# Table of Contents & Glossary

**NSM** = North Star Metric

**PPC** = Pay Per Click

**CRO** = Conversion Rate Optimization

**KPO** = Key Performance Opportunity

**CPA** = Cost Per Acquisition

**DSA** = Dynamic Search Ads

**SIS** = Search Impression Share

**RDA** = Responsive Display Ads

**OCT** = Offline Conversion Tracking

**GCLID** = Google Click ID

Glossary

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# Executive Summary

Directive

# (Client) NA
# NSM Performance - Q2 2023

| Opportunities Generated | **16** | +700% YoY |
|---|---|---|

| | | | |
|---|---|---|---|
| **(Client) North America** | 16 Opportunities | -40% QoQ | +700% YoY |
| **(Client) Canada** | 2 Opportunities | -50% QoQ | +∞ YoY |
| **(Client) United States** | 14 Opportunities | -39% QoQ | +600% YoY |

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# Annual Performance Impact:
## (Client) Canada

| | Google | Linkedin | All |
|---|---|---|---|
| **Opps** | 1 | 25 | 26 |
| **(%)** | 0% | + ∞ % | + 2,500% |
| **c/Opp** | €110k | €7.7k | €11.67k |
| **(%)** | 103.59% | - ∞ % | - 90.99% |

**Opportunities Generated** **26** +50% YoY

The quickest efficiencies we saw in the Canadian market were by using data-backed insights from the international (Client) CRM to find industry opportunities that were currently untapped and historically a good fit for (Client) internationally. Linkedin skyrocketed, and Google became substantially more efficient. Next up we're focusing on Google-Opportunity alignment and expanding top performers using best practices.

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# Annual Performance Impact:
## (Client) United States

|  | Google | Linkedin | All |
|---|---|---|---|
| **Opps** | 12 | 40 | 52 |
| **(%)** | - 76% | + ∞ % | + 4% |
| **c/Opp** | €30.8k | €6.1k | €11.8k |
| **(%)** | + 166% | - ∞ % | - 32.72% |

**Opportunities Generated** **52** +50% YoY

Although we're looking back a year, Directive started working with (Client) United States late Q4 and didn't stand up a new foundation of campaigns until Q1. That being said Q2 was only our second quarter working together and we're excited for additional growth as we prioritize Google and Bing across the US market and solidify CRO efforts.

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# (Client) NA
# Annual Performance Impact

| Opportunities Generated | **78** +52% YoY |
|---|---|

| | | | |
|---|---|---|---|
| **(Client) North America** | 78 Opportunities | +52% YoY | €11.7k c/Opp | -50% YoY |
| **(Client) Canada** | 26 Opportunities | +1,200% YoY | €11.6k c/Opp | -90.99% YoY |
| **(Client) United States** | 52 Opportunities | +4% YoY | €11.8k c/Opp | -32.72% YoY |

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# Lacked TOFU Replenishment

We prioritized tightening up our targeting on Linkedin this past quarter as a main outcome of sales team feedback. We then started on plans to replenish our lead funnels affordably with video assets. **Unfortunately TOFU didn't support our BOFU effectively because of low engagement and uncompelling messaging- leading to poor video retargeting efficiency.**

**The opportunity** here is creating videos that not only better capture our audience's attention but express clear tangible value **emphasizing the places (Client) can win:**

- Price and affordability transparency
- Faster onboarding and implementation driving quicker ROI
- Simplicity and code-free management

| | View Rate | CPV | Completion Rate (%) |
|---|---|---|---|
| **(Client)** | 21.9% | $0.22 | 3.08% |
| **(Competitor) *(Directive's Standard)*** | 52.3% | $0.05 | 51.9% |
| **Engagement Inefficiencies** | **139%** | **77%** | **1585%** |

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# Website CRO Failed to Follow Best Practices for Opportunities

We drove users to the (Client) main website which had pivoted away from best practices for generating opportunities and even outside of paid efforts, YoY we saw steep decreases in conversion rates for the actions that best lead to Opportunities.

- In Q2 we saw the EN sitewide change of **-30.66% in conversion rate for demo requests** and a **-23.01% change in conversion rate for pricing requests**.

- All the while assets like information packages and brochures saw a 32% increase in downloads which have historically been great MQL drivers but not effective for Opportunity generation for (Client) or the SaaS market as a whole.

**The opportunity** here is to capitalize on the CRO efficiencies of the various (Client) regions and their custom landing pages and then use those learnings to inform the main website across the board.

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# Visibility for CRM-backed Post-Click Quality Refinement

Our ad copy actually drove higher click-thru-rates across Canada and the United States. For some context, iln Canada, **CTR rose by +27.02%** across the account with efficiencies in both **avg. CPC decreasing by 29.76%** and **cost per conversion dropping 52.80%**.

So what was the problem? We drove higher engagement and more conversions at cheaper costs... the problem is messaging and offers resulted in **poor post-submission quality with limited visibility.**

| | Cost | Avg. CPC | Conv. | c/Conv. | Leads | c/Lead | SQOs | c/SQO |
|---|---|---|---|---|---|---|---|---|
| **Previous Period** | $477.9k | $6.30 | 1,068 | $276.86 | 1050 | $455.17 | 50 | $9,558.47 |
| **Annual Performance** | $311.7k | $5.59 | 1,126 | $447.47 | 839 | $371.60 | 12 | $25,981.27 |
| **Change (%)** | -34.76% | -11.30% | +5.43% | -38.13% | -20.10% | -18.36% | -76% | +171.81% |

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# Platforms Made for Search
# Wasted Spend on Display

If our primary goal as an organization is to drive Opportunities, then TOFU efforts need to be very targeted to guarantee unwasted spend. **Google Display campaigns lack firmographic targeting like job titles and company-based targeting making it a poor fit** resulting in less funnel value.

The opportunity here is to leverage previously wasted spend of €113k and transition these TOFU efforts to where we can confirm:

1. **Firmographic and B2B Targeting** - This targeting is mandatory to guarantee that the users viewing our paid ads are relevant buyers based on company and ICP needs.
2. **Comprehensive Engagement Capturing** - Ensuring the ability to capture anyone who interacts or clicks-through a campaign and put them into an audience to push them down-funnel.

|  | (Client) US | (Client) CA | Total Wasted Potential |
|---|---|---|---|
| Cost | €89,091.72 ($98,990.80) | €24,015.11 | €113,106.83 |

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# Priorities from Learnings

Streamlining search campaigns across Google and Bing
For efficient **Opportunity generation**

Improving targeting on brand awareness to reduce wasted spend and
**bring down our customer acquisition costs**

Scaling top-performers while retaining quality by improving retargeting
so it **avoids audience loss** as we push users down-funnel

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# Paid Media Strategy

# Our Q3 2023 North Star Metrics

| Opportunities Generated | **22** | +43% QoQ |
|---|---|---|

| | | |
|---|---|---|
| **(Client) Canada** | 5 Opportunities | +150% QoQ |
| **(Client) United States** | 17 Opportunities | +21% QoQ |

**Summary:** If we are able to execute a comprehensive pivot throughout search to drive primarily demos and maintain the scale lead gen across our conversation ads on social, then we can see a clear path to greater Opportunities for (Client) NA in Q3 and beyond.

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# Key Concepts for Progress

Here are some key takeaways we took into account when developing our 2023-2024 strategy.

## 01

**Grow Funnel Efficiency**

Scaling in the most efficient places, both in terms of top performers and audience building wherever data supports.

## 02

**Market Alignment Priority**

Realigning paid search to push the offers that generate opportunities as much as possible throughout the customer journey.

## 03

**Customer-led CRO**

Expanding our CRO footprint to optimize in-platform efficiencies but also both landing pages and the main site

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# 2023 Objectives & Solutions

The objectives (Client) needs achieve to succeed and the tactics to achieve them.

| Objectives | GROW FUNNEL EFFICIENCY | MARKET ALIGNMENT PRIORITY | CUSTOMER-LED CRO |
|---|---|---|---|
| Tactics | Expand top performers to **new industries** as supported by data such as revenue requirements | Pivot paid search to push **opportunities as the priority leveraging OCT** with potential for secondary offers present | Launch our in-build landing pages to **kickstart conversion rates** that lessen distractions with clear guided flows |
| | Launch compelling videos for high view-completion rates to **cost-effectively replenish lead funnels** | Align messaging across videos, ads and landing pages based on the true wants of the IT Manager, highlighting **tangible differentiators** | Implement ongoing testing roadmap to quickly find ITSM and Service Management market **efficiencies to apply sitewide** |
| | Test winning campaigns on Meta with a tool to keep audiences consistent for **additional scale and cost savings** | Take market share via competitor campaigns with comparisons that put us in a **winning position** | Apply new **CRO insights and tactics from the broader SaaS** market to in-platform and onsite assets |

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# Directive's Strategy

- **Align core value points across ads, landing pages and assets** to foster greater engagement and drive users effectively down-funnel

- Take better advantage on inbound leads by prioritizing **the offers that drive opportunities most effectively such as demos**

- Expand our top-performing conversation ads for additional industries that still have **high market-alignment based on your CRM data worldwide** all while pivoting to focus on priority high ACV accounts to **maximize ROI potential**

- Build up engaged users efficiently to replenish Linkedin lead generation at the lowest cost possible and test Meta for **additional savings and scale**

- Launch aggressive CRO testing and insight sharing to **increase conversion rates sitewide**

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# Replenish Lead Funnels
# with Effective Video

**IN PROGRESS** - We will launch compelling videos for high view-completion rates to cost-effectively replenish lead funnels. We've started this process but low view rates and even lower view completion rates (3%) are stifling this approach from scaling our retargeting audiences on Linkedin as much as we could be.

### Static Ads

**Average Cost-Per-Click:** $26.20

**Cost for minimum threshold:** $7,860

### Video

**Cost-Per-View (Retargeted):** $0.36

**Cost for minimum threshold:** $109

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# Pre-Qualification via Video Content

The video helped pre-qualify leads prior to the intro meeting, which led to a more productive discussion that made it easier to qualify and move buyers to the next stage. Our "easy" brand awareness video's messaging lacks anything tangible for us to be remembered by.

*Our Directive brand video communicated our main value proposition to our ICP and drove engagement.*



## +28%
Increased Intro Call Attendance Rate

## 1.93x
Nearly 2x the SAL > SQL qualification rate

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# Expand Top Performers to New Industries

In the coming quarter we are going to expand top performers to new industries as supported by data such as our CRM's insights and any additional revenue requirements for companies. Specifically focusing on bringing back Education, Financial Services,, Manufacturing, and Professional Services.



Compiled Industry Groups from Enriched CRM

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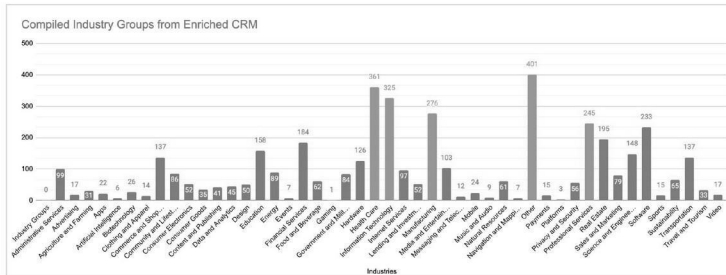
# Save and Scale on Meta

Test winning campaigns on Meta with a tool to keep audiences consistent for additional scale and cost savings. Facebook & Instagram expands reach AND lower inventory costs can generate a higher LTV:CAC ratio. This is achieved by leveraging a Clearbit, Zoominfo or Metadata audience import.

**$120k**
In Total Spend

**$5.6M**
In Pipeline Revenue

**63%**
Lower Cost per Opp. vs LinkedIn Sponsored Content Ads

**4.44**
LTC:CAC vs 2.4 with LinkedIn Sponsored Content Ads

**341%**
6-Month ROI

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# Market Alignment Priority

# Pivot Search to Push Opportunities
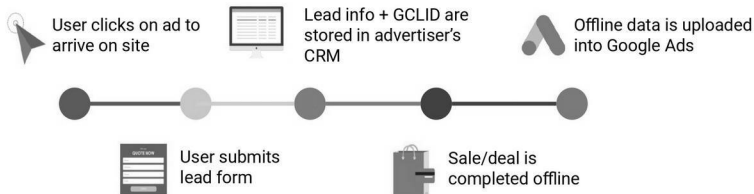


Restructure at the campaign-level based on keyword intent as currently we're seeing inconsistencies across "awareness" campaigns showing to high intent searches fumbling those opportunities for an intro call. We will pivot paid search to push opportunities as the priority for all campaigns with potential for secondary offers present.

This will send **+8,400 users annually to demo-prioritized landing pages** as opposed to mixed messages and flows that lack direction and value-provided proof-points.

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# Pipeline Data Connections for In-Platform Insights

Each region of the (Client) team has massive opportunities to streamline Opportunity generation by implementing **OCT at the (Client) MCC level** and centralizing the CRM's data for in-platform analysis.**This is the only way to get granular custom columns for finding insights** on which audiences, geos, days of the week and ads drive the most down-funnel metrics- not just in platform conversions via initial form completion.

User clicks on ad to arrive on site

Lead info + GCLID are stored in advertiser's CRM

Offline data is uploaded into Google Ads

User submits lead form

Sale/deal is completed offline

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### 01 The Challenge

Adjust paid search strategy to improve marketing qualified lead (MQL) volume.

### 02 The Strategy

- ▶ Implement offline conversion tracking (OCT) to identify which keywords are driving the most MQLs.
- ▶ Isolate those top-performing keywords into their own campaign to maximize search impression share.

### 03 The Results

**32%**
Decrease in cost-per-MQL

**36%**
of all MQL volume, despite using only 24% of ad spend, was due to OCT

# Align on Tangible Differentiators

Align messaging across videos, ads and landing pages based on the true wants of the
IT Manager, highlighting tangible differentiators.

## Opportunities to win:

Affordability

Transparency

Implementation Speed

Time to ROI

Simple (Code-Free)

## (Client) won't win:

Feature Sets

Technical Customization

Large Enterprise

Best Reporting

Most Integrations

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# Align on Tangible Differentiators

Bringing this alignment to our ad copy will push consistency across our ads, landing pages and offers. Additionally, it will **balance the need for quality score optimization via keyword relevance with the need to have more compelling ad copy** and eliminate any chances of redundant ads that can automatically populate based on a given search.

To combat this, we have developed a strategy to **prioritize selling points** while giving Google the search keywords needed for relevance. By pinning a first keyword centric headline and letting the remaining sales-focused headlines test which is most effective.
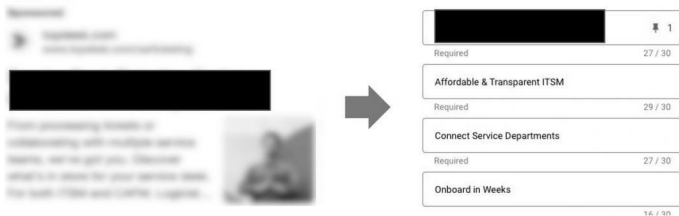
# Bid to Take Relevant Market Share

**IN PROGRESS** - Competitor campaigns are a mandatory part of a digital media strategy if you plan to take market share. That being said, they are tricky and need very specific and compelling content in order to work effectively.

Initially, we selected (Competitor) due to its name recognition and high market presence and search volume. While we're moving forward with that competitor landing page, the comparison brought to light that (Client) will need to be **creative when it comes to differentiation based on how similar and competitive the space is.**

**Moving forward we'll be focusing on (Competitor) and (Competitor) as next up.**

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# Customer-Led CRO

# Launch Isolated Landing Pages

**IN PROGRESS** - Launch our in-build landing pages to kickstart conversion rates that lessen distractions with clear guided flows to prioritize BOFU offers first and foremost. We are also setting up a tailoring strategy to get all landing pages aligned with specific ad groups related to search keyword clusters for quality score optimization leading to greater IS and lower costs.



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# Customization Content Plan

We have developed a **customization strategy that will prioritize our keywords with the greatest revenue opportunity** and make sure we're maximizing our IS across those terms. This will align the content users see with what they were searching for.
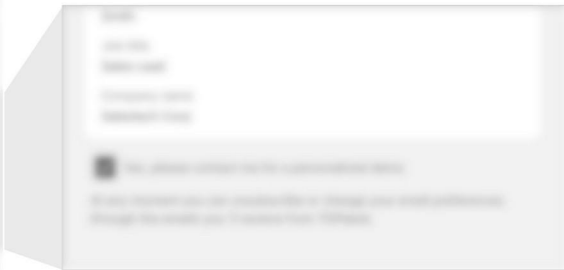


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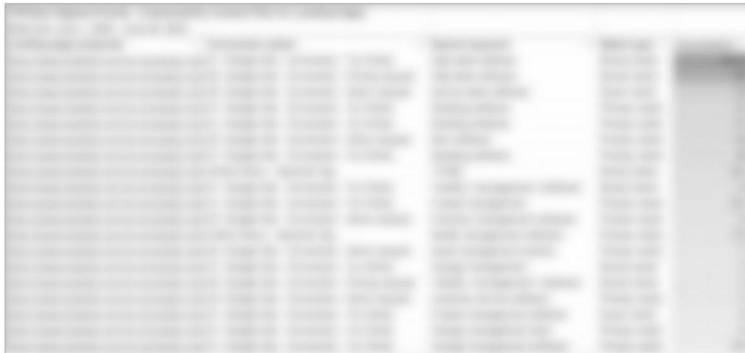
# CRO Testing Roadmapping

With new landing pages launching that are independent of the main site and only discoverable via ads, we can run CRO tests more efficiently and build out a roadmap to guide testing and prioritize based on winning practices. **Winning practices can be translated to the main website** where applicable.



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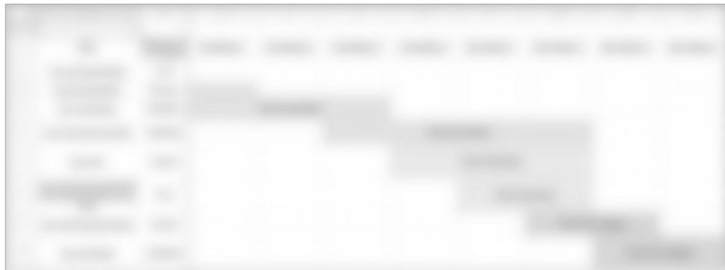
# Optimize All Touchpoints for Opportunity Generation



Adding a selection box across social and on-site asset downloads that when toggled will trigger a demo or pricing request consultation is a subtle way to instantly increase MQLs and then Opportunities down funnel.

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# Self-Service Scheduling is a Need-to-Have

Using Chili Piper or Calendly advanced scheduling for B2B revenue teams can have a real impact on attendance rates from leads at that critical first meeting.

Directive was able to improve funnel conversion metrics by adding Chili Piper to our martech stack.
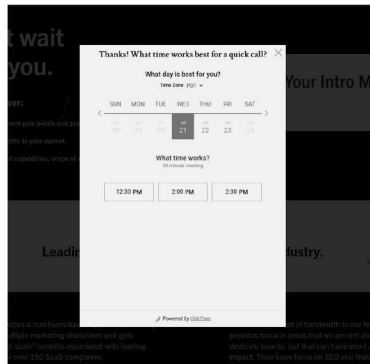


| Without Chili Piper | With Chili Piper |
|---|---|
| **34%** | **51%** |
| Form Fills > Intros Held Conversion Rate | Form Fills > Intros Held Conversion Rate |

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# Long Term Opportunities

# (Client) EN Website CRO Optimizations and Redesign



The main website and overall messaging strategy when it comes to CRO needs some improvement especially in user flows. T**he brochure was the main CTA of the website** until we asked it to be promptly swapped back to the personal demo, while the FR website still has it prioritized. We were disoriented to discover that the free trial being pushed sitewide- **isn't even a trial at all** but more of a scaled down walkthrough experience that confuses users and diseases while providing no value. We even discovered that the main **link "Contact Sales" was a broken link erroring out.**

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**ONTASK CASE STUDY**

# Driving $10M+ Pipeline through Performance Creative x CRO
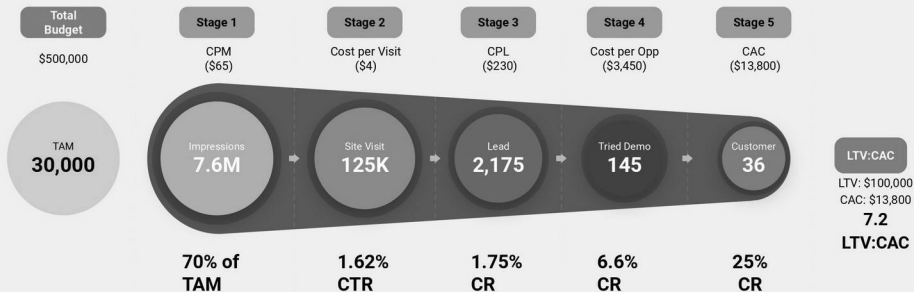
Our landing page redesign, plus a new CTA experience and continuous testing and optimization led to a dramatic increase in conversion rate from 15% to almost 50%, capturing over 3,000 high-quality leads.
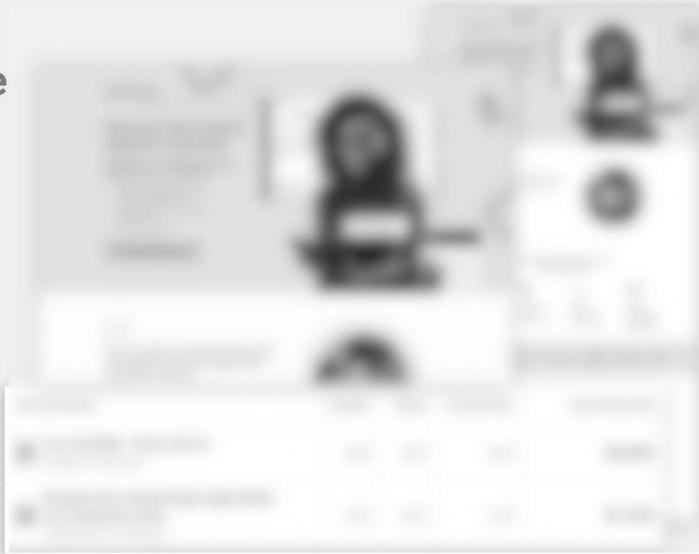


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# Lifecycle Marketing Audit

The reality for (Client) and most SaaS companies is their customer lifecycles are broken - leading to wasted spend, mis-managed data & lost leads pouring through the cracks. **It's a silent drain of revenue that goes unnoticed.**

| Total Budget | Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 |
|---|---|---|---|---|---|
| $500,000 | CPM ($65) | Cost per Visit ($4) | CPL ($230) | Cost per Opp ($3,450) | CAC ($13,800) |

| TAM **30,000** | Impressions **7.6M** | Site Visit **125K** | Lead **2,175** | Tried Demo **145** | Customer **36** | LTV:CAC |
|---|---|---|---|---|---|---|
| | **70% of TAM** | **1.62% CTR** | **1.75% CR** | **6.6% CR** | **25% CR** | LTV: $100,000 CAC: $13,800 **7.2 LTV:CAC** |

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# All these lifecycle issues will stifle growth

Budget not allocated towards the highest ROI campaigns

This is only one customer journey - missing key touchpoints

LTV:CAC is incorrect - mis-reporting ROI

| Total Budget | Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 |
|---|---|---|---|---|---|
| $500,000 | CPM ($65) | Cost per Visit ($4) | CPL ($230) | Cost per Opp ($3,450) | CAC ($13,800) |

| TAM 10,000 | Impressions 7.6M | Site Visit 125K | Lead 2,175 | Tried Demo 145 | Customer 36 | LTV:CAC |

LTV: $100,000
CAC: $13,800
**7.2 LTV:CAC**

70% of TAM

1.62% CTR

1.75% CR

6.6% CR

25% CR

TAM not informed by customer data, and does not reflect our highest-value ICP

Offline conversions not tracked - missed attribution

Leads are not enriched, scored and managed effectively - losing valuable customers

CRM not properly setup - marketing & sales are misaligned

Can't attribute customers to specific marketing spend and channels

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# We turn your customer lifecycle into a revenue engine

Complete lifecycle design

| Total Budget | | Stage 1 | Stage 2 | Stage 3 | Stage 4 | Stage 5 |
|---|---|---|---|---|---|---|
| $500,000 | | CPM ($65) | Cost per Visit ($4) | CPL ($230) | Cost per Opp ($3,450) | CAC ($13,800) |

**TAM 10,000**

**Impressions 7.6M** → **Site Visit 125K** → **Lead 2,175** → **Tried Demo 145** → **Customer 36**

| 70% of TAM | 1.62% CTR | 1.75% CR | 6.6% CR | 25% CR |
|---|---|---|---|---|

**Accurate forecasting & optimal budget allocation**

**100% marketing attribution & ROI**

LTV:CAC
LTV: $100,000
CAC: $13,800
**7.2 LTV:CAC**

**CRM & data controlled & leveraged**

Full-proof funnel with no leaks

# Budget Analysis + Media Plan

# CA Campaign Media Plan

Campaigns we recommend for this quarter include historical top performers for sales-qualified opportunities, as well as some new campaigns for competitor takedowns. TOFU has pivoted from Google Display to video on Linkedin for the interim. This plan doesn't include Meta yet as we have haven't gotten confirmation of audience building tools.



Campaign Media Plan Link

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# US Campaign Media Plan

The campaigns for the United States and Canada are consistent in theme but take into account the unique budget requirements for each. To confirm, these are campaigns drafted as of now, this plan doesn't include Meta yet as we have haven't gotten confirmation of audience building tools like MetaMatch or Clearbit.



Campaign Media Plan Link

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# Strategic Roadmap

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# Q3 Quarterly Roadmap

## Launch New Landing Pages

Kickstart our conversion rates and search pivot by launching our non-brand and competitor landing pages. Keep the progress going with a customization plan.

## Keep the Pipeline Filled

Launch CRO testing roadmaps for search and social. Execute on video for TOFU campaigns to keep the pipeline filled effectively.

## Scale Lead Generation on Social

We can expand current top performers via industries, scale retargeting with video, and depending on the tools available- bring those over to Meta for higher visibility and lower costs.

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# 12 Month Roadmap for Success in 2024

| Goal | Q3 2023 Structure | Q4 2023 Expand | Q1 2024 Optimize | Q2 2024 Scale |
|---|---|---|---|---|
| **Strategy** | Launch Search Pivot | Understanding Acquisition | Spread Efficiencies and Save | Scale as Data Supports |
| | OCT / Enhanced Conversions / Plan | NSM / User Journey / QBR / Plan | NSM / Offer Analysis / QBR / Plan | NSM / QBR / Plan |

| Initiatives | Initiatives | Initiatives | Initiatives |
|---|---|---|---|
| 1. Add in new industries that are supported by CRM data for top performers<br>2. Pivot foundationally on search to make sure we're prioritizing high value searches<br>3. Implement OCT company wide | 1. Launch completed videos and assets for efficiency increase<br>2. Continue implementing and developing CRO roadmap<br>3. Expand search to bing as data supports given Google traction | 1. Audit comprehensive revenue backed keyword alignment for review sites finding pockets of opportunity<br>2. Cut out any spend that didn't measurably impact Opportunity generation<br>3. Pipeline visibility audit action items | 1. Break down A/B Testing specifically designed for each ICP<br>2. Consider SEO for Further Organic SERP Optimization Based on Campaign Keyword Findings<br>3. Translate efficiencies from campaigns to organic and main site |

**Business Initiatives**

Produce Video Assets

**Ongoing**

| Advertising Optimization, Discoverability, & Conversion Management |
|---|
| Reporting |

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# Directive's win/win referral program!

Any time that you refer someone to us that we provide a proposal to, you'll receive…

A Visa gift card for **$250!** If your referral chooses Directive to be their partner, you'll receive a second **$250** Visa gift card.

## AND we will make a $500 charitable donation in YOUR name!

If there is anyone in your network you think could use paid media, SEO, video, revenue/marketing ops help please send them our way!

**Directive**