

QUARTERLY BUSINESS  
REVIEW



Directive,

# QUARTERLY BUSINESS REVIEW

DECK

PREPARED  
BY:

Directive

DATE: July 21, 2023

Section 01  
Quarter 1  
Breakdown

PREVIOUS  
**QUARTER  
BREAKDOWN**

**01**

16

Opportunities  
+33% QoQ

£554,140

Potential First Year Fees  
+39% QoQ

6.27%

Lead > Opportunity Rate  
+102% QoQ

#### What Worked

1. The implementation of our LinkedIn full funnel strategy has allowed us to nurture prospects in the early stages buying journey leading to a **90% decrease in average lead to opportunity time** and **60% attribution of current potential first year fees** from open opportunities.
2. By refining our Google keywords to focus on historical opportunity contributors, we saw a **83% increase in search opportunity attribution** and a **15% decrease in CPO** QoQ.

#### What We Learned

1. While this quarter's CPO is 51% higher than Q2 FY23, the opportunities brought in this quarter have **211% more potential first year fees** than those brought in in Q2 FY23. This tells us that the overall quality of our opportunities has drastically improved.
2. Many of our audience members that submit a content piece form are completing a secondary action within the same day. Some download additional pieces of content while others go directly to a demo form, expressing immediate interest.

## 01

## PERFORMANCE BREAKDOWN

	Total Spend	Leads	CPL	Opps	CPO	Lead > Opp	First Year Fees
Q2 '23	£62,548	361	£173	11	£5,686	3.05%	£178,375
Q3 '23	£97,130	349	£278	5	£19,426	1.43%	£212,444
Q4 '23	£174,326	387	£450	12	£14,527	3.10%	£399,347
Q1 '24	£137,384	255	£539	16	£8,586	6.27%	£554,140

**Cross Channel Performance**

Q1 of FY2024 produced the smallest volume of leads but the largest volume of opportunities in comparison to previous quarters in FY2023. While we did not hit our NSM goal of 19 NSMs, the 16 opportunities we did bring in equvalate to **£554,140 in potential first year fees, a 39% increase from the previous quarter.**

In comparison to the previous quarter, we obtained **33% more opportunities** and increased our **lead to opportunity rate by 102%.**

Out of the 16 Opportunities, we **lost 5, closed 2**, and the remaining 56% are still being worked on by the (Client) sales team.

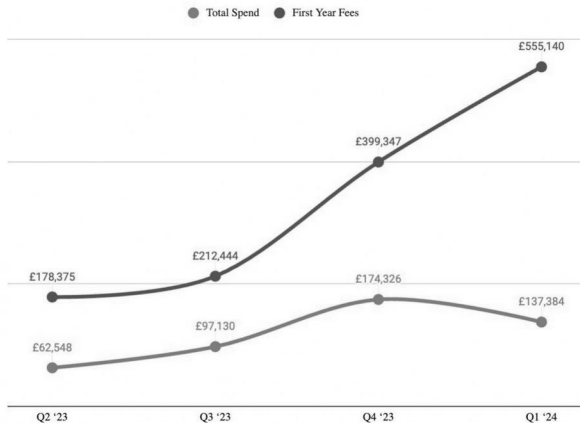
## 01

## PERFORMANCE BREAKDOWN

**Total Spend vs. Revenue (Total First Year Fees)**

While Q2 '23 had the lowest average CPO, the opportunities we created this past quarter are bringing in **more than 2x** potential first year fees.

	Total Spend	First Year Fees
Q2 '23	£62,548	£178,375
Q3 '23	£97,130	£212,444
Q4 '23	£174,326	£399,347
Q1 '24	£137,384	£554,140



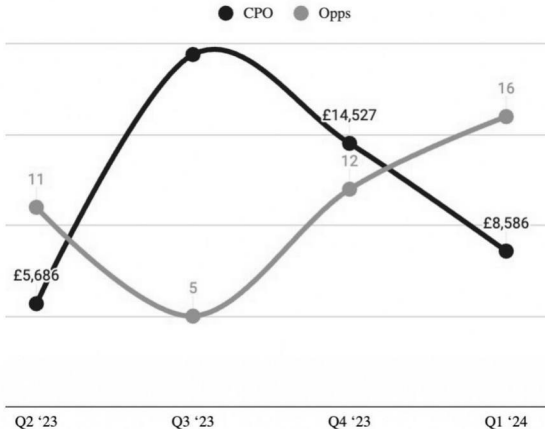
## 01

## PERFORMANCE BREAKDOWN

**Total Opportunities vs. Cost per Opportunity**

As our total opportunities increase, our average CPO decreases.

	Opps	CPO
Q2 '23	11	£5,686
Q3 '23	5	£19,426
Q4 '23	12	£14,527
Q1 '24	16	£8,586



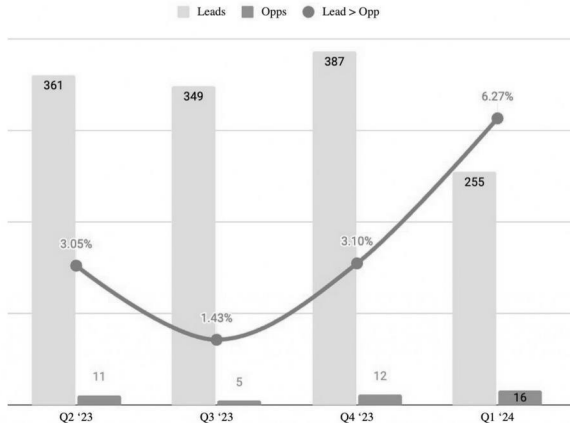
# 01

# PERFORMANCE BREAKDOWN

## Lead to Opportunity Conversion Rates

While our total leads are decreasing, our average lead to opportunity conversion rate is steadily increasing.

	Leads	Opps	Lead > Opp
Q2 '23	361	11	3.05%
Q3 '23	349	5	1.43%
Q4 '23	387	12	3.10%
Q1 '24	255	16	6.27%



# 01

# OPPORTUNITY ANALYSIS

Diagnose: 5

First year fees: £88,675

Engage: 4

First year fees: £142,130

Prescribe: 5

First year fees: £255,225

Propose: 3

First year fees: £52,115

Conclusion: 1

First year fees: £100,500

## Opportunity Stages + First Year Fees

We currently have **18 opportunities** with the potential to become closed wins totalling **£638,645**.

LinkedIn £385,470

Google £253,175

\$

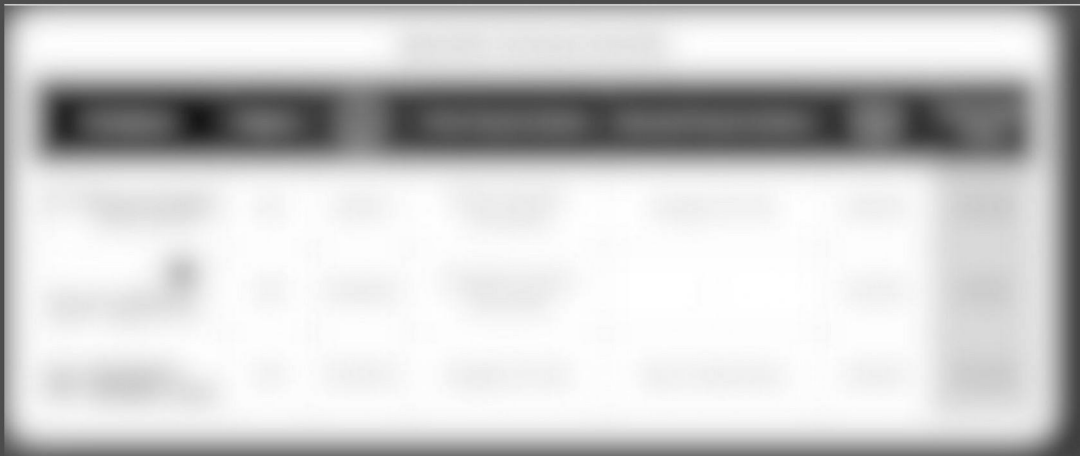
Closed Lost: 11 [-£454,767]

Closed Won: 3 [+£76,105]



01

# OPPORTUNITY ANALYSIS



# 01

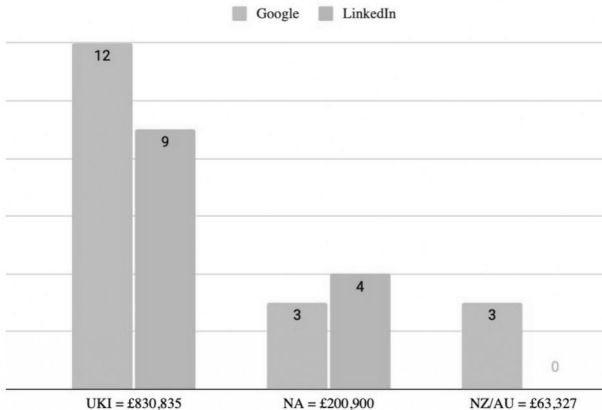
## OPPORTUNITY ANALYSIS

### Opportunities by Location

We are continuing to see a majority of our opportunities originate from the UKI.

However, NA contributed 19% [**£103,640**] of potential first year fees this past quarter. This is **36% higher** than last quarter's total [**£76,340**].

While Google is continuing to lead over LinkedIn, we have seen 73% of Closed Losses come from Google.



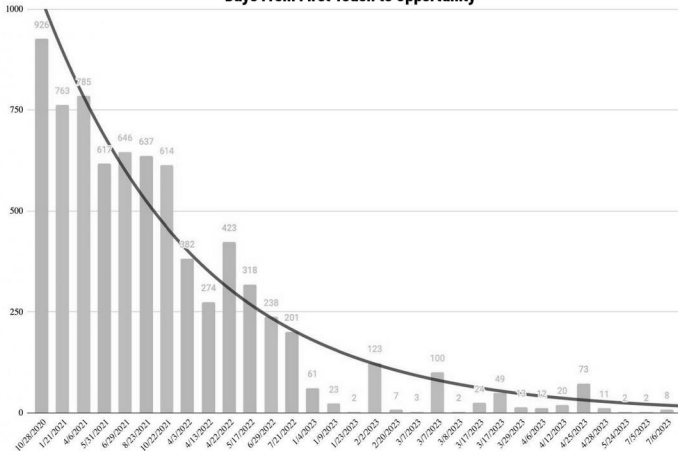
**Average Lead to Opportunities Time Frame**

Of the 31 opportunities we have created this year, a large majority have originated from first touch lead submissions dating back to 2021 or 2022.

Especially for LinkedIn where we have seen it takes longer for the demand we build to convert to pipeline.

Average lead to opportunity time:

- 191 days for Google
- 302 days for LinkedIn

**Days From First Touch to Opportunity**

**Opportunity Keywords**

Google accounted for **69% of all opportunities** this past quarter and **74% of potential first year fees [£408,665]**.

UKI: 7

NA: 2

NZ/AU: 2

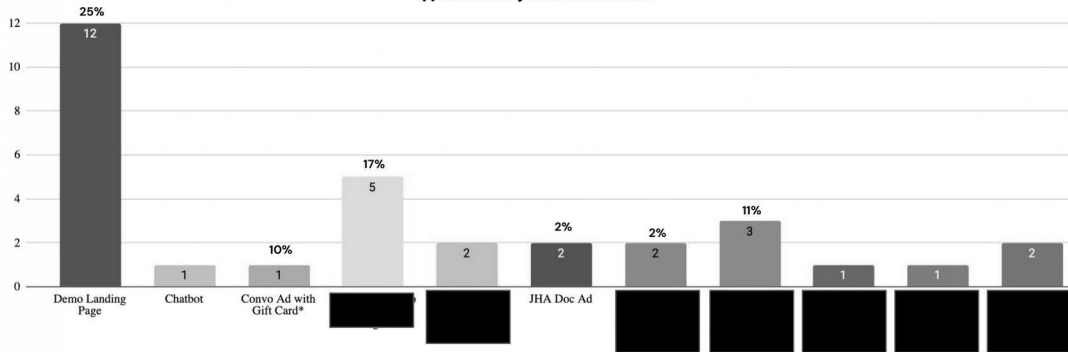
("Client Name") was our top performing keyword creating 36% of our opportunities.



## 01

## OPPORTUNITY ANALYSIS

Opportunities by First Touch Action



45% of our opportunities created YTD originated from a purchase intent form submission (conversion) while 55% of our opportunities originated from a content piece form submission (consideration).

\*\*Convo ads launched April 2023


# 01

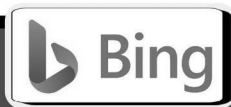
## WHAT WE LEARNED

### Same Day Second Touch Action

From our opportunity analysis we learned that many of our audience members that submit a content piece form are completing a secondary action within the same day.

Some download additional pieces of content while others go directly to a demo or contact form, expressing immediate interest.

Platform	First Action	Second Action	Timeframe
Google			Same day
Google			Same day
Google			Same day
LinkedIn			Same day
LinkedIn			Same day
LinkedIn			Almost 2 years**
LinkedIn			2 months later



# 01

## WHAT WORKED - MOTION

We saw that adding animated product shots drove more leads compared to our original design with just the static images.

We saw there was a decrease of 0.53% bounce rate and average of 1 minute 46 seconds which saw an increase of people staying on our landing pages.

### Motion

PAGE  
VIEWS

**1299**

FORM  
SUBMISSIONS

**3**

NEW  
CONTACTS

**3**

TIME PER PAGE VIEW

**1.46 MINS**

BOUNCE RATE

**90.15%**



# 01

## WHAT WE LEARNED - PRODUCT VS HUMAN IMAGERY

We tested product imagery vs human imagery on our content landing pages. This was an interesting learning result with success on the test depending on the context of the eBook in mind.

If we're focusing on content based on our product/software, we'll see much more people engaged with with product imagery and if the content is focused more on management people are more likely to engage with our human imagery.

### Product Imagery

PAGE VIEWS	FORM SUBMISSIONS	NEW CONTACTS
<b>266</b>	<b>12</b>	<b>6</b>
TIME PER PAGE VIEW	BOUNCE RATE	
<b>8.29 MINS</b>	<b>94.72%</b>	

### Human Imagery

PAGE VIEWS	FORM SUBMISSIONS	NEW CONTACTS
<b>233</b>	<b>17</b>	<b>5</b>
TIME PER PAGE VIEW	BOUNCE RATE	
<b>1.45 MINS</b>	<b>94.23%</b>	



# Q2 NSM OBJECTIVE

19 Opps

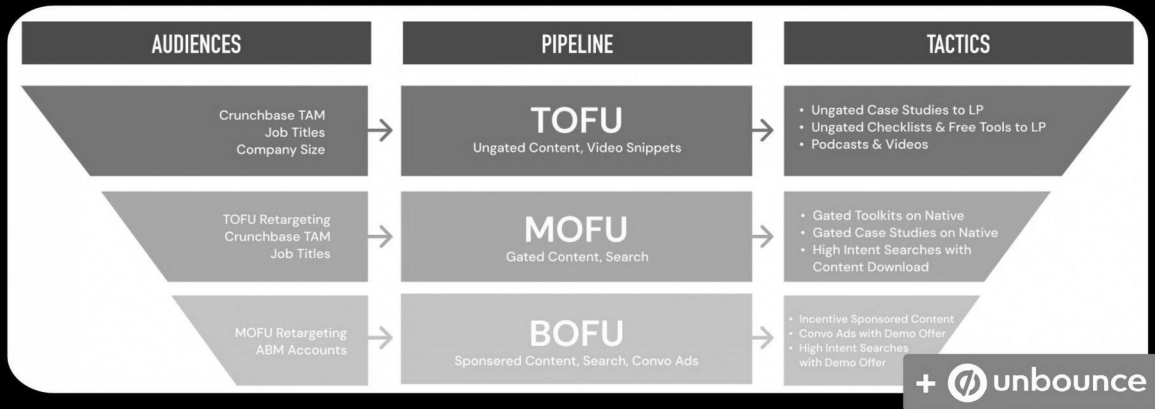
Q2: 11    Q3: 5    Q4: 12    Q1: 16

While we missed our Q1 NSM by 19%, we are continuing to aim for the same goal throughout Q2. We are confident we will hit 19 opportunities based on the decreasing trendline of first touch action to opportunity timeframe. If achieved, this NSM is a 73% increase from our quarterly average.

# STRATEGY & TACTICS

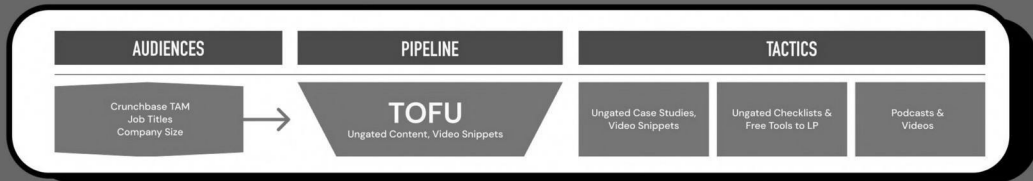
# 02

# PAID MEDIA + CREATIVE FULL FUNNEL STRATEGY



## 02

# TOP OF FUNNEL - INCREASING SHARE OF VOICE



Our TOFU campaigns cast a wide targeting net and utilize sponsored content + video snippets to promote education and **awareness-based** assets that live on our website.

This quarter, we will be focusing on flooding the market with content in order to increase our overall **share of voice**.

By measuring share of voice as a secondary objective, we will be able to assess how much of the conversation we are dominating and how much ad space we're taking up compared to the competition.

# 02

## UNGATED CAROUSEL ADS: SOLUTION OF THE MONTH (JHA)

**CAROUSEL AD**



**COMING NEXT**



## 02

# UNLOCKING THE FAST LANE TO QUALIFIED MEETINGS

In order to effectively flood the market space and increase our share of voice, (Client) needs to create a "hype" video.

By showcasing an explainer video, we can provide our audience with a preview of what they can expect from our software and products.

Interestingly, none of our competitors are utilizing video assets in their LinkedIn ads. This presents a unique opportunity for us to differentiate ourselves from the competition.

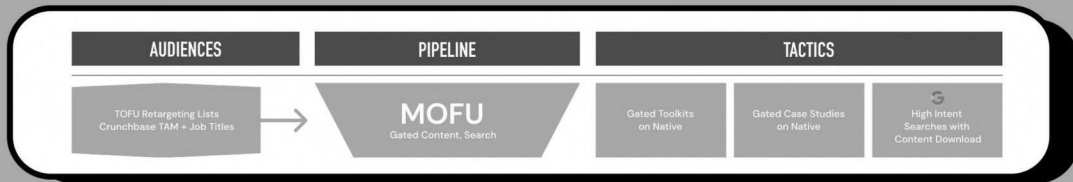
Coming next:

- Failing Safely
- Health & Safety Mindset
- Pre-Inspection
- Video Case Studies



## 02

## MIDDLE OF FUNNEL - INCREMENTAL IMPROVEMENTS & OPTIMIZATIONS



Our MOFU campaigns target a slightly more refined audience than our TOFU campaigns; layering on a list of users that *clicked* on our awareness-based TOFU campaigns.

Because we are targeting users that are already *aware* of (Client) and have shown first-touch interest, we utilize gated document ads to promote education and **consideration-based** assets that stay on the native platform.

We can leverage the document ads with the highest engagement levels and lowest CPL to influence which assets will become the next TOFU solution of the month.



# 02

## ALIGNING INTENT OF THE PRE & POST CLICK EXPERIENCE

We will continue to enhance our content landing pages to ensure that the post-click or landing page experience aligns with the pre-click intent, encouraging our audience to take the desired action.

Additionally, we will monitor the heatmap data of these pages to gather insights and make further improvements based on the data collected over time.

As it stands right now, 89% of our keywords have a below average landing page experience which directly affects our ad rank positioning.





## 02

# NON-BRAND SEARCH AD COPY EXPERIMENT

To improve the performance of our non-brand keywords, we will implement an experiment that tests “left-brain” vs. “right-brain” ad copy and measures our audience preferences.

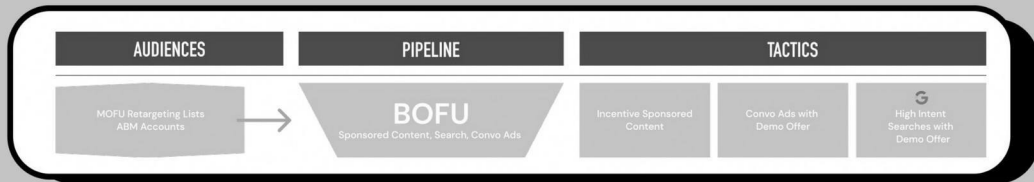
Left-brain copy is more analytical, logical and data focused.

Right-brain copy uses feelings and looks at the big picture.



## 02

# BOTTOM OF FUNNEL - BUYER INTENT RETARGETING



Our BOFU campaigns target a refined audience of:

- Individuals that have requested a demo but haven't converted
- Contacts that have become a lead but haven't been touched by a BDR in 60 days
- Leads generated from our MOFU campaigns
- Historic closed losses with existing potential

On the native platform, we use sponsored content and conversation ads (incentivized & non-incentivized) + a demo offer to **convert** users that have shown previous consideration in (Client).

# 02

## REVISITING CLOSED LOSSES

Seeing the long sales cycles & leads that revisit (Client), we should launch strategy targeting **closed losses** from 2022 & prior.

For re-approachable reasons such as budget concerns, stopped connecting, etc... we could try to recapture these once hot leads!

Opportunity: Retarget these individuals with an incentivized *unique offer*. I.e: first two month free, free training offer, etc.

### ABM Strategy →

Directly call out the company we lost in the sales process and position the copy around the reason they did not sign with us.

The image is a screenshot of a LinkedIn post from a company named 'Directive'. The post is addressed to 'Hey Adobe' and discusses performance marketing. It includes a list of client logos and a call to action at the bottom.

**Directive**  
17,226 followers  
19h · Edited · 🌐

Hey Adobe, imagine if you never had to worry about hitting your growth goals...ever 🤖  
...see more

Hey Adobe

**Tasked with doing more with less?**

It's possible with the performance marketing partner that's done it for 250+ tech brands

Fewer leads & "MQLs", more revenue like:

Performance Marketing for Tech That Drives Revenue, Not Vanity Metrics

# 02

## SCALING NORTH AMERICA TARGETING

Our strategy to increase the US share of pipeline coverage will be to take a per-industry approach, starting with the manufacturing sweet-spot where we have seen proven success with companies of 1000-2,500 employees.

Other option: reverse targeting manufacturing directors/plant managers/general managers and bring their EHS person to the call and talk about how safety can impact product outputs and lost/time.

### Convo Ad Strategy →

Offer less-senior titled prospects a \$105 gift card if they bring their Director of Operations to the meeting with them.



Hi %FIRSTNAME%!

Want to earn a 📺 \$105 Amazon gift card AND learn how Evotix can help you manage all your health and safety needs in one system?

At [REDACTED] we believe every person has a right to work in a safe & fulfilling environment. That's why we've created dynamic EHS solutions to help you stay ahead of the curve, boost engagement and keep your people safe.

If you still perceive safety as a cost center then schedule a 30-minute call with a member of our team and discover how investing in safety doesn't cost, it pays! 📺

After our meeting, you'll receive a gift card on us!

[REDACTED]  
Business Development Representative

Sure, Let's Do It!

More Info, Please

# 02

## NEXT STEP FOR BRAND CAMPAIGNS

Using custom combined audiences, we can **mimic LinkedIn's firmographic targeting**.

Paired with value-based bidding (ex. Target ROAS), the implementation of these audiences can also help us **"lead score"** within Google Ads.

● Audience segment	Targeting setting	Status	Conversion:	Cost / conv.	↓ Cost	Interaction rate
● <u>Lifestyles &amp; Hobbies Business Professionals</u>	Targeting	Eligible	0.00	£0.00	£468.15	28.51%
● <u>Banking &amp; Finance Avid Investors</u>	Targeting	Eligible	0.00	£0.00	£250.68	28.57%
● <u>Technology &gt; Technophiles Cloud Services Power Users</u>	Targeting	Eligible	1.33	£177.49	£236.65	33.75%
● <u>Software Business &amp; Productivity Software</u>	Targeting	Eligible	2.00	£77.17	£154.33	18.42%
● <u>Vehicles &amp; Transportation</u>	Targeting	Eligible	0.00	£0.00	£130.48	26.09%
● <u>Business Services &gt; Business Tech... Enterprise Software</u>	Targeting	Eligible	0.00	£0.00	£110.72	18.75%
● <u>Financial Services</u>	Targeting	Eligible	0.00	£0.00	£109.55	46.15%
● <u>Travel Business Travelers</u>	Targeting	Eligible	0.00	£0.00	£97.11	20.75%
● <u>[Engagement Pack] Visited last 180 ...</u>	Targeting	Eligible	0.00	£0.00	£70.60	20.00%
● <u>News &amp; Politics &gt; Avid News Readers Avid Business News Readers</u>	Targeting	Eligible	2.00	£24.55	£49.11	31.58%

## 02

# THE VALUE OF unbounce

The next step is building our landing pages on to Unbounce.

This would give us more flexibility with how we can build out our designs and more with tests in mind.

- Visual refresh
- Messaging (headline, copy, CTA)
- Motion (icons, product animations, illustrations, messaging)
- Form (multi-step forms, short vs long form fields)

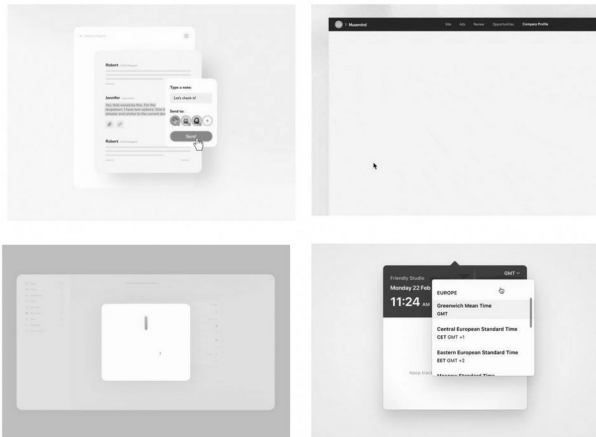


## 02

# UNBOUNCE - INCORPORATING UI/UX MOTION

Incorporating more animated motion elements into our branding & product images can be used as a visual way for impressions and also showcase the users about the product without explaining multiple step interactions.

We can incorporate these into our landing pages and image ads with motion in mind.

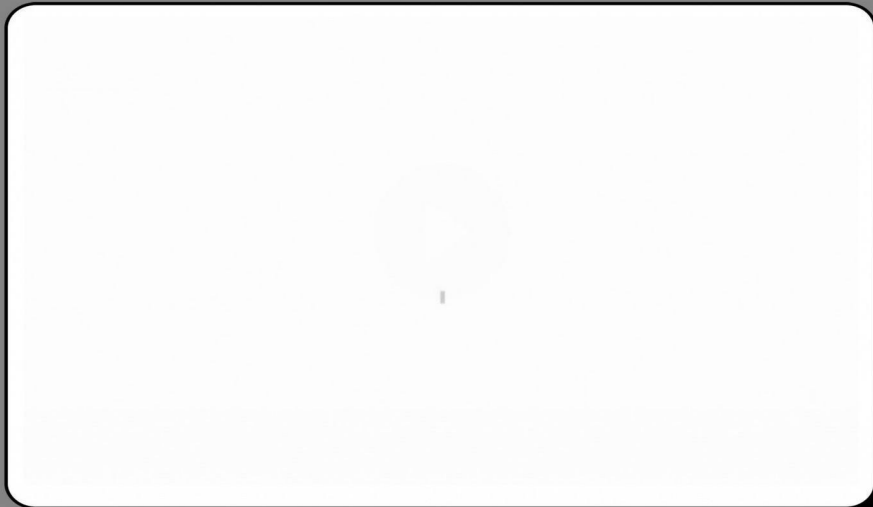


# 02

## UNBOUNCE - INTRODUCING DYNAMIC KEYWORD INSERTION

Now that we have strong foundation from narrowing our keyword focus in Q1, we can use dynamic keyword insertion to personalize our ads to exactly what our customers are searching for.

We will be able to create custom landing pages for each of our quality keywords. The end result is improved quality score, decreased CPC, high auction ranks, and increased conversions.





# ROADMAP & NEXT STEPS

# 03

# FY24 Roadmap

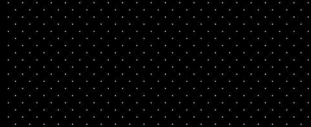
Ongoing Strategy

Q2 Test & Explore	Q3 Iterate & Optimize	Q4 Expand	Q1 Scale
LinkedIn Full Funnel Strategy			
Solution of the Month Promotion + Podcast & Video Ad Implementation			
Document Ad Implementation + Content Landing Page Creation			
Conversation Ad Optimizations + Brand Campaign Adjustments			

New Ideas

Testing Documentation			
Left vs Right Brain Experiment	Competitor Keyword Experiment		
Closed Loss Retargeting			
Unbounce Transition			
Bing Test Launch	Bing Optimizations		
	Enterprise & ANZ Targeting Expansion		

# Thank



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Consulting Directive Co

# You

Section 05

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APPENDIX

05

# 02

## UNGATED CAROUSEL ADS: SOLUTION OF THE MONTH (JHA)

	Performance: July 10-19					
	Impressions	Clicks	CTR	CPC	Cost	Conv
US	18,630	374	2.01%	£0.54	£202.69	-
UK	18,184	212	1.17%	£0.96	£203.90	-
	36,814	586	1.59%	£0.65	£406.59	-



## 02

# UNGATED PODCAST IMAGES & SNIPPETS TO LANDING PAGE

	Impr.	Clicks	CTR	CPC	Cost	Website visits
Ep. 21	61,372	842	1.37%	£2.37	£1,997.94	841
Ep. 22	76,799	714	0.93%	£3.19	£2,275.41	714
	138,171	1,556	1.13%	£2.75	£4,273.36	1555

Adding interactive subtitles to our video snippets increased our CTR **230%!**

We went from an average of **0.49% to 1.13%** CTR on our newest episodes.



# 03

## TESTING DOCUMENTATION

We are actively working to create testing documentation to cover our ongoing and future tests for all creative and paid media initiatives.

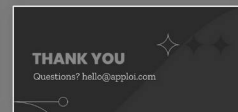
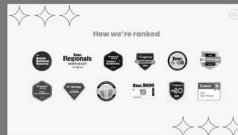
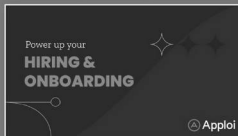
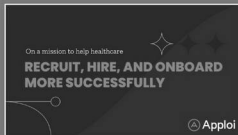
We'll be shaping our testing document throughout the quarter and use our learnings to improve our overall performance.



On top of our services for design that we're helping elevate with (Client) on the branding, we can also provide sales enablement materials that would be including:

- Sales & Product Decks
- Case Studies/Ebooks
- Infographics Email
- Campaigns/Templates Newsletter

The visual example on the right is just an idea of what we have approached and done for other clients in mind.





# 03

## WORKFLOW PROCESS

