Nansen Campaign Brief Builder

"From kickoff call to CMP campaign workspace, without the manual rewrite."

Nansen Campaign Brief Builder is a workflow that connects your meeting insights to execution in Optimizely CMP. It identifies the latest campaign planning meeting, extracts the key decisions and requirements, drafts a structured campaign brief in CMP's standard fields, and generates a practical set of campaign tasks tied to that campaign for immediate execution. The result is faster campaign initiation, more consistent briefs across teams, and a clearer path from kickoff to launch, with governance friendly traceability of what was decided and what still needs confirmation.

What we built

- A secure connector service that lets an Opal user connect their Fathom account via OAuth and retrieve recent meeting metadata plus meeting summaries.

- An Opal agent called "Nansen Campaign Brief Builder" that:

  - Detects the latest relevant campaign meeting (within a default lookback window and using default campaign keywords).

  - Applies confidence rules. If confidence is medium or low, it asks the user to confirm the meeting before doing anything in CMP.

  - Generates a CMP ready campaign brief draft from the meeting summary.

  - Creates 5 to 10 practical execution tasks and associates every task to the campaign in CMP (no standalone tasks).

Why it matters for the end user

- Less manual admin after campaign meetings: the brief and initial plan are created automatically from what was discussed.

- Faster time to execution: reduces lag between meeting and work starting, especially across large teams and distributed approvals.

- Better governance and fewer mistakes: the agent will not create CMP objects unless it is confident it selected the right meeting, or the user confirms.

- More consistent briefs: standard fields are populated every time, and missing inputs are explicitly captured as "Open questions" instead of being invented.

Why it matters for Optimizely

- Natural extension of CMP workflows: this feels like an acceleration layer on top of existing campaign and task mechanics rather than a separate tool.

- Makes Opal tangible for enterprise teams: a repeatable, high frequency workflow that drives daily value and adoption.

- Supports the "embedded agent" direction: the user experience is a simple, guided action that produces real work artifacts inside CMP, not just a chat answer.

- Accelerates time to ROI: reduces implementation friction by packaging a clear, concrete use case that marketing ops leaders can operationalize quickly.

Security and enterprise considerations

- OAuth tokens are stored per user, encrypted at rest, and refreshed automatically when expiring.

- Clear separation of dev and prod environments.

- Connector access can be controlled via bearer token for server to server calls, with an explicit local dev bypass when needed.

Use Case

Problem

Enterprise marketing teams run frequent campaign planning and kickoff meetings, but the output is typically scattered across meeting notes, follow up messages, and manual CMP entry. The result is slower execution, inconsistent briefs, and missed actions. In regulated environments like financial services, teams also need traceability and a controlled path from discussion to approved plan.

What the solution solves

- Converts a campaign meeting summary into a structured campaign brief and an execution plan inside CMP.

- Ensures tasks are created under the campaign so the plan is immediately trackable and reportable.

- Reduces risk by requiring explicit confirmation when meeting selection confidence is not high.

- Captures missing details as open questions, creating a clear next step for the team rather than guessing.

End to end flow

1. User runs fathom_oauth_connect_link_v0 once, completes the browser connect flow.

2. User prompts the Campaign Brief Builder in Opal (for example: "create the brief for the latest campaign meeting").

3. Agent retrieves recent meetings and selects the best candidate using keywords, recency, and confidence scoring.

4. If needed, user confirms the meeting.

5. Agent creates a CMP campaign with a populated brief, then creates all tasks associated to that campaign.

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