



# Taking an Annual Perspective to Campaign Optimizations

Lightning Talk, Fall 2023

# Quick Introduction

Senior Campaign Manager

7+ Years In-House CPG Experience

12 Years Agency Experience

Began with OHO October 2019

Still managing campaigns for my first OHO client!

Not a runner



# Optimizations Are A Marathon, Not A Sprint

Taking an Annual Approach to Campaign Management


# Agenda

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## What we can do to Plan Ahead

- **Budget Mapping**
- **Scheduling Key Dates & Other Factors to Consider**

## The Big Race Day

- **Off the line**
  - **Pacing**
  - **Tactics**
  - **AI Short-Cuts**
  - **Long Term Conversions**
  - **The Finish Line**
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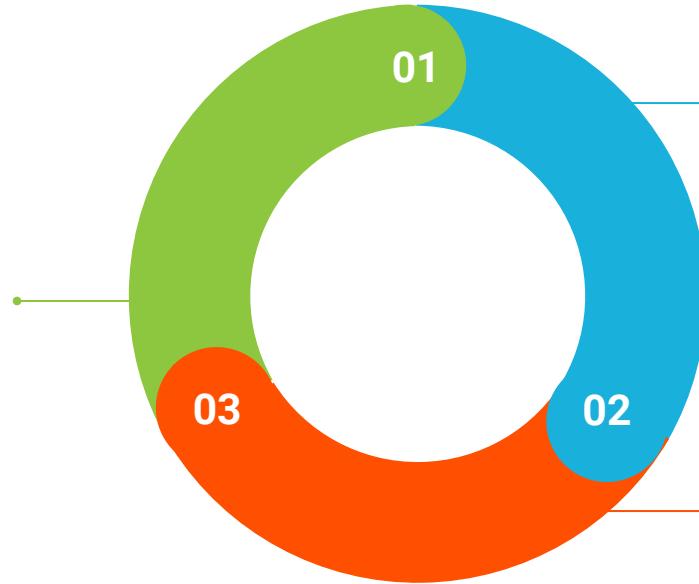
# — Planning Ahead



# 3 Part Planning Process

## 01. Assign Budgets

Split media budget across tactics and quarters



## 02. Collect relevant campaign data

Campaign mix, competitive and market factors, key dates and details.

## 03. Refine Monthly budget plan

Factor in collected campaign data to fine tune allocated spend, set pacing, and tactic hand off.

# Planning Ahead

## Chart the Course - Top Down

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### Split the budget between tactics

- Search Demand
- Social/GDN Awareness & Prospecting
- Social/GDN Remarketing & Retargeting

Divide the Tactical Budget into quarters.

Then, fine tune across each month, horse trading within the plan so that there are dollars appropriately allocated.

## Take Note of Course Factors

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- What programs are we promoting?
- How established are they? How much do they rely on new inquiries?
- How competitive are the programs and how do they rank?
- How are they related to other programs in the mix?
- How far do the programs reach geographically? Is that aligned with the goals and budget?
- What are the key dates for the programs, including deadlines and key events we would want to promote.

# Planning Ahead

- Map out budget for the fiscal year
- Understand the breadth of programs, how they relate to each other and their competition
- Measure your search budget to your geo reach and review how close it will come to your goals
- Mark out key dates of events and program deadlines to plan around.





# Race Day



# Bolt off the line!

*Begin collecting data immediately, giving us more information to react to.*

*An aggressive start can build strong performance that is awarded down the stretch.*

# Racing is Pacing

After our rocket start, we want to review recent performance and look at where the opportunity is to grow.

Our priority should be for growth, so if we find the wind at our back with relevant traffic that is affordable, or opportunity to raise budgets, we want to take them and drive our scale up.

Eventually the growth will give, so when volume and efficiencies dip, pull back spend.



## Perspective

Year over Year perspectives provides a more apples-to-apples approach to your campaign performance.

It can help you measure the impact over time, as well as track how the market shifts year over year.

## When to use which perspective

### Month over month

Tracking recent changes, or understanding if demand is growing or shrinking due to seasonality, competition, budget, or other external factors.

### Year over year

Tracking performance and to understand if the campaigns are effective. In certain cases efficiencies will be sought, in others growth will be the priority.

# Tactics are teammates in a relay race

## Search Demand

- Begin campaigns with search demand to build relevant audiences.
- Leverage keyword data to learn of opportunities to scale.
- Don't forget to sprint off the line.

## Prospecting & Awareness

- Once we receive search traffic we can leverage the audiences we have reached as models to scale off of, including:
  - Lookalike Audiences
  - Custom Intent Audiences
- Setup negative audiences to filter out those that have been to the site.
- When performance wanes, pull back spend or quality may suffer.

## Retargeting & Remarketing

- As traffic builds from multiple sources, we can expect to see the retargeting audiences grow and allow us to introduce additional messages and actions to take.
- Remarketing is targeting specific lists, usually to take a particular action at a particular time. These can be more expensive to serve as our targets are most qualified.

# Short Cuts, Thy Name Is AI

- Networks aggressively push their automated campaigns options on users.
- Digital Marketing has been using AI for quite some time to define bids and serve specific ad messages.
- Leverage automation to scale efforts, though retain control of targeting to ensure relevancy.
- Requires good data to react to, and demand to be present in the market.
  - Bad data will lead to bad decisions - ensure conversion tracking is accurate.
  - Lack of market demand opens the door for bad actors to exploit the networks, leaving advertisers as the victims.

# Long Term Conversions

- Leverage UTMs on all traffic and capture UTMs on all forms.
- Ensure the UTM data stays with the record and understand the sequencing of traffic to actions taken.
- Over time, data presents opportunity.
- Eventually, can automate the data between your CRM and the advertising networks.




*Orville was an inspirational Masters athlete competing until he was 101.*

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# In demand generation there is no finish line.

*We may stop and catch our breath, but we stay  
in the race, ready to pick up the pace when  
demand warrants it!*

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Decorative graphic in the top-left corner consisting of overlapping orange and yellow circles.

# Thank you!

Have a wonderful day

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# How to manage a long term search campaigns

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## **Aggressive Start**

Get the momentum in your favor and drive stronger performing campaigns to enable control over future optimizations.

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## **When performance is there, scale efforts**

When demand is growing while maintaining performance, allow budgets to scale to meet the demand.

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## **When performance is lacking, reserve resources**

When demand is shrinking or becoming less efficient, pull back spend.

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