Directive

ABR 2024

PREPARED FOR

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- Growth Roadmaps & Next Steps
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Paid Media + Programmatic Annual Review

Executive Summary

Paid Media

2024 was a year of learning and growth for our paid media efforts. Early in the year, we focused on brand awareness, promoting external marketing events and running Google programmatic campaigns. A major milestone was cleaning up our tracking infrastructure, allowing us to accurately track MQLs as our North Star Metric (NSM) and establish a reliable data foundation. As we moved into Q2 and Q3, we navigated some instability while testing and launching new channels. However, in Q4, we refined our approach—shifting to a purely bottom-of-funnel, high-intent strategy. By narrowing our focus to prioritizing only the channels delivering strong returns, we successfully reached 102% of our NSM goal and achieved a 64% year-over-year increase in MQLs.

Heading into 2025, our strategy is to re-establish a full-funnel approach while prioritizing industries and segments with higher average deal sizes. This focus will maximize efficiency and drive stronger revenue impact. By leveraging insights from our 2024 optimizations, we aim to scale with precision, ensuring our efforts generate high-quality leads and meaningful business growth. Additionally, we will enhance tracking within programmatic and optimize for more BOFU metrics on Google and LinkedIn.

Executive Summary

Programmatic

Delay in conversion tracking implementation to confirm impact of awareness and consideration campaigns on site traffic have lead to us focusing optimizations and gauging performance based on in platform metrics. Next quarter we want to use multiple sources of truth to avoid any bias. Focusing on measurement and performance awareness channels allow us to optimize in real time for maximum reach and audience penetration.

2024 Paid Media NSM Review

21

Paid Media Generated Closed Won Leads (2024)

108

Paid Media Generated MQLs (92, April - Dec'24)

102% of Goal

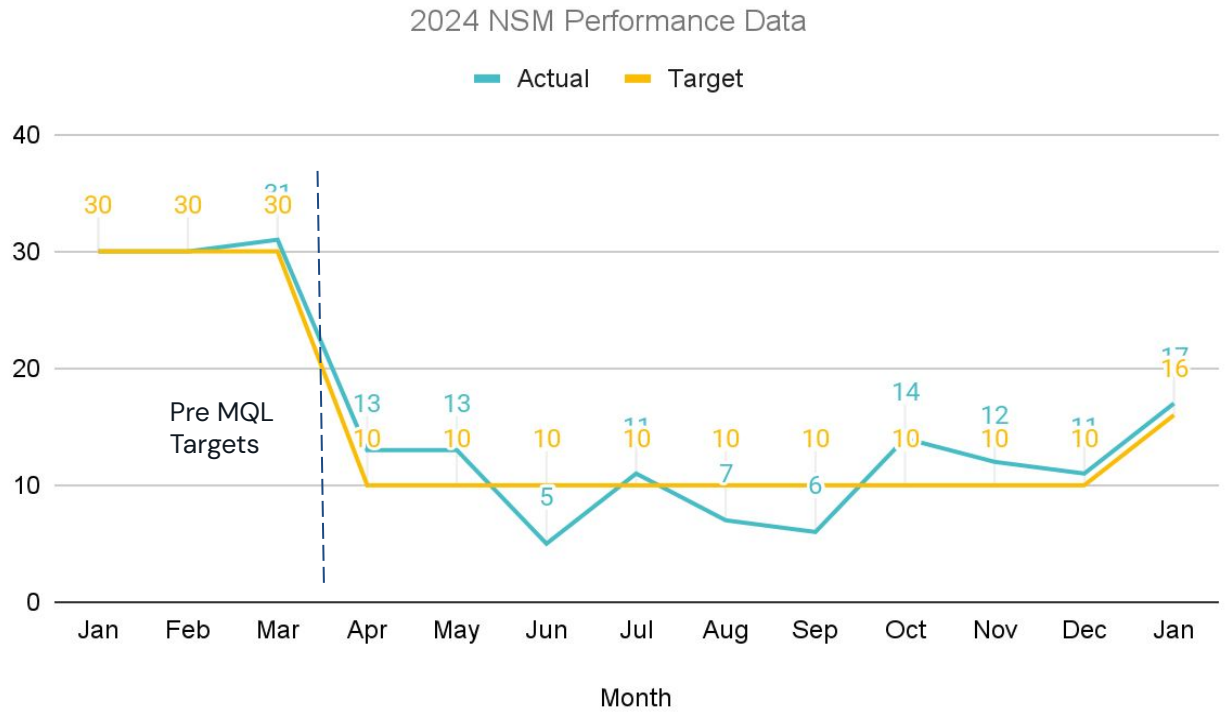
$64K

Paid Media Generated Revenue (2024)

Paid media delivered strong results in Q4, successfully reversing previous challenges and driving sustained growth. A focused shift toward bottom-of-funnel initiatives and increased efficiency in Google Ads contributed to this success. This momentum positions us well for continued impact in 2025, as we focus on industries that yielder higher average deal sizes to maximize paid marketing revenue.

From Volatility to Growth: Paid Media Performance in 2024

Our Q4 shift to a BOFU-focused strategy drove sustained growth into the new year.



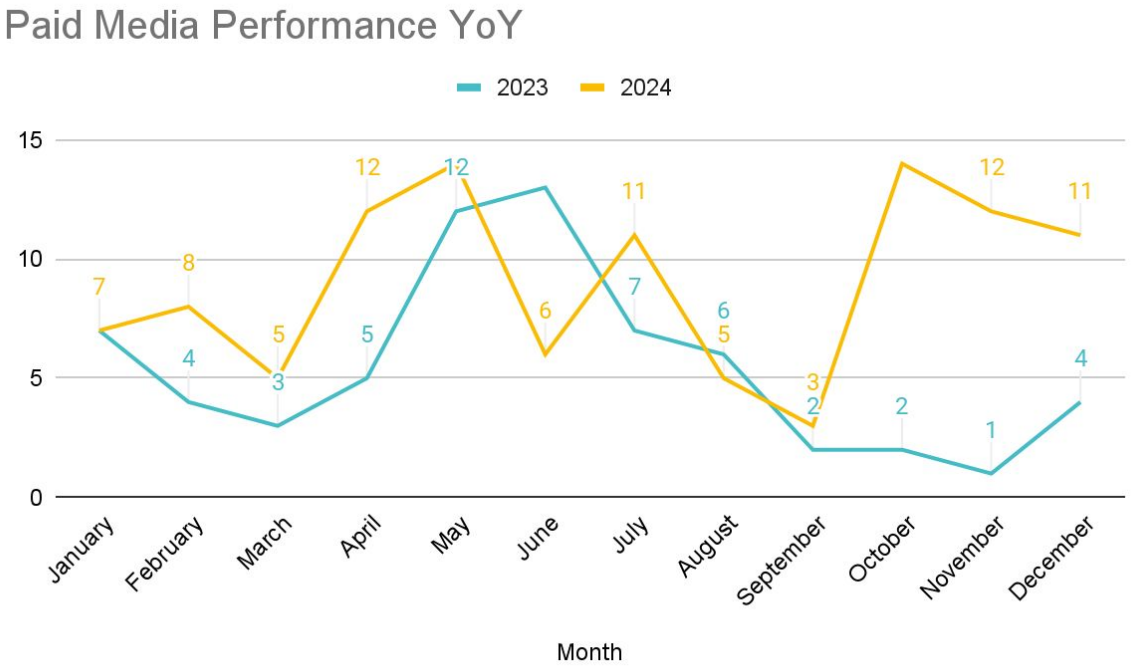
Paid Media MQLs

Jan 2025

+143%

YoY

2024 Performance Set the Stage—Now It's Time to Turn Growth into Revenue



Paid Media MQLs
Q4 2024

+429%

YoY

Paid Media MQLs
2024

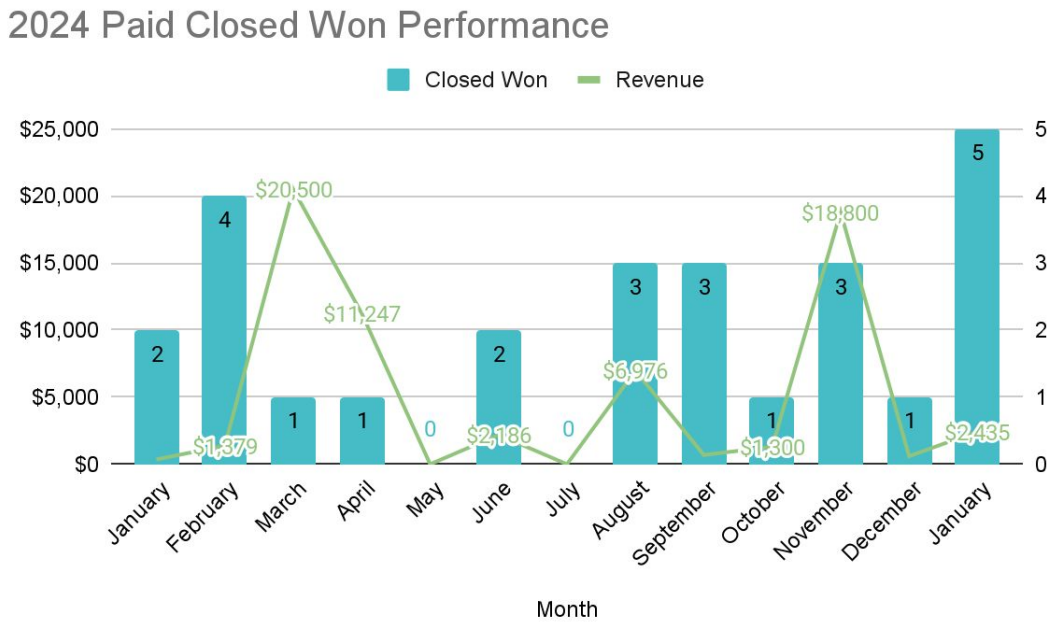
+64%

YoY

Shifting Focus Towards Closed Won Leads and Generated Pipeline

Over the last 6 months, paid has consistently driven pipeline, with March & November being the highest performing months this year.

- On average we drive about 2 closed one leads per month.
- Our largest deal sizes are sourced from our capterra paid listing, at $10,310 per deal
- PMax is a consistent source for MQLs and closed won deals, averaging $6.3K per deal.



Moving Beyond MQLs and Wins, We Confront AOV

Understanding where our largest average deal sizes (AOV) stem from will be crucial for 2025 and will enhance our budget allocation strategy

	Q1	Q2	Q3	Q4
Leads	82	68	64	146
MQLs	20	32	19	37
Wins	7	3	6	5
Lead -> MQL	24.39%	47.05%	29.69%	25.34%
MQL -> Wins	35.00%	9.38%	31.58%	13.51%

Our largest average deal sizes stem from PMax and Capterra, but both channels can be inconsistent

	Q1	Q2	Q3	Q4
Wins	7	3	6	5
Revenue	$22,239	$13,433	$7,665	$20,699
Average Deal Size (AOV)	$3,177	$4,478	$1,278	$4,140

Paid Media Performance Breakdown: Efficiency & Impact Across Channels

Reallocating budget toward high-converting industries, job titles, and channels that drive larger deal sizes will improve MQL-to-closed-won conversion and maximize revenue impact.

- Google Ads is driving the most impact – It's our top performer for leads (508), MQLs (108), and closed-won deals (26), making it our key pipeline driver.
    - At $2.8K per MQL, this signals there's room to improve efficiency.
- LinkedIn Ads and Reddit Ads successfully drive reach and impressions (2M+ and 1.8M+, respectively), but as expected, they do not generate MQLs.
- Gartner Digital Markets is a Cost-Effective MQL Source – With a $1.6K CPL and 6 MQLs, Gartner is an efficient source compared to Google Ads for lead generation.

	Google Ads	LinkedIn Ads (Brand Awareness)	Reddit Ads (Brand Awareness)	Gartner Digital Markets
Spend	$297,417	$41,541	$5,317	$9,442
Impr	4,424,485	2,032,992	1,807,188	
Clicks	146,715	5,965	5,018	
CTR	3.32%	0.29%	0.278%	
Leads	508	1	1	7
MQL	108 **$2.8K CPL**	0		6 **$1.6K CPL**
Closed Won	26			6

Overall December Performance

Metric	US_EN_TAM
Spend	$2,000.09
Impressions	40,324
CPM	$49.60
Clicks	26
CTR	0.06%
Viewability	82.60%
Conversions	Conversion tracking not set up with tracking pixel

We were able to address 10% of our TAM audience in December, with display inventory with across the web on major sites such as Investing.com, Forbes.com and MSN.

Due to the competitive bids needed to secure this highly targeted audience at a highly competitive time of the year, we saw a higher than avg CPM.

December flights (especially leading into the holiday period is known to have lower engagement, **rather that assessing performance based on clicks conversions are a better indicator of success.**

PRG Monthly Performance

Main Metric

10,058

Uniques

Supporting Goal

40,324

Impressions

X forecasts an audience size of 97,983 indiciating we were able to reach our TAM with a market saturation of 10% at average ad frequency 4 impressions. We can further scale our reach by adding more channels, reducing frequency, and expanding inventory on premium sources as we move into the new year.

Top ABM audience attributes and insights for future engagement optimizations



Directors have the highest CTR of all job seniorities, where Managers are receiving the majority of campaign spend



Professionals 35-44 are 160% more likely to engage via clicks with ads leading to more site and/or LP traffic



Sales job functionalities drove the highest volume and CTR (stat sig) among all departments such as IT, HR, R&D



Business Services and Legal industries drove the highest amount of engagement whereas Education and Retail accounts did not



Maine, Kentucky, and Connecticut at at least 200% more likely to engage with brand content, Tennessee is least likely (-12%)

Creative Theme Overview



Variant 1A

CPM	CTR
$49.59	0.07%



Variant 1B

CPM	CTR
$49.50	0.00%



Variant 2A

CPM	CTR
$49.62	0.08%



Variant 2B

CPM	CTR
$49.63	0.05%

Creative Delivery and Performance Analysis

Theme	Spend	Imp	Clicks	CPM	CTR
Variant 1A	**$561.41**	**11320**	**8**	**$49.59**	**0.07%**
Variant 1B	**$240.23**	**4853**	**0**	**$49.50**	**0.00%**
Variant 2A	**$881.05**	**17756**	**15**	**$49.62**	**0.08%**
Variant 2B	**$317.40**	**6395**	**3**	**$49.63**	**0.05%**
Total	**$2,000.09**	**40324**	**26**	**$49.60**	**0.06%**

Theme Variant 2A drove the highest engagement in clicks with an overall CTR of 0.08%.

However, of all ads in market the individual creative to see the highest engagement was the 728x90 1A creative indicating that this messaging may have resonated most with viewers.

Moving forward we recommend continuing to testing messaging around pain points, avoiding busy backgrounds, and utilizing the bold yellow and/or recognizable imagery to catch viewer attention.

What Is Working: Paid Media Tactics

What Worked?	The Why & How:
Optimizing Our PMax Campaigns	We updated our targeting and messaging within our PMax campaigns which resulted in a higher CTR and increased lead volume & quality.
Optimize Google towards BOFU	By focusing on BOFU keywords and reducing wasted spend, we were able to increase MQL generation for Google Ads.
Focusing on the Customer	Developed, tested, optimized our messaging towards the customer pain points and challenges.
Strategic Budget Allocation	We reduced spend within channels that were not resulting in MQLs and wins, and shifted this to top performing channels such as Google & Capterra.

What Isn't Working: Paid Media Tactics

What Didn't Work?	The Why & How:
LinkedIn Is Not Set Up For Success	Our current structure in LinkedIn is purely focused on brand awareness and we are not using retargeting lists strategically.
Reddit Failed to Be a Proven Channel	Due to the lack of optimizations and spend while running ads in Reddit in Q1-Q3, it failed to deliver impactful results.
Overleveraging On Google Ads	Currently we are overleveraged on Google Ads which has rising CPC costs and inconsistency from the PMax campaigns. It will be important to diversify in 2025.
Planning Ahead for Events & Promotions	Our paid promotions for our event calendar were often not planned strategically and we missed out on opportunities to use lists for retargeting.

Paid Media + Programmatic 2025 Strategy

Executing a Full Funnel Strategy In 2025

An ABM Strategy to get us closer to the companies, and decision makers that matter.

	Enhanced Financial Modeling, OCT, and Optimizing AOV	Growing Prospects in Primary TAM/TALs	Restructuring Our Campaigns Based On Intent	Asset Expansion and Ad Variant Testing
Objectives:				
Solutions:	Gather historical data and key metrics such as Gross Margin and Customer Lifespan Value	Create TAM for new target industries based on highest-value prospects	Run keyword research to identify possible reach	Launch 1 month A/B tests for new ads in Q1-Q2 with major variations
	Run LTC:CAC analysis to assess which channels are most efficient	Generate engagement through full-funnel dedicated campaigns	Build campaigns based off commercial/ non-commercial terms	Launch two week A/B tests for new ads in Q3/Q4 with minor ad variations
	Integrate OCT into Google Ads & enhance tracking in other channels	Incentivized conversation ads at BOFU through retargeting	Develop messaging tailored towards ICPs and intent	Launch A/B test for demo page with minor variations.
	Begin tracking towards revenue	Utilize TAM lists within our channels for multiple touchpoints	Send to dedicated paid pages.	

Financial Modeling is a critical part of strategy development, budgeting, and driving sustainable growth.

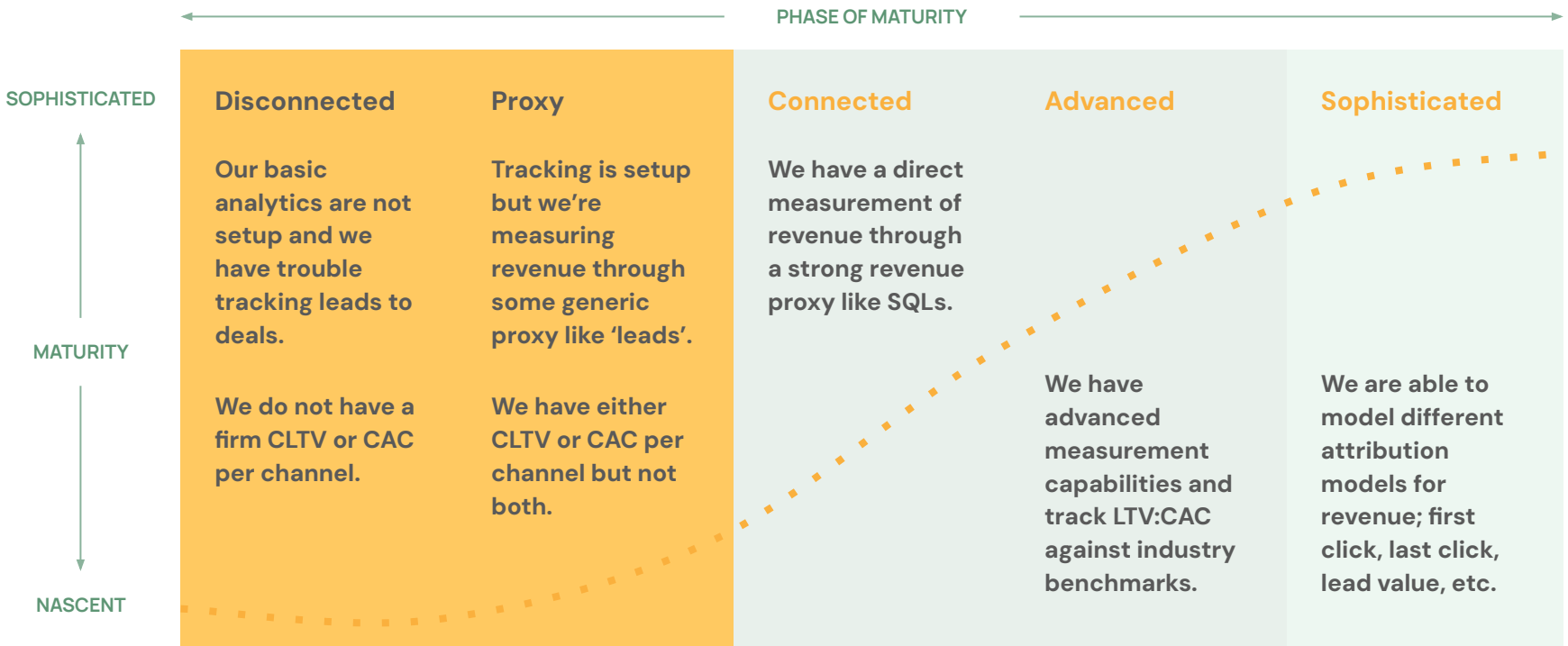
3:1 LTV CAC

We leverage LTV:CAC modeling to identify your most impactful levers, optimize capital allocation, and scale our most effective funnels for **Customer Generation.**

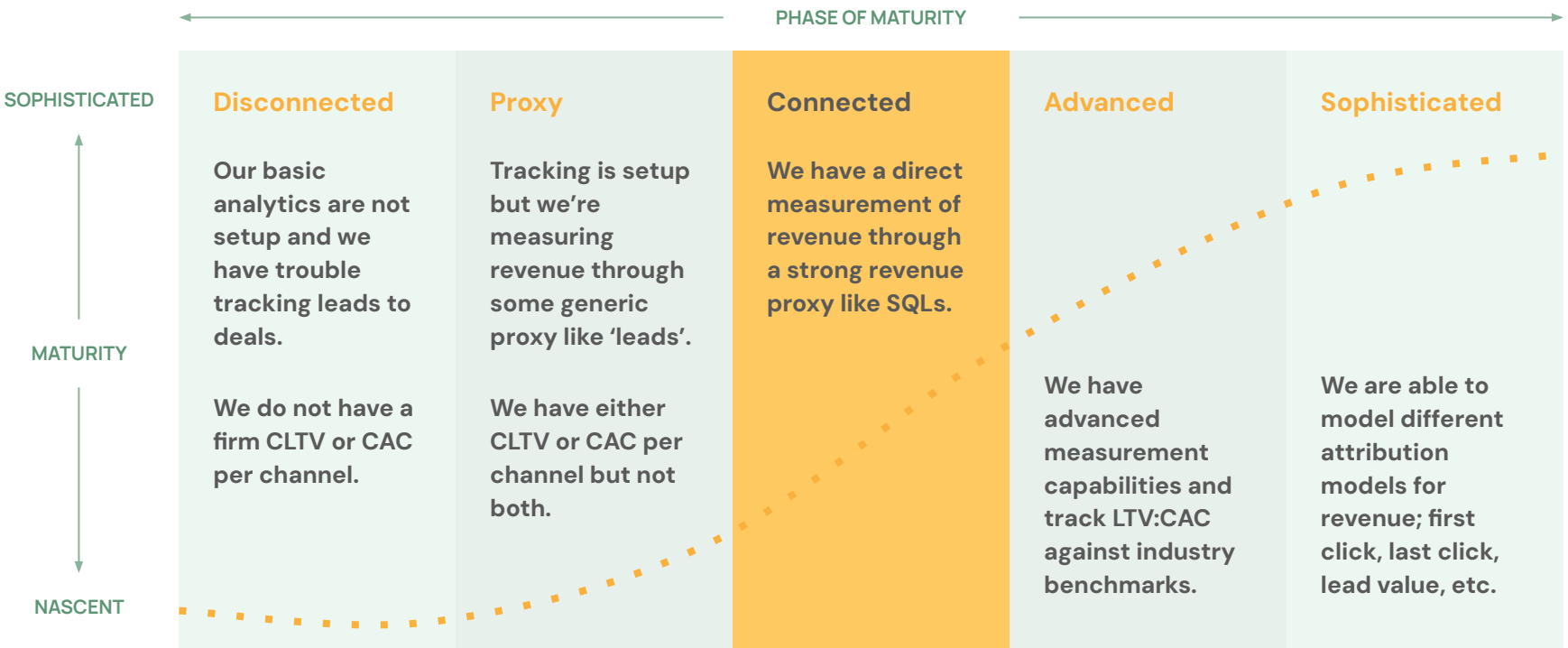


Financial Modeling & Tracking Maturity: Proxy

Financials & Measurement Maturity Model



Quick Win: OCT Integration



LTV:CAC Analysis

Summary:

Business financials review (LTV):

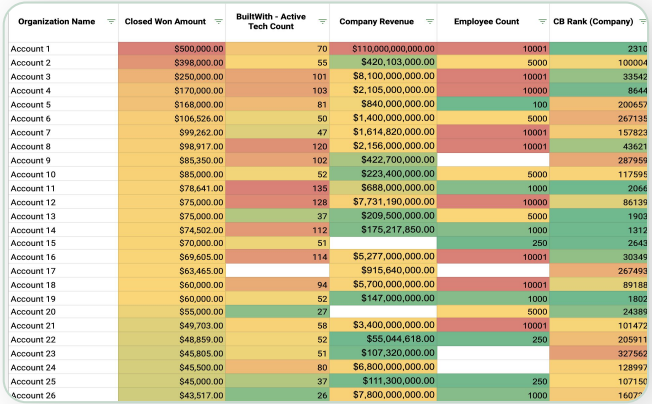
- AOV/Average Deal Size
- Gross Margin
- Customer Lifespan

Discussion:

Creating an ideal model to arrive at a baseline **> 3** LTV:CAC ratio

	Total	Google	LinkedIn	Facebook
LTV:CAC Ratio	*6.52*	*7.56*		
Total Spend	$149,767	$129,309	$10,446	$10,012
Leads	336	319	6	11
Customers	61	61	0	0
Lifetime Value (LTV)	$16,020	$16,020	$16,020	$16,020
Est. Revenue (Annual)	$732,000	$732,000	$0	$0
ROI	$827,453	$847,911	-$10,446	-$10,012
Cost-per-Lead	$446	$405	$1,741	$910
Cost-per-Customer	$2,455	$2,120	--	--
Lead > Customer	18%	19%	0%	0%

Utilizing Advanced Targeting: TAM Lists

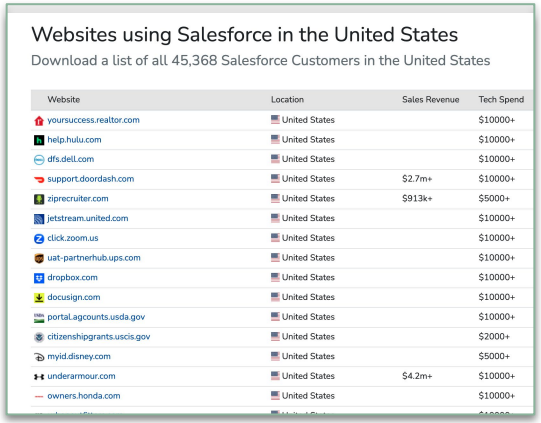


Organization Name	Closed Won Amount	BuiltWith - Active Tech Count	Company Revenue	Employee Count	CB Rank (Company)
Account 1	$500,000.00	70	$110,000,000,000.00	10001	2310
Account 2	$398,000.00	55	$420,103,000.00	5000	100004
Account 3	$250,000.00	101	$8,100,000,000.00	10001	33542
Account 4	$170,000.00	103	$2,105,000,000.00	10000	8644
Account 5	$168,000.00	81	$840,000,000.00	100	200657
Account 6	$106,526.00	50	$1,400,000,000.00	5000	267135
Account 7	$99,262.00	47	$1,614,820,000.00	10001	157823
Account 8	$98,917.00	120	$2,156,000,000.00	10001	43621
Account 9	$85,350.00	102	$422,700,000.00		287959
Account 10	$85,000.00	52	$223,400,000.00	5000	117595
Account 11	$78,641.00	135	$688,000,000.00	1000	2066
Account 12	$75,000.00	128	$7,731,190,000.00	10000	86139
Account 13	$75,000.00	37	$209,500,000.00	5000	1903
Account 14	$74,502.00	112	$175,217,850.00	1000	1312
Account 15	$70,000.00	51		250	2643
Account 16	$69,605.00	114	$5,277,000,000.00	10001	30349
Account 17	$63,465.00		$915,640,000.00		267493
Account 18	$60,000.00	94	$5,700,000,000.00	10001	89188
Account 19	$60,000.00	52	$147,000,000.00	1000	1802
Account 20	$55,000.00	27		5000	24389
Account 21	$49,703.00	58	$3,400,000,000.00	10001	101472
Account 22	$48,859.00	52	$55,044,618.00	250	205911
Account 23	$45,805.00	51	$107,320,000.00		327562
Account 24	$45,500.00	80	$6,800,000,000.00		128997
Account 25	$45,000.00	37	$111,300,000.00	250	107150
Account 26	$43,517.00	26	$7,800,000,000.00	1000	1607

Discover Indicators of Revenue*

Enriching current customers as well as pipeline will allow us to find trends within your ideal customer profile.

We leverage these trends by using them as search criteria in our TAM building platforms. We segment your first party data by revenue so that we can develop tiered TAM lists with different ranges of projected revenue.



Websites using Salesforce in the United States

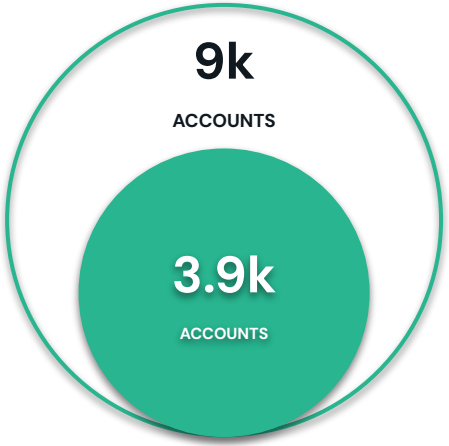
Download a list of all 45,368 Salesforce Customers in the United States

Website	Location	Sales Revenue	Tech Spend
yoursuccess.realtor.com	United States		$10000+
help.hulu.com	United States		$10000+
dfs.dell.com	United States		$10000+
support.doordash.com	United States	$2.7m+	$10000+
ziprecruiter.com	United States	$913k+	$5000+
jetstream.united.com	United States		$10000+
click.zoom.us	United States		$10000+
uat-partnerhub.ups.com	United States		$10000+
dropbox.com	United States		$10000+
docusign.com	United States		$10000+
portal.agcounts.usda.gov	United States		$10000+
citizenshipgrants.uscis.gov	United States		$2000+
myid.disney.com	United States		$5000+
underarmour.com	United States	$4.2m+	$10000+
owners.honda.com	United States		$10000+

Firmographic & Technographic Targeting

Firmographic & Technographic targeting is a great way to narrow your audience down to an audience that is likely to use your products and solutions.

This is done by building out audiences specific to your stack of integrations and ICP indicators.



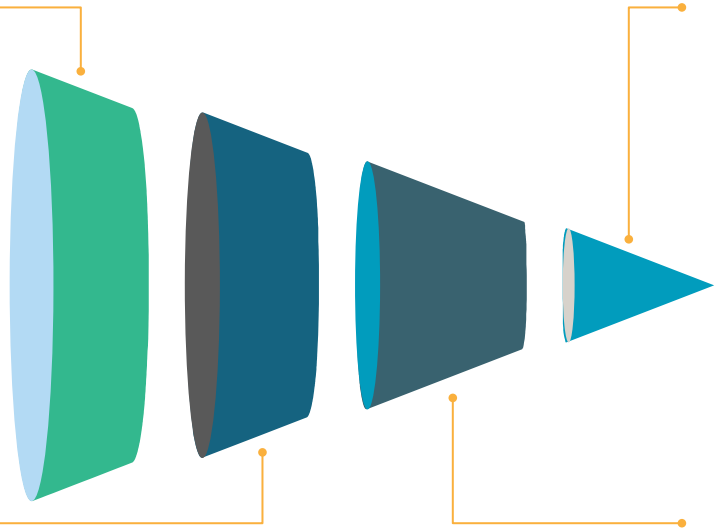
Manual Verification

Rather than just relying on data providers, we will manually verify the members of your TAM that we want to go after.

Executing a Full Funnel Strategy In 2025

Awareness

Channel(s): LinkedIn, Programmatic
Formats: Single Image, Video
Goals: Website Traffic, Video Views



Conversion

Channel(s): LinkedIn, Google Ads, Meta
Formats: Lead Gen, Convo Ads, RT
Goals: Demo Request

Education

Channel(s): Organic
Formats: Blog Content, Listicles, etc.
Goals: Blog Visit, Ungated Download/Access

Engagement

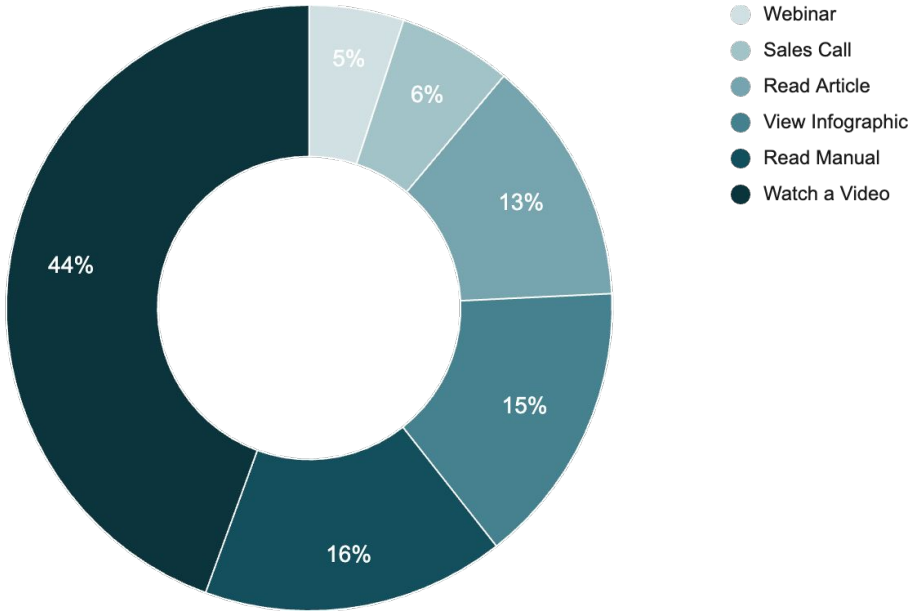
Channel(s): LinkedIn, Google Ads/Organic
Formats: Single Image, Lead Gen,
Goals: Downloads, Free Trials, Event Sign-up, Webinar Registration

Short-form Video on Social

44% of customers prefer to learn about a product or service through short videos.

Consumers have limited attention spans, so it's important your message is short and engaging. Short-form video ads are steadily outperforming single image and carousel formats, as audiences are able to absorb details faster before deciding to engage further.

Audiences are also more likely to be influenced with well produced videos, as 87% of consumers say video quality impacts their trust in a brand.

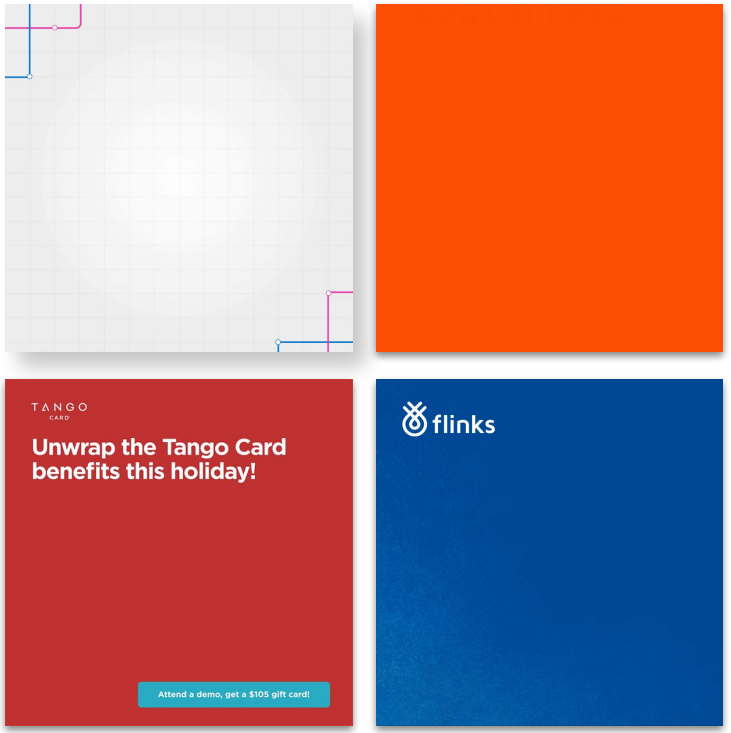


Create Industry Specific TOFU Ads for Social and Programmatic

To increase relevance and clarity for first-touch campaigns across new target ICPs such as ISVs

Utilizing scroll-stopping animated social content, we can increase the amount of movement in our ads right away.

Layering awareness messaging with motion will give our first-touch campaigns a stronger reach, and allow for faster incorporation of industry specific TOFU content while we wait on longer term video asset creation.

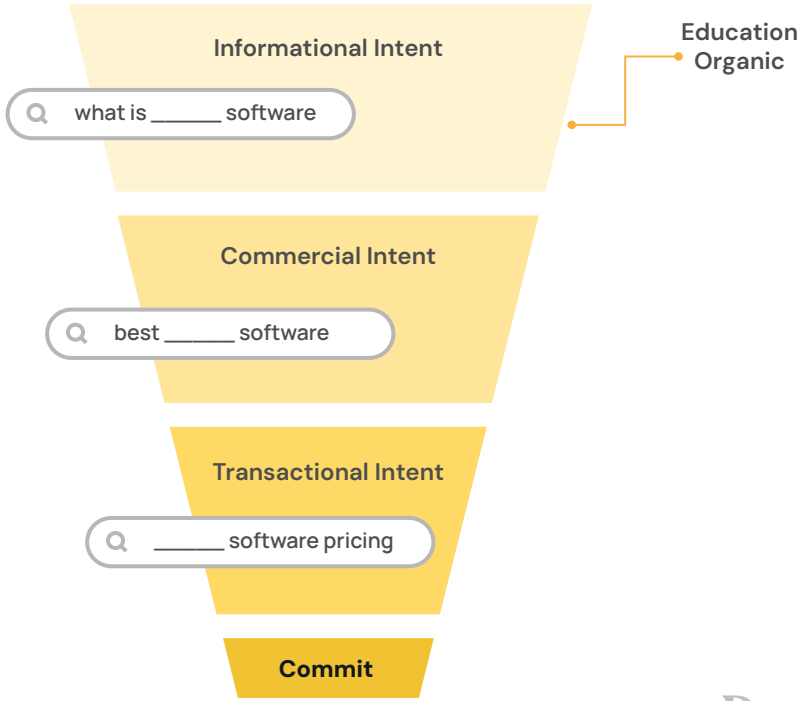


Segmenting Our Campaigns Based Off Intent

To align spend with qualified prospects.

- Resegment keywords by BOFU and JTBD to pivot budget to high performing & **high intent** keywords with a more aggressive bidding approach.
- Google Ads does not have firmographics capabilities, so we cannot ensure we are only capturing your TAM.
- Continue vetting and narrowing-in on long tailed performing keywords to focus on gaining top-of-page delivery for our niche.

SaaS Marketing Funnel



Reaching Our ICPs Through Tailored Messaging

Incentivized convo ads with layered TAM lists + Firmographics to deliver high quality leads

Once users reach this stage of the funnel they will have been exposed to awareness content and primed with product and differentiation education.

Now they're ready to be pushed towards a sales call, or on-demand demos for decision makers who are too busy to get on the calendar.

Gift Card Amount	CPL	Conv. Rate	Impr. to Lead	ROI
$0	$552	0.52%	0.22%	$0
$50	$330	0.98%	0.35%	$0
$100	$177	1.77%	1.04%	$2.9M
$105	$253	2.70%	1.27%	$3.4M
$110	$300	2.22%	1.00%	$275K
$250	$423	3.11%	1.36%	$431K
$500	$584	8.93%	2.80%	$389K

Note: the CPLs above INCLUDE the cost of the gift cards. For example, the CPL for a $50 gift card was $280 in platform, but with the incentive cost, ends up at $330.



Our success formula honed from running hundreds of Social ad campaigns.

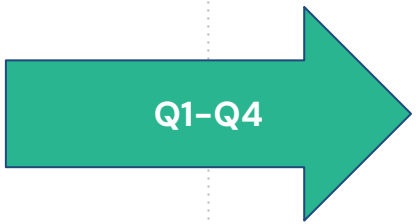
- **Lead with the offer**, pre-header & header
- **Social proof** tailored to the ICP
- **Tailor the outcomes** to their JTBD
- **Sell the meeting** by restating the offer + CTA
- **Add a lower friction, secondary offer**

LinkedIn

Our programmatic strategy is centered around building reach and positive sentiment from our audience by catering our media and targeting for maximum retention

Retro / Current State

- No pixel on site
- No conversion events mapped
- TAM Targeting only
- Display inventory only
- Always on campaign
- Creative performance optimized
- Not eligible for any measurement studies



Future State

- Universal / DSP pixel placed
- Conversion events mapped for key events
- Prospecting + TAM (Intent)
- Retargeting across multiple inventory types for scale
- Always on Prospecting
- Creative Sandboxing / learnings from other campaigns

Importance of Conversion Tracking

Here's why you should care:

- Effectively hold ourselves accountable for performance
- Able to identify user drop off for optimizations to ads, strategies, and landing pages
- 1P data allows us the most accurate information tailored to your needs
- Conversions allow us to not only work on TOF strategies but optimize toward MOF business outcomes
- Enable us to utilize Ad Tech for maximum efficiency for cost metrics
- The more data we can collect the accurate we can optimize the platforms
- Ex. 30 conversions in the past 30 days



FY25 Big Rock Goals to establish a secure foundation for future activations with maximum impact

Goal 1 : Increased efficiency and measurement

- ❑ Establish baseline
- ❑ Creative Testing
- ❑ Enhanced decision making with multiple sources
- ❑ New DSP Test
- ❑ Establish performance repository for performance lookback - create a dashboard inclusive of all tactics

Goal 2: Audience Expansion and Retargeting for reach

- ❑ TAM List Audience Expansion
- ❑ Bombora ABM intent layering
- ❑ Industry / Role PRSP
- ❑ Audience and Contextual testing
- ❑ Nurture stream retargeting
- ❑ Web visitor retargeting

Goal 3 : Channel expansion for additional frequency and retention

- ❑ Premium display
- ❑ Video viewability and engagement
- ❑ Determine online behaviour after exposure
- ❑ Cross device reach (keep in 1 platform deduplication)
- ❑ Corelogic event buy DOOH

Paid Media + Programmatic NSMs

Monthly Media Plan Recommendations

Channel	Funnel stage	DSP	Placement Name	Targeting	Device	Environment	Creative Size	KPI	Estimated Results	Estimated Impressions/Video Views	CPM/CPV	Total Budget (USD)
Programmatic	Awareness	TTD	Standard Display	B2B 3rd party segments	Desktop, Mobile	Web	160x600 300x250 728x90 300x600 300x50 320x50	Viewability	92%	300,000	$10.00	$3,000.00
				TAM			160x600 300x250 728x90 300x600 300x50 320x50	Viewability	92%	93,750	$32.00	$3,000.00
			Video OLV	B2B 3rd party segments			1280 × 720, 1920 × 1080, or 1440 × 1080	VCR	60%-70%	150,000	$20.00	$3,000.00
				TAM			1280 × 720, 1920 × 1080, or 1440 × 1080	VCR	60%-70%	75,000	$40.00	$3,000.00
											Total	**$6,000.00**
	Consideration	TTD	Standard Display	RMKT & CRM	Desktop, Mobile	Web	160x600 300x250 728x90 300x600 300x50 320x50	Landing Page View	400	160,000	$25.00	$4,000.00
											Total	**$4,000.00**
TOTAL										**553,750**		**$10,000.00**

Monthly Paid Media NSMs

NSM

+60% YoY

16

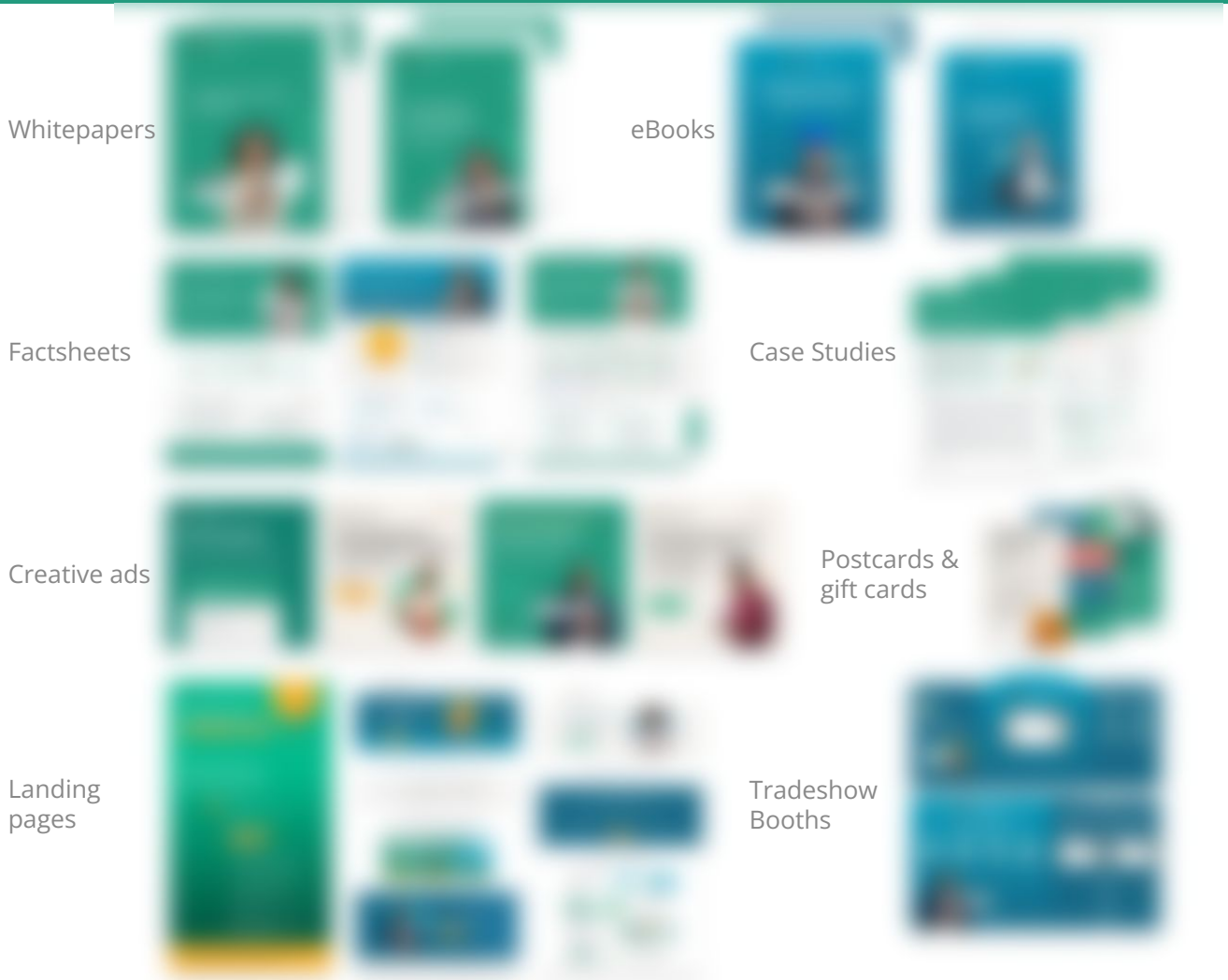
MQLs

Historically, we have been responsible for 22% of total MQLs on average, which puts us at 13 out the 60 per month. However, based on performance in Q4 and our confidence in continued growth, we have agreed upon 16 MQLs per month in 2025. We are expecting seasonality to impact specific months, however overall average to be 16.

Performance Design Annual Review

What we've done

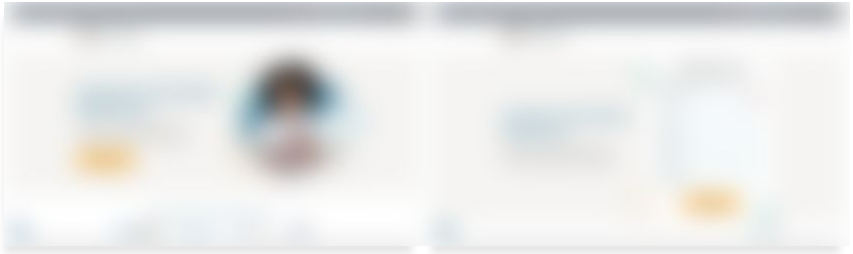
Over the past year, we've created a range of creative assets, including landing pages, ads, booths, whitepapers, case studies, decks, gift cards, banners, billboards, postcards, eBooks, etc. Each piece was designed to strengthen brand presence, drive engagement, and maximize impact.



Performance highlights

- **A/B testing**: Optimized conversions by testing hero section forms in different placements. Also tested ad size variants. Landscape formats outperformed square ones
- **Effective CTAs**: Used action-driven buttons like "Get a Demo" and "Learn More."
- **Human + UI Images**: Combined human imagery with simplified UI for better user relatability.
- **Iconography**: Used clear icons for easy recognition and better scannability.
- **Mobile optimization**: Ensured all pages were mobile-friendly for better UX and conversions.
- **Consistent branding**: Maintained brand visuals for stronger recognition.

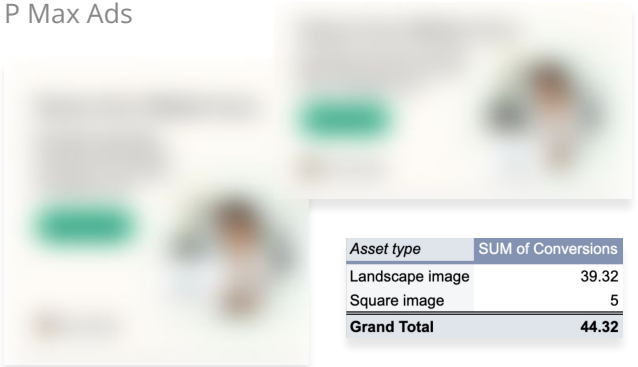
Contract Automation LP



Weight	Visitors	Views	Conversions	Conversion Rate
50%	16649	24639	59	0.35%

Weight	Visitors	Views	Conversions	Conversion Rate
50%	7001	8167	8	0.11%

P Max Ads



Asset type	SUM of Conversions
Landscape image	39.32
Square image	5
Grand Total	**44.32**

Performance Design Production

Q1& Q2

20 projects

SLs 4 days

Q3 & Q4

41 projects **+50% vs H1**

SLs 24/48 hours

Before transitioning to the unlimited SOW, we were completing 10 to 12 tasks/projects per quarter. Since the renewal, we have increased our output to 20 to 22 tasks/projects, representing a 50% growth.

In terms of service levels, we have been delivering our work in half the time compared to the first half of the year. Our turnaround times have significantly improved, reducing from 3 to 4 business days to just 1 to 2 business days for deliveries.

Performance Design 2025 Strategy

Performance Design Strategy for 2025

- **Landing page optimization:** While recent design efforts have focused on non-cro related assets, we will continue optimizing existing landing pages with the updated look and feel, ensuring a cohesive and engaging user experience.
- **Brand identity:** We will reinforce the presence of the brand mascot across all creative assets, enhancing brand recognition and consistency.
- **Human + UI visuals:** Keeping the strategy of combining images of real people with UI elements from the platform to create engaging and relatable assets.
- **Form & thank you page optimization:** Improving new form designs and thank you pages for landing pages to enhance user flow and conversion rates.
- **Consistent visual identity**: Ensure brand coherence across all materials.

SEO
Annual Review

Executive Summary

SEO

2024 was the year of *recovery*. The new brand is a breath of fresh air, but getting to a point of stability took a full team effort. The special attention to technical success helped us to avoid steep decreases post-launch and to maintain the same traffic numbers from Q4 2023 to Q1 2024. Recovery continued in Q2 with QoQ *and* YoY traffic and conversion increases. As the site recovered, template pages were reinvigorated and by the end of the year were topping our contact creation and traffic charts. We rolled through four Google Core Updates without a scratch. **We ended 2024 with 140% more contacts and 47% more traffic than last year and are poised for further growth in 2025**.

Our strategy for 2025 is to be persona-led while leaning into the areas where we've seen proven success, specifically within functional content (templates + tools). We will strengthen lagging assets like core pages and underperforming content. We will continue expanding our library with more templates and new assets that speaks to target personas outlined by the internal team. **This strategy will help us obtain our 2025 goals of a 41% contact increase and 15% traffic increase.**

SEO - 2024 NSM Review

633

Organic Contacts

+140% YoY

62,123

Organic Sessions

+47% YoY

The organic channel earned 633 contacts in 2024—a 140% increase over last year. This was led by the homepage, electronic signature page, and templates. We see this as a success even given the slow start following the rebrand last year.

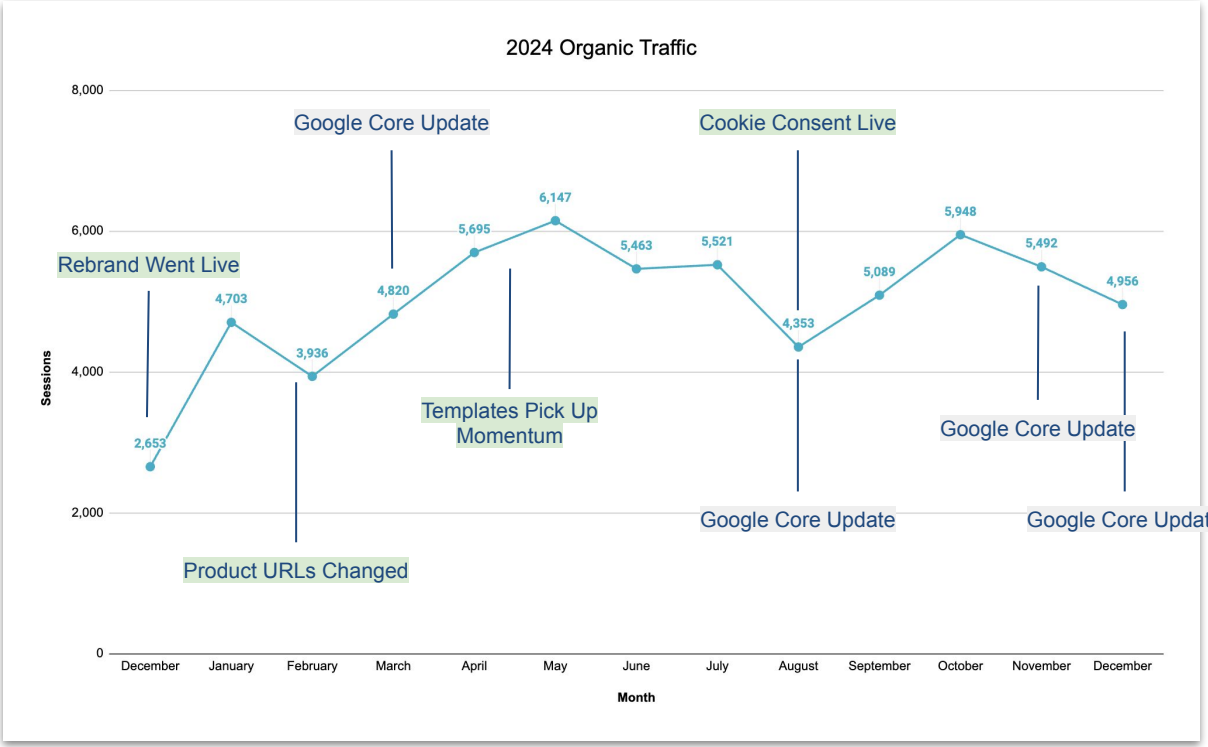
The AI Tool was a wildly successful page for driving contacts. However, it was skewing our data view and has been excluded from reporting.

We had a total of 62,123 organic sessions which surpassed last year by 47%. Unsurprisingly, the same pages driving contact growth were also responsible for our traffic increases.

2024 SEO Timeline

Showed resilience throughout 2024's tumultuous year.

Despite a **complete rebrand, new domain and all,** and **four core updates** rolled out by Google, **managed to outperform the previous year** and recover from temporary losses.

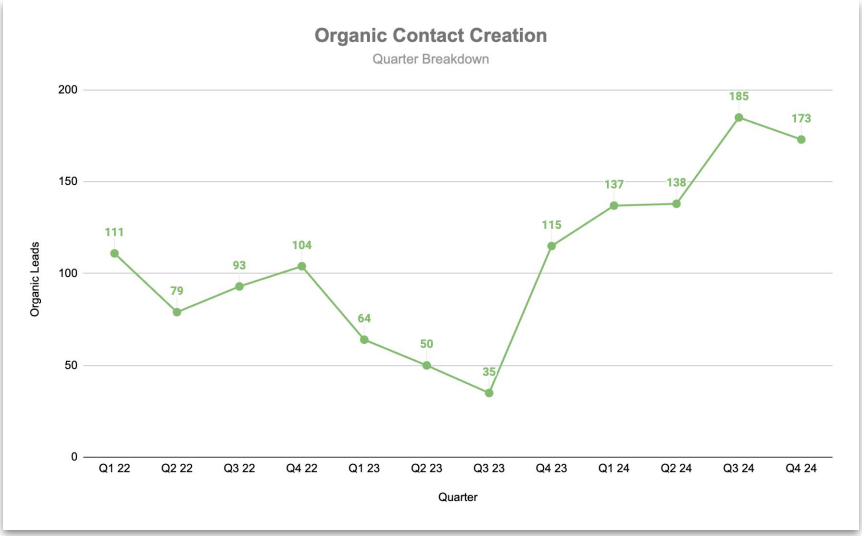


Organic Contacts

Contacts held steady post rebrand then jumped in the second half of the year save for a slight seasonal dip in Q4.

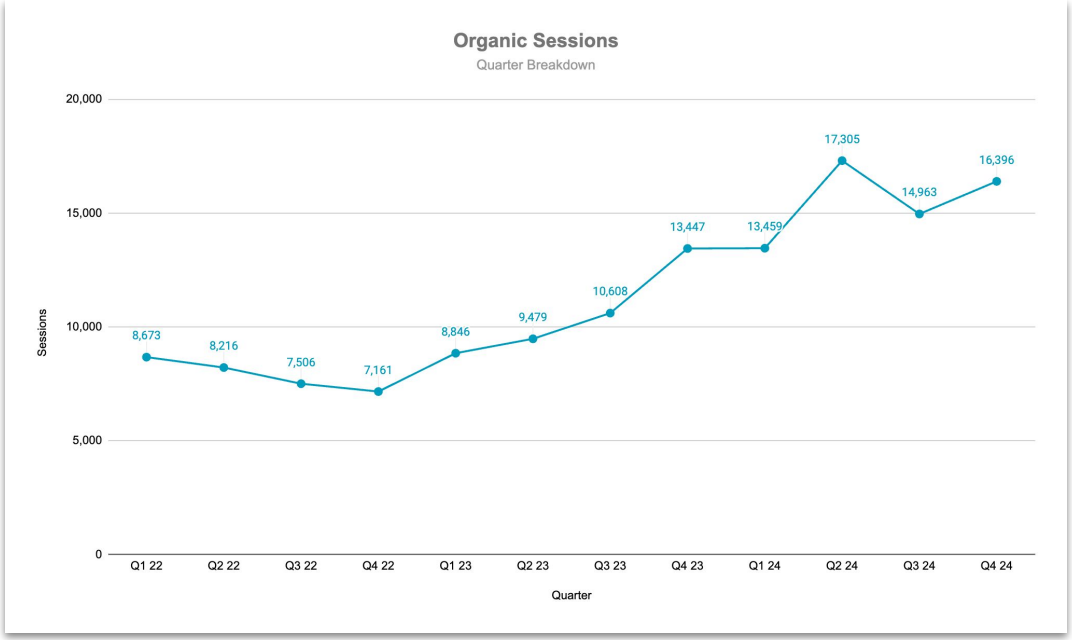
The homepage drove 126% more contacts over last year.

- The signature page was our best performing core page with a 200% increase YoY.
- Q3'24 marked the return of template pages causing a spike in contacts - these 12 pages accounted for 18% of contacts in 2024.
- The AI Tool created *1,715 contacts—a major TOFU magnet for the site.



Organic Sessions

Organic traffic started the year flat QoQ—a major victory since most websites decline after changing their domain name. The rest of the year was our true recovery period which despite additional speed bumps, we prevailed.



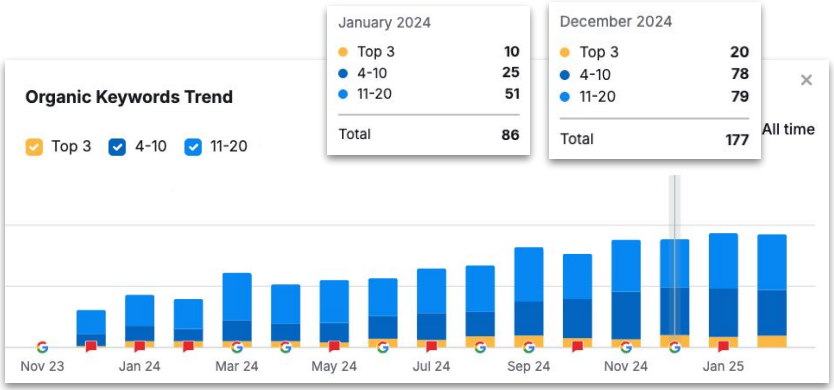
Keyword Rankings

Keywords in prime positions (1-20) steadily grew throughout the year with mid-range rankings (4-20) ending the year with **106% more rankings** than where we started.

The AI Tool picked up the most keywords in prime positions over the year however blogs were also close behind followed by template pages.

Rankings in the high-range (21+) ended 2024 with a **81% increase** compared to the start, a net of 421 additional keywords.

In October of 2023, we had a total of 230 keywords ranking in prime positions.

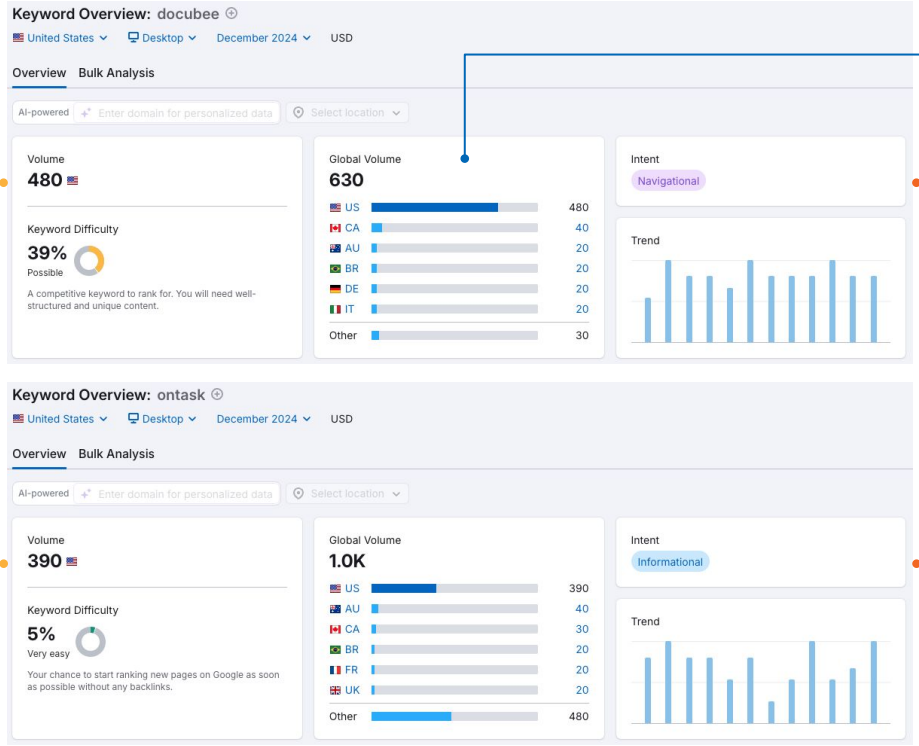


Notable keyword changes, shown right, came from a mix of blogs and the homepage picking up terms directly related to our core focus areas in 2024 such as X & Y.

Brand Growth

Search Volume
"Our company" receives 90 more searches than "Competitor X" in the US.

Keyword Difficulty
Ranking for "our company" is significantly harder than "Competitor X" which is a good sign that the term is picking up in value.



Global Volume
"Competitor X" has roughly 370 more searches globally. We also see that CA has picked up their searches for our company faster than AU.

Intent
"Our company" is registering as having a navigational intent meaning users are looking to get to a specific page when using this query. "Competitor X" holds an informational intent which means users are looking to learn more about something.

Trend
"Our company" shows much less volatility and looks to be overall net positive towards growth.

What Is Working: SEO Tactics

What Worked?	The Why & How:
Minimal losses following rebrand	We worked as a team to minimize URL changes and ensure a smooth cutover to the new domain. Special attention was paid to making UX better.
Campaign alignment	While we needed to pivot at times, we were able to coordinate SEO work with broader business focus and those campaigns saw growth because of it.
We lean into successes	When we notice a successful tactic, we often try to replicate that - leaning into what works is always the path of least resistance for driving traffic and eventual leads.
New blog experience	The new blog experience is **awesome** - users are able to navigate easier and digest content quicker which should improve blog engagement

What Isn't Working: SEO Tactics

What Didn't Work?	The Why & How:
Core pages are floundering	Despite concerted efforts to makes these pages perform well these pages show very little signs of traffic growth - URL changes post-rebrand did not help
Over-indexed on topics	We (me) like to hit target audiences/topics hard and as we saw with legal, too much content in one area can be a deterrent for ICPs in other industries
Organic strategy planning	Organic is most successful when there is some lead time to allow pages to pick up traction in the SERPs - a clear persona roadmap for the rest of the year would do us well so we can support other channels as they activate

SEO

2025 Strategy

Connect to Personas

Pulled hot off the press, SEO will be ready to attack the mentioned verticals, especially for what is planned in H2.

Healthcare is a new frontier for us and with such an expansive industry we'll need to nail down our key persona(s) to create content that drives our target audience to site.

Topic coverage for Legal is mostly complete and Construction is almost there as well.

We'll prioritize content, template, and refreshes based on these verticals.

	Vertical	Segments	Engagement	Priority
Active-ish	ISV	Legal Tech	API	Primary
New	Healthcare	At-Home Care Senior Living Centers	API End-User	Secondary
Active	Legal	Law Firms Corporate Legal	End-User	Maintenance
Active	Construction	General Contractors Energy & Utilities	End-User	
New	Higher Education	Universities Charter Schools	End-User	H2 Expansion*
New	Insurance	Administration & Claims Commercial	API	
New	Real Estate	Applications Property Management	API	

Refresh Low Performers

To gain some easy traffic wins and recover lost ground, we'll work in regular content refreshes in our schedule.

Q1 we are focusing on refreshing signature and legal content which is already in progress!

Since we've recently completed a lot of construction content, we'll take a look at the following key industries to fill our queue next:

- Healthcare
- Education
- Insurance
- Real Estate

Unlock Core Page Growth

We will work on refining our core pages to unlock bottom of funnel traffic.

Based on our target personas I suggest we focus on the following first:

- Healthcare
- Legal
- Construction
- Education
- Insurance
- Real Estate

After that group we can prioritize pages based on impressions which is a sign of opportunity:

- Core offering 1
- Core offering 2
- Core offering 3



The *How* of Unlocking Core Page Growth

H1s are clunky and should only feature our target keyword

We need **tighter keyword targeting** throughout the content - we're going for "X" yet the content is focused on "Y". Search volumes are vastly different and X is superior here.

I'd like to test using **product imagery** throughout the page. We see competitors leaning heavily on their product images. What we do have looks more like graphics and not our true platform.

We also have zero **social proof** on our product pages which is a must-have! Direct quotes, star ratings, or a G2 badge of honor will instill confidence.

Keyword	Intent	Volume	Trend	KD %
[redacted]	I	1,000		26
[redacted]	I	50		13

Lean Into Functional Content

We've seen such a positive response to our AI page and our small but mighty template library, the latter of which will benefit from additional effort..

In the past we've been more focused on volume but now we will instead focus our efforts on functional content plays that align with a business audience.

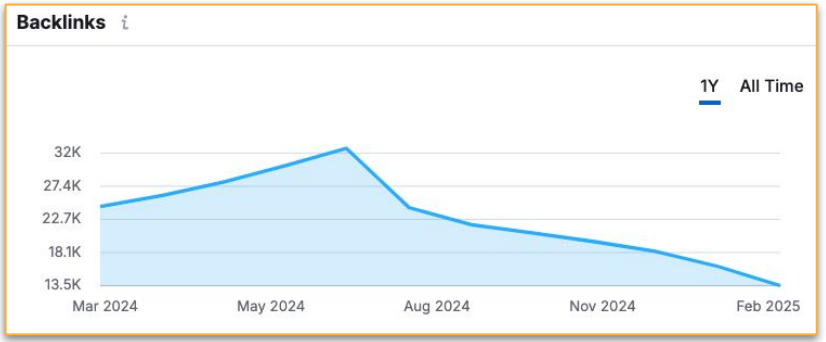
The keywords to the right are viable targets that represent jobs-to-be-done within our target industries. We also include two new generator ideas which have very high search volumes.

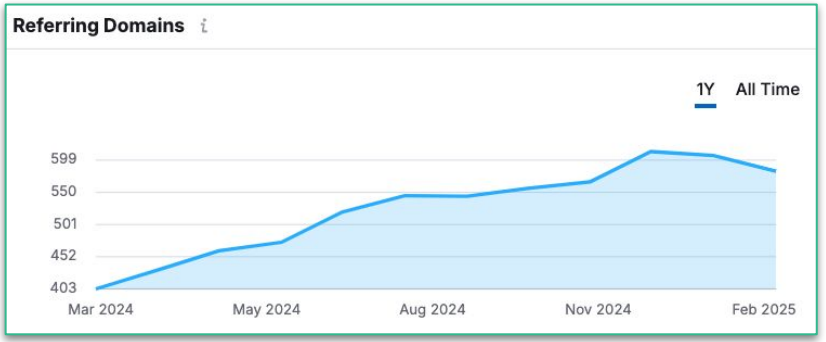
Support Backlink Generation

Backlinks can be a powerful tool for improving our Domain Authority and trustworthiness. We've been steadily picking up backlinks from an increasing number of referring domains as natural growth.

We see that over the last six months total backlinks have dropped, almost in half. Our lost links came largely from low-Authority Score domains and foreign websites. In some cases, source URLs experienced issues resulting in lost links.

We will dive in deeper to our backlink profile and provide the internal team recommendations for outreach. In addition, we can produce "link magnet" content to try and acquire more links naturally.





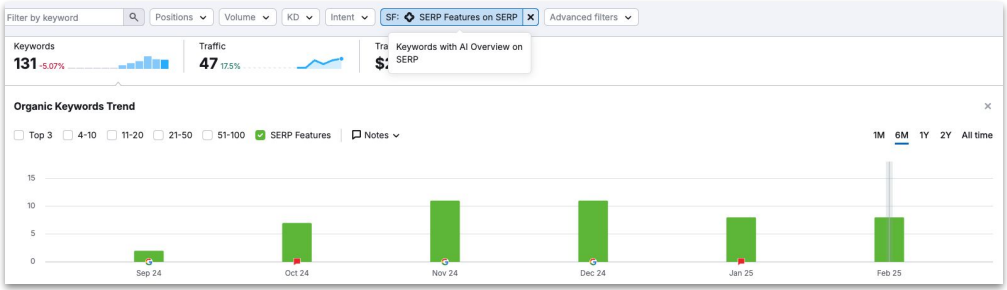
Strengthen AIO Presence

A recent study found that AIO results typically see a 9% lower CTR than traditional organic listings or other SERP features. That said, AIOs are the future of search and their prevalence is predicted to increase, especially for educational content.

Our company has only picked up a handful of AIO placements since it's launch in May.

We have an opportunity to increase our visibility by targeting AIO results. Key areas for optimization include:

- **Concise answers to questions**
- **Schema markup**



SEO NSMs

2025 SEO NSMs

Primary NSM

+41% YoY

891

Contacts

Supporting NSM

+15% YoY

71,380

Sessions

In 2025 we plan to build on the momentum we felt in H2 of 2024. With stronger core pages and an expanded functional content program, we hope to beat 2024 contacts by 41%. In support of our primary NSM we also would like sessions to beat last year by 15% for a total of 71,380 sessions. Our persona-driven content should get us there in tandem with our efforts to grow our primary NSM.

Roadmap & Tests

12-Month Paid Media Roadmap

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Goal	Build	Test	Test	Scale
Strategy	Plan	NSM QBR Plan	NSM QBR Plan	NSM QBR Plan
Channel initiatives	**Q1 Initiatives** **PM –** Run Keyword Research **PM –** Restructure Google Ads Campaigns (Alpha/Beta) **PM –** Launch incentivized convo ads, lead gen forms, and Customer List audience in LinkedIn (tailored towards ISVs) **PM –** A/B Test Demo Page **PM** – Revamp Gartner Profile **PM** – LTV:CAC Analysis	**Q2 Initiatives** **PM –** Launch video ads within LinkedIn **PM –** A/B Test paid dedicates pages **PM** – Expand LinkedIn campaigns – Test motion ads **PM –** A/B Test creatives	**Q3 Initiatives** **PM –** A/B Test creatives **PM –** Retest Reddit targeting ISVs	**Q4 Initiatives** **PM** – Expand ICP targeting in LinkedIn **PM** – Expand Google keyword coverage into higher-funnel intent **PM –** A/B Test creatives
Ongoing	**Optimization, Asset Creation, Strategy, & Conversion Management**			
	Reporting			

12-Month Programmatic Roadmap

Initiatives	Q1	Q2	Q3	Q4
DSP Test	FEB/MAR			
Creative Sandbox Test	FEB/MAR			
PRSP Audience Expansion		APR/MAY		
Retargeting Intent	MAR	APR		
Category/Contextual Strategy			MAY-JUL	
Video Inventory		APR-MAY		
X	MAR			

12-Month SEO Roadmap

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Goal	Build	Test	Test	Scale
Strategy	NSM Plan	NSM QBR Plan	NSM QBR Plan	NSM QBR Plan
Channel initiatives	**Q1 Initiatives** **SEO –** Backlink audit and outreach recommendations **SEO –** Persona organic research **SEO –** Core Page optimization **SEO –** New Blog **SEO –** Blog Refresh **SEO –** New Template x2 **SEO –** Template Refresh	**Q2 Initiatives** **SEO –** Core page optimization **SEO –** Link Magnet progress check in **SEO –** New Blog x2 **SEO –** Blog Refresh **SEO –** New Template **SEO –** Template Refresh	**Q3 Initiatives** **SEO –** Backlink progress check in **SEO –** Core page progress check in **SEO –** Persona organic research round 2 **SEO –** Review + Update content split	**Q4 Initiatives** **SEO –** Net new content **SEO –** Content refreshes **SEO –** Core page content optimization
Ongoing	**Metadata Optimization and Technical Management**			
	Reporting			

x Directive

Thank You!

Appendix

SEO NSMs Calculations

				Forecast - No Manipulation	Forecast - Sessions Manipulated
	2022	2023	2024	2025	2025
Contacts	387	755	633	891	891
YoY		95.09%	-16.16%	40.80%	40.80%
Sessions	31,556	42,380	62,123	66,039	71,380
YoY		34.30%	46.59%	6.30%	14.90%

Month	Contacts	YoY Change	Sessions	YoY Change
January 24	51	13.33%	4,703	82.29%
February 24	36	-42.86%	3,936	46.59%
March 24	50	-38.27%	4,820	34.60%
April 24	47	-45.98%	5,695	89.33%
May 24	46	-42.50%	6,147	94.83%
June 24	45	-43.04%	5,463	64.75%
July 24	65	25.00%	5,521	94.20%
August 24	57	16.33%	4,353	10.93%
September 24	63	26.00%	5,089	32.49%
October 24	63	10.53%	5,948	29.67%
November 24	48	-40.00%	5,492	-11.52%
December 24	62	93.75%	4,956	86.81%
January 25	68	33.33%	4,864	3.42%
February 25	66	83.97%	5,393	37.02%
March 25	68	35.66%	5,501	14.13%
April 25	70	48.09%	5,611	-1.47%
May 25	71	55.04%	5,723	-6.89%
June 25	73	62.42%	5,838	6.86%
July 25	75	15.08%	5,955	7.85%
August 25	77	34.35%	6,133	40.90%
September 25	78	24.36%	6,317	24.13%
October 25	80	27.09%	6,507	9.39%
November 25	82	70.49%	6,702	22.03%
December 25	84	34.76%	6,836	37.93%

PRG Roadmap & Tests

B2B Performance Benchmarks across our most popular PRG tactics

Inventory	eCPM	eCPC	CTR%	VCR%	View%
Display	$4.18 ~ $5.40	$3.38 ~ $4.72	0.08% ~ 0.11%		
Video	$9.22 ~ $33.64	$12.00 ~ 18.00	0.05 % ~ 0.2%	70% ~ 90%	60% ~ 80%
Audience	eCPM	eCPC	CTR%	VCR%	View%
CRM	$22.90 ~ $35.35	$6.60 ~ $9.85	0.25% ~ 0.4%		
ABM	$16.80 ~ $25.20	$6.40 ~ $9.60	0.2% ~ 0.3%		
RMKT	$19.25 ~ $28.90	$7.60 ~ $11.40	0.2% ~ 0.3%		
3rd Party	$3.20 ~ $4.80	$3.15 ~ $4.70	0.08 % ~ 0.12%	70% ~ 90%	60% ~ 80%

Conversion Events	Impr. leading to conversions (%)	Clicks leading to conversions (%)
All Conversions	0.13% ~ 0.28%	15% ~ 20%

DSP Test

Here's our hypothesis:

- ❏ We'd like to consider testing a new dsp to see if our additional data integrations can improve performance while tapping into mass scale
- ❏ X allows more visible in data costs allowing us to ensure we are only purchasing prospecting data in our expansion that is more likely to lead to conversion increasing our eCPM

Cross Channel Reach	Strong non-Google media, including CTV, audio, and display	Display, video, native, desktop, tablet, CTV, and mobile
3'rd Party Data	Extensive integrations with data providers (strong attribute for DSP)	B2B, Finance, Government, Healthcare, Retail, and Travel
Data Transparency	High transparency into media costs, inventory and performance	Less granular cost transparency
Attribution & Conversion Tracking	Limited multi-touch attribution comparatively to DV360	Provides additional built in tracking for Brand awareness, 1P data Attribution, and Footfall
Reporting	Advanced customizable reporting	Limited reporting

DSP Test

Here's our hypothesis (cont.):

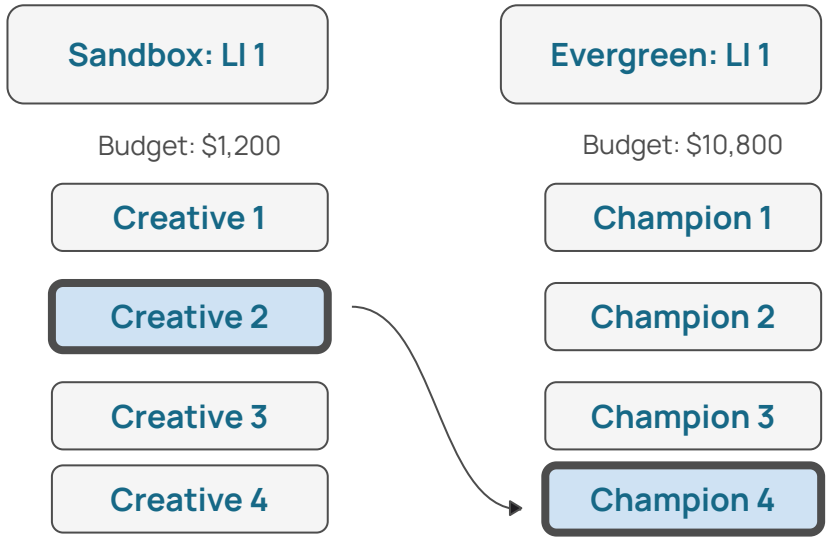
- Allows for more immediate reporting and optimizations in real time with more granularity
- Also known for a great B2B industry reach with publisher partnerships
- New "audiences" allow us to prospect audiences more effectively using 1P data (ie. audience overlap report)

CPM	$5.51	$18.97
CTR	0.11%	0.08%
CPC	$4.81	$24.29
CPE	N/A	$166.24

Creative Sandbox Testing

Here's a how it works:

- Creative sandbox testing is a testing method used creating a duplicate campaign of your evergreen.
- This sandbox will rotate a new batch of creative evenly in order to compare performance across each variant with equal budget.
- The sandbox campaign will be a campaign with a reduced budget where each variant will spend $200-$350 each before adding to your evergreen with your increased budget.
- This approach safeguards your budget by reducing spend on inefficient creative.



Dashboard & Budget Tracker

Here's a list of what's coming:

- Create a dashboard for budget tracking
  - Updated daily (up to previous day)
- Establish benchmarks for future success
- Set goals catered to each stage of the funnel
- Performance by campaign, ad group, inventory type
- Link Google Analytics for traffic and user acquisition in one place
- Overview of each tactic for holistic view of paid media strategy





Prospecting Audience Expansion

Here's a list of what's possible:

- ABM Audience Targeting with purchase intent layered
  - ABM at scale with cross device reach
- 3P Audience Testing
- TTD: 1P Seed data for overlapping high index audiences
- Conquesting Keyword Audiences built off of competitor terms

Third-party Intent data

Third-party Intent data is information collected from outside sources that provides a broader view of a buyer's intent. There are several ways to source third-party Intent data, and it's important to use a trustworthy source that's transparent about the methods of collection.

Methods include:

- Behavioral data, actions, and interests shared across digital environments from a cooperative of publishers, websites and apps
- Bidstream data that originates from a publisher's website or app that passes some site visitor and page-level data during the real-time bidding process for programmatic advertising
- Behavioral data collected by a publisher's owned and operated network of websites and apps

Out-of-the-box pre-built data integrations. Our partnership with Workato includes integration into 450+ popular applications!

Connect your data to the power of the Dun & Bradstreet Data Cloud—insights on hundreds of millions of businesses worldwide.

Map and match your data and quickly integrate into leading CRM, MAP, ERP, and MDM systems such as HubSpot, Pardot, Snowflake and 450+ other platforms.

Integrate enriched account and contact records directly in your systems—quickly and seamlessly.

Retargeting Audiences

Here's a list of what's possible:

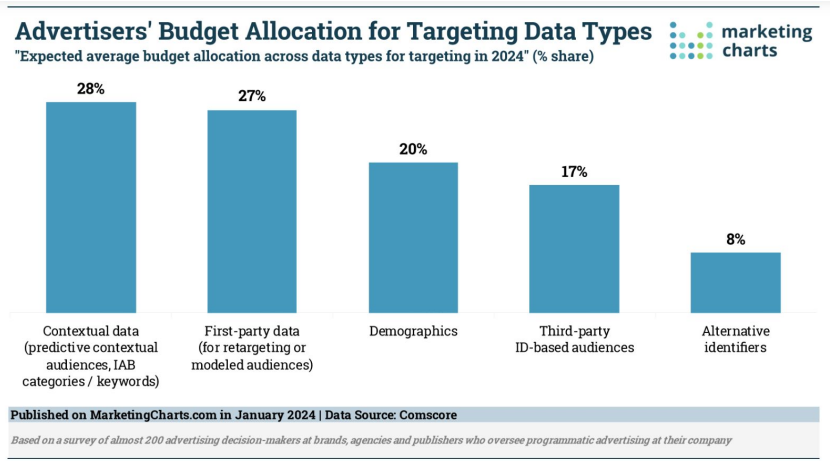
- Website Visitors
  - Key page views
  - Conversion action initiated (URL)
- CRM Data
  - API or manual list upload
- Sequential Ad Opportunities / Tailored Key messaging
  - Click retargeting
  - Video midpoint
  - Video completion
- Custom audiences
  - Ex. came to the site AND Visited pricing page



Contextual/Category Strategy

Here's a list of what's possible:

- ❑ Contextual Category Targeting
  - ❑ Tech&Computing>Computing>Computer Software & Applications
  - ❑ Business & Finance>Sales, Business utilities, Business operations, Business IT, Business accounting and finance
- ❑ Content Genre
  - ❑ Business/Financial
- ❑ Premium Publisher Inventory Access (PMP/PG)
  - ❑ Bloomberg Business Network
  - ❑ Forbes
  - ❑ Harvard Business Review
  - ❑ Wall St. Journal
- ❑ Allows visibility where competitors may be more likely present



THE WALL STREET JOURNAL. WSJ

BNN Bloomberg

Harvard Business Review

Forbes

Video

Here's a list of what's possible:

- 77% of B2B marketing leaders have focused on developing bolder creative, with over two in three (69%) saying it improves engagement and conversion
- 50% of B2B buyers watch video content to help them make purchase decisions. (Source: Demand Gen Report)
- Different Video Creative Strategies
  - Brand Videos
  - Product Explainer
  - Testimonial
  - Use Cases
  - Demo
  - Review
- Metrics: Impressions, Engagement, View Rate, CTR, Watch Time, LPV CVR

