

Strategy Presentation

June 2023

Overview

Overview

Overview

- **Executive Overview & Key Findings**
Key actionable insights from the Project Phase
- **Customer Generation Strategy**
The big opportunity and our strategy to win
 - **Market Review**
 - **#1 Persona-Based Campaigns**
 - **#2 Product-Led Messaging**
 - **#3 Optimizing for Revenue**
- **NSM & Budget Allocation**
Establishing our leading indicator of success
- **Growth Roadmaps & Next Steps**
Planning for the first 90 days and the next 12 months

Our Mission Is to Help You Achieve Your Target Pipeline of \$100MM By the End of 2023

“

How do we reduce reliance on field marketing and have a more reliable digital marketing pipeline?

- Pete Vomocil, SVP Marketing

”

Fully Integrated Campaign Strategy

- Paid Media
- SEO & Content
- Creative Design
- Rev Ops



Persona-Based Campaigns

Rebuild Resource
Library by
Persona

Site Architecture
Refresh

First-Party
Targeting

Regional
Segmentation

Seniority
Segmentation

Buyer-Centric Ads



Product-Led Messaging

Use Case
Content

Dashboard
Gallery

OpenAI Feature
Video Ads

Optimized
Product Ads



Optimizing for Revenue

Conversion-Based
Bidding

Optimizing for
High Intent
Keywords

Incentivized
Demo Campaign

Optimizing for
High Intent
Keywords

New Dedicated
Demo Landing
Page

A/B Testing
CRO

Attribution
Improvements

Directive,

The Directive Strategy Phase Delivers More Value, Faster Than Any Other Agency

BI & Strategy
PROJECT

Execution
ONGOING



Client
Partnership
Dynamics



Business
Objectives & NSM



Target Buyers &
Users



Product &
Positioning



Channels
& Ads



Growth
Roadmap

Comms Planning
Immediate Needs
Brand Initiatives
Key Stakeholders
Sales Process

Revenue Models
Historical Data
Financial Modeling
NSM Goal-Setting
Key Metrics

Customer Data
TAM Development
ICP Segmentation
Buyer Personas
Buyer Use Cases

Brand Guidelines
Product Sentiment
Competitive
Analysis
Pricing & Offers
Positioning & UVPs

Channel Performance
Campaign Media Plan
Ad Copywriting
Tech & Reporting
Budget Allocation

12-Month Roadmap
Brand Milestones
Key Deliverables &
Final Presentation

Directive,

We've Implemented Quick Wins to Improve Short-Term Investment While Formulating Long-Term Strategy to Drive Revenue

Our Paid Media team has partnered with you to analyze existing efforts, optimize spend, and come up with an action plan to drive consisting MQLs through paid media efforts.

Outcomes:

- Better matching to relevant search queries
- Improved impression share across regions through localized segmentation
- Identified opportunities to capture hand-raisers with high-intent bottom-of-the-funnel keywords
- Mapped out (Client)'s paid media strategy that includes generating, nurturing, and capturing demand
- Created a more compelling and strong buyer-focused ad messaging strategy



Directive,

Quick Wins and Long Term Testing in Our Ads and Landing Pages Will Level Up the Integrated Campaigns

Our **Design** team has uncovered the opportunity to leverage your brand message and intentions by polishing areas of design in our Paid deliverables.

Outcomes:

- Our designs have CTAs; visually impactful and clear
- High contrast elements
- Use cases for imagery types are considered
- We've completed audits and design quick wins as takeaways to inject the best practices for Click Rate Optimization on your website
- Prioritizing test ideas via a testing repository will optimize our paid landing pages on an ongoing basis

Design Quick Wins

Initial Website audit



Directive,

We've Provided Optimizations for Driving More MQLs That Will Lead to Bookings

Our **Revenue Operations** team has partnered with you to overhaul your lead scoring model, including updated score weighting and new model elements.

Outcomes:

- New and existing leads will be impacted by **new model**
- **Higher conversion rates** > More MQLs
- **Increased sales efficiency**
- Sales and Marketing alignment
- **Measurable ROI** on lead generation efforts
- More stringent disqualification



Less Time Wasted



Higher Lead ROI



Increased
Conversion Rates



Fewer Lost
Opportunities

We've Identified and Prioritized Organic Keyword Targets Representing a 7K Annual MQL Opportunity

Our **SEO** team has partnered with you to define the “keyword universe” where we will drive greater market share for high-intent, non-branded keyword search terms by building product-driven content highlighting the unique outcomes we help our ICPs achieve.

Outcomes:

- Resolved high-priority technical issues that were affecting site performance
- Mapped out (Client)'s content strategy over the next 12 months based on comprehensive market analysis
- Provided clear line of sight into areas of strength and vulnerabilities relative to our competition when it comes to positioning and on-site content

Content Category	Keyword Theme	Search Volume (Monthly)	Search Volume (Annually)	Estimated Traffic from First Page Positions			
				Position 1 CTR 31.88%	Position 2 CTR 18.71%	Position 3-4 CTR 9.63%	Position 5-10 CTR 2.33%
Core Pages	Decision Intelligence	3,860	46,320	1231	722	349	90
	Business Intelligence	23,360	280,320	7447	4371	2109	544
	Business Analytics	5,420	65,040	1728	1014	489	126
	Augmented Analytics	3,180	38,160	1014	595	287	74
	Data Modeling	9,780	117,360	3118	1830	883	228
	Data Visualization	3,450	41,400	1100	645	312	80
	Data Preparation	470	5,640	150	88	42	11
	Data Integration	18,750	225,000	5978	3508	1693	437
	Cloud	11,050	132,600	3523	2067	998	257
	SAP	930					
	Embedded Analytics	3,44					
				KW Relevance		Keyword	
						Intent	
Blog & Glossary Pages	Decision Intelligence	22,81		Very Relevant	bi tools	commercial, informational	
	Business Intelligence	41,36		Very Relevant	augmented analytics	commercial, informational	
	Business Analytics	390		Very Relevant	business analytics tools	commercial	
	Augmented Analytics	380		Very Relevant	decision support system	commercial, informational	
	Data Modeling	29,81		Very Relevant	data modelling	commercial, informational	
	Data Visualization	27,44		Very Relevant	data integration platform	commercial	
	Data Preparation	29,14		Very Relevant	data modeling tools	commercial	
	Data Integration	7,76		Very Relevant	business intelligence solutions	commercial, informational	
	Cloud	4,71		Very Relevant	data integration software	commercial	
	SAP	7,78		Very Relevant	data integration solutions	commercial	
	Embedded Analytics	1,32		Very Relevant	business intelligence reporting	commercial, informational	
				Very Relevant	business analytics software	commercial	
				Very Relevant	decision support systems	commercial, informational	
				Very Relevant	augmented intelligence	commercial, informational	
				Very Relevant	bi platform	commercial, informational	
				Very Relevant	business intelligence strategy	commercial	

Buyer Insights

“

Here's what
customers are
saying:

In 6 months we were able to reproduce and improve an existing solution that a 3rd party team of consultants took over 18 months to create.

Director of Data Analytics
Mid-Market Org.



Manufacturing used to take a week working with Excel spreadsheets to analyse data that can now be produced in an hour.

Senior Department Manager of
BI Projects
Mid-Market Org.



We used to get insights a month later than we needed them, whereas now we see constant updates. A lot more visibility means we don't miss anything.

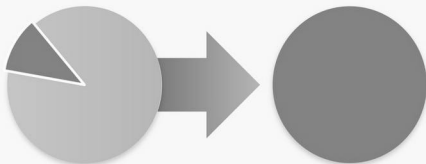
Director of Technology &
Analytics
Mid-Market Org.



Initially Prioritizing Fast-Growing, Upper Mid-Market Organizations Will Enable Us to Drive Revenue Within the Year

Deal Velocity + Volume = More
Revenue, Faster

We can win mid-market faster, building up social proof and creating a wedge to expand upmarket.



Directive,

Your Ideal Customer Profile

Establishing your ICP based on our research and analysis, budget allocation, and historical performance data.

Buyer Personas

1. Mid-market Champion (Analytics Leader)
 - a. Manager+ in BI, Analytics; recent job changers
2. Mid-market Decision-maker (Tech Executive)
 - a. CEO, CFO

Firmographic Profile

Our campaigns will initially target:

- Fast-growing, mid-market organizations
- 501 - 3,000 employees*
- \$100M - \$1B revenue

Extended ICP Opportunity

As we find success with this buyer segment, and with additional budget, we recommend expanding our target audience to include decision-makers and champions of enterprise organizations.

ICP Analysis

We're leading with this firmographic profile because mid-market organizations close quickly compared to enterprises, and we want to start proving value as soon as possible.

**LinkedIn segmentation is limited to 501-1000; 1001-5000, but we will use ZoomInfo to identify organizations under 3,000 for our TAM*

Directive,



Meet Shannon,

The Analytics Leader

Business Intelligence, Data Analytics Manager in High-Growth Organizations

Pain Points & Challenges

- Operational inefficiencies (reporting time, cost of talent, etc.)
- Producing quality results with a low budget
- My team isn't big enough to provide executives with the level of insight they need

Risks & Fears

- Losing the bandwidth to keep up with tickets and requests AND drive innovation, either by headcount or budget reductions
- Missing growth opportunities and revenue due to poor data visibility, quality, and analysis

OKRs

- Reduce Total Cost of Ownership (TCO) by 25% YoY
- Reduce BI ticket backlogs by 50% YoY
- Eliminate 3 vendor contracts, to free up an additional 30% of the budget to be reallocated

JTBD

- Reduce the number of one-off reporting requests directed at data analysts so that they can focus on their individual KPIs
- Get data to actionable visualizations as few steps and tools as possible
- Earn the trust of executives and board members by providing strategic recommendations for business decisions



Meet Edward,

The Data-Driven Executive

CEO, CFO in High-Growth Organizations

Pain Points & Challenges

- I have too many responsibilities to be worried about the accuracy of the data I'm given to share with other executive and the board
- Complex and sophisticated data is not delivered in a quickly digestible and actionable manner

Risks & Fears

- Missing an opportunity to improve the bottom line because I didn't have the information I needed to make a real-time decision (either based on timing or accuracy)
- Lack of data governance

OKRs

- Retain 85% of customers YoY
- Identify 2 or more departments where we can reduce costs through automation
- Increase operational efficiency of my BI department by 10% YoY while reducing overhead costs by 5%

JTBD

- Get my organization to the next stage of funding by forecasting revenue figures for the next 4 FQs within a 5% MOE
- Define data needs and build dashboards to establish and meet operational efficiency targets

Full Personas Worksheet

Our Core Personas and the Outcomes They Need to Achieve



The Analytics Leader

- I'm new to my role, and I'm looking to make an impact on our bottom line quickly by consolidating our tech stack and cutting costs (lower TCO)
- I need to deliver a dashboard with insights and next steps, that executive team can use and understand on a regular basis.
- My organization's data is spread out across platforms and teams, and my team needs to clean, consolidate, and make sense of it in a way that can be presenting to leadership.



The Data-Driven Executive

- I need to know how the data at my fingertips should inform strategic direction of my company.
- I need to make budget decisions for the company, quickly.
- I need to know what is impacting the results my company is seeing and where I should pivot strategy to improve our revenue.

Customer Generation Strategy

CHALLENGE

Standing Out in a Highly Saturated Market With a Lot of Household Names

How will (Client) reduce reliance on field marketing and develop a more reliable digital marketing pipeline in a market that is “mature,” “saturated,” and “crazy?”



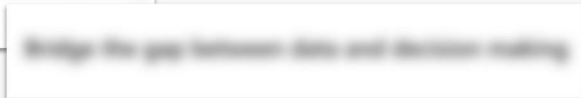
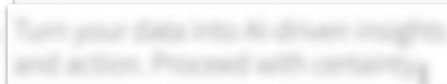
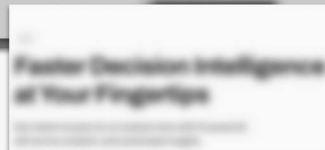
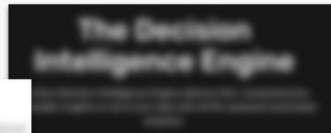
Source: [G2 Grid for Analytics Platforms](#) & [Gartner Magic Quadrant for Analytics and BI Platforms](#)

CHALLENGE





We All Talk About Our Value in the Same Way

Everyone in the space says they can get you the best insights the fastest—which makes this value proposition completely meaningless.





The concepts aren't new, but to stand out, we'll find a new way to show our buyer why they should choose (Client).



Core Competitor Comparison

				
Positioning	<ul style="list-style-type: none"> Helps people see and understand data Analytics for everyone, from anywhere 	<ul style="list-style-type: none"> Turn your data into immediate impact 	<ul style="list-style-type: none"> Turn your data into AI-driven insights and action. Proceed with certainty. 	<ul style="list-style-type: none"> Empower anyone to make faster, more intelligent decisions
CTA / Offer	<p>"Try now" and "Buy now" CTAs</p> <p>Pricing starts at \$15/month/user for just a viewing capability</p>	<p>"Start Free" is a free download of the desktop app</p> <p>"Buy now" is secondary CTA</p> <p>Pricing as low as \$10/month/user</p>	<p>"Try for Free" is main CTA, offering a free trial</p> <p>Also offering a Demo Video</p> <p>Pricing starting at \$30/month/user</p>	<p>Demo, no free trial</p> <p>No pricing information available</p>
Ratings / Awards	<p>G2: 4.3 stars (1,778 reviews)</p> <p>Capterra: 4.5 stars (2,145 reviews)</p> <p>GPI: 4.4 stars (3,561 reviews)</p>	<p>G2: 4.4 stars (952 reviews)</p> <p>Capterra: 4.6 stars (1,432 reviews)</p> <p>GPI: 4.4 stars (2,862 reviews)</p> <p>Named a "Leader" in the April 2023 Gartner Magic Quadrant for ABI Platforms</p>	<p>G2: 4.4 stars (649 reviews)</p> <p>Capterra: 4.4 stars (239 reviews)</p> <p>GPI: 4.4 stars (1,095 reviews)</p>	<p>G2: 4.1 stars (17 reviews)</p> <p>Capterra: 0 stars (0 reviews)</p> <p>GPI: 4.4 (184 reviews)</p> <p>Named "Visionary" platform from Gartner Magic Quadrant for ABI Platforms; #1 in Augmented Analytics</p>

Secondary Competitor Comparison

				
Positioning	<ul style="list-style-type: none"> Based on fact, not instinct Make faster, smarter decisions Intelligence everywhere 	<ul style="list-style-type: none"> Know what, why and how, faster Faster decision intelligence at your fingertips 	<ul style="list-style-type: none"> The fastest path to why The decision intelligence engine 	<ul style="list-style-type: none"> Empower anyone to make faster, more intelligent decisions
CTA / Offer	<p>Free trial ("pilot"); requires account</p> <p>Demo; no information prior to email</p> <p>No pricing on site, G2, Capterra listed as starting from \$600</p>	<p>Free trial (14-day) and demo</p> <p>Pricing is included on the site, listed as starting at \$495 for self-serve but requires sales for Enterprise</p>	<p>Demo, no free trial</p> <p>No pricing information available</p>	<p>Demo, no free trial</p> <p>No pricing information available</p>
Ratings / Awards	<p>G2: 4.2 stars (535 reviews) Capterra: 4.3 stars (60 reviews) GPI: 4.6 (681 reviews)</p> <p>Highest product scores from Gartner in Enterprise Analytics and Embedded Analytics use cases</p>	<p>G2: 5 stars (1 reviews) Capterra: 0 stars (0 reviews) GPI: 4.6 (48 reviews)</p> <p>Named "Visionary" platform from Gartner Magic Quadrant for ABI Platforms</p>	<p>G2: 0 stars (0 reviews) Capterra: <i>not listed</i> GPI: 0 stars (0 reviews)</p>	<p>G2: 4.1 stars (17 reviews) Capterra: 0 stars (0 reviews) GPI: 4.4 (184 reviews)</p> <p>Named "Visionary" platform from Gartner Magic Quadrant for ABI Platforms; #1 in Augmented Analytics</p>

OPPORTUNITY

Most of Our Competitors' Content Is Top and Middle of Funnel

With the exception of Microstrategy, which is investing in BOFU demo ads on LinkedIn, our peer set is targeting top and middle of funnel buyer with content.






We can stand out on saturated social platforms with more creative formats and a wider variety of content offerings.



INSIGHT

Our Competitors Are Investing Heavily in Google and LinkedIn, but Ignoring Meta and Capterra

While we want to maintain a competitive presence on the core advertising platforms, there is also an opportunity to take advantage of the open markets on review sites and social platforms that aren't traditionally B2B SaaS—because our buyer is still there.

	Facebook	Google	LinkedIn	Twitter	Meta	YouTube
	✗	✗	✗	✗	✗	✗
	✓	✓	✗	✓	✓	✓
	✓	✓	✗	✓	✗	✗
	✓	✓	✓	✓	✓	✓
	✗	✗	✗	✗	✗	✗

Directive,

OPPORTUNITY

Expand Review Campaigns to Additional Directories to Become More Discoverable

We've historically placed our review site focus on GPI and analyst reports, resulting in strong content and profile.

By mimicking our review campaign strategy to G2 and the Gartner Suite, we will ensure we're always top of mind as our buyer is researching the right solution for their needs.



Source: G2, Capterra, Software Advice & Gartner

INSIGHT

First Impressions Matter

Most of the engagement here will be prime real-estate and the carousel looks great, but is showing mostly abstract images that might not come across as related to the messages that we want to convey.

People are spending a lot less time and heatmap snapshot suggests that they might be skipping the long paragraphs.

Initial Website Audit

Design Quick Wins



INSIGHT

What Are Competitors Doing With Their Ads?

██████ applies good practices in its ads, keeping it simple and effective.

Learning: human imagery helps connecting with target audience, displaying a short a concise headline and geometric shapes.

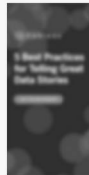
██████ using too many confusing visual elements and too much text.

Learning: use the 'billboard rule' and try to stick to less words, more impact.

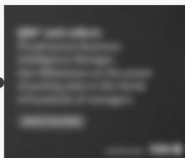
██████ has a good usage of copy, but the images lack legibility and are not engaging.

Learning: human imagery or simplified product UI to engage audiences

Probleview



██████



Mindfulogy

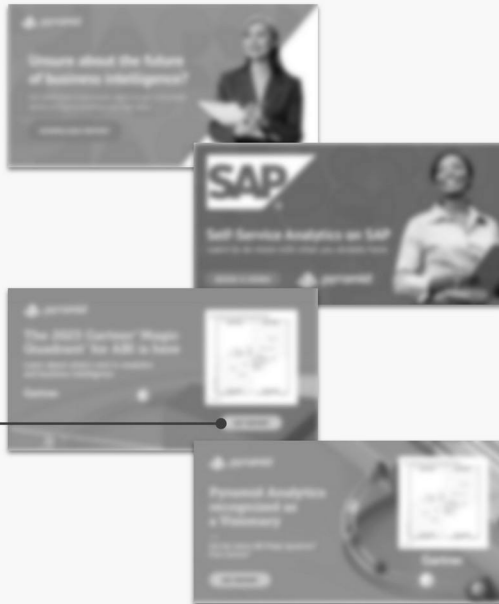


Directive,

OPPORTUNITY

Display Ads Are the Perfect Format to Test and Identify Messaging and Visuals That Resonates With Our Personas

- Stick to the essential information and eliminate any unnecessary details. **7 or fewer words for maximum impact on headlines.**
- **Test both static and video ads** to see which format resonates better and generates higher engagement or conversions. This is an **opportunity to explore with abstract illustrations.**
- **Consider using carousels ads**, highlighting different platform features as people swipes through each image.
- Having a **clear and accessible CTA** is a must



OPPORTUNITY

Optimize Existing Site Elements for Improved Experience

- Abstract 3D images have great potential when different scenes are brought together to tell a story, but only in video. For static images, human imagery and UI works well.
- **Bite-sized pieces of text**, sprinkling key information through the page instead of frontloading, in order to reduce drop-off.
- Consolidate all **major buttons** to one color for the main offering
- For **secondary buttons** (ghost-buttons) – consider outlining

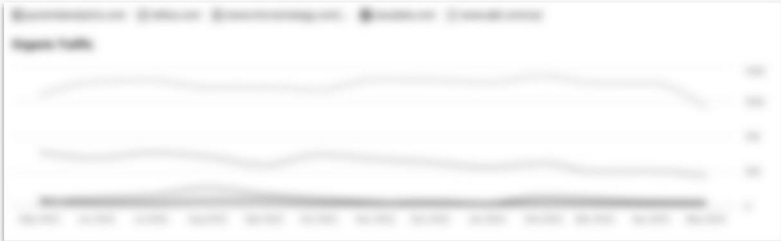


CHALLENGE

Attempting to Define
“Decision Intelligence”
Category Within the BI
Space Has Not Fueled
Scalable Growth

Decision Intelligence is a small
piece of the BI market,
representing ~10% of keyword
opportunity.

Continuing to focus on this niche
while ignoring broader categories
will not fuel the type of growth
required to succeed in this
market.



Source: SEMRush

[Click to see where Qlik stacks up vs. Tableau & PowerBi](#)

OPPORTUNITY

Build Optimized,
Product-Led Content to
Capture Non-Branded
Search Traffic at Each
Funnel Stage

There is ample search
opportunity in your space with
thousands of MQLs potentially in
play.

By leading with messaging that
highlights (Clients') lower TCO
and market-leading capabilities,
Directive will increase visibility
and drive more MQLs from
non-branded search.

413K

Total Clicks (Annual, Total)	5,229,360	1,778,505	935,010	413,119	100,927
Total Clicks (Annual, Core Pages + Blogs)	3,237,120	1,047,562	356,276	121,169	41,210
Total Clicks (Annual, Dashboards)	1,992,240	677,561	230,438	78,372	26,654

Average Conversion Rate	0.40%				
Total MQLs (Annual, Total)		7,114	3,740	1,652	404
Total MQLs (Annual, Core Pages + Blogs)	12,948	4,190	1,425	485	165
Total MQLs (Annual, Dashboards)	7,969	2,710	922	313	107

[Link to workbook](#)

413K

Total Estimated
Annual Organic Clicks
Opportunity Based on
Middle of Page 1 CTR

[Link to keyword recommendation](#)

1.8K

Organic clicks to (Clients')
website from non-branded
search queries, last 12 mos.

[Link to striking distance keywords](#)

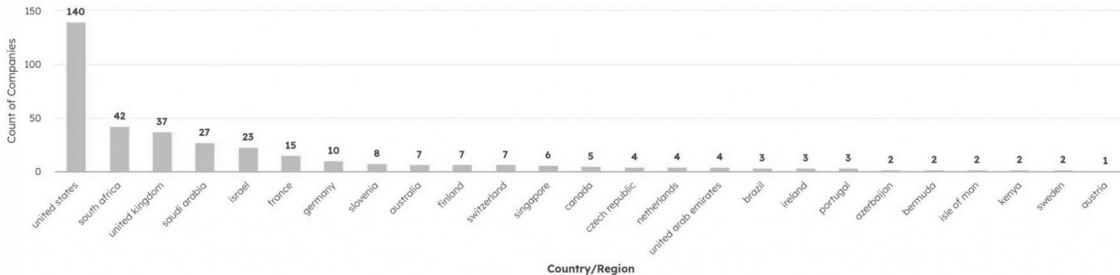
CHALLENGE

Our International Market Penetration Is Low Compared to the US

Customers by Region

Date range: All time

● Count of Companies



Source: HubSpot, all time

Directive,

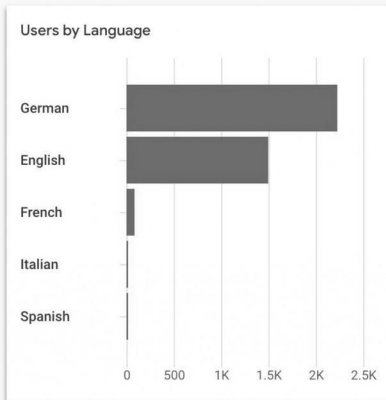
OPPORTUNITY

Test Campaigns Segmented by Region and Language

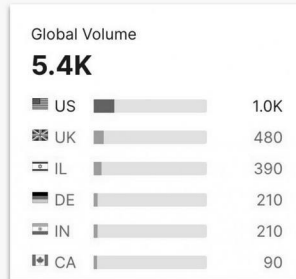
Increase brand awareness and authority outside of the US by investing in more ToFu and MoFu content, localized based on language and country.

Directive has a premier partnership with Google's International Growth segment.

57% of site visitors in DACH region over the last 90 days were using German language settings



Search volumes for
“(Client)” by country



Source: GA4 & SEMRush

So What Do We Do With This Research?

The Directive Path to Success

We will position (Client) as the highly innovative **AND** customer-driven business intelligence platform designed to fit the evolving needs of disruptive analytics leaders at high-growth organizations.

By creating content and campaigns across Search and Social that are **segmented by persona**, we will show our prospective buyers how (Client) is dedicated to a **customer-first** approach to analytics. We will be enabled to connect with buyers in a more emotive way, through specific, **product-driven messaging** that bring awareness to the core capabilities that set (Client) apart—OpenAI, PYRANA, deployment options, and more.

By meeting our audience where they are in their buying journey and speaking closely to their pain points and OKRs, we'll be able to **convert prospects into pipeline at a higher rate**.

Directive,

Fully Integrated Campaign Strategy

- Paid Media
- SEO & Content
- Creative Design
- Rev Ops



Persona-Based Campaigns

Rebuild Resource
Library by
Persona

Site Architecture
Refresh

First-Party
Targeting

Regional
Segmentation

Seniority
Segmentation

Buyer-Centric Ads



Product-Led Messaging

Use Case
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Dashboard
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OpenAI Feature
Video Ads



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New Dedicated
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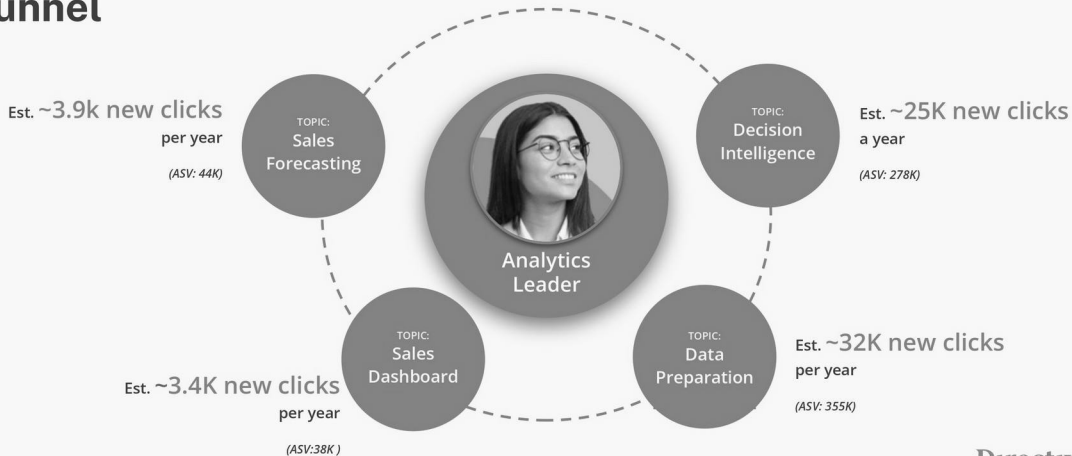
A/B Testing
CRO

Attribution
Improvements

Directive,

Persona-Based **Campaigns**

Focusing Our Content on What Matters the Most to Our ICPs Allows Us to Engage Them at Every Stage of the Funnel



Turn Resources Library Into Curated Thought Leadership Experiences for the “New Analytics Leader” Persona

Establish (Client) as a thought leader in the BI space for Analytics Leaders whose high-level social and emotional needs involve being a change agent in their organization and staying on the cutting edge of all the latest innovations in the industry.

This aligns well with (Client)'s designation as a “Visionary” and can turn into a content generation engine that encompasses our Dashboards strategy, TCO calculator data, case studies and more.



Example of competitors leveraging this strategy

Layer First-Party Data With Native Firmographics to Align Our Targeting With Qualified Buyers

Using first-party data from ZoomInfo, based on your current customers, cuts wasted spend and ensures we show ads only to your ICP.

Splitting campaigns by persona and region will enable us to leverage personalized messaging that speaks to the individual's pain points and how (Client) solves them.

Where is your target audience?

Locations (Permanent)

Canada, United States

Exclude people in other locations

Who is your target audience?

Include people who have ANY of the following attributes:

Job Titles (Current)

Senior Manager Business Intelligence, Vice President Business Intelligence, Business Intelligence Team Lead, Reporting Manager, Chief Information Officer, Director of Analytics, Senior Business Intelligence Developer, Director Business Analytics, Director of Information Technology, Business Intelligence Manager, Chief Information Officer, Business Intelligence Project Lead, Lead Business Analyst, Data Science, Head of Data Science, Business Analytics Manager, Director Information Technology Operations, Data Science Vice President, Business Intelligence Consultant, Director Business Intelligence, Director Reporting, Vice President of Analytics, Business Intelligence Lead, Business Strategy Manager, Director Business Strategy, Senior Vice President Information Technology, Director Information Technology Infrastructure, Vice President Information Technology, Business Intelligence Project Manager, Head of Business Intelligence

AND also have ANY of the following attributes:

Company Size

501-1000 employees, 1001-5000 employees

AND also have ANY of the following attributes:

Company Revenue

\$100M-\$1B

Company List

TAM_MM_Decision-Maker&Champion



Forecasted results ⓘ

Target audience size

5,400+

Segment breakdown ⓘ

Function ▾

Information Technology	54%
Research	26%
Business Development	20%
Engineering	19%
Finance	6%

Hide segments

ⓘ Forecasting for maximum delivery bidding is not yet available with your current campaign setup.

Directive,

Segment Campaigns by Region and Tailor Strategy According to Regional Necessities

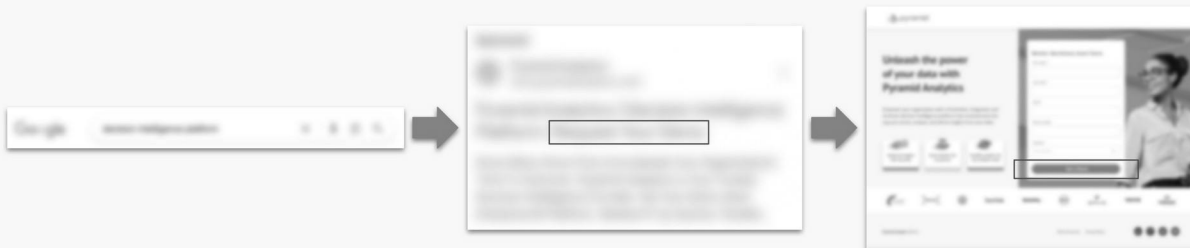
- Resegment campaigns by our three main regions:
 - USA + Canada
 - UK + Ireland
 - DACH (Germany, Austria, Switzerland)
- Optimize budget due to difference in time zones
- Tailor messaging by region:
 - Translate ad copy by language & utilize colloquial lingo
 - Promote best performing offers (i.e. SAP in DACH)
- Tailor strategies to regional necessities:
 - UKI & DACH need more ToFu efforts
 - USA+CA is ready for BoFu efforts
- Find untapped opportunities and high-performing campaigns by region
 - Partner with Google's [International Growth Agency Program](#) for best practices for expansion



Align Intent of the Pre and Post Click Experience

Showing up in moments of high intent to is only half the battle.

Paid Media and Design are collaborating to make sure we offer the right experience, at the right time, based on our specific persona, in order to draw them in and compel them to convert.



Directive,

Product-Led **Messaging**

“(Client) Beats SAP Analytics Cloud in 7 Out of 8 Key Categories According to G2 Ratings”

We are positioning (Client) as the leading solution for high-growth companies that need to win on innovation while also enjoying the true partnership and lower TCO of a holistic decision intelligence platform.

(Client)’s reviews and customer feedback all align with this positioning statement, and our initial strategy focus will be on getting (Client) into a wider consideration set for our ICPs.

We will do this by calling out the product features that (Client)’s customers love in our Paid, SEO, and Creative tactics.



Source: [https://www.g2.com/compare/\(Client\)-\(Client\)-vs-\(competitor\)](https://www.g2.com/compare/(Client)-(Client)-vs-(competitor))

Let's Highlight Everything That Your Buyers Love About Using Your Platform

Current focus on “integrated platform” messaging is too macro, making it difficult for ICPs to see the true value of your product when they visit your website.

Our messaging and content strategy will put (Client) product front-and-center by highlighting exactly HOW (Client) supports intelligent decision making and WHAT outcomes clients can accomplish that they can't do without (Client).

We are partnered with you to define and call out every problem that you solves for your ICPs and WHY the key capabilities offered in your solution are better, simpler, and more effective than those offered by your competitors.



Adding in Customer-Led Components to Guide the Journey to Self-Selection Could Lead to an Additional 40K Organic Sessions per Year

Home

Why Pyramid

About

Learn More

Newsroom

In the News

Careers

Platform

Platform

Learn More

Latest Release

Pricing

Deployment Options

Cloud

On-Prem

Hybrid

Key Capabilities

Data Prep

Business Analytics

Data Science

Augmented Analytics

Embedded Analytics

Predictive Analytics*

Data Visualization

Data Modeling*

Decision Support

Self-Service BI

Low Code / No Code

Cloud Analytics

Integrations

Overview

SAP

AWS

Azure

Google BigQuery

Snowflake

Datavard

Exasol

cData

OpenAI

SAP BW

SAP HANA

Quickbooks

Solutions

Featured Solution

Learn More

Use Cases

By Industry

By Title

Forecasting*

Data Governance

Process Optimization

Anomaly Detection

Market Research

Automated Insights

Competitive Intelligence

Capacity Planning

Churn Prediction

Inventory Management

Operational Efficiency

Solution Comparison

Tableau

PowerBI

Qlik

Microstrategy

Resources

Featured Resource

Resource Center

Blog

Events & Webinars

Dashboard Gallery

Customer Stories

Analyst Reports

Guides & Insights

Videos

View All

Community**

Learn**

Partners

Featured Partners

SAP

AWS

Our Partners

Become a Partner

Find A Partner

Take a Tour

Get a Demo

Pages We Already Have

Pages We Need to Build

Buttons

*Use Cases linking to case studies - should have a dedicated core page instead

** Off-site link to a subdomain

***We have a blog on this topic - it should be a main pillar page

Link to workbook

Directive,

Focus Initial Thought Leadership Content Strategy on Promoting OpenAI Integrations to Support Latest Release



Source: <https://www.client-analytics.com/blog/page/>

Current thought leadership pieces on this topic are not conveying the full weight of how game-changing this integration is and what potential outcomes it unlocks for your ICP. The visual above is difficult to understand and would be far more impactful with a brief product demo video.

Use More Video to Convey the Complex Nature of the (Client) Product and Message Our UVPs and Use Cases

Augmented Analytics is an emerging industry trend and (Client) is primed to be positioned as a leader in the field with your recent OpenAI integrations.

We will focus on promoting these game-changing features and capturing available search traffic via content creation.

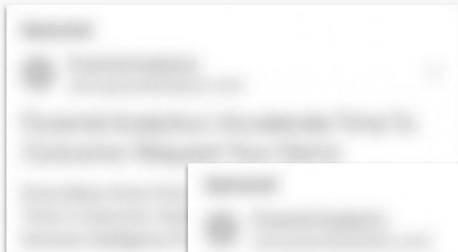
+600

Potential Clicks Per Month based
on estimated middle of page 1
CTR for your industry




Tailor Messaging by Persona, Mapping Outcomes to Buyer Needs and JTBD

Search



Social



Hey %FIRSTNAME%!

Want to unlock the full potential of your data?

In a fast-paced business environment, time and efficiency are critical. [REDACTED]' holistic platform replaces multiple solutions with a single, integrated platform.

Book a demo meeting and discover how to provide your organization with a tailored self-serve experience. After I'll send you a \$105 Amazon gift card.

Interested? 🗨

Sign up for a demo

Tell me more

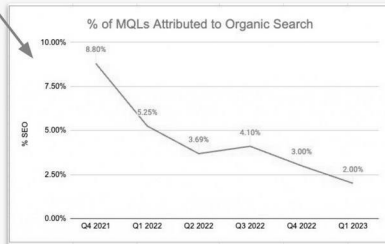
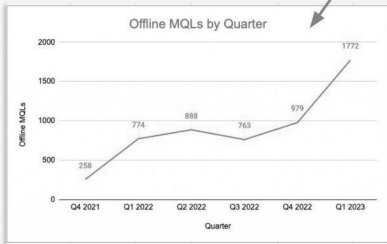
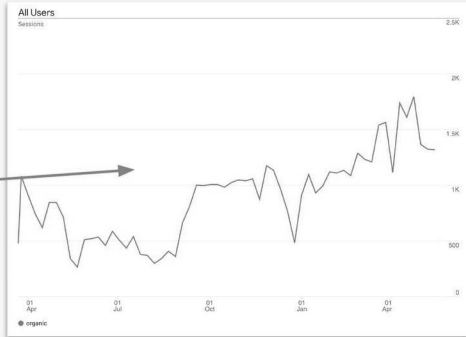
Optimizing For **Revenue**

Recent Organic Traffic Growth Has Not Equated to Revenue

After spending the last year tackling tech debt from the old site, Organic traffic has begun to rebound. Most organic traffic growth from Q1 - Q2 thus far hinges on promoting your Gartner results.

However, share of organic MQLs has decreased three consecutive quarters, while the unattributed MQL number keeps rising.

Source: Google Analytics & Hubspot



Make Sales Love You—Get the Right People to the Right Place

- Key elements missing from existing model
 - Decay model, negative scoring, auto-disqualify, firmographic
- Opportunity to streamline the sales handoff process
- Look to drive increased MQLs based on new scoring factors
- Remove junk. New scoring elements will remove junk leads, competitors, job applicants, etc. and prevent them from entering the sales process
- Goal: Increase MQLs from content sources (i.e. nurture programs) rather than relying purely on 'hand-raisers'

Next Steps


- Remove current scoring elements
- Implement new scoring model
- Schedule review meetings with sales for temp check
- Revise scoring element weighting based on feedback
- Update scoring model for new elements being created
- Review nurture programs to optimize for MQLs



Directive,

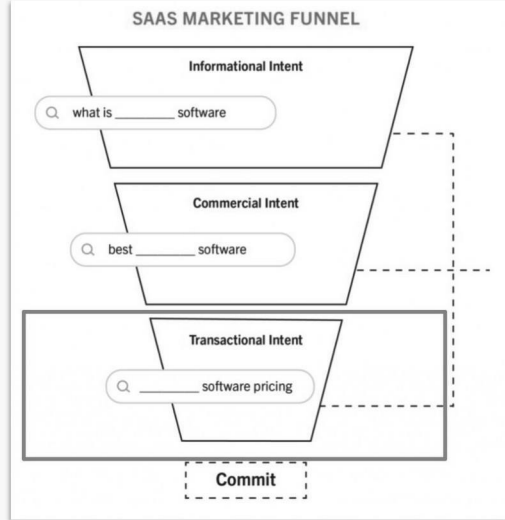
Optimize Towards the Right Signals and Accurate Data to Drive Results From Search

- Google's machine learning capabilities are only as good as the information we provide it
- It's not enough to have OCT set up, but for that set up to provide the right quality signals to our campaigns
- With a better MQL lead scoring, we will have better optimized campaigns
- As we build out attribution and down-funnel stages, we'll be able to **optimize directly to revenue**

 Qualified lead 23 of 105 campaigns			
<input type="checkbox"/> Conversion action	Action optimization ↓	Conversion source	All conv.
<input type="checkbox"/> HubSpot - Marketing Qualified Lead	Primary	Website (Import from clicks)	28.00
<input type="checkbox"/> HubSpot - Opportunities	Primary	Website (Import from clicks)	0.00

Align Spend With Our ICP Using BoFu Keywords

- Resegment keywords by BoFu to pivot budget to high performing & high intent keywords with a more aggressive bidding approach.
- Continue vetting and narrowing-in on long tailed performing keywords to focus on gaining top-of-page delivery for our niche



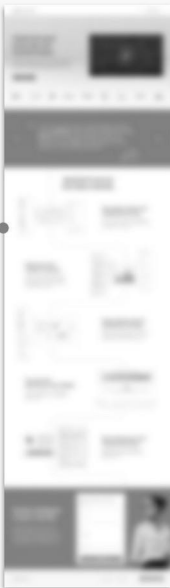
New Demo Pages to Complement Search Traffic

We created two different variants for the Demo LP, in order to test which one has better conversion rates.

Landing A

Larger landing page allows us to build storytelling, showing videos and UI, displaying key platform features.

Once the user understands, he can find the form at the bottom of the Landing page.



Landing B

Short and concise landing page, targeting users with a clear background of understanding.

The form can be found directly in the hero section.



Get a Demo Landing Page

Short version

Clear headline

Subheader

Main outstanding
features

Social proof

Quick & easy
to fill form



Directive,

Get a Demo Landing Page

Long version



SEO A/B Testing: Demo Request Form

Showcase a more compelling benefit to our ICP - what will the prospect get out of the meeting? Why is it valuable to them?

Unclear visual - what is this showing? How frequently are customers accessing (Client) on their mobile devices?

"Simplify analytics" is not specific enough to compel an action



[https://www.\(Client\).com/request-a-demo/](https://www.(Client).com/request-a-demo/)

(Client) Has an Opportunity to Expand Into Untapped BoFu Search Queries to Meet High-Intent Buyers Where They Are Searching

Content Category	Keyword Theme	Search Volume (Monthly)	Search Volume (Annually)	Estimated Traffic from First Page Positions			
				Position 1 CTR 31.88%	Position 2 CTR 18.71%	Position 3-4 CTR 9.03%	Position 5-10 CTR 2.33%
Dashboard Gallery	Accounting & Finance Dashboards	6,840	82,080	2326	1223	540	132
	Analytics Dashboards	14,950	179,400	5084	2673	1181	289
	Business Intelligence Dashboards	20,270	243,240	6894	3624	1601	391
	CRM Dashboards	4,300	51,600	1462	769	340	83
	Dashboard Design	16,760	201,120	5700	2997	1324	323
	E-Commerce Dashboards	1,210	14,520	412	216	96	23
	Executive Dashboards	3,200	38,400	1088	572	253	62
	Dashboard Features & Functionality	44,280	531,360	15060	7917	3498	855
	Healthcare Dashboards	1,200	14,400	408	215	95	23
	HR Dashboards	3,000	36,000	1020	536	237	58
	Logistics & Transportation Dashboards	1,500	18,000	510	268	119	29
	Manufacturing Dashboards	850	10,200	289	152	67	16
	Marketing Dashboards	19,240	230,880	6544	3440	1520	371
	Operations Dashboards	6,770	81,240	2302	1210	535	131
	Project Management Dashboards	6,560	78,720	2231	1173	518	127
	Sales Dashboards	3,180	38,160	1082	569	251	61
	Support Dashboards	7,900	94,800	2687	1413	624	152
	Data Visualization Dashboards	1,610	19,320	548	288	127	31
	Web Development Dashboards	850	10,200	289	152	67	16
	Other	1,550	18,600	527	277	122	30

~2M

Annual Search Volume Opportunity

Directive,

Competitors Are Driving 2-4K Organic Search Visits to Their Websites Each Month by Leveraging This Strategy



~2.6K

Est. Monthly Search Traffic



~4.5K

Est. Monthly Search Traffic

Directive,

Prioritize Use Cases Based on Relevance, Business Value, and Search Opportunity

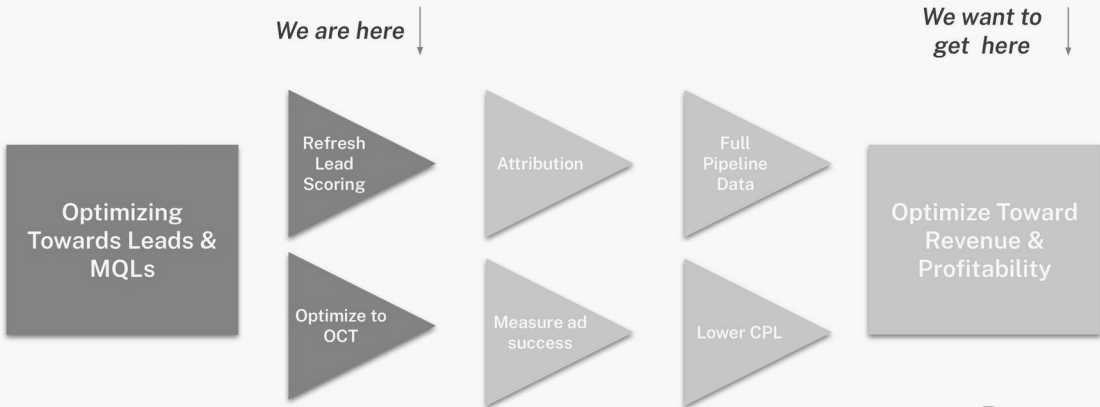
Use Case	MSV	KD (Avg.)	Relevance to ICP	Use Case Frequency
Budget Planning	68,610	53	High ▾	Medium ▾
Fraud Detection	49,150	32	Low ▾	High ▾
Sales Forecasting	43,840	42	▾	▾
Customer Segmentation	39,500	42	▾	▾
Claims Processing	39,400	42	▾	▾
Capacity Planning	36,950	29	▾	▾
Asset Utilization	4,920	27	▾	▾
Churn Prediction	4,400	30	▾	▾
Assortment Planning	2,540	20	▾	▾
Call Center Optimization	1,580	29	▾	▾
Channel Optimization	1,570	26	▾	▾
Citizen Experience	440	22	▾	▾
Claims Fraud Investigation	110	0	▾	▾

[Link to workbook](#)

NSM-Setting & Budget Allocation

Getting to LTV:CAC

Our plan towards complete financial modeling and performance measurement



Our Initial Forward-Looking Growth Goals

For SEO in Q3, we've set the NSM of:

100 Organic MQLs

Based on your historical data and your SEO strategy, the NSM is 100 Organic MQLs, which is a 127% increase YoY.

Annually, we're targeting an NSM of:

410 Organic MQLs

This is an aggressive goal of 133% YoY, however it is important to note that Organic search traffic from Q2 - Q4 was down significantly compared to historical averages and has begun to rebound in Q2.

For Paid Media Q3, we've set the NSM of:

337 Paid MQLs

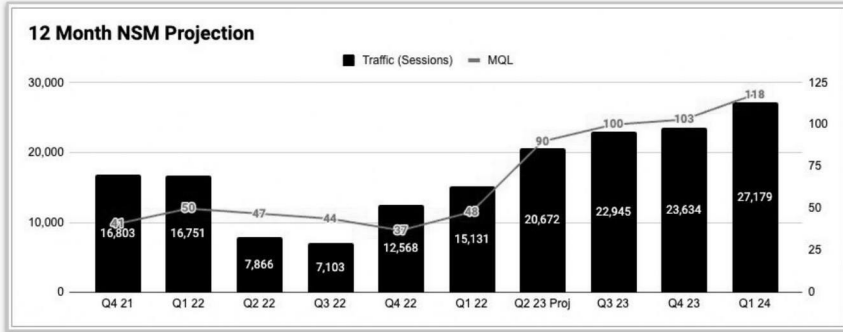
Based your historical data, projected spend, and assuming we keep the same CxMQL as projected in Q2, the NSM is a 3% increase QoQ.

Annually, we're targeting an NSM of:

1,457 Paid MQLs

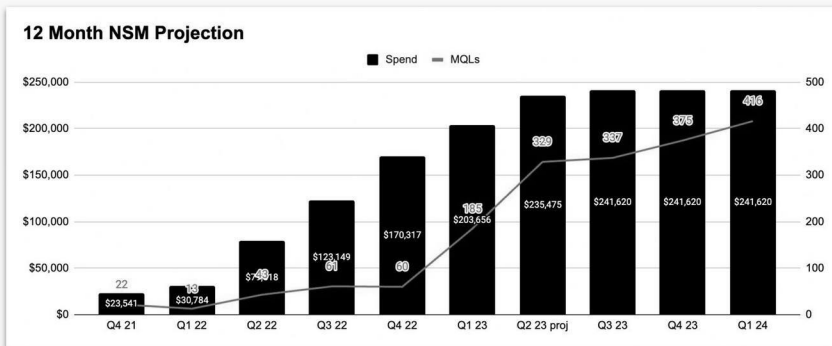
This is an aggressive goal of 317% YoY, and it depends on total projected spend, assuming we can keep current performance going. Important to note that new lead scoring strategy may result in changes to this projection.

SEO North Star Metric (NSM)



NSM Category	Q2 '23	Q3 '23	Q4 '23	Q1 '24	Total	% Change YoY
Organic Sessions	20,672	22,946	23,634	27,179	94,432	121.32%
MQLs	90	100	103	118	410	132.93%

Paid Media North Star Metric (NSM)



Category	Q2 23	Q3 23	Q4 23	Q1 24	Total	%Change YoY
Spend	\$235,475	\$241,620	\$241,620	\$241,620	\$960,335	66.54%
MQLs	329	337	375	416	1457	317.35%
CxMQL	\$717	\$717	\$645	\$580	\$659	-60.10%

Paid Media Campaign Plan

Current budget (\$80k/mo)

To have high-intent BoFu initiatives in all regions, complementary MoFu content initiatives for some audiences in all regions, and video ToFu initiatives only in the Europe regions initially.

Growth budget (\$120k/mo)

To have high-intent BoFu initiatives, complementary MoFu content initiatives by audience, and video ToFu initiatives in all three regions at the same time.



Campaign Budget Breakdown

Budget allocation by region and funnel stage.

Current budget (\$80k/mo)

Region	Stage	Budget	%
US+CA	ToFu	\$0	0%
	MoFu	\$6,590	18%
	BoFu	\$29,410	82%
UKI	ToFu	\$3,100	13%
	MoFu	\$6,300	26%
	BoFu	\$14,970	61%
DACH	ToFu	\$2,900	14%
	MoFu	\$6,190	31%
	BoFu	\$11,080	55%
Total		\$80,540	

Growth budget (\$120k/mo)

Region	Stage	Budget	%
US+CA	ToFu	\$6,200	12%
	MoFu	\$13,220	26%
	BoFu	\$31,510	62%
UKI	ToFu	\$6,200	17%
	MoFu	\$13,130	36%
	BoFu	\$17,070	47%
DACH	ToFu	\$6,200	19%
	MoFu	\$13,220	41%
	BoFu	\$13,180	40%
Total		\$119,930	

Growth Roadmap

Next 90 Days of Paid Media

30 Day

- Refine NSM based on new lead scoring and new campaigns progression
- Optimize Google search and LinkedIn campaigns
- Refine customer-led ad copy
- Launch convo ads, lead gen forms, content ads, and add TAM lists to audience in LinkedIn
- A/B testing of new demo landing page

90 Day

- Launch convo ads with remarketing audiences on LinkedIn
- Start evaluating ToFu expansion on YouTube
- Tailor and translate messaging by region
- Define best practices by region with the help of Google's [IGAP](#)

- Launch ToFu campaigns in LinkedIn
- Expand Google keyword coverage into more competition, use cases & JTBD
- A/B test ad messaging on Google search and LinkedIn campaigns
- Evaluate winning campaigns and efforts by region to determine best practices

60 Day

Paid Channel Expansion

Our immediate strategy is to maximize budget on Google Search, where we are able to generate the lowest cost MQLs, as well as expanding into existing opportunities on LinkedIn. Once this new structure and strategy proves to be successful, we would then start to explore YouTube, Meta, and Microsoft. Once we have generated enough reviews, we would recommend expanding into Capterra.

	Google Search	Microsoft Search	YouTube	LinkedIn	Meta	Capterra
Q3 '23	✓			✓		
Q4 '23			✓			
Q1 '24		✓			✓	✓

Next 90 Days of SEO

30 Day

- Refine NSMs based on data visibility & progression
- Create Content Calendar based on high-priority core pages, 'striking distance' keywords and latest product release
- Begin on-page SEO optimizations to existing content
- Deliver Content Briefs for core pages we've identified as missing

90 Day

- Update main navigation to expand on Use Cases & Key Capabilities
- Update Demo Request LP based on A/B test results
- Review early content strategy performance and iterate based on results

- Partner with (Client) team to prioritize Use Cases based on relevance to ICP and revenue potential
- Build roadmap for Dashboard Glossary and Resources Library content strategy based on Use Case prioritization
- Begin A/B testing Demo Request landing page

60 Day

Design Roadmap

- Heat-mapping tabs on our core pages and paid landing pages.
- We'll roll out an action plan for next steps on campaigns and take an inventory of where we can provide value creatively.
- Connect with Paid Media on content across the funnel.
- Explore tests to get statistical significance.
 - Keep a testing prioritization table and report and document this to improve our design.
 - Starting with a control variant LP, testing display ads.
 - Test ideas: Tone of voice, header language, photography subjects, illustration vs photography, color temperatures.
- Scale back learnings to (Client) marketing and internal activities as needed

12 Month Roadmap

Goal	Q3 '23 Optimize			Q4 '23 Convert			Q1 '24 Expand			Q2 ' 24 Scale		
Strategy	Strategize by Persona			Optimize Conversion Rate			Introduce Enterprise Campaigns			Expand Coverage		
				NSM		User Journey	NSM			NSM		
		Plan		QBR		Plan	QBR		Plan	QBR		Plan
Channel Initiatives	Q3 Initiatives			Q4 Initiatives			Q1 Initiatives			Q2 Initiatives		
	SEO: Core Page Optimizations and Expansion for targeted ICPs SEO: Augmented Analytics and OpenAI integration content focus (New Analytics Leader ICP) SEO: Prioritize Use Cases and build revised Resources Library structure PM: Launch convo ads, lead gen forms, content ads, video ads and TAM lists to audiences on LinkedIn PM: Evaluate Google keyword coverage into use cases & JTBD SEO/PM: Prioritize client reviews on G2, Capterra and related sites to influence consideration			SEO: Build Upon Q3 Content Strategy SEO: Link building outreach for non-linked brand mentions across third-party industry lists PM: Expand ToFu campaigns into YouTube ads and A/B test ads PM: Expand Google keyword coverage into use cases & JTBD PM: Define a regional strategy based on best performing campaigns, best practices, and the help of Google's IGAP			SEO: Build out revised main nav based on key capabilities and use cases mapped to our target ICP SEO: Relaunch Resources Library as a tailored content experience targeting our New Analytics Leader persona PM: Launch Capterra and G2 sponsored listings PM: Expand LinkedIn campaigns for Enterprise business audiences PM: Create comparison ads & landing pages PM: Refine messaging by ICP and region			SEO: Identify additional areas of content opportunity for our ICPs and begin expanding our optimized Resources Library SEO: Ongoing Technical & Site Performance Optimizations SEO: Internal Linking optimization campaign PM: Expand into Meta & Bing Ads PM: Expand Google keyword coverage into higher-funnel intent PM: Leverage on SEO opportunities to launch paid media campaigns		
Ongoing	Advertising Optimization, Content Creation, Discoverability, & Conversion Management											
	Reporting											

Thank

Any Questions?

You

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 my way.

Appendix

Ads Test Opportunities

Making ads more inviting

This is where we can make tests in order to see which one has better results:

- Copy/Messaging
- Gender in images
- Abstract vs Human imagery
- Background colors
- Add motion images
- Use existing videos



Optimize Title Tags and Meta Data on Core Service Pages So That They Are More Competitive for High Priority Keyword Terms Identified by Our Keyword Research

Competitors are driving MoFu search traffic from core service pages that organically outperform corresponding pages on (Client) website.

Directive will begin providing instructions on how to refresh core services pages while also providing content briefs to help create net-new Key Capabilities pages. The outcome will be updated meta data that specifically targets high-volume, high-intent keyword search terms.



[Link to Workbook](#)

Focus on Optimizing URLs Ranking for “Striking Distance” Keywords While We Build Depth Around our Product-Led Content



[Link to workbook](#)

Directive,

Media Plan - Current Budget (\$80K/mo)

Our approach is to have high-intent BoFu initiatives oriented towards conversions, with complementary MoFu content initiatives, and regional ToFu initiatives that will gain cadence as we learn more from our ICP's.



Current Campaign Budget Breakdown

Budget allocation by platform, region, objective, and funnel stage.

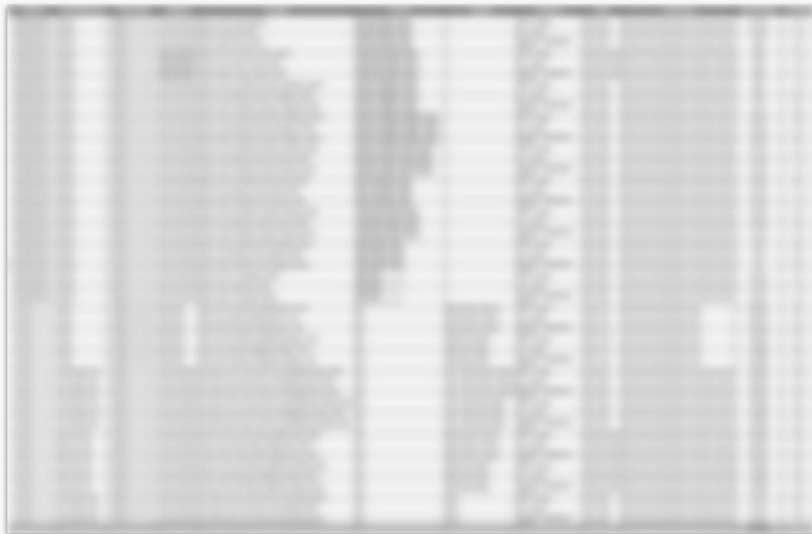
Budget Breakdown by Platform		
Google Search	\$54,830	68%
LinkedIn	\$25,710	32%
Total	\$80,540	100%

Budget by Funnel Stage		
Top	\$6,000	7%
Middle	\$19,080	24%
Bottom	\$55,460	69%
Total	\$80,540	100%

Budget by Funnel Stage		
US+CA	\$36,000	45%
UKI	\$24,370	30%
DACH	\$20,170	25%
Total	\$80,540	100%

Media Plan - Ideal (\$120K/mo)

Our approach is to have high-intent BoFu initiatives oriented towards conversions, with complementary MoFu content initiatives, and regional ToFu initiatives that will gain cadence as we learn more from our ICP's.



Ideal Campaign Budget Breakdown

Budget allocation by platform, region, objective, and funnel stage.

Budget Breakdown by Platform		
Google Search	\$54,830	46%
LinkedIn	\$65,100	54%
Total	\$119,930	100%

Budget by Funnel Stage		
Top	\$18,600	16%
Middle	\$39,570	33%
Bottom	\$61,760	51%
Total	\$119,930	100%

Budget by Funnel Stage		
US+CA	\$50,930	42%
UKI	\$36,400	30%
DACH	\$32,600	27%
Total	\$119,930	100%

SEO

Channel Tactics

Our SEO strategy will focus on bridging the gap between (Client) platform and the day to day problems that (Client) solves for your ICP through a carefully crafted funnel journeys to amplify your new and existing traffic.

1. **Product Led Messaging** will highlight Use Cases and Key Capabilities that set your product apart from competitors in the space, putting the “magic moment” for ICPs front-and-center in your marketing strategy
 - *How We'll Do This: Site Architecture Refresh*
2. **Solution-oriented messaging** that targets **jobs-to-be-done** allows us to position our content in better alignment with our ICP's.
 - *How We'll Do This: Dashboard Gallery Strategy, Rebuild Resource Library*
3. **Focus on high intent keywords** and align messaging for higher relevance, rank, and conversion.
 - *How We'll Do This: Core Pages Optimizations*