be?

Bring the findings to a scoped discussion so we can identify the work, owners and useful next step before recommending a solution.

Book a January planning discussion.

The Integra Partners team

APPENDIX E / DELIVERY RESOURCES

Quarterly resources and webinars

Four practical resources and four proposed webinar outlines support the annual campaign. Dates, speakers and delivery tools are agreed before promotion. Quarterly webinar promotion uses the existing monthly content and email allocations.

Annual information services planning template

[ ] Review the business problems raised by IT, records and operations.

[ ] Summarise measured retrieval, rework and administration effort.

[ ] Review existing client or business-unit commitments.

[ ] Separate one-off backlog projects from recurring support.

[ ] Identify regulatory and retention review needs with the responsible experts.

[ ] List Microsoft 365, migration and information-quality priorities.

[ ] Prioritise the most important improvements by business need and feasibility.

[ ] Identify the internal sponsor and delivery owner for each item.

[ ] Estimate staff capacity before committing to dates.

[ ] Separate software, services, media and internal time in the budget.

[ ] Choose one first-quarter pilot and a practical acceptance test.

[ ] Agree monthly review measures and quarterly decisions.

Capture the next action

Review owner	Priority / finding	Action and due date

APPENDIX E / PLANNING WORKSHEET

Digitisation scope and ROI worksheet

[ ] Identify record types and the business teams that use them.

[ ] Estimate boxes, pages, formats and the age of the backlog.

[ ] Separate active records from material needing retention review.

[ ] Record fragile, oversized or unusual documents.

[ ] Define preparation work, indexing and metadata fields.

[ ] Choose a representative sample for testing.

[ ] Agree OCR and searchable-file requirements.

[ ] Set quality checks and acceptance criteria.

[ ] Record access controls and chain-of-custody requirements.

[ ] Choose the destination repository and naming rules.

[ ] Estimate current retrieval effort using actual staff observations.

[ ] Compare agreed project cost with measured ongoing effort and storage costs.

[ ] Plan staff training and a post-delivery retrieval test.

[ ] Agree the handling of original records with the responsible records owner.

Capture the next action

Review owner	Priority / finding	Action and due date

APPENDIX E / PLANNING WORKSHEET

Engineering information handover checklist

[ ] Name the receiving operations owner and project information owner.

[ ] List required asset records, drawings, manuals and procedures.

[ ] Agree document numbering, revision and status conventions.

[ ] Define metadata needed to find information by asset and location.

[ ] Identify missing, duplicate and superseded items.

[ ] Confirm acceptance requirements with engineering and operations.

[ ] Test access for receiving staff and approved third parties.

[ ] Check that current drawings can be identified without ambiguity.

[ ] Record exceptions and name an owner for each gap.

[ ] Agree a method for approving corrections and final revisions.

[ ] Transfer a representative sample and test search and retrieval.

[ ] Record final acceptance and the location of authoritative records.

[ ] Set ongoing ownership after the project team leaves.

Capture the next action

Review owner	Priority / finding	Action and due date

APPENDIX E / PLANNING WORKSHEET

Information risk and readiness checklist

[ ] List your document repositories, shared drives, SharePoint sites and paper stores.

[ ] Name a business owner for each important information set.

[ ] Identify the documents needed for critical operational decisions.

[ ] Record where staff cannot find the latest version.

[ ] Review who can access sensitive information and external sharing.

[ ] Identify duplicate, outdated and ownerless content for review.

[ ] Record retention requirements and any legal holds with the responsible owner.

[ ] Sample metadata and document classifications for consistency.

[ ] Check whether a pilot can use an approved, representative dataset.

[ ] Choose one business problem and a measurable baseline.

[ ] Assign a technical reviewer and a business sponsor.

[ ] Agree a scoped next step and an accountable owner.

Capture the next action

Review owner	Priority / finding	Action and due date

APPENDIX E / PROPOSED WEBINAR

Get asset information ready for operations

What attendees should leave with.

Learning objectives

Agree what a receiving team needs from a handover.

Find gaps in completeness metadata and access.

Create a practical exception and acceptance workflow.

Planning status: date, host, registration page and delivery platform are not yet confirmed. This page is a delivery brief, not a live registration form.

The full session agenda.

45 minute agenda

Time	Topic
0-5 min	The receiving team perspective
5-15 min	Required documents and metadata
15-25 min	Gap review and exception ownership
25-35 min	Search access and acceptance tests
35-45 min	Questions and handover checklist

Prepare and follow up.

Event operations

Confirm the service SME, presenter and moderator.

Prepare a representative demonstration with approved, non-sensitive material.

Test captions, sound, screen sharing and recording permissions.

Publish the confirmed event page and include the relevant worksheet.

Use one consented invitation segment and the month’s CAD 1,200 LinkedIn allocation.

Send event logistics only to registrants and record consent separately.

Provide the recording within two business days to eligible recipients.

Sales follows up on requested conversations and logs qualification outcomes.

Measures: relevant registrants, attendance, questions, requested follow-ups, meetings and opportunities. A registration is not automatically a qualified lead.

APPENDIX E / PROPOSED WEBINAR

Prepare your information for Copilot

What attendees should leave with.

Learning objectives

Explain how permissions and information quality affect the usefulness of a pilot.

Identify ownership and content issues worth assessing first.

Leave with a short list of practical readiness actions.

Planning status: date, host, registration page and delivery platform are not yet confirmed. This page is a delivery brief, not a live registration form.

The full session agenda.

45 minute agenda

Time	Topic
0-5 min	Business context and the information foundation
5-15 min	Permissions ownership and content quality
15-25 min	A representative readiness review walkthrough
25-35 min	Prioritising a manageable pilot
35-45 min	Questions and next steps

Prepare and follow up.

Event operations

Confirm the service SME, presenter and moderator.

Prepare a representative demonstration with approved, non-sensitive material.

Test captions, sound, screen sharing and recording permissions.

Publish the confirmed event page and include the relevant worksheet.

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APPENDIX E / PROPOSED WEBINAR

Plan a useful digitisation project

What attendees should leave with.

Learning objectives

Define the backlog, destination and acceptance requirements.

Understand how OCR indexing and metadata support retrieval.

Prepare a useful scope for a supplier conversation.

Planning status: date, host, registration page and delivery platform are not yet confirmed. This page is a delivery brief, not a live registration form.

The full session agenda.

45 minute agenda

Time	Topic
0-5 min	The business problem behind a scanning project
5-15 min	Inventory preparation and record selection
15-25 min	Indexing OCR and quality checks
25-35 min	Scope cost and acceptance criteria
35-45 min	Questions and worksheet walkthrough

Prepare and follow up.

Event operations

Confirm the service SME, presenter and moderator.

Prepare a representative demonstration with approved, non-sensitive material.

Test captions, sound, screen sharing and recording permissions.

Publish the confirmed event page and include the relevant worksheet.

Use one consented invitation segment and the month’s CAD 1,200 LinkedIn allocation.

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Provide the recording within two business days to eligible recipients.

Sales follows up on requested conversations and logs qualification outcomes.

Measures: relevant registrants, attendance, questions, requested follow-ups, meetings and opportunities. A registration is not automatically a qualified lead.

APPENDIX E / PROPOSED WEBINAR

Build your 2028 information roadmap

What attendees should leave with.

Learning objectives

Distinguish recurring support from one-off project work.

Build a business case using measured effort and actual costs.

Choose a feasible first-quarter improvement plan.

Planning status: date, host, registration page and delivery platform are not yet confirmed. This page is a delivery brief, not a live registration form.

The full session agenda.

45 minute agenda

Time	Topic
0-5 min	Reviewing the past year
5-15 min	Where recurring information work consumes capacity
15-25 min	Budget assumptions and a practical business case
25-35 min	Priorities ownership and the first 90 days
35-45 min	Questions and planning template

Prepare and follow up.

Event operations

Confirm the service SME, presenter and moderator.

Prepare a representative demonstration with approved, non-sensitive material.

Test captions, sound, screen sharing and recording permissions.

Publish the confirmed event page and include the relevant worksheet.

Use one consented invitation segment and the month’s CAD 1,200 LinkedIn allocation.

Send event logistics only to registrants and record consent separately.

Provide the recording within two business days to eligible recipients.

Sales follows up on requested conversations and logs qualification outcomes.

Measures: relevant registrants, attendance, questions, requested follow-ups, meetings and opportunities. A registration is not automatically a qualified lead.

APPENDIX F / ACTIVATION

Ad copy and launch checklist

Proposed copy for approval. Facebook paid examples are held for a future approved test; the initial Facebook paid allocation is $0. Event dates and destination pages require confirmation.

Google | Scanning

Document Scanning Calgary | Searchable Business Records | Plan Your Scanning Project

Turn paper records into searchable files. Discuss scope, indexing and delivery.

Destination: /services/document-digitisation. Proposed URL; must exist before launch

Google | Governance

Information Governance | Records Management Advice | Build a Practical Roadmap

Clarify ownership, retention and access. Discuss an information governance roadmap.

Destination: /services/information-governance. Proposed URL; must exist before launch

Google | Migration

SharePoint Migration Help | Plan Before Moving Files | Discuss Your Migration

Plan metadata, permissions and adoption before moving content to SharePoint Online.

Destination: /services/m365-information-management. Later test; validate capability and URL

Facebook | Warm audience

Can your team find the right record?

See the questions to ask before starting a digitisation project. Get the practical worksheet.

Destination: /resources/digitisation-planning. Only eligible audiences; no promised results

APPENDIX F / ACTIVATION

Ad copy examples continued

LinkedIn | March

Prepare Your Information for Copilot

Join Integra for a practical session on permissions, content quality and information ownership. Register for the proposed webinar.

Destination: /events/copilot-readiness. Confirm speaker date and destination

LinkedIn | June

Plan a Useful Digitisation Project

What needs scanning, how should files be indexed, and how will quality be checked? Join the practical session.

Destination: /events/digitisation-planning. Confirm date and destination

LinkedIn | September

Get Asset Information Ready for Handover

A practical session for engineering and operations teams covering completeness, metadata and access.

Destination: /events/asset-information-handover. Confirm date and destination

LinkedIn | November

Build Your 2028 Information Roadmap

Review recurring information work, prioritise improvements and plan the next step. Join the planning session.

Destination: /events/information-roadmap. Confirm date and destination

APPENDIX F / ACTIVATION CHECKLIST

Launch tasks and acceptance

Timing / owner	Task	Acceptance evidence
Before January Leadership	Confirm priority services, service area and availability	Offer scope and owner agreed
Before January Marketing lead	Approve campaign themes and identify one SME per service	Named reviewers and review deadlines
Before January Marketing lead	Audit existing email list consent and unsubscribe suppression	Only eligible recipients enter campaigns
Before January Analytics owner	Export 12 months of available web, ad and lead history	Baseline with source dates and gaps
Before January Paid media specialist	Validate candidate keywords in Calgary and Alberta Keyword Planner	Volume, bid ranges and relevance recorded
Before January Web owner	Build or verify scanning and governance landing pages	Working forms, mobile layout and correct routing
Before January Analytics owner	Test consent-aware tags and enquiry events with test records	One valid submission creates one lead
Before January Sales operations	Define enquiry, qualified lead and opportunity stages	One definition used across channels
Before January Sales operations	Map lead source and campaign fields into Ruddr or companion CRM	Original source survives opportunity creation
January week 1 Paid media specialist	Launch narrow Google service groups within approved cap	No more than two core groups; negatives applied

APPENDIX F / ACTIVATION CHECKLIST

Launch acceptance continued

Timing / owner	Task	Acceptance evidence
January week 1 Marketing lead	Start weekly social and monthly editorial workflow	First four weeks approved
January week 2 Sales lead	Review first enquiries and follow-up handling	Reject reasons and response time logged
January week 4 Marketing and sales	Review search terms, lead quality and landing-page friction	Document one change to test
February Service SME	Prepare Copilot checklist and March webinar outline	Useful asset and confirmed host
February Marketing lead	Check paid-social audience eligibility and consent	Audience large enough or budget returns to Search
March Marketing lead	Run one LinkedIn webinar burst and follow-up sequence	Spend capped and leads reviewed by sales
March end Leadership	Review first 90 days and service delivery capacity	Continue, change or stop each tactic
Monthly Marketing lead	Review all 12 competitors and capture public changes	Dated offer/content/ad log; no inferred spend
Quarterly Analytics owner	Reconcile campaign IDs, deduplication and opportunity outcomes	No duplicated revenue or invented attribution
Quarterly Service SME	Refresh technical details and approved proof assets	No unapproved client names or results

APPENDIX G / EVIDENCE REGISTER

Sources and research scope

Research date: 10 November 2026. The defined set includes six original competitors and six adjacent or regional providers. Public websites and selected indexed social material support the positioning review. No private competitor analytics, complete social history, measured search volumes or competitor spend estimates were obtained.

Media charts and quantities are plans, not historical performance. Account permissions, licences, source coverage and connection routes are confirmed during onboarding. The pricing uses RainRocks package rates plus project-specific scope, with a 20% service discount and the dated EUR/CAD reference conversion.

S01 | Integra services

Company positioning and service scope

Open source

S02 | Integra customer stories

Existing proof assets; results require context and permission

Open source

S03 | Gravity Union services

Governance, migration, Microsoft 365 and AI

Open source

S04 | Gravity Union Calgary location

Calgary presence

Open source

S05 | Gravity Union insights

Governance articles, newsletter and staff content

Open source

S06 | Gravity Union resource library

Webinars and downloadable education

Open source

S07 | WCD services

Scanning, ECM, automation and managed operations

Open source

S08 | WCD public LinkedIn

Energy-sector digitisation story and community content

Open source

S09 | Tesseract services

Calgary consulting, OpenText, SharePoint and BI

Open source

S10 | Access Calgary

Local facilities, scanning, lifecycle governance and Energy

Open source

S11 | Ricoh governance consulting

RIM, ECM, education and assessment approach

Open source

S12 | Johal Consulting

Local records health checks, advisory and procurement

Open source

S13 | Copyseis

Calgary energy records, storage and seismic digitisation

Open source

S14 | Iron Mountain Canada scanning

National enterprise alternative; local facility not verified

Open source

S15 | Cadence Solutions

Governance playbook, health check, oversharing workshop and migrations

Open source

S16 | Long View Systems

Calgary office link, Modern Workplace and AI positioning

Open source

S17 | ARC Calgary

Local scanning, construction documents and quote offer

Open source

S18 | DHQ scanning

Local OCR, large-format scanning and quote offer

Open source

S19 | Integra public LinkedIn

Existing social themes: M365, energy, governance and team

Open source

S20 | Integra workflow example

Company-reported SharePoint and Power Automate workflow

Open source

S21 | Microsoft governed Copilot foundation

Technical editorial reference; recheck product details before publication

Open source

S22 | Google keyword historical metrics

Volume, competition and bid validation method

Open source

S23 | Google location targeting

Presence targeting for local campaigns

Open source

S24 | LinkedIn audience sizing

Minimum audience and matching considerations

Open source

S25 | CRTC commercial email requirements

Consent, sender identification and unsubscribe requirements

Open source

S26 | Ruddr sales pipeline

Contacts, companies, opportunities and integrations

Open source

S27 | Ruddr API quick start

Workspace integration and API access

Open source

S28 | Meta Ad Library

Future ad monitoring reference; advertiser audit not completed

Open source

S29 | LinkedIn Ad Library

Future ad monitoring reference; advertiser audit not completed

Open source

S30 | Gravity Union public LinkedIn

Webinar promotion, events and staff culture

Open source

S31 | Ruddr plan features

Sales Pipeline in Pro; confirm the existing subscription

Open source

S32 | Ruddr API reference index

Company and contact endpoints; opportunity automation requires validation

Open source

S33 | Power BI refresh

Refresh depends on model and source configuration

Open source

S34 | LinkedIn Lead Sync

Access and authorisation requirements

Open source

S35 | Power BI secure sharing

Sharing permissions and licence requirements

Open source

S36 | RainRocks published pricing

Package references and additional work at €80/hour; accessed 10 November 2026

Open source

S37 | ECB EUR/CAD reference rate

10 November 2026: EUR 1 = CAD 1.5852; reference conversion, not a bank settlement rate

Open source