

 + Directive,

May 2024

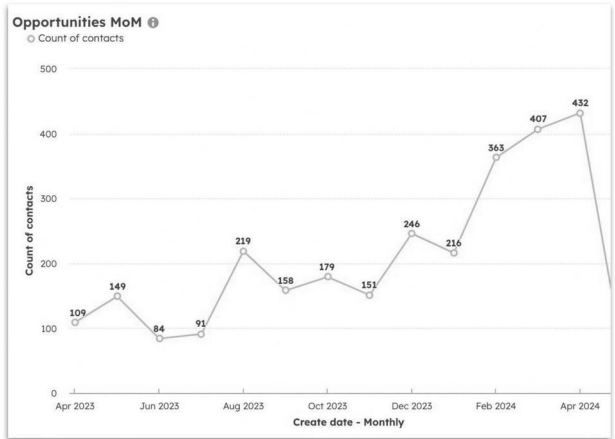
Annual Business Review

ing Directive
Performance

Year In Review

Directive,

Executive Overview



Setting Records MoM

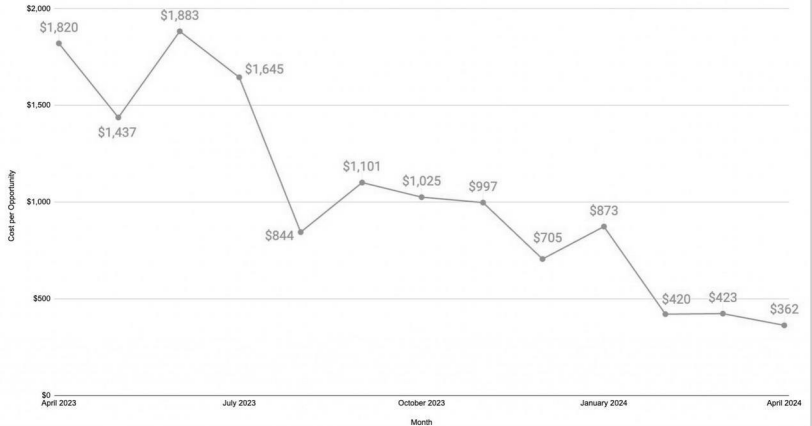
Total opportunities coming from Paid Search and Paid Social are steadily increasing month over month with a record breaking total of 432 obtained in April. Total thus far in 2024: 1,418

Maximizing ROI

And while we have seen our total opportunities increase 295% YoY, we have also seen our spend decrease 22%.

This has resulted in a **80% decrease in the total cost per opportunity** (\$1,820 vs. \$362).

Cost per Opportunity MoM



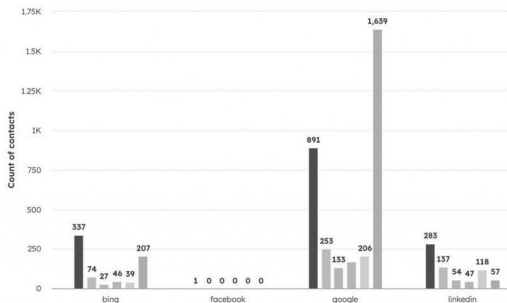
Google: The Reigning Champion

Google Search continues to lead in total converted opportunities and closed wins. In 2024, Google has accounted for **90%** of total closed wins obtained from paid media.

April Performance			
Platform	Spend	Opportunities	Cost per Opp
Google	\$116,822	352	\$332
Bing	\$23,865	73	\$327
LinkedIn	\$13,229	6	\$2,205

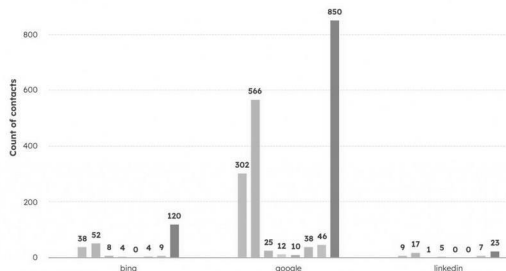
Pipeline Breakdown by Channel ⓘ

● Unqualified ● Attempted ● Engaged ● Sales Qualified Lead ● Nurture ● Converted



Opportunity Stage Breakdown by Channel ⓘ

● closed lost ● closed won ● customer review ● discovery ● onboarding ● program live ● prospect ● registered



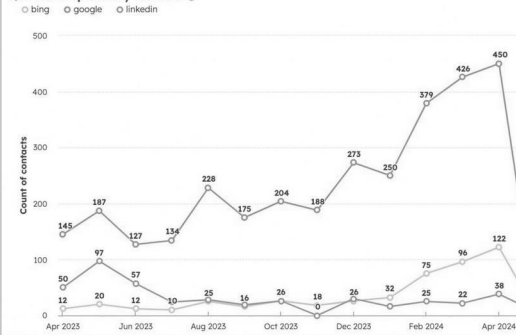
The Rise of Bing

Google may continue to be the reigning champion but Bing is gaining traction. In 2024, we have seen our Bing campaigns continue to improve in total qualified opportunities.

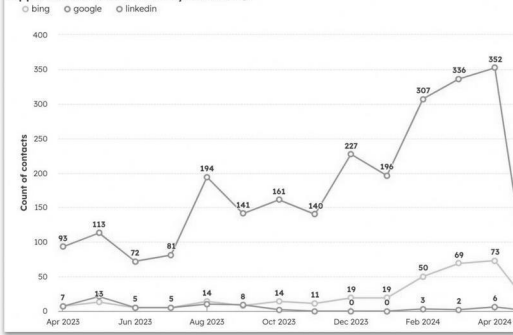
April Performance

Platform	Spend	Opportunities	Cost per Opp
Google	\$116,822	352	\$332
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Qualified Pipeline by Channel ⓘ



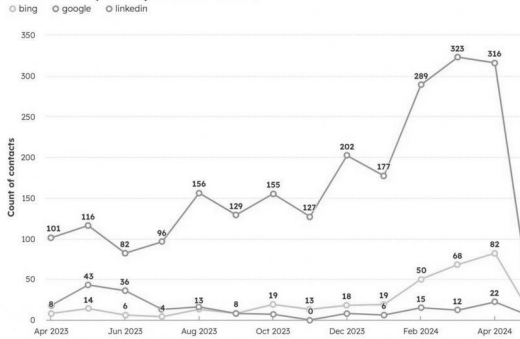
Opportunities & Customers by Channel ⓘ



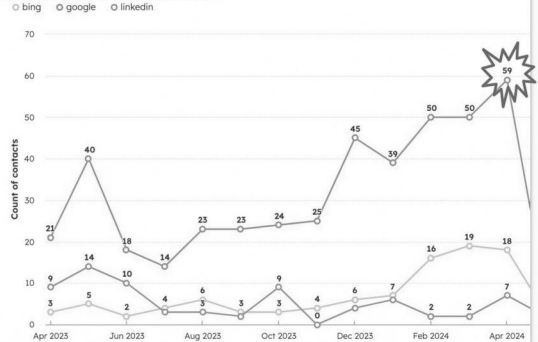
High Priority Enterprise Focus

We have begun to see a rise in qualified enterprise leads across all platforms. However, LinkedIn struggled to gain momentum until mid-April with the implementation of incentives on the convo ads.

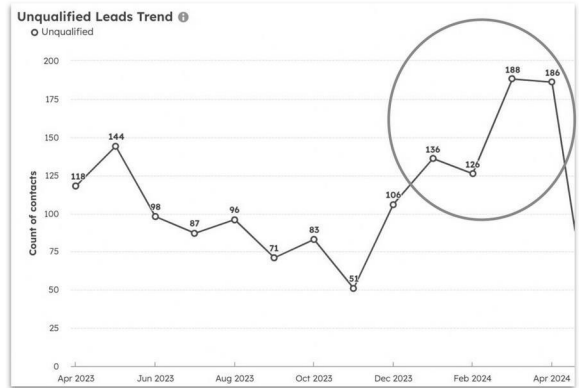
SMB Qualified Pipeline by Channel - Clone ⓘ



ENT Qualified Pipeline by Channel ⓘ



Unqualified Traffic



Keeping Tabs on Unqualified Traffic

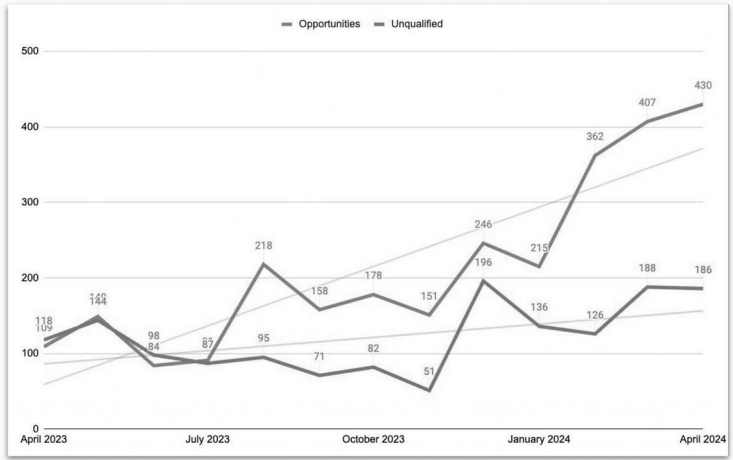
While we were originally concerned with the growing volume of unqualified leads....

DocuSign

Keeping Tabs on Unqualified Traffic

We have recently discovered that in the past year, the total number of unqualified leads has grown at a rate of 19% MoM while the total the number of opportunities has grown at a rate of 20.64% MoM.

In fact, looking at YTD 2024, unqualified leads are only growing 13% MoM and opportunities are growing 29%. MoM.

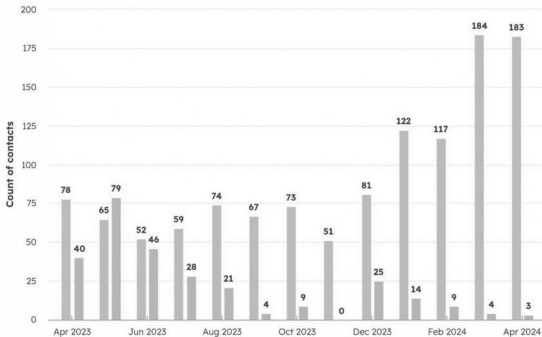


Keeping Tabs on Unqualified

Traffic We have successfully reduced the total number of Paid Social unqualified leads by analyzing the various reasons why leads are marked unqualified and tailoring our audience targeting.

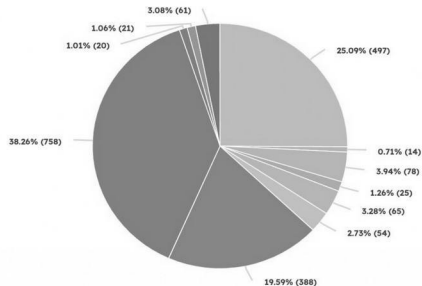
Unqualified Leads Trend By Platform ⓘ

● Paid Search ● Paid Social



Unqualified Leads Reasons ⓘ

● No Longer Interested ● No Longer with the Company ● Undeliverable Email ● Personal Use
● Rejected/Fraud ● Unable to Verify Company/Person ● Customer Service ● Looking for Card Processor ● Recipient

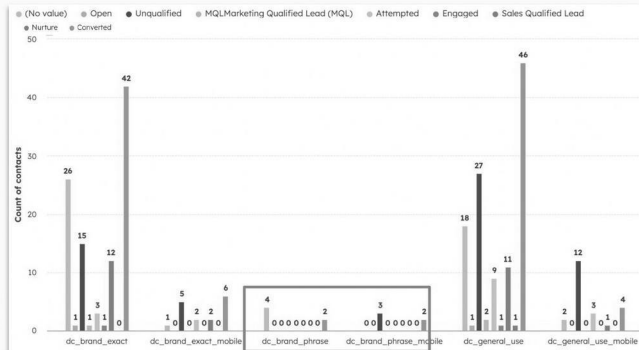


Keeping Tabs on Unqualified

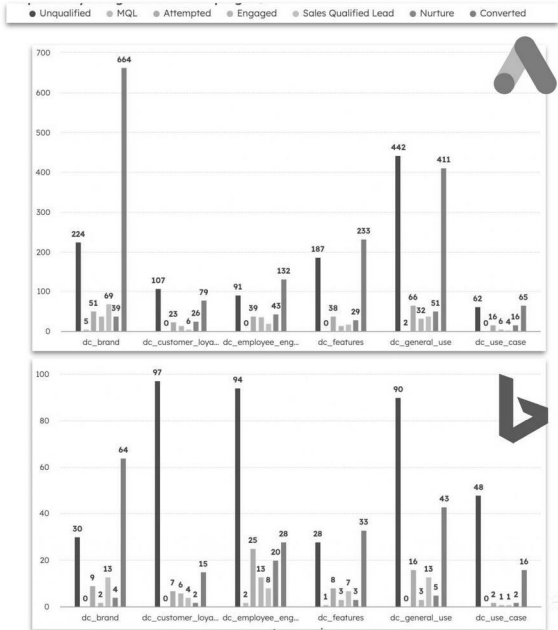
On Paid Search, we are heavily focused on our keyword experiments to assess unqualified lead trends.

Experiments

- Brand: Phrase vs Exact Match
 - Findings: Brand phrase match terms are not needed as all matched search terms are pre existing brand exact match keywords.
 - Result: Paused brand phrase match campaigns to give exact match the full brand budget.
 - Brand phrase spent \$10K in April
 - Next: run similar experiment on non-brand campaigns
- Brand & General Use: Desktop vs Mobile Device
 - Findings & results to be determined.



Paid Search



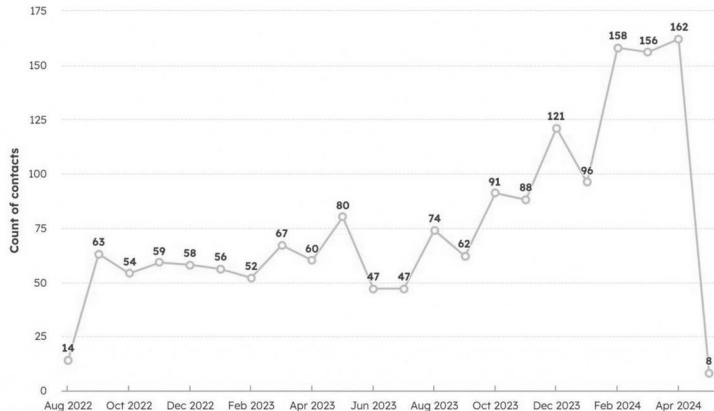
(Client) is Top of Mind

Over the past years, we have seen our brand conversions **triple**. Largely in part due to our recent brand awareness efforts, this increase tells us that our efforts across all platforms are paying out in the long haul.

April Performance			
Platform	Spend	Opportunities	Cost per Opp
Google	\$116,822	341	\$343
BRAND	\$31,729	135	\$235

Brand Campaign Growth ⓘ

○ Count of contacts



Enterprise Focus

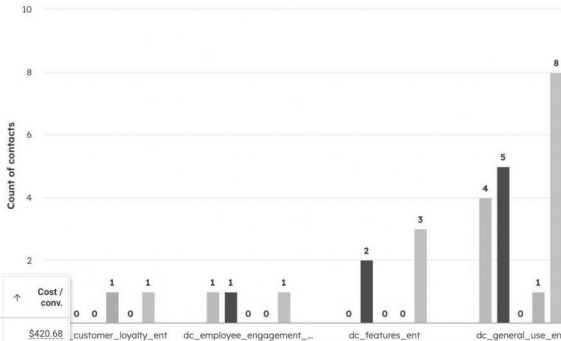
Our newly launched Google campaigns target companies with 10,000+ employees. While traffic is slower than our regular campaigns, high intent, qualified conversions coming from these efforts.

Audience segment

Employment > Company Size
Very Large Employer (10k+ Employees)

Pipeline By ENT Google Search Campaign

(No value) Unqualified Attempted Sales Qualified Lead Converted



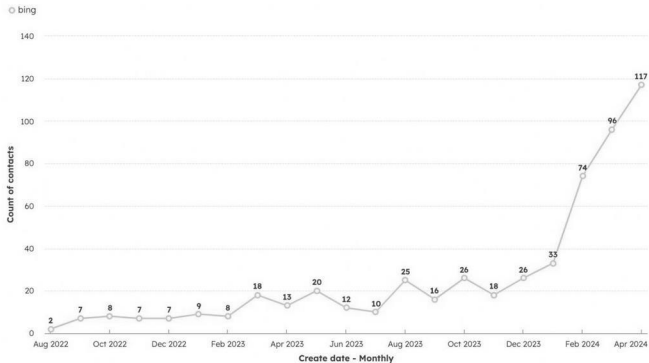
Campaign	Cost	Impr.	Clicks	Avg. CPC	CTR	Conversi.	↑ Cost / conv.
DC - General Gift Cards - ENT	\$15,144.39	23,159	2,261	\$6.70	9.76%	36.00	\$420.68
DC - Features - ENT	\$9,005.27	8,757	892	\$10.10	10.19%	12.00	\$750.44
DC - Employee Engagement - ENT	\$7,302.92	5,087	471	\$15.51	9.26%	6.00	\$1,217.15
DC - Customer Loyalty - ENT	\$6,400.66	4,044	312	\$20.51	7.72%	2.50	\$2,560.26

Bing Growth

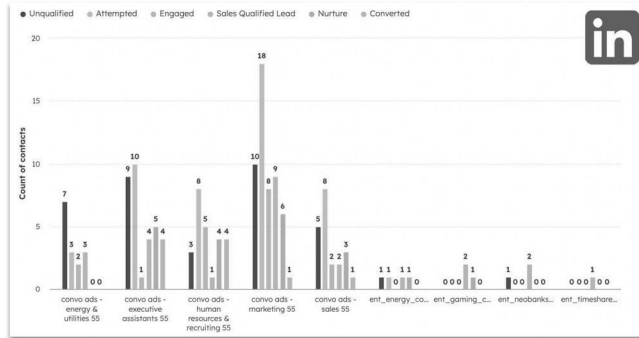
Bing has slowly been climbing the ranks and bringing in quality conversions across all campaigns.

April Performance			
Platform	Spend	Opportunities	Cost per Opp
Google	\$116,822	352	\$332
Bing	\$23,865	73	\$327
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Qualified Pipeline by Channel



Paid Social



Incentivizing Demos with (Client)'s Incentives

What better way to encourage a demo of our platform than giving users a chance to try it for themselves.

SMB Champions Carry On

After testing 8 job title groups, we have dialed our SMB efforts to the top 4 groups.

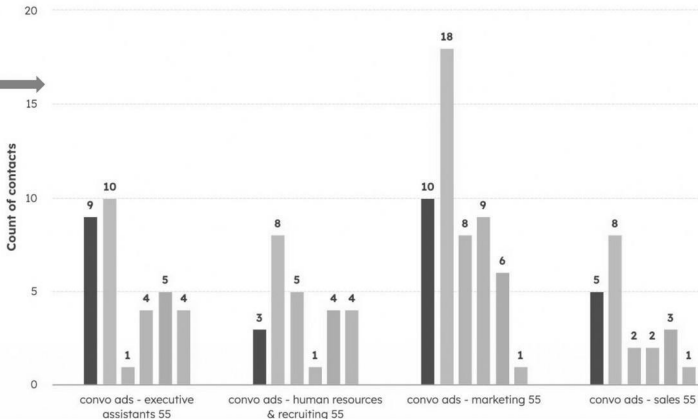
- Business Owners
- Software Engineers
- Health & Wellness
- Insurance

While we know these leads take longer to close than search, we are continuing to track them through the funnel to ensure we are maximizing our ROI.

April Performance			
Platform	Spend	Opportunities	Cost per Opp
Google	\$116,822	352	\$332
Bing	\$23,865	73	\$327
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LinkedIn SMB \$55 Convo Pipeline - 6 months ⓘ

● Unqualified ● Attempted ● Engaged ● Sales Qualified Lead ● Nurture ● Converted



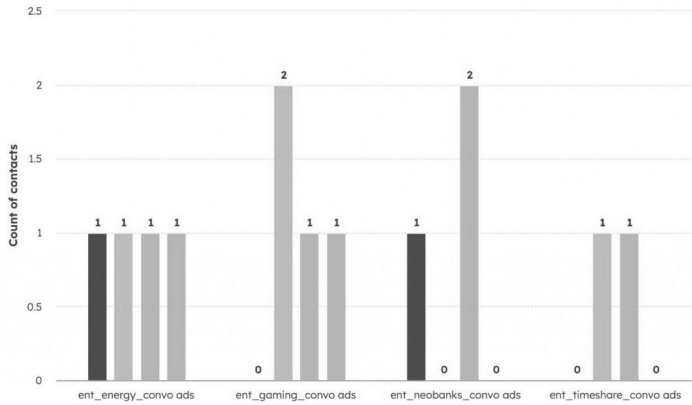
Cracked The Enterprise Code

Since June 1st, 2023 to April 11th, 2024, we spent \$63K on enterprise efforts to receive zero leads.

On April 12th, we added a \$55 incentive to the top of our conversation ads and immediately began to see leads come through. Since then we have spent \$8,000 and obtained 17 leads, 5 of which of have already become SQLs.

LinkedIn ENT \$55 Convo Pipeline - 6 months ⓘ

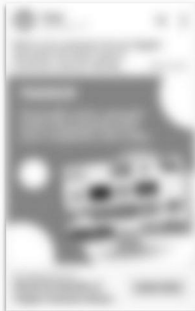
● Unqualified ● Attempted ● Sales Qualified Lead ● Nurture



Relaunch of

After refreshing both visual elements and copy, we reactivated our brand awareness image ads on Facebook.

The goal of this campaign is to increase our Share of Voice and continue positioning ourselves as leaders in our market. So far, we have seen good acceptance from the audience, with a total of **7,643 clicks in just 2 weeks**.



Ad Group: Customer
Clicks: 1,076
CTR: 0.21%
CPC: \$0.36



Ad Group: International
Clicks: 1,174
CTR: 0.52%
CPC: \$0.46



Ad Group: Catalog
Clicks: 1,265
CTR: 0.21%
CPC: \$0.33

Creative Review

Directive,

The Beginning

We optimized many tests for our **demo page** with our previous radical redesign in order to increase conversions.

Our tests focused on the hero section:

- **Messaging** (animated headlines, unique value propositions, CTA)
- **Imagery** ((Client) branding smileys, brand elements, product imagery)
- **Information hierarchy** (layout optimization)
these tests would lead to an average of **1.59% CR** and at its highest conversion rate at **2.07% CR**.



Test 1: Hero Section - Messaging	10	100	100	10	1.00%	0.00%
Test 2: Hero Section - Imagery	10	100	100	10	1.00%	0.00%
Test 3: Hero Section - Information Hierarchy	10	100	100	10	1.00%	0.00%
Test 4: Hero Section - All Changes	10	100	100	10	1.00%	0.00%

Radical Refresh

With the new radical refresh in mind, we generated a visually interesting landing page to further engage users.

Insight: Our tests showed users would stay on our pages longer and scroll all the way when we used:

- **New Messaging** (statistical headlines/callouts),
- **Motion** (animated gifs, scroll on animations)
- **Optimized information hierarchy** (visual refresh, re-adjusting key sections, shorter page length) helped with engagement on our landing pages to get as high as **4.11% CR**.



Category	Page 1	Page 2	Page 3	Page 4	Page 5
Category 1	100	100	100	100	100
Category 2	100	100	100	100	100
Category 3	100	100	100	100	100
Category 4	100	100	100	100	100
Category 5	100	100	100	100	100

CRO Audit Demo LP

We conducted a comprehensive CRO Audit for the (Client) Demo LP. This led to the following insights for potential improvements.

Key Findings:

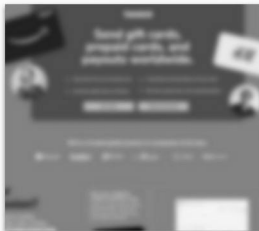
- The interactive design and motion additions effectively capture users' attention, as they are more inclined to pause, read the content, and ultimately convert.
- There is engagement throughout the landing page, however there is a slight dropoff by the footer. We added CTA to scroll along in our section to get users to convert before they drop off.
- On our hero section, certain gift cards had higher notice/attention with users trying to interact with Uber gift card having 4.9% of all page clicks



Segmented Landing Pages

By creating segmented landing pages for each major search campaign or ad group, we have been able to provide each of our visitors a unique experience that aligns with their search intent.

Additionally, our dual CTA has ensured we are meeting the needs of both those ready to buy today and those looking for additional information.



Strategy & Tactics

Brand Expansion



Mental Availability Secures Future Customers

95% of buyers are “out-of-market” future buyers who gradually come “in-market” over time when they need to make a purchase.

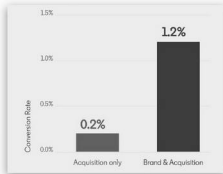
By building up mental availability, we can position (Client) as the first considered when prospects come into market.

Benefits of Brand Awareness

By leveraging (Client)'s brand assets that highlight our unique value propositions, we can simultaneously:

- Increase our Share of Voice and ultimately allow us to gain market ownership
- Increase brand recognition and ultimately bring in buyer-intent qualified leads

"[the availability heuristic] ...given a choice between several options, people tend to prefer the one that comes to mind most easily."



Video Promotions

Channels: YouTube, Google, LinkedIn, Facebook

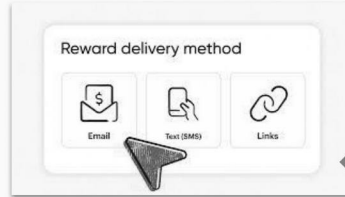
According to the latest *Google B2B buy research* **61% of enterprise and 72% of mid-market buyers** will use YouTube as a trustworthy source when looking for a new technology solution for their company.

Mid-market buyers are most likely to use YouTube

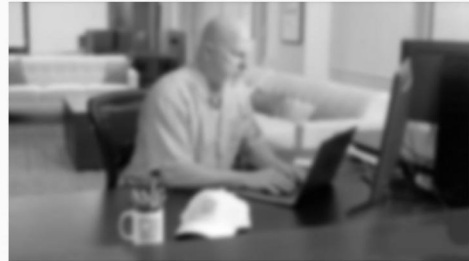
64% of small business buyers
72% of mid-market buyers
61% of enterprise buyers

By promoting our new videos across all our current paid channels, we can:

- Establish (Client) as a thought leader in the industry.
- Increase brand recall and become the first choice option for when customers are ready to buy.



Competitors like Tremendous are already using Youtube as an awareness channel.



Spotify: Podcast Ads

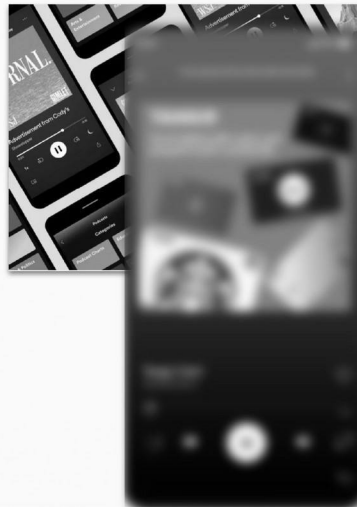
41% of podcast listeners trust ads more if they hear them during a podcast.

Podcasts provide +16% higher ad engagement compared to all other media.

Targeting proposal:

- **Business:** People who listen to business podcasts.
- **Tech:** People who listen to technology podcasts or stream via emerging platforms like smart TVs, gaming consoles, and streaming sticks.
- **Podcasts:** People who listen to podcasts (Ads are targeted to users who recently listened to podcasts, but they aren't served during podcasts)

Full strategy proposal & next steps←



Enterprise Expansion

6.8

People on average in the
B2B buying committee



Enterprise Expansion

Decisions at the enterprise level are increasingly made by a committee of 20+ individuals & include a variety of role types, from the final decision makers to end users, implementers, and other influencers.

Revisit Enterprise Convo Ads

Now that we have cracked the code to obtaining enterprise engagement with our most recent verticals, we can revisit our past unsuccessful convo ads and relaunch them with these new learnings.



Speaking Directly to Enterprise Needs

Increasing brand awareness in our enterprise efforts will help us gain more visibility and reinforce our brand, ultimately leading to better conversion results.

- By getting in front of our enterprise audience on every platform, we can ensure we are the top-of-mind when they are ready to buy.
- **Google Display** will allow us to reach users outside of our current placements for a low cost and therefore increase our Share of Voice.

Our next segmented landing page and image ad set will solely focus on the pain points, needs, and challenges of enterprise companies looking for a rewards & incentives software.

- By assessing our enterprise visitors' search term trends, we can ensure we are answering their most burning questions so they feel compelled to book a demo with our team to learn more about (Client)'s solutions.



Geographical Expansion



(Client), Get Your Passport Ready

Given the high volume of current customers that come from outside the US & Canada, (Client) is missing the opportunity to meet these potential users on the SERP.

First Trip: Cross the Atlantic Ocean to Europe

- Utilizing our existing UK campaigns, we can expand EMEA to include:
- Germany, France, Ireland, Sweden, Netherlands, Switzerland, Italy, Poland, and Spain.

Second Trip: Head South towards the Equator

- Utilizing our current multilingual abilities, we can expand NA beyond US & CA to include these Latin countries:
- Mexico, Brazil, Colombia



Continent	Country	Count
Europe	Belgium	12
	France	83
	Germany	127
	Ireland	47
	Italy	26
	Netherlands	46
	Norway	16
	Poland	26
	Portugal	11
	Spain	23
	Sweden	48
	Switzerland	28
+ Middle East Total		220
+ Asia Total		113
Australia	Australia	86
	New Zealand	18
South America	Brazil	38
	Colombia	12
North America	Mexico	35
+ Africa Total		25
+ Antarctica Total		1
Grand Total		1041

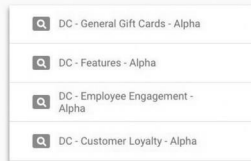
Assessing Need and Engagement

With the purpose of expanding our efforts to generate greater results in those countries where we have a significant presence, our strategy will consist of the following points:

- Setting **awareness campaigns** in both **Display and Video**, to begin building better brand recognition.
- **Duplicate Search campaigns** with the best performance, targeting the countries mentioned earlier.
- By monitoring these campaigns, we will **expand our keyword lists** by region to appear in searches relevant to our audiences.

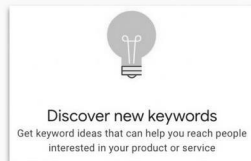
1.

Duplicate **Top-performing Alpha Non-Brand & Brand** campaign efforts.



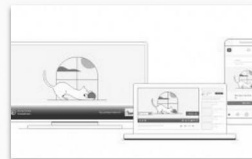
2.

Keyword research-expansion per region.

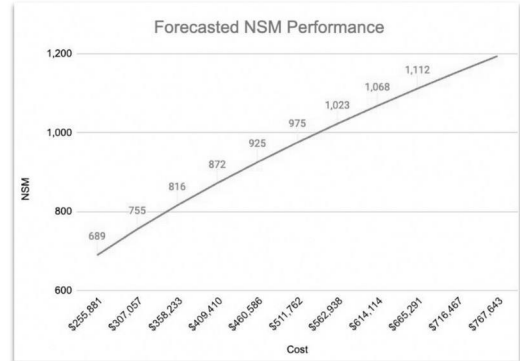


3.

Display and Youtube brand awareness campaigns



Budget Expansion



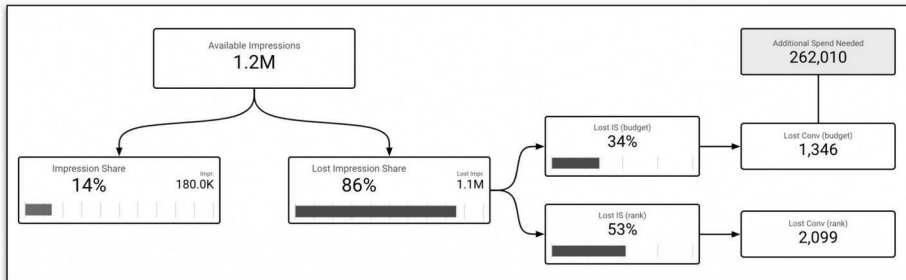
Maximizing ROI

Without hitting the line of diminishing returns

Increasing Impression Share

34% of Impression Share is being lost due to budget. To fully offset this, the additional cost is estimated to be **\$262,010**. This additional investment would **increase our IS to 48%** and we could expect about **1,346 additional primary Google conversions** to follow. From there, we can focus our efforts on decreasing the Impression Share lost to rank by improving our Quality Scores (ad relevance, expected CTR, & landing page experience).

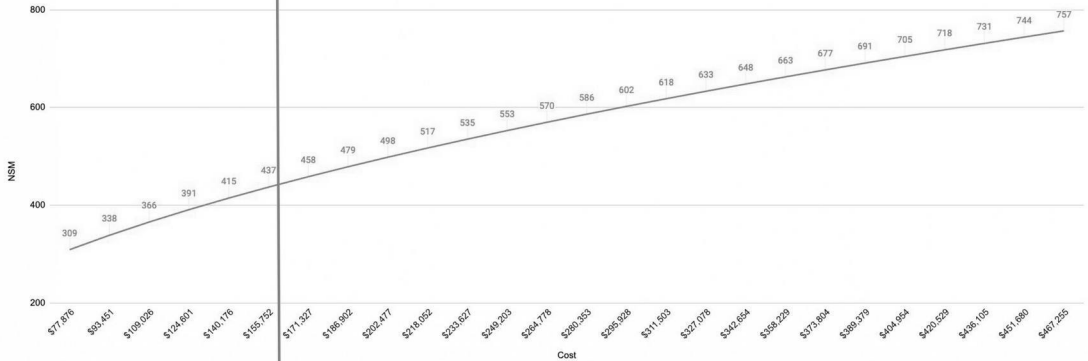
Budget Recommendations & Lost Impression Share ←



Forecasts

Current

Forecasted NSM Performance



Unlimited Possibilities

Increasing our monthly budget will allow us to expand geographically on search, give our enterprise search campaigns their own budget allocation, invest in new platforms, decrease the search IS lost to budget on our current campaigns, and expand our ENT convo ads to target new/old verticals. Budget Recommendations ←

Platform	Campaign	Monthly Budget	% of Budget
Google	Non-Brand NA	\$85,000.00	37.8%
Google	Brand NA	\$45,000.00	20.0%
Google	Display NA	\$0.00	0.0%
Google	ENT NA	\$25,000.00	11.1%
Google	Non-Brand EMEA	\$7,500.00	3.3%
Google	Brand EMEA	\$4,500.00	2.0%
Google	Display EMEA	\$0.00	0.0%
Google	Non-Brand MX	\$0.00	0.0%
Google	Brand MX	\$0.00	0.0%
Google	Display MX	\$0.00	0.0%
Bing	Non-Brand NA	\$23,000.00	10.2%
Bing	Brand NA	\$5,000.00	2.2%
LinkedIn	Brand Awareness Video & Image Ads	\$4,000.00	1.8%
LinkedIn	SMB to LGF [\$55] Convo Ads	\$7,000.00	3.1%
LinkedIn	ENT to LGF [\$55] Convo Ads	\$14,000.00	6.2%
Facebook	Brand Awareness Video & Image Ads	\$5,000.00	2.2%
Spotify	Podcast Advertising	\$0.00	0.0%
YouTube	Brand Awareness Video Ads	\$0.00	0.0%
		\$225,000.00	100%



Platform	Campaign	Monthly Budget	% of Budget
Google	Non-Brand NA	\$85,000.00	37.8%
Google	Brand NA	\$45,000.00	20.0%
Google	Display NA	\$5,000.00	2.2%
Google	ENT NA	\$30,000.00	13.3%
Google	Non-Brand EMEA	\$7,500.00	3.3%
Google	Brand EMEA	\$4,500.00	2.0%
Google	Display EMEA	\$2,000.00	0.9%
Google	Non-Brand MX	\$5,000.00	2.2%
Google	Brand MX	\$3,000.00	1.3%
Google	Display MX	\$2,000.00	0.9%
Bing	Non-Brand NA	\$25,000.00	11.1%
Bing	Brand NA	\$5,000.00	2.2%
LinkedIn	Brand Awareness Video & Image Ads	\$4,000.00	1.8%
LinkedIn	SMB to LGF [\$55] Convo Ads	\$7,000.00	3.1%
LinkedIn	ENT to LGF [\$55] Convo Ads	\$20,000.00	8.9%
Facebook	Brand Awareness Video & Image Ads	\$5,000.00	2.2%
Spotify	Podcast Advertising	\$5,000.00	2.2%
		\$260,000.00	116%

Thank You

Consulting Directive Co

Consulting Directive Co

3 Month Roadmap

Directive Co
Consulting

Directive,

Top Priorities

Audience Observation for ENT		May	June	July	August
Directive	Alpha & Beta → Phrase & Exact	Launch Spotify Ads	Keyword Research by Country	Launch Lead Campaigns on FB	
	Migrate LI to ENT Focus	Add Thought Leadership to LPs	Expand UK Countries on Google	Reassess Impression Share	
	Budget Increase Plans	Add \$\$ Values to OCT	ENT Focus Bing Campaigns	Live Event Convo Ads	
	Expand ENT Focus on Google	Mobile vs Desktop Results	Phrase vs Exact Match Results		
	Launch Videos on G, YT, LI, & FB	Create ENT LP & Image Ads	Create Incentive Use LP		
	Relaunch LI Doc Ads to ENT	Relaunch Blitz Campaigns	Test Global Brand Engagement		
	Add BHN logo to all assets	New Keyword Experiments	Expand to Mexico on Google		
	BHN Keyword Watch	Launch ENT Display Campaign	Begin Holiday Planning (7/1)		
(Client)	Create Spotify Business Account	Send Top Content for LPs	Provide Q3 Budget		
	Send ENT data from SEO & Sales	LPs to Match Brand Guidelines			
	Refine Google OCT	Add Order Values to Hubspot			
	Give Directive Access to YouTube				