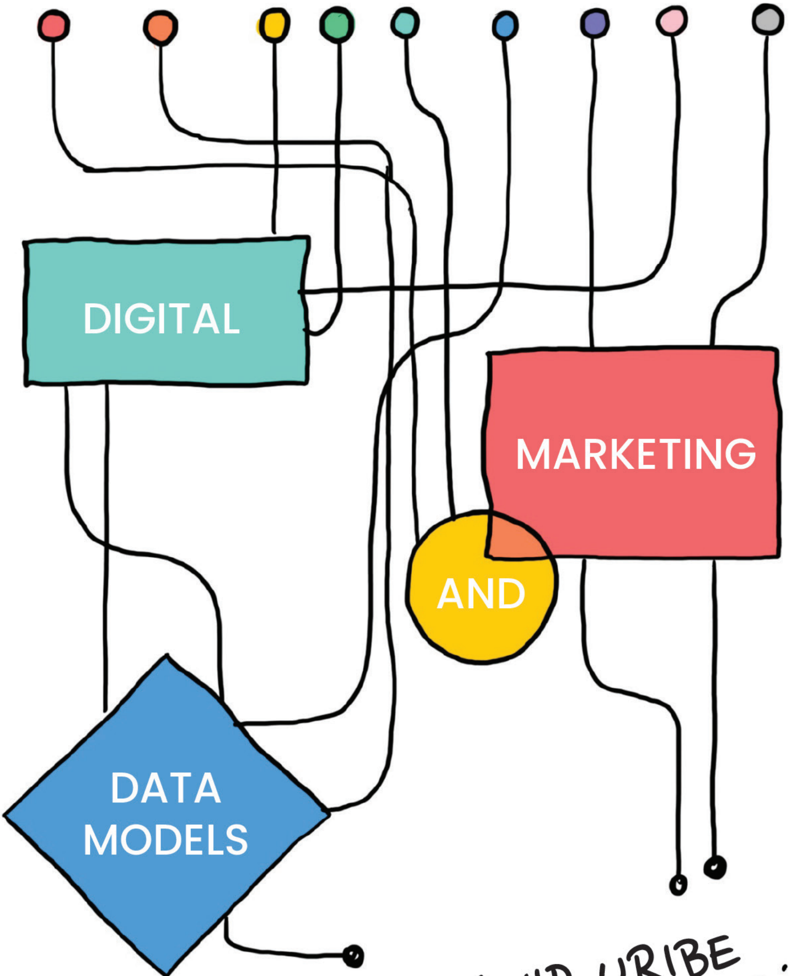
SCRIBBLES



DAVID URIBE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To my beloved sister in heaven
- Alejandra Uribe (1989 -2018) and 🐝🐺🐶-
you're all that matter

THE AUTHOR

DAVID URIBE

David Uribe is a Colombian professional, who works at TBWA Worldwide as the Regional Head of Data for EMEA and the Head of Digital for TBWA Hunt Lascaris in South Africa. He is passionate about using technology and processes toward better customer experiences and performance-first digital work.

He holds a bachelor's degree in Science of Advertising, a master's degree in Digital Business from the University of Barcelona, two certifications in Big Data and Machine Learning from the Massachusetts Institute of Technology (MIT), and one in Digital Business from Harvard Business School.

Previously, Uribe was the Global VP/Creative Director at Asylum Marketing, Co-founder and CMO of smartBeemo, and a professor at the Miami Ad School, the world's most awarded advertising school.

He is the author of 101 Tips Para Mejorar Tu Presencia En Redes Sociales (101 Tips to Improve Your Social Media Presence) and has over 20 e-books on digital marketing and data. Uribe has also spoken at over 200 digital events and summits worldwide.

CONTENTS

Special Thanks and Acknowledgements

I have had significant help in developing the models and my thinking in this book. Most of these were written under the pressure of client deadlines, new business opportunities, testing exercises, and training initiatives. So I will start by thanking TBWA and all OMNICOM agencies, I have been privileged to work here for almost five years, and it has been a never-ending growth experience. Thanks to my colleagues at TBWA EMEA, APAC and North America, Cem Topcuoglu, Sean Donovan, Luca Gallarelli, Des Jones, Adam Byars, David Cohen, Nathan Reddy, Karabo Denalane, and all of our clients; without your support and faith, this book would not have been possible.

Thanks to John Hunt for the constant guidance and encouragement through the years. Your support and mentorship have been crucial to my personal and professional development. Big thanks to my partner in this project, Laura Seal, for delivering such an impeccable design. Also, thanks to David Gemmell and Olivia Matterson for an outstanding editing job. Our digital and data teams in South Africa, your commitment, hard work, and curiosity were essential in realising this book.

Special thanks to my family and friends for their unconditional support and love. Finally, I would like to thank everyone who has supported me directly or indirectly through the years. Thank you for your challenging questions, thoughtful feedback on my work, and constant inspiration to find a way to simplify the complex. Stay brave and curious; it will just get better and better!

Model #24: Developed in collaboration with Yatish Nasri.
Models #72 and 74: Developed in collaboration with Olivia Matterson.

PREFACE

I am the last person who should be writing this preface.

At the beginning of my career, I was hardly steeped in technology or the processes behind it. In truth, performance-first digital marketing hadn't been invented. Data was exotic. Something IBM knew about.

But here's the point, I guess.

If David can explain it to me and get me nodding about testing, optimising and quantifying, he can explain it to anyone. I believe this is because Mr. Uribe has a knack for making the complicated simple, not superficial. What's more, his genuine enthusiasm is infectious. He draws while he talks, while he thinks. Bar graphs, pyramids, and spirals explode from his pen.

I never thought I'd be so interested in content models or acquisition strategies. More importantly, we have seen time and again that what David orchestrates, works.

In a world where data dances with everything, Scribbles teaches us how to tango. It shows how to turn information into insight. And insight, as we all know, is the key that unlocks sales.

Happy reading.

Cheers,

John Hunt - Global Creative Chairman at TBWA Worldwide

INTRO

When I finished my Bachelor's Degree in Advertising (Copywriter) in Colombia, all I wanted to do was to find a job at a big agency and write print, radio, and TV ads. I had a relatively good run as a creative at school, winning a few internal awards for scripts and campaigns, so I knew there'd be a place waiting for me at an ad agency.

In the last semester of school, I put my portfolio together and reached out to the few people I knew in the industry. Months went by with nothing happening, not even an internship. That was my first reality check; I wasn't special, nor did the industry need someone like me, so I had to change my strategy: apply for anything related to advertising and marketing and hope for the best.

After a couple of months, I got a call from a small digital marketing agency in Bogota to come for an interview. You must understand digital back in 2009 was still a tiny part of the whole pot. Against my own will and hopes, I went to the interview, put on a good face, and tried to answer their questions. And it happened; my first job as a copywriter at an ad agency.

The job was to write Google AdWords and social media posts, (when social media for brands was still in its infancy). The position seemed underwhelming for me at the time, because there was no creative challenge (or so I thought), and the formats were so small and quick I felt my work wouldn't be noticed. I was also wrong about that.

One day the agency was invited to pitch for a global brand. Ideas came and went, but nothing good enough to compete against the big agencies. Then we had a collective epiphany; since this was a digital pitch, we didn't necessarily need a big conceptual idea. What we needed was a framework, a process that ensured users would go through an experience started on online touchpoints, and would end in a purchase offline, (e-commerce wasn't a thing just yet for that category).

As we changed the approach and started drafting experience models, I realised it was much easier to operate that way. It was almost easier to scribble through problems, even though I wasn't a planner, (usually, they're the ones with the models).

We won the business, and I contributed to the win. The rest is history. I became a creative director. Then a global agency offered me a position as Digital Director six months later. Soon after, another agency in the United States offered me a job based out of Miami.

I spoke at conferences worldwide and taught at the Miami Ad School. I then joined an agency as a partner and helped turn it around from packaging to a stable digital operation in five countries. I developed the first predictive analysis tool for social media predictions, based on regression analysis and contributed to building one of the largest online education marketplaces for Spanish-speaking people.

Then one day, I received THE call from the big agency I was hoping to join fresh out of school. It took almost ten years, but it finally came in 2017. That's when I was offered a Regional role as Head of Data for TBWA / OMNICOM for Europe, the Middle East and Africa.

From this summary of my journey, I want you to take away three key learnings:

1. Be patient and trust the process. If you're good and consistent, the call will come.
2. Don't wait for plan A to fail to think about plan B. Deploy plans A, B, C and D simultaneously, then see what happens.
3. Great things don't come from comfort. Be happy being uncomfortable. You'll open the door to a new world.

Now I have the privilege of working with some of the world's biggest brands. My approach to digital solutions is rooted in models and frameworks built on five simple principles:

- Quantifying everything.
- Attributing results.
- Constantly testing.
- Optimising.
- Timelines vs expected results.

When we receive a brief on digital marketing and data, it leads to many questions. By trying to answer those questions, I've realised, given the complexity of today's customers, technology and brand ecosystems, it is impossible to formulate solutions with one-dimensional plans.

That's why for the past 12+ years, I've been developing models and structures of aggregated knowledge that use data at their core. They are designed to answer those questions with tangible results; all within a given period.

I will share some of those models and the questions they've helped us answer in this book.

But before we get into models and frameworks, I want to clarify a few things:

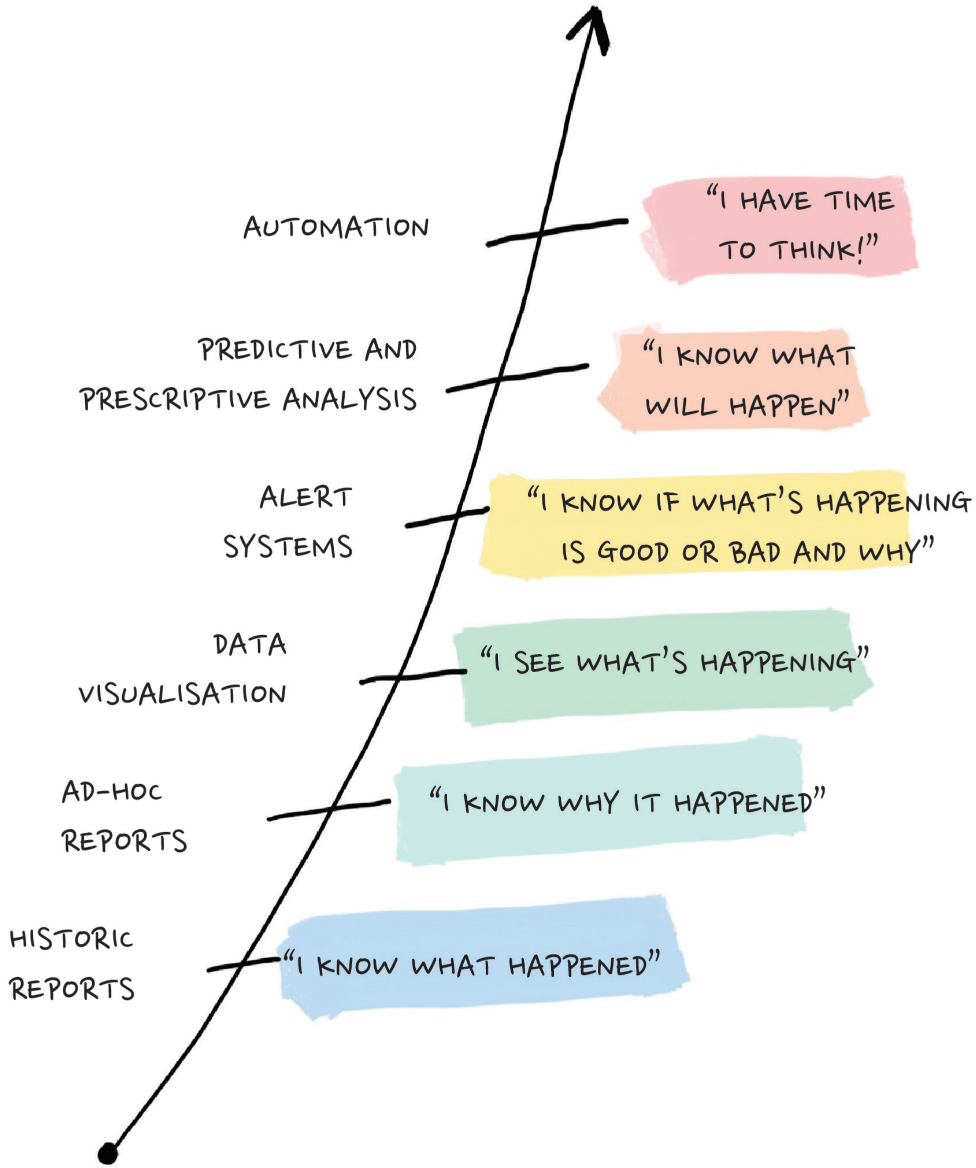
1. When working with Data, NOBODY will tell you what's the next right thing to do because there's no playbook. Go and try something.
2. Your clients probably won't share their first-party data with you, but they expect you to deliver the best possible data practices.
3. Tools are not the answer. They can quickly become another problem.
4. You will rarely work with Big Data. Make peace with that. Start looking into small and medium data. And learn to collect and process it.
5. Data in advertising is not just about finding planning insights, monthly performance reports, media targeting and measurement. It is about making better-informed decisions at all stages.
6. Did you watch Karate kid? Wax on, wax off. That's data labelling. Prepare for that.
7. If you work in advertising or marketing, the role of data is not just to report to your clients. We're using data for creative optimisation, conversion rate optimisation, social commerce, and many other practices.
8. A good data practice is critical for sustainable digital transformation.
9. Quantitative data is good, but real insight comes from qualitative quantification, correlation, and analysis. I'll explain these through models.
10. Anybody can become a data person. Yes, we need data scientists, statisticians and mathematicians down the road, but the core of what we do is asking questions and layering sources of information to find an answer.

Everything I've done in digital marketing and data starts with a scribble, a doodle or a simple model. This book is a compilation of the models we've used when working with some of the world's biggest brands.

Disclaimer: I have included what I believe are my best models and tried to explain them in a quick list format of steps, simple and to the point, to give an idea of what to do next. This is not a data science or statistics book.

CHAPTER 1

THE FUNDAMENTALS

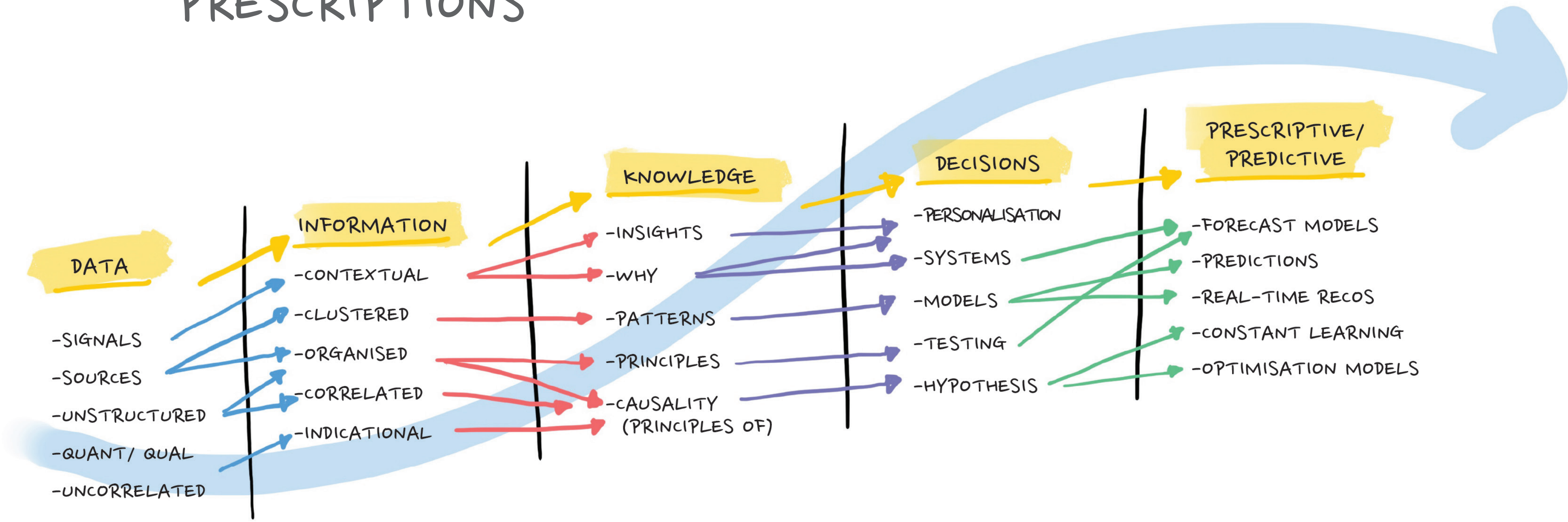


THE DATA PYRAMID

1. The data journey I've followed is based on a ladder of outputs, with specific processes at each step, (explained in detail in this book).
2. The most basic data practices are standard historical reports, and the most advanced ones are when you reach a level of automation.
3. The first step is to assess where you are on the ladder regularly.
4. Define a timeframe to start climbing and reach the middle, (it shouldn't take more than 12-18 months).
5. List your touchpoints, data sources and tools, if any.
6. List your outputs per client/practice. What do you need to answer, and how often?
7. Based on the ladder list, which of the outputs could you implement per client/practice?
8. Focus on human-based practices and leave the last 2 to 3 for later. Processes first, tech later.
9. From each of these practices, it is vital that an actionable recommendation/time comes out, always!

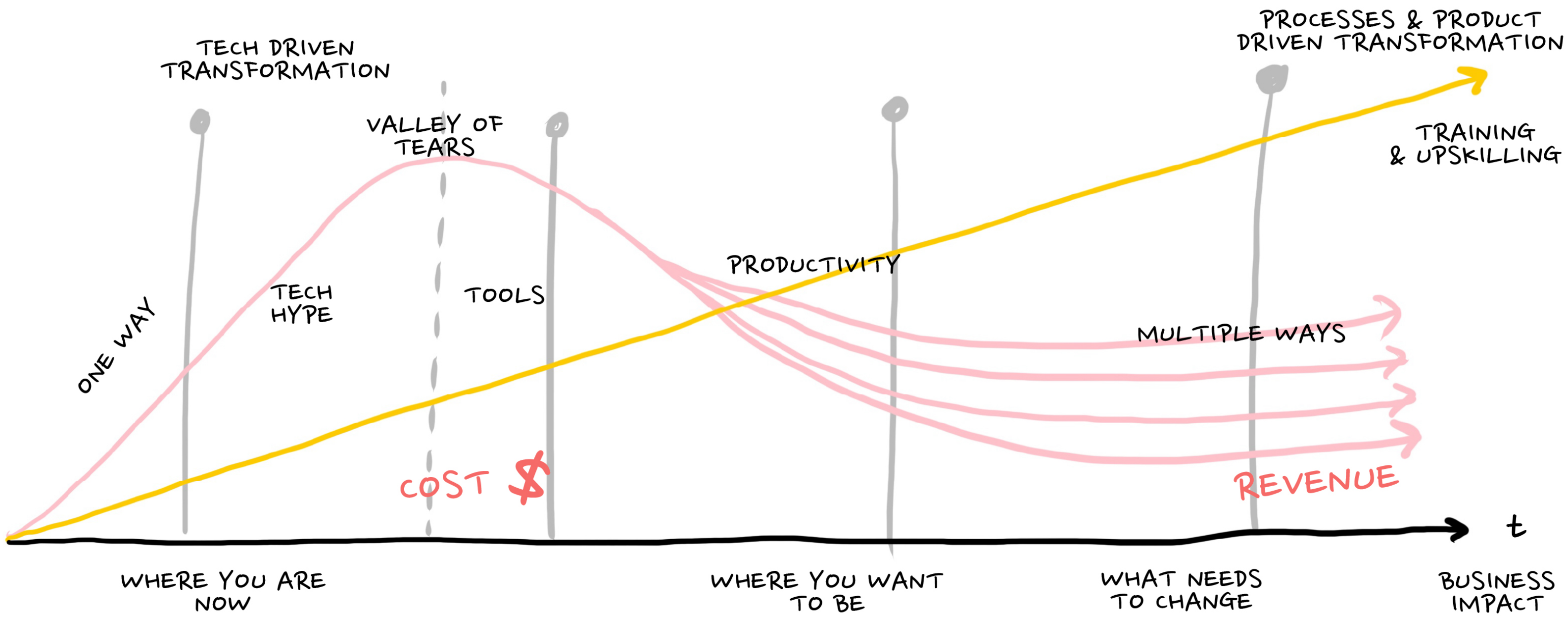
There are free tools for every single step of this model.

FROM RAW DATA TO PREDICTIONS AND PRESCRIPTIONS



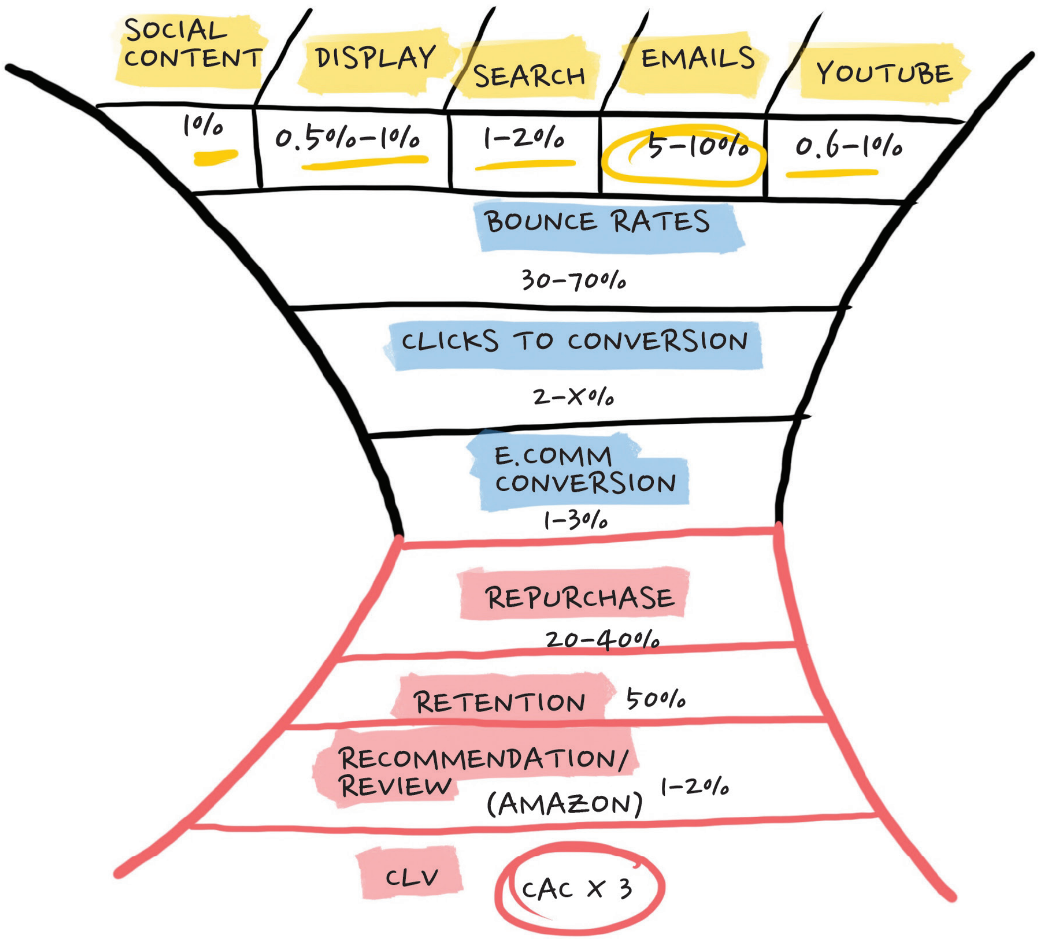
1. When working with data, the priority is translating raw signals into knowledge and decisions.
2. Determining which signals you will work with, is by looking into the sources and labelling them, to start structuring them into information.
3. Once the data starts taking shape, you will be able to get more contextual information and see clusters and indications of what's happening.
4. The next step is to look for patterns in the information, elaborate on insights and look for initial whys.
5. You will now have enough information to decide your next steps. Aim to personalise messages and create systems and models using the data you've been structuring.
6. And finally, once you've done this for a while, you'll be able to be predictive and prescriptive about your outputs, design forecast models, predictive analysis, and real-time recommendations based on dynamic information and keep learning with it.
7. It is a common mistake to see professionals trying to make sense of unstructured data and coming to wrong conclusions. Remember, data without proper interpretation and analysis is just noise.

DIGITAL TRANSFORMATION FRAMEWORK



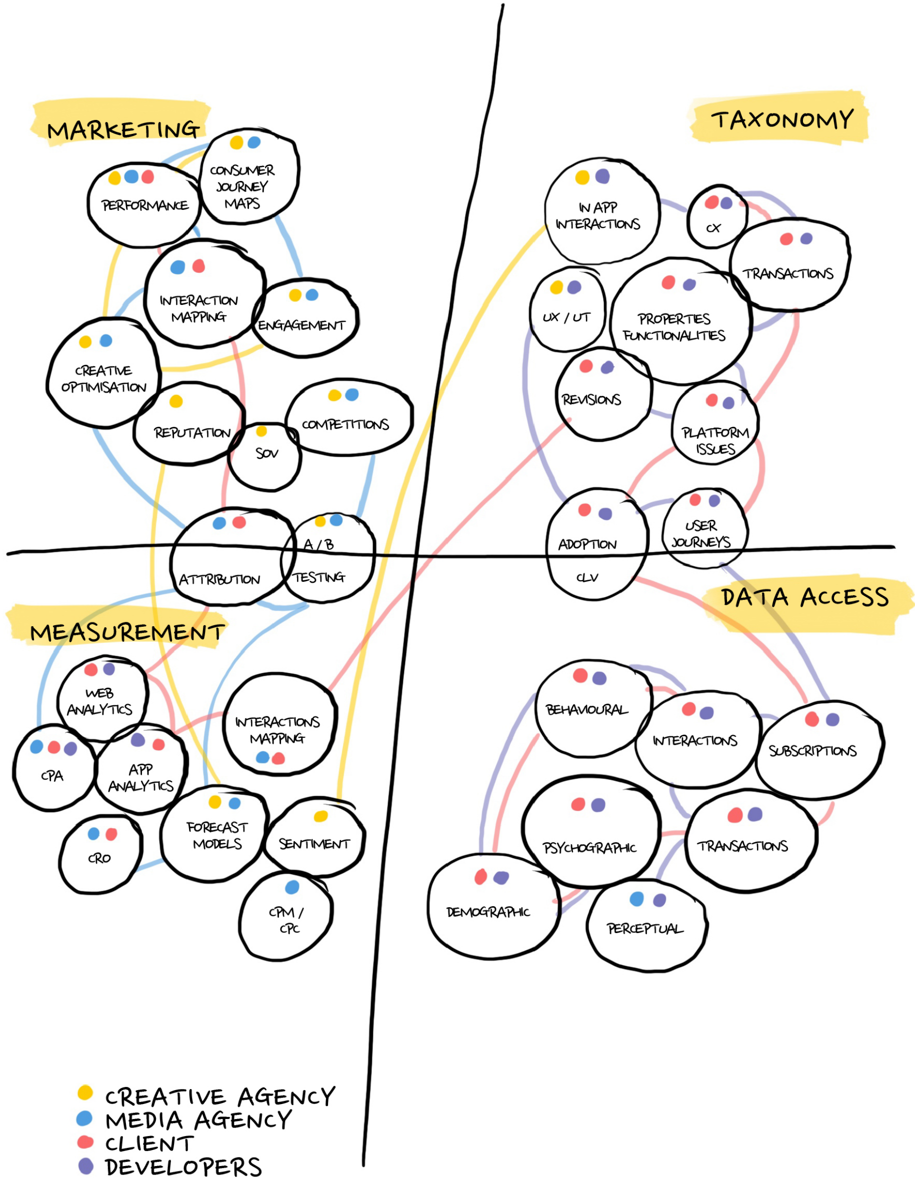
1. In this model, I share a journey toward a sustainable and realistic digital transformation in marketing.
2. The first recommendation is, do not depend on tools. Digital transformation is not about having a heavy tool stack, but processes and a product/offer-driven transformation. In our case, the way we produce work as a creative agency.
3. First, assess where you are regarding processes, talent and tools. When the goal is correct, but the journey is not, (i.e. depending too much on tools), you will inevitably reach, "a valley of tears", which is a non-systematic, siloed and costly operation.
4. Then, plan where you want to be and when. Focus on productivity, being faster, more efficient and consistently better.
5. Once that's set, there are four key areas to drive: Better operations, better digital marketing work, better offerings to your clients and better tech, (proprietary or from third parties).
6. When you start achieving the above points as, "What needs to change", revenue will come in and you will see a business impact.
7. There is no one way to digital transformation. It needs to be a systematic deployment of multiple practices working together. Initially, you might need investment, but that will rapidly transform into revenue.
8. The essential point to a sustainable digital transformation process, is talent and client upskilling and training. Everybody involved in the operation must train what we do and why we do it.

THE 1% OF THE 1% – THE DIGITAL ECONOMY

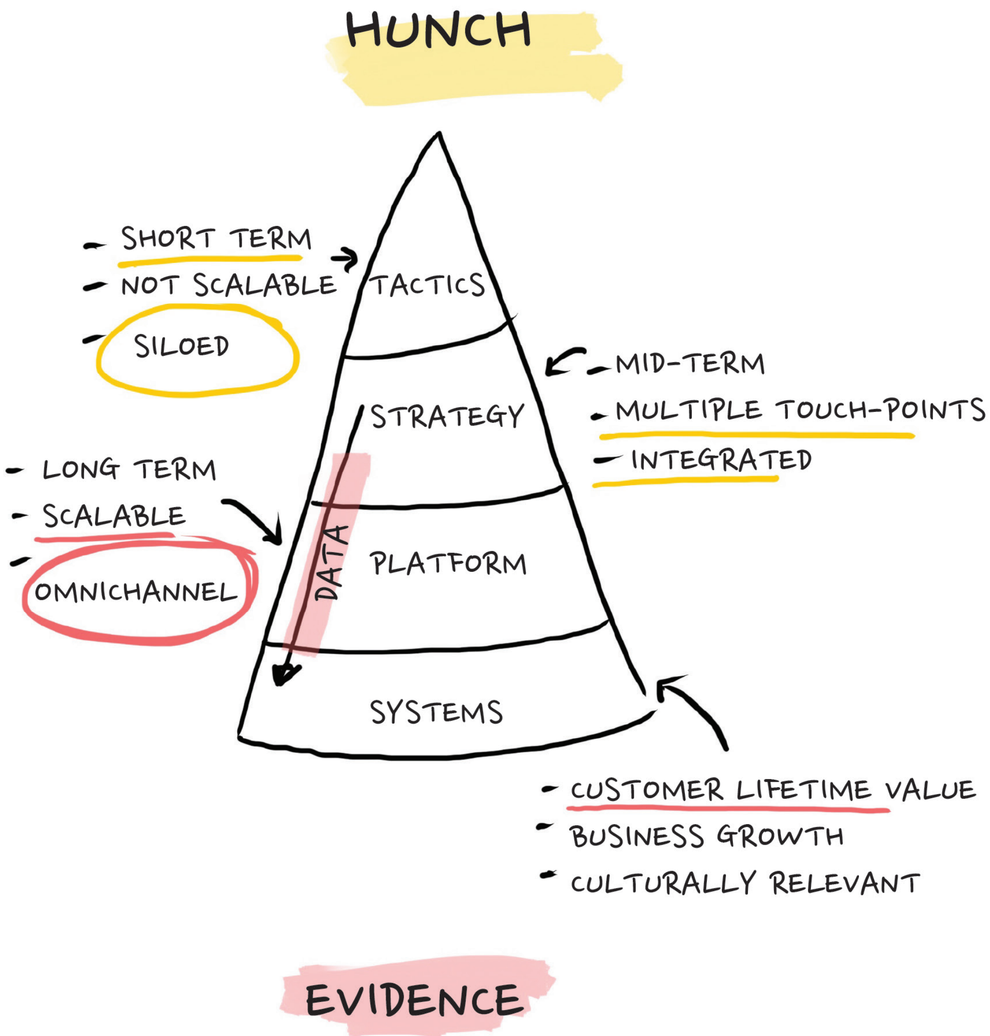


1. This model illustrates our challenges when working on e-commerce and performance marketing strategies, beyond one-time conversions. These numbers vary depending on the industry, country, etc. But here is an overview of the metrics we deal with today.
2. On the top, you'll see the CTR (Click through rate) on the main digital channels.
3. When only 1% or fewer people are clicking on your ads, content or emails after opening them, often the majority will bounce when landing on a website or app marketplace.
4. Then we have to retarget the user 3, 4, 5, and 10 times to come back. Only 2-3% of them will convert at a first level, (registration or first interaction).
5. And only 1-3% of registered users will convert at an e-commerce level. That is a typical conversion funnel, but it gets interesting when we enter the customer lifetime value or CLV space, (the red inverted funnel).
6. Only 20-40% of your converted users will repurchase, (again, this varies depending on the category).
7. On subscription models, after three months only 50% will stay, and the rest will leave.
8. People don't often write recommendations either. Amazon data shows only 1-2% of users write reviews after making a purchase.
9. And finally, you can calculate customer lifetime value, by taking your cost per acquisition and multiplying it *3. That's what your customer needs to spend for your investment to make sense. Remember, this changes depending on the industry, but generally, these are the numbers we deal with.
10. Acquisition is essential and the precursor to everything else, but the real challenge is developing long-term customer relationships and advocacy

DIGITAL CHALLENGES AND ACCOUNTABLE ENTITIES



1. As we get into performance marketing and e-commerce spaces, the challenges become more multi-dimensional and more rooted in technology and access to data.
2. With this level of complexity, there's much-needed cooperation between all parties involved: the creative agency, technology partners, media agencies and clients.
3. This cooperation needs to reflect in central repositories of real-time data that allow for optimisation and actions to maximise results.
4. Some of the most critical marketing challenges we are facing are creative optimisation frameworks; creative production at scale; data-driven consumer journey maps; engagement analysis; multi-channel competitor's analysis and A/B testing practices, **(see model #65)**.
5. On measurement: Web analytics; e-commerce metrics; forecast performance, **(see model #63)**; conversion rate optimisation; CPA (cost per acquisition/action), CPL (cost per lead), CPC (cost per click), CPM (cost per 1000 impressions). In-app analytics and sentiment analysis.
6. When looking at technology, it is vital to monitor all property's interactions, transactions; retention; customer experience, (recorded journeys); user behavioural data; reviews; user journeys; adoption and loyalty data.
7. Finally, when looking at first-party data, it is key to constantly monitor behavioural, demographic and psychographic data, consumer interactions on all touchpoints, subscription data, perceptual data, transactions and customer lifetime value.
8. When layering all of these data sources, it becomes easier to understand what is working and when.
9. One of the most common problems we see in the industry is brands focusing primarily on top of the funnel/acquisition work instead of on mid and low-funnel efforts, where conversions and lifetime value start happening.

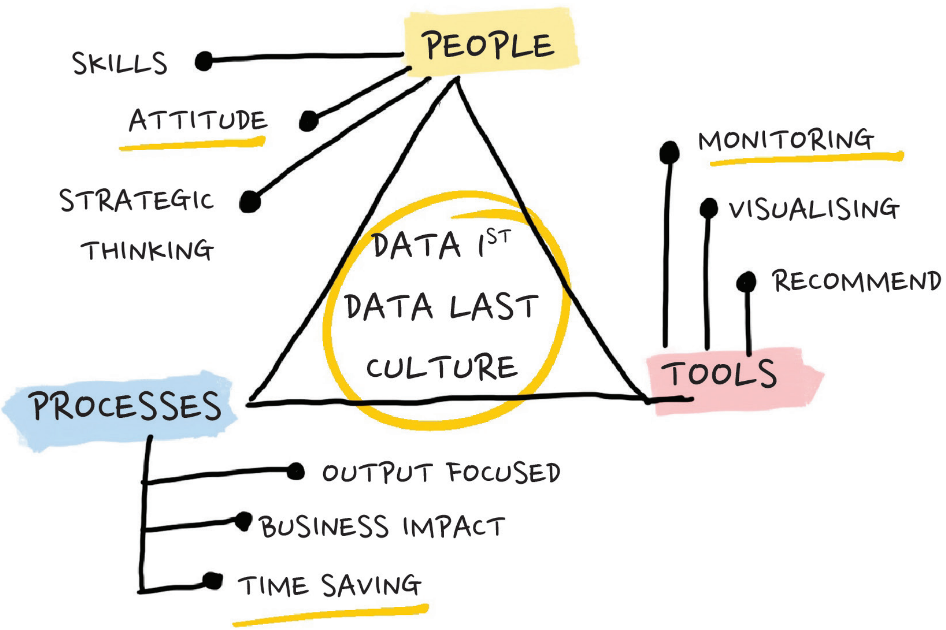


FROM TACTICS TO SYSTEMS:

THE EVIDENCE FRAMEWORK

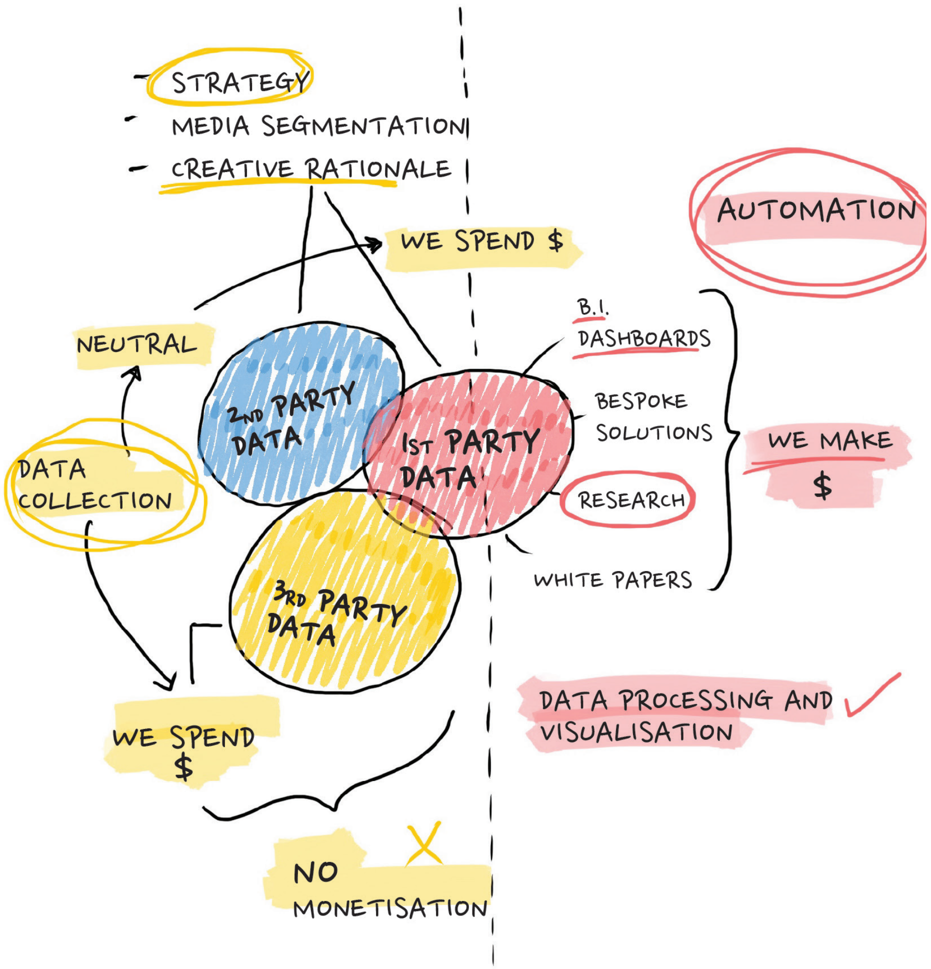
1. We have changed the way we approach our solutions to briefs, under a system we call the evidence framework.
2. The central premise of this model is to move away from hunches, heavily built general strategies and tactics and deliver systems based on evidence.
3. We also implemented this thinking because of the need to build customer lifetime value, instead of only delivering once-off transactions.
4. Inevitably, our initial reaction to briefs starts with a hunch of what's correct; however, we need to start by looking at the available data and avoid hypothesising personal hunches.
5. A common mistake is to build strategies to cater to a brand or its services and products, and not to deliver long-term value to consumers.
6. Instead, we enrich our strategic frameworks into platforms and systems, especially in digital and data-first work.
7. Another critical component of this thinking is the inclusion of transactional forecasting models for our clients, in which we put a dollar value to each interaction in the journey to conversion, repurchase and lifetime value.
8. We now build systems ensuring we deliver three key things: customer lifetime value, business growth and cultural relevance for our clients.

THE DATA TRIANGLE TO BUILD A DATA CULTURE

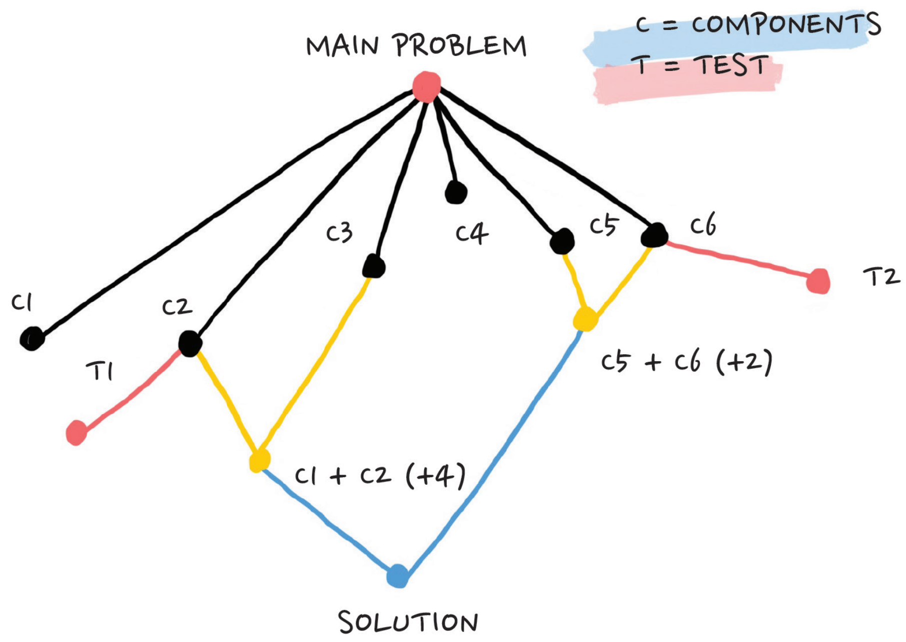


1. To develop a data-first culture in an organisation, I recommend focusing on the confluence of three main factors: people, processes, and tools.
2. The best data people, in my experience, have been ones with traditional soft skills, like critical and analytical thinking and complex problem-solving.
3. Every data team or individual needs to be able to answer simple business questions; even more so to formulate them. Encourage your team to find and prioritise the main questions impacting the business.
4. Work on processes that are easy to implement, scale, and, most importantly, are output-focused. In the world of data, (especially in marketing and advertising), simple recommendations matter the most. Not the dashboards or reports.
5. A good data culture is determined by implementing constant and disciplined processes, created to answer simple business questions.
6. Keep in mind you are working with different audiences; creatives, strategists, account executives, clients and they all want to see different things. Effective processes must be able to have actionable outputs for all groups.
7. You will rarely work with big data, so don't obsess with big, expensive tools.
8. All you need is a tool for channel monitoring and data visualisation and, if you get there, one that gives you recommendations, but the team can process these.
9. If possible, I highly recommend connecting to your data sources via APIs, (Application Programming Interfaces) and building your correlation models, **(see models #57 and 70)**. This will allow you to tailor your data stack to your company's and client's requirements.

DATA MONETISATION



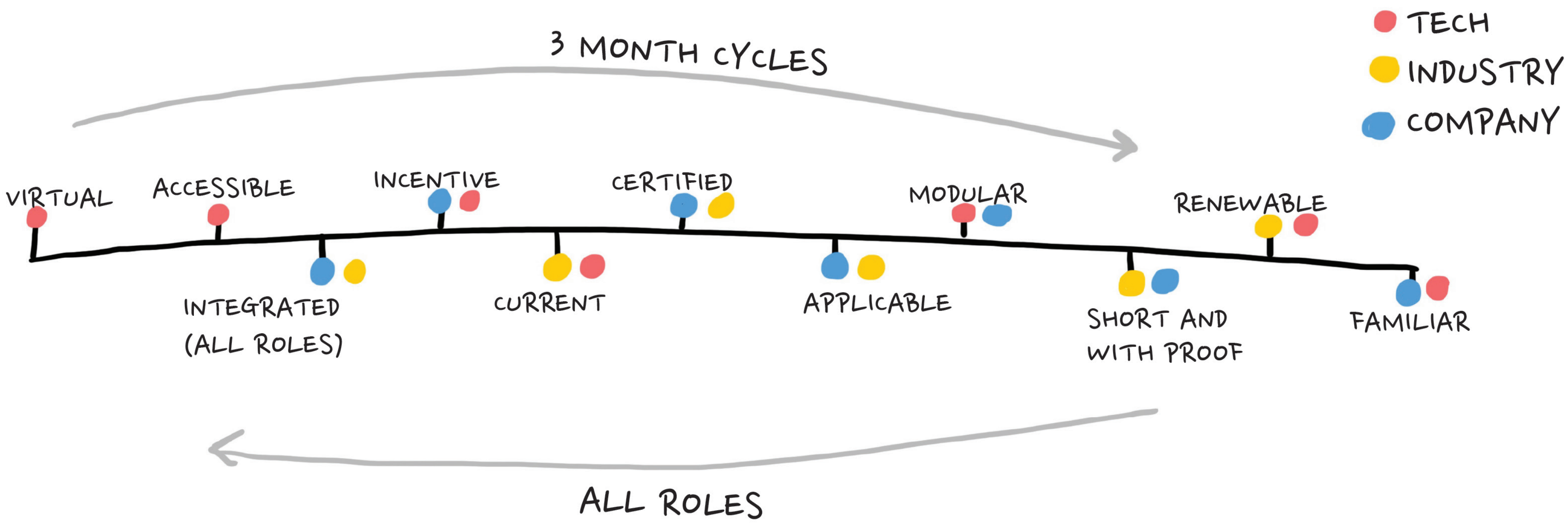
1. There are generally three categories of data. First-party data is the data you collect and own, second-party data is the data your partners produce, and third-party data, which is produced by others; it could be free and public or paid.
2. Producing first-party data usually costs money, (collection, processing and output), gathering second-party data from partners usually costs nothing, and getting third-party data could or could not cost money.
3. Commonly, second and third-party data is used to build and validate communication strategies for initial media segmentation and to help with creative rationales.
4. This is important to remember when intending to monetise data products because you will have to spend money to make money.
5. An excellent way to monetise data is by collecting, packaging, layering and selling first-party data. In some cases, you can enrich it with second and third-party data.
6. The most common way to monetise data at an agency level is through data visualisation or business intelligence dashboards, **(see model #57)**.
7. Other ways to monetise first-party data are by producing knowledge pieces, such as white papers and research pieces.
8. And finally, by building marketing technologies that allow us to do our jobs quicker and better. For example, automation tools.
9. An example of an automation tool we've built is a rollout tool for creative assets, we fuel with performance data and creative taxonomies, **(see model #53)**. Based on those two features, it recommends and helps us produce better data-driven creative assets at scale.
10. There is a relatively new form of data called zero-party data, which is the data consumers willingly share with brands, (i.e. purchase intention data), **(see model #49)**.



PROBLEM REDUCTION LOGIC

1. This logic is the divide and conquer of problem-solving. Start by breaking a big problem into sub-problems or smaller problems.
2. Then, start solving more minor problems by testing micro-solutions or hypotheses.
3. Take the solutions that have worked in different fractions of the main problem and combine them.
4. As you start doing so, you will find integrated solutions to the major problem.
5. An example of this is a Lead Generation problem. We deal with these quite often, raising many questions about investment, placements, messaging, touch point allocation, etc.
6. We start by breaking the problem into those four key sub-problems and test.
7. A good way to test messaging is by doing it on social media before investing any money in paid platforms. Once there's a hypothesis, we move on to the placement problem.
8. We test the best performing messages on paid platforms, measure and conclude.
9. Then we decide the investment strategy per product/service and the key messages and touchpoint allocation, (organic and paid) and build an interactions map for different audiences, as seen in **models #18 and 19.**
10. We set a timeframe for testing all of our solutions to the micro-problems, and once we find the right mix that performs above what we need to deliver, we've solved the main problem.

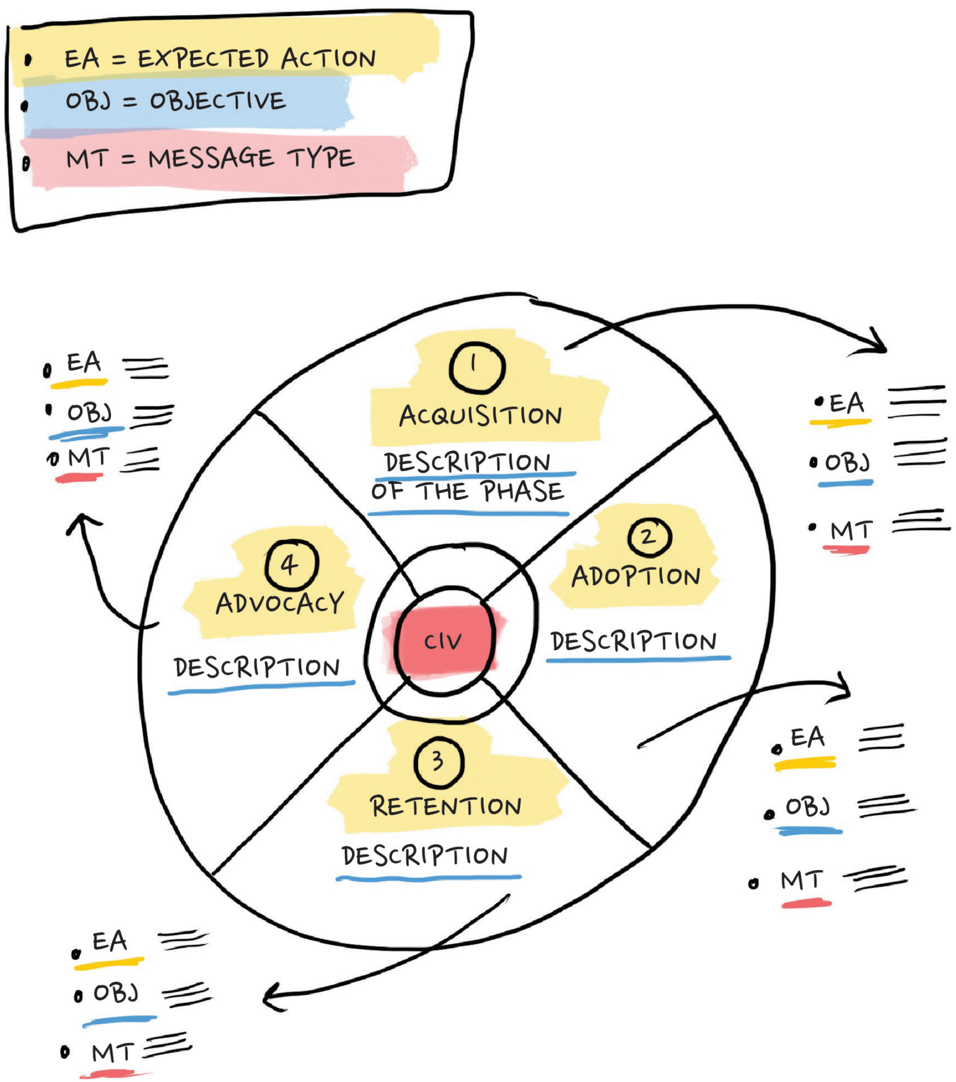
COMPANY TRAINING PROGRAMS



1. It is critical to upskill your workforce and clients regularly.
2. For that, I highly recommend virtual training, because it is scalable, long term and well received by professionals.
3. Recommended training cycles, (in our experience), are every three months because information and technology change rapidly.
4. Develop a program that is:
    a. Virtual (LMS or learning management systems, which are easy and low-cost to implement).
    b. Accessible from all devices at all times.
    c. The content should apply to as many people and departments as possible.
    d. Incentivize your colleagues to do the courses.
    e. Make sure the content is current and relevant.
    f. A key incentive for professionals today is certifications. Add them if possible.
    g. Make sure the content applies to your colleagues' daily work, nothing too complicated.
    h. Build short and sweet modules, no more than 20 minutes per lesson.
    i. If possible, add proof of the concepts in real use cases.
    j. Make content renewable and familiar to your colleagues.
5. I've been part of the development of 2 major training platforms with thousands of students all over the world, and to be successful, we focused on three key factors (besides the ones mentioned above):
    a. Using the right technology to build these (WordPress, Lifter, Stripe, and Mailchimp), none of those is expensive or challenging to implement.
    b. We use relevant industry content and leaders to make appealing content.
    c. Making it company-focused, we've built courses that help our people succeed in their daily activities.
6. Also, these courses have become a key component of our onboarding processes in many countries worldwide, saving us time and money and increasing employees' satisfaction and willingness to work with us, because they're constantly learning and upskilling themselves.

CHAPTER 2

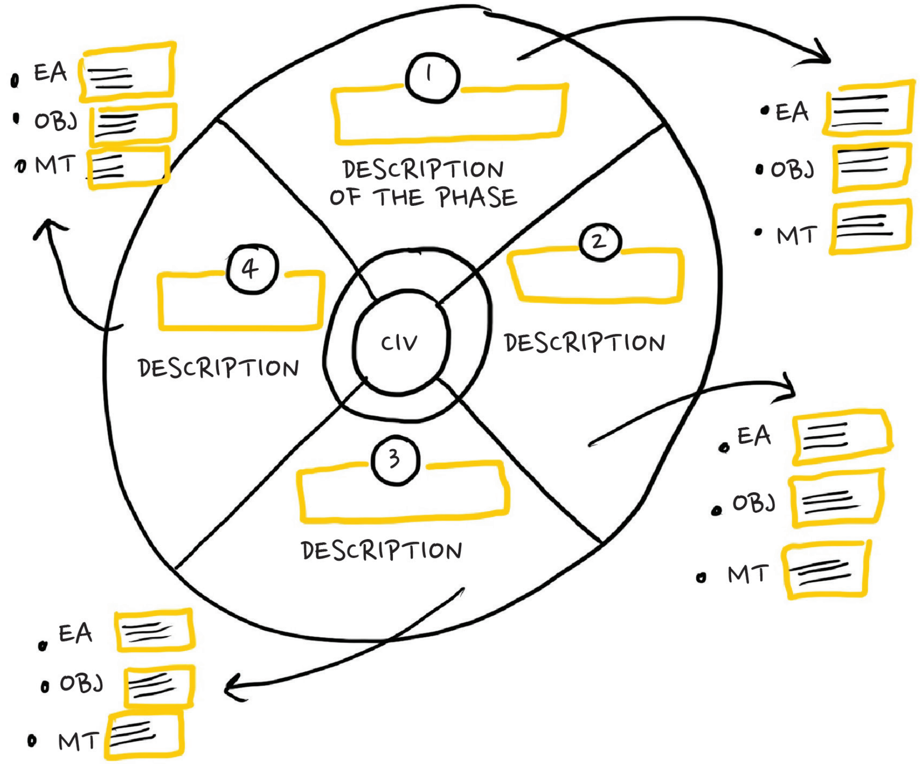
DIGITAL AND DATA STRATEGY MODELS



THE PERFORMANCE WHEEL

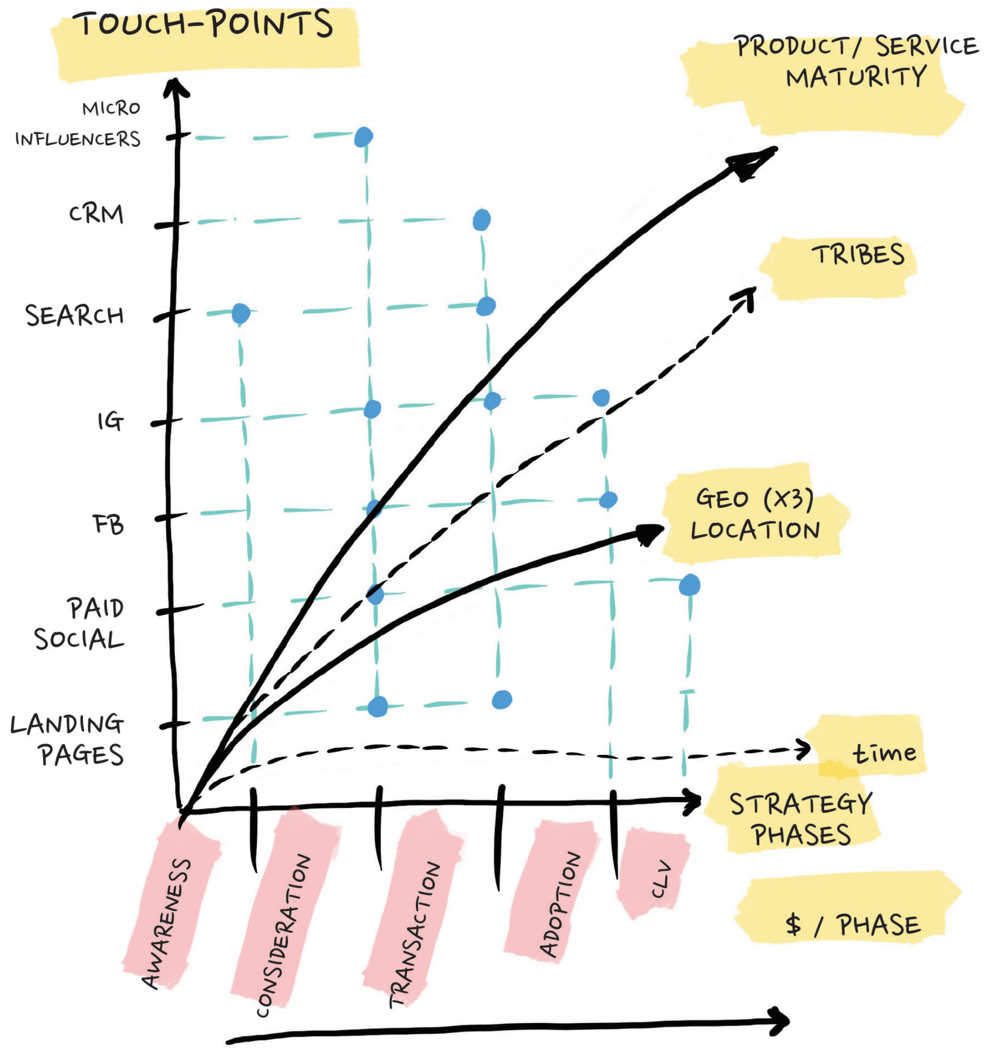
1. Switch from funnels to wheels so you don't forget the people in the middle and bottom of your acquisition efforts; which is where conversions happen.
2. Determine the phases of the wheel depending on your strategic needs.
3. Each of the phases has three key components:
    a. Expected action: What do you want the user to do? (i.e. clicks, follow, views, visits, etc.) This is key to determining, so the creative messages are crafted accordingly.
    b. Quantitative objectives: How many views, clicks, visits, impressions, etc. Remember the model of the 1% of the 1% to forecast your performance. **See model #4**.
    c. Message type: Product/service, feature, benefits, validations, demonstrations, hooks, problems/pains and a given incentive. **See model #28**.
4. Each of the phases of the wheel should have different message types, (so you avoid retargeting people with the same message, which is a common mistake in performance marketing).
5. Apply the performance and forecasting frameworks covered in **models #61 and 63**.
6. Adjust the messages and actions as you learn what works and what doesn't.
7. Assign a percentage of budget and attributable success to each of the messages and actions described in each phase when you deploy.

- EA = EXPECTED ACTION
- OBJ = OBJECTIVE
- MT = MESSAGE TYPE



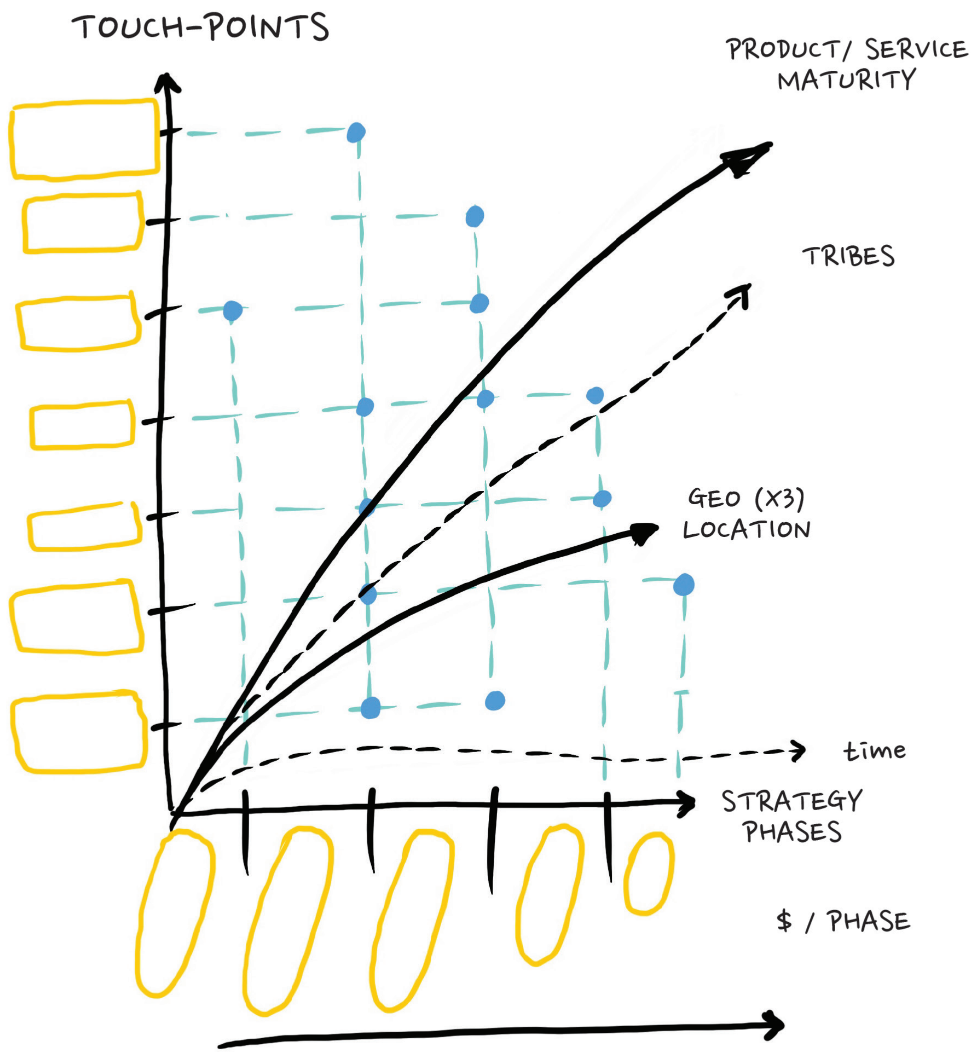
TEMPLATE

Fill in the model with your own data.



DIMENSIONS OF A DIGITAL STRATEGY

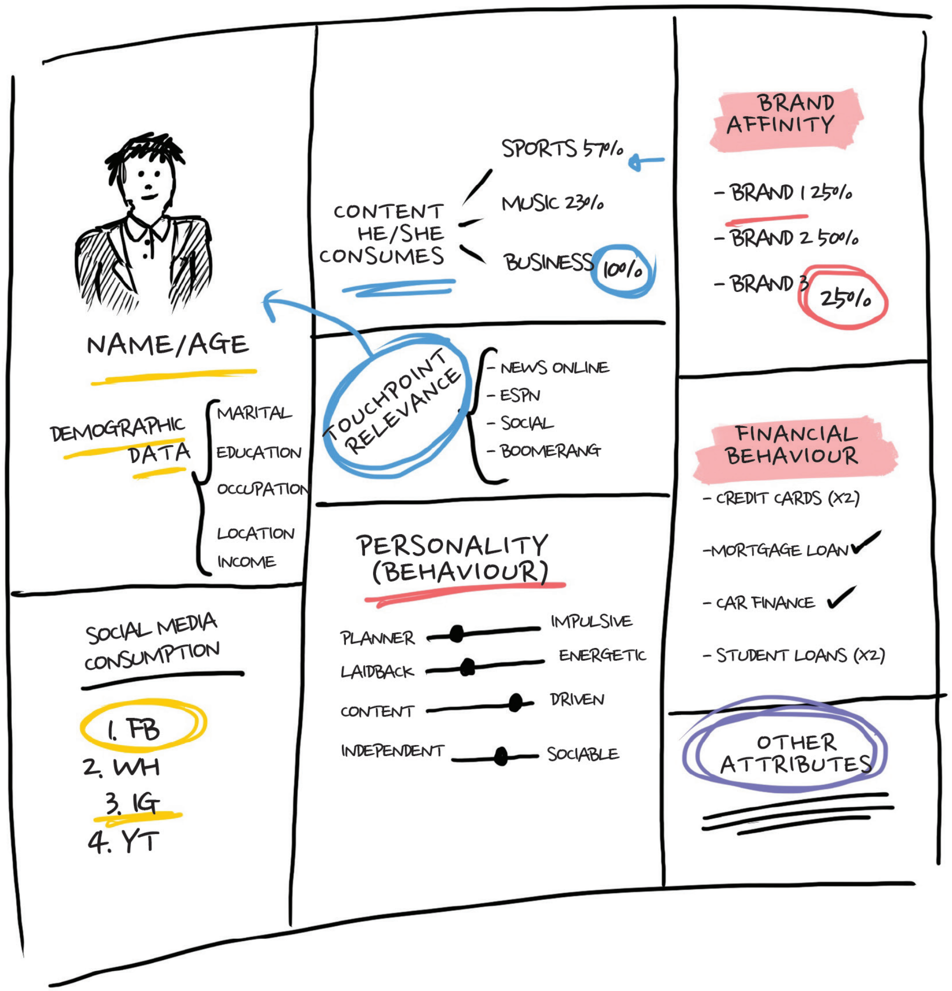
1. Another way to plan a digital strategy is by using the following seven dimensions: touchpoints; phases of the strategy; time per phase; budget per phase; geo-location/territories; audience tribes or archetypes and product or service maturity, (this will help you determine where to put more effort and budget).
2. Mapping your strategy in a Cartesian plane, will allow you to build a multi-dimensional view focused on performance per phase, audience and touchpoint.
3. On the X-axis, determine your strategy phases.
4. On the Y-axis, plot the touchpoints by affinity to the audiences you want to reach. I recommend you create/test at least three different audiences.
5. On the Z-axis, plot the market maturity or presence of your product or service. Something new or in a launch phase will be closer to 0 on both axes, and will require more of the initial stages of the strategy, (awareness and consideration work).
6. Determine the time of your strategy parallel to the phases. Avoid giving the same time to all stages; it rarely works.
7. Allocate a budget value per phase. This will allow you to correlate spending with the KPIs along the strategy execution.
8. Test this model on at least three different audiences and locations. This will allow you to deliver specific levels of personalisation.



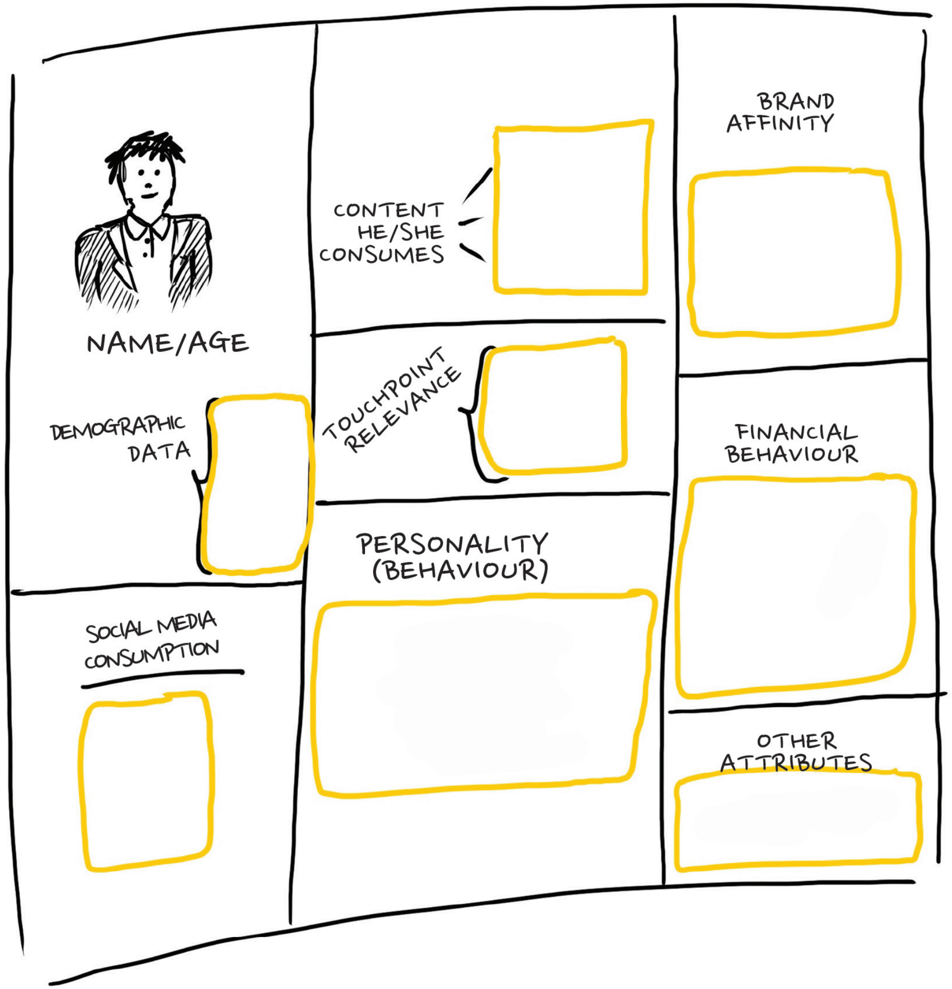
TEMPLATE

Fill in the model with your own data.

DATA-DRIVEN ARCHETYPES



1. Building archetypes of, "buyer personas" is vital for messaging, channel and targeting strategies in digital marketing; which ultimately will get you closer to your personalisation objective.
2. If possible, build four key audiences for your campaign with 2-3 variations, (sub audiences) within each.
3. Keep it as quantitative and accurate as possible. Data can come from your current consumer base, research or audience insights, tools (i.e. Metlwater's Audiense).
4. I recommend you look into seven clusters of data when building data-driven archetypes.
5. The first is Demographic Data: marital status, education, occupation, location, income, etc.
6. The second is Social Media consumption: where do they spend their time platform wise. This is important when building journey maps.
7. The third one is the type of content they consume by category. If possible, assign a value, as seen on the model above, (this is key for creative purposes).
8. Then look into what other touchpoints are relevant for this group, (online news, financial portals, OTTs, etc.).
9. An essential one is to map the archetype's personality under behavioural principles. This will also be key when executing creative work.
10. Then look into brand affinity with other vital categories, (i.e. automotive, technology, banking, apparel).
11. What's their financial behaviour? Do they have credit cards, mortgages, or loans? Are they planners or more impulsive buyers?
12. And conclude/recommend which touchpoints, incentives, key messages and conversion journeys you see each archetype sensitive to.



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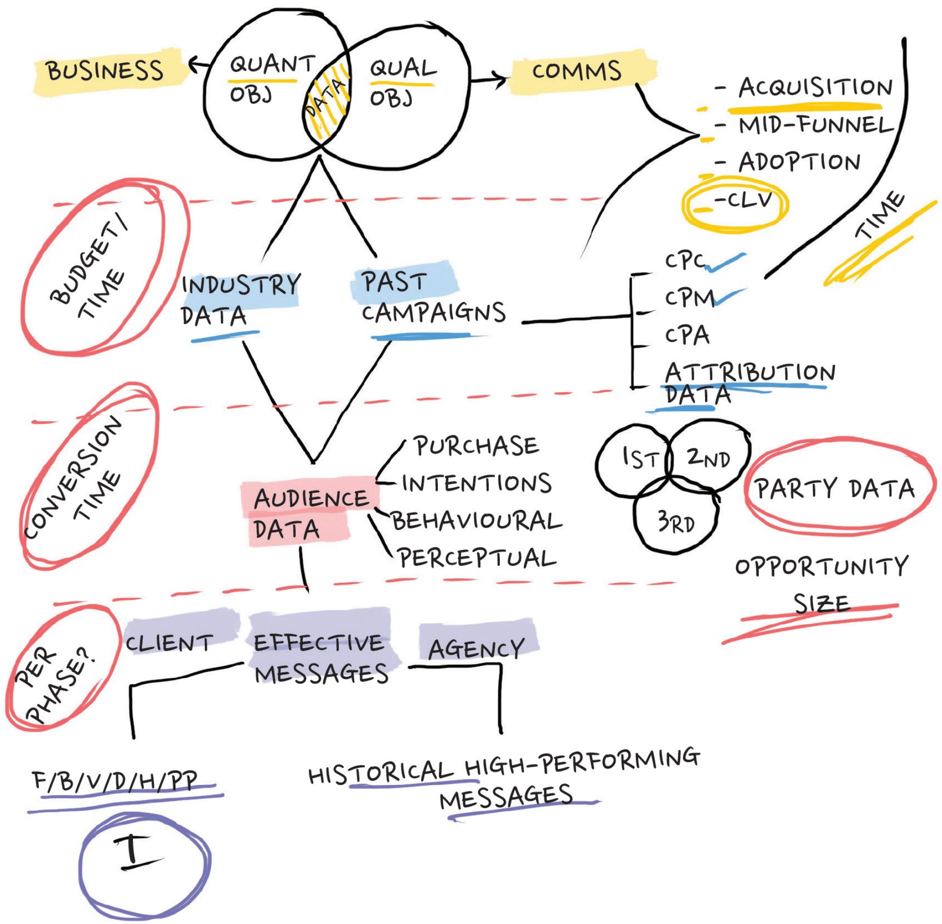
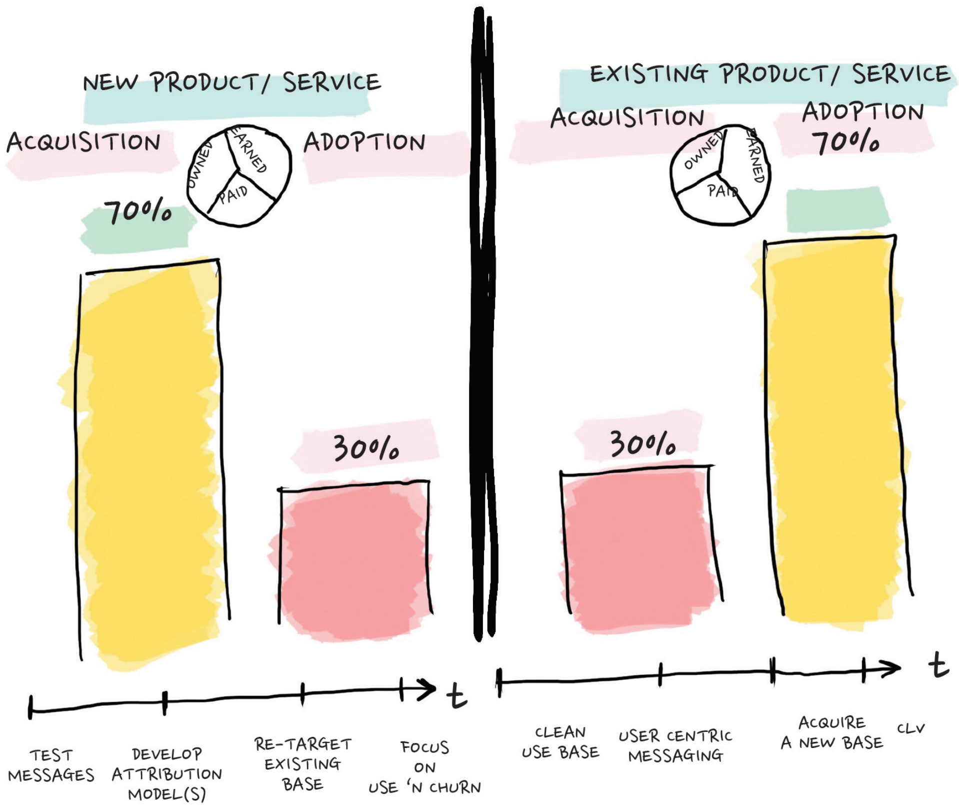


BRAND ECONOMICS BRIEFS

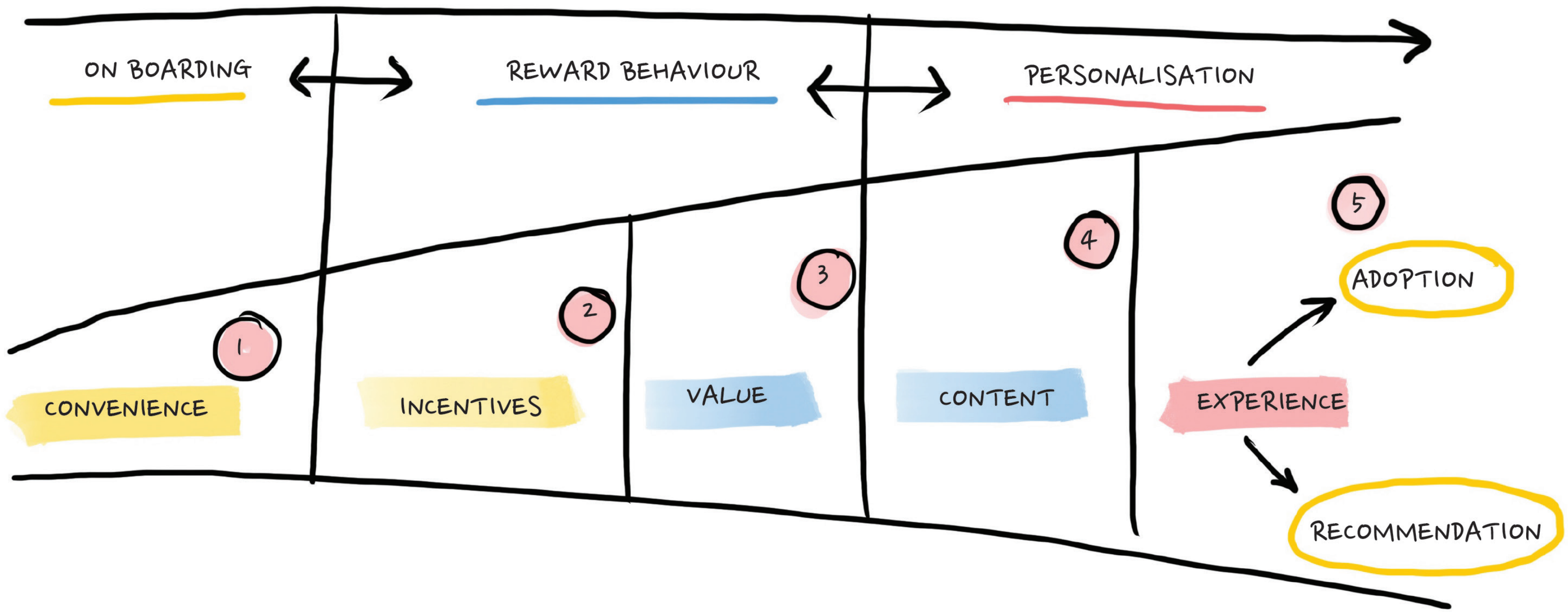
1. This model will help you build better briefs, by quantifying the opportunity with data.
2. Start by determining two objectives - Business (Quantitative) and Communication (Qualitative).
3. Then, determine what type of work the team needs to do. Is it acquisition, mid-funnel, adoption, CLV, etc.?
4. Determine the budget and time for the challenge to be delivered. Keep in mind depending on the job to be done, the budget needs to be allocated accordingly.
5. Gather past campaign or industry average data. CPCs, CPMs, CTRs, CPAs, Attribution Data, Conversion Rates, Bounce Rates, Direct Conversions, etc. This will give you a good point to start forecasting results. **See models #63 and 64.**
6. What do you know about the audience? Start with demographic data, but try to bring more behavioural, perceptual and purchase intention data; see **model #20**.
7. Quantify the opportunity. What can we get with the budget and time? Knowing this will set reasonable expectations for the client and the team. This can be quickly done with forecasting models.
8. Write down highly effective past messages based on data. If this is a first-time effort, look into the category and competitors' data. **See models #51 and 52.**
9. With all this information, you can determine performance, effective messaging, the strategy phase, what success looks like and when. And most importantly, you'll be able to hold your team and client accountable for the results you get.



ACQUISITION VS ADOPTION STRATEGIES

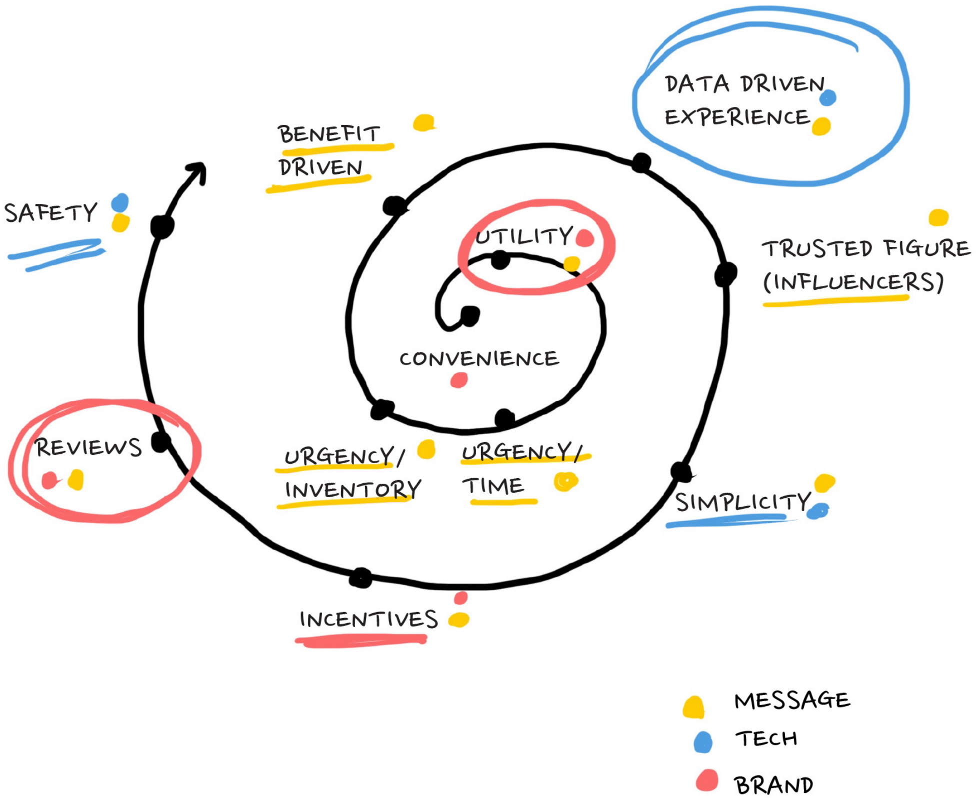
1. A common mistake in digital marketing is putting all budgets on top of the funnel work, not in adoption, audience behavioural change, repurchase or loyalty. This model will help you mitigate high churn or inactivity and low conversion rates.
2. First, determine if you are launching or reinforcing a campaign for a new or existing product or service. If it's technology or e-commerce, the education/onboarding phase is significant for conversions and adoption.
3. If you're launching/selling something new, you should break your investment strategy into 70% acquisition/downloads/new users and 30% adoption/recommendation/use/reducing churn.
4. If you only focus on clicks and top-of-the-funnel tactics, you're not converting mid-funnel prospects or building lifetime value.
5. Once the base of your users or visitors reaches a critical mass, revert the investment strategy to only 30% acquisition of new users/ downloads and 70% adoption or education/onboarding of the platform.
6. Cost per acquisition is a good metric at the beginning of all performance campaigns, but soon enough, you will have to start looking at active users, the share of wallet, user spend, sales and customer lifetime value. You will struggle with these later if you spend all of your budget putting users on top of the funnel.
7. Create clusters of your audiences and the messages they engaged within the first interactions, (clicks, downloads) and retarget them with contextual messages to make them come back and transact. Avoid generic messaging.

USER ADOPTION FRAMEWORK

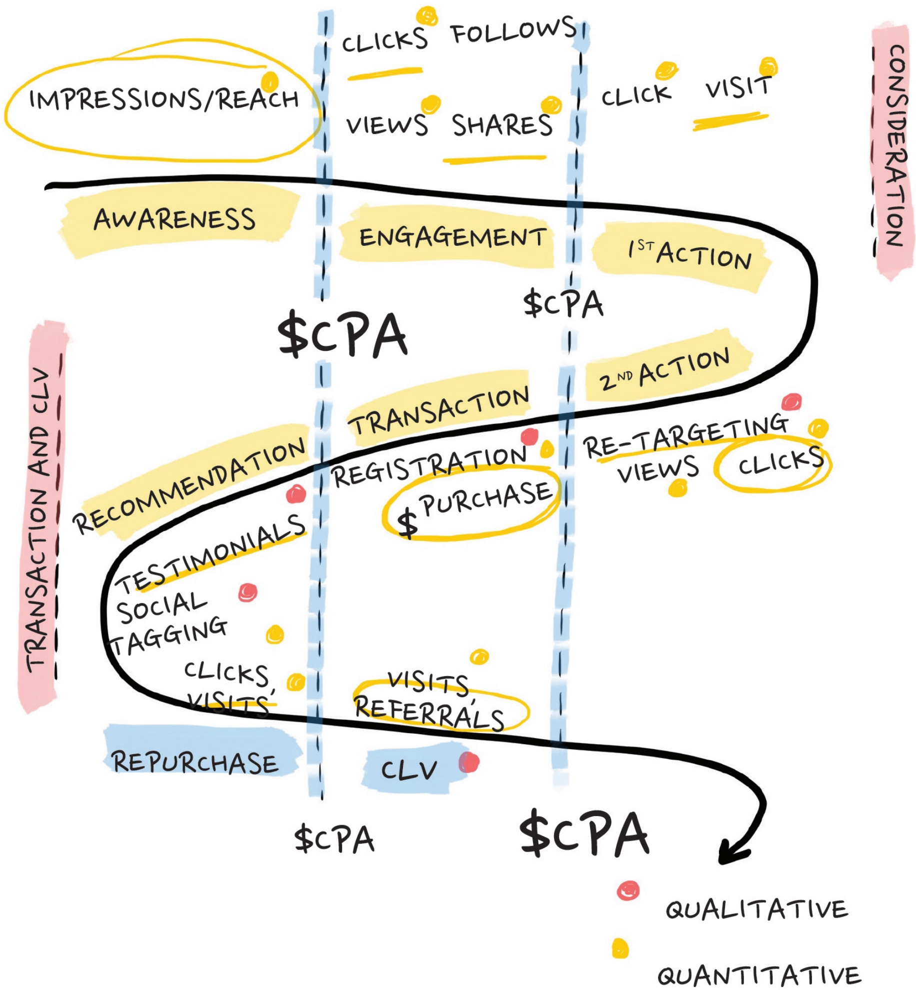


1. Users' adoption of new technologies/platforms is one of the main challenges marketers and technologists face.
2. Start by delivering a clear onboarding strategy: How-to videos, step-by-step animations, infographics, and lists. Don't make any assumptions about what your users know or don't.
3. Focus on convenience in the early stages. We live in a fast-paced world where experience is the battleground and convenience is the primary weapon.
4. When your users start interacting with the property, reward their behaviour constantly; which is one of the best practices to keep users engaged.
5. Collect behavioural data and shape new experiences. This is translated into value and later in adoption.
6. Content within the property and peripheral touchpoints will help you keep your users engaged and build a habit.
7. Once the experience is tailored to your user, you will accomplish adoption and habit of use. And if that experience is good, inevitably, the users will recommend it.
8. To boost recommendations, use incentives.
9. A quick note to remind you to focus on onboarding content and experiences at the beginning until a habit is built. This is often overlooked, making our work more difficult and expensive. For some content and format ideas, **See models #38, 39 and 40**.

THE CONVERSION DRIVERS

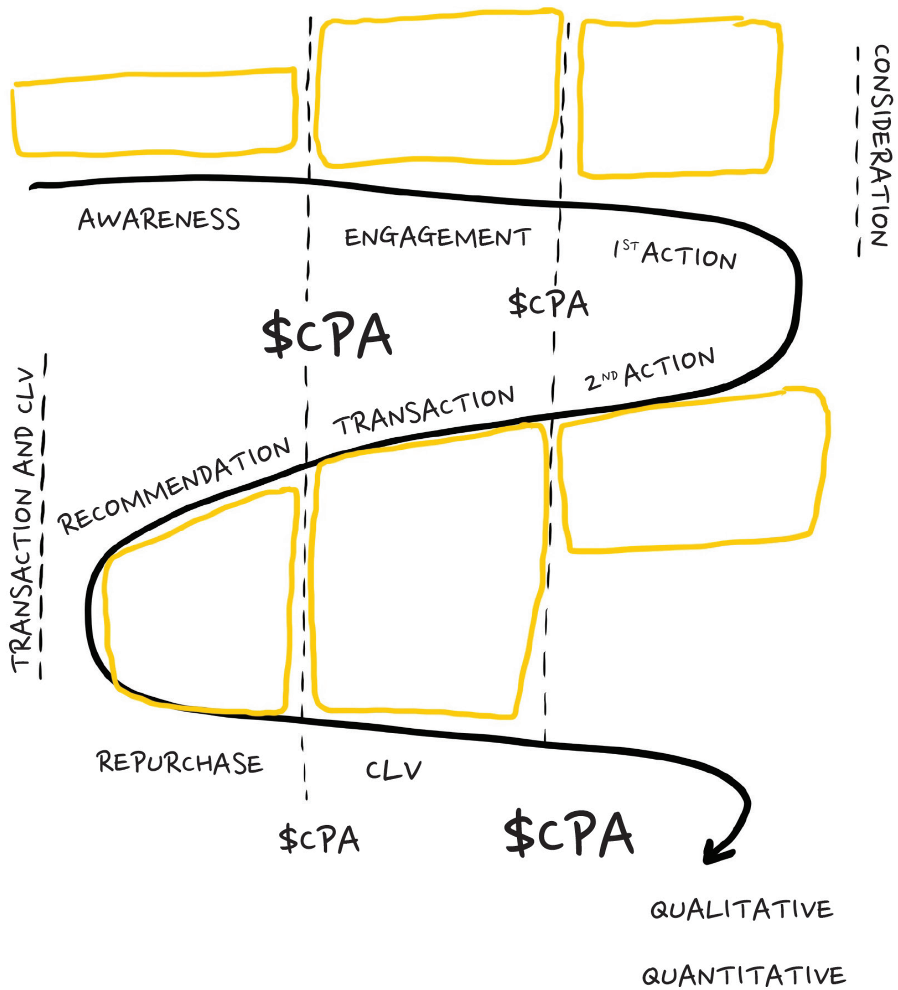


1. When working in performance marketing and complex e-commerce strategies, we have noticed audiences react more to specific drivers, depending on their stage in the journey and the category. This model will explain some of the best-performing ones in our experience.
2. When looking at all the conversion drivers, it is important to assess which ones are delivered in the message, the platform(s) or technologies used, and in the brand.
3. Utility and convenience both in the message and the technology, used to take the user to convert, are very effective.
4. Urgency/time is perhaps the most important of all. The fear of missing out (FOMO) for digital audiences is a key driver for conversion.
5. Urgency/inventory availability: Use geospatial data connected to your inventory if applicable and produce messages that tell people the availability is limited. The results will speak for themselves—another example of FOMO.
6. Benefit-driven messages, (rather than product ones) have also proven to perform better across multiple industries.
7. Data-driven experiences from a tech point of view: Personalised recommendations, time-relevant follow-ups and good customer lifetime value strategies consistently out-perform generic messages.
8. Trusted figures like influencers or opinion leaders, drive conversions if they are aligned with the brand's key message and strategy. **See model #43**.
9. Experience-based incentives: Like faster fulfilment, pickup options, same-day delivery, rewards, testing new products/services, and exclusive benefits. **See models #36 and 44**.
10. Reviews from other buyers: The stranger with previous experience is one of the main drivers in e-commerce platforms. One bad review is enough to make users hesitate, even if they don't know the other buyer.
11. Emphasis on security of platforms and transactions is also key to consumers completing the purchase journey or registering online.



CONSUMER INTERACTIONS MAPPING

1. This model helps us visualise all our possible consumer interactions in a conversion journey.
2. Note, each stage of the journey contains different interactions.
3. An important point to keep in mind, is all these interactions are quantified differently, and some of them are quantitative, (i.e. Impressions are usually in the millions, clicks in the thousands, conversions are less, and reviews are qualitative).
4. The purpose of capturing all these interaction values per phase, is to map the most effective roads to conversion by audience clusters.
5. The journey doesn't end in the transaction. We enrich the experience after the transaction to build customer lifetime value. **See model #62**.
6. An important metric to remember when working with mapping models is the 1% of the 1%. For instance, the average CTR on CPM models is close to 1%, the same on Facebook Ads and final conversions on lead generation or e-commerce strategies. **See model #4**.
7. So, when mapping our interaction models, we always quantify and be at least above 1% (industry average), in all stages to ensure the strategy is executed correctly.



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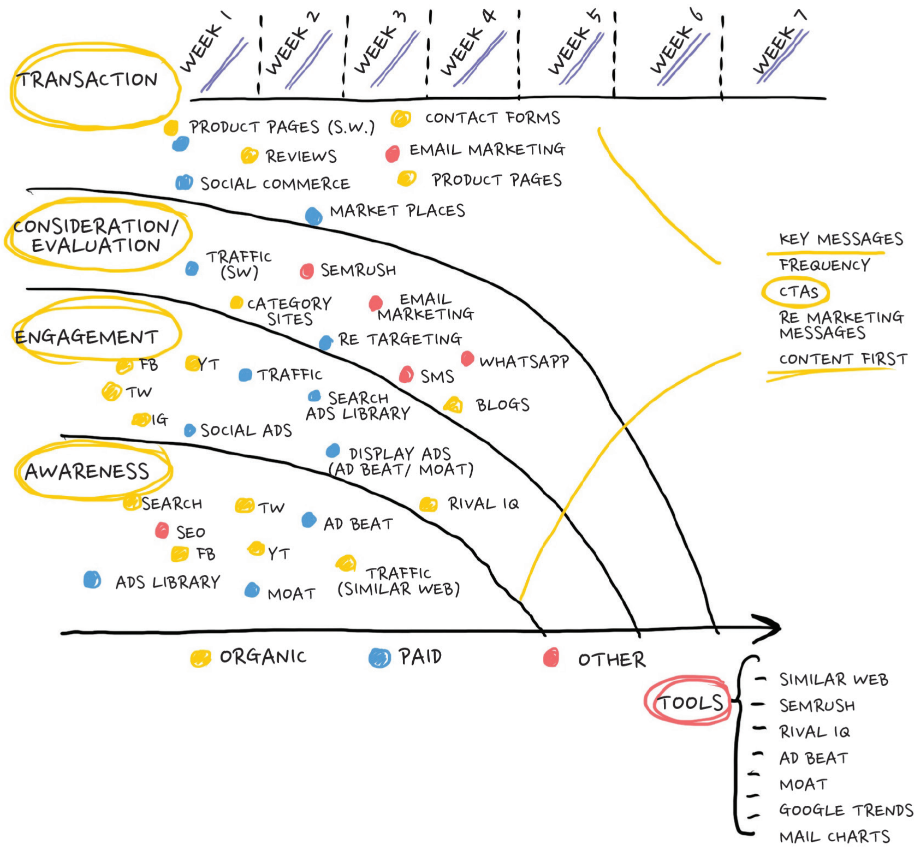
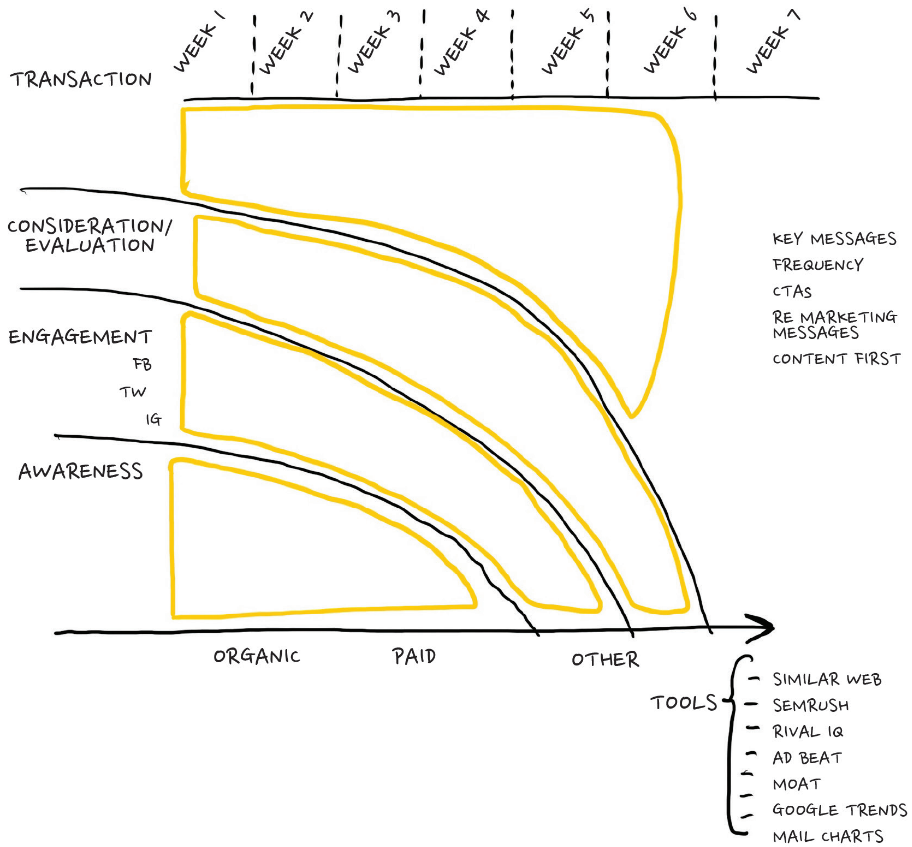
SIGNALS AND MESSAGING MAPPING



1. This model was built to list and quantify as many digital touchpoints as possible to refine each of the stages, in the conversion process with freemium tools.
2. Determine the phases you want to analyse, (awareness, engagement, consideration, transaction, etc.).
3. Usually, for awareness mapping, we look into social media organic content and organic traffic to websites (Using Similar Web). For paid assets, we look into AdBeat to monitor the quantity of live paid assets and key messages. We also look into the share of search using Google Trends.
4. For engagement, we look into Share of Voice among the industry and ourselves, best-performing content, paid social assets (Facebook Ads Library) and web traffic (Similar Web).
5. For consideration and evaluation, we monitor specific product/ service pages' traffic and sources (Similar Web), remarketing messages and formats, email marketing strategies (Mailcharts), paid search strategies and keywords (SemRush), content strategies on blogs and other efforts like chatbots.
6. Finally, for transactions and recommendations, we look into product pages' traffic sources, contact forms and ads leading to them, reviews on marketplaces, social commerce content, email marketing, customer reviews and ads directing users to conversion points.
7. I recommend monitoring these weekly. Start the journeys yourselves to see the evolution of messages and retargeting strategies. Depending on the category's conversion cycle (time), you'll be able to map how consumers convert in a given industry. Note, the path to conversion in the industry is different to tech, apparel, etc.



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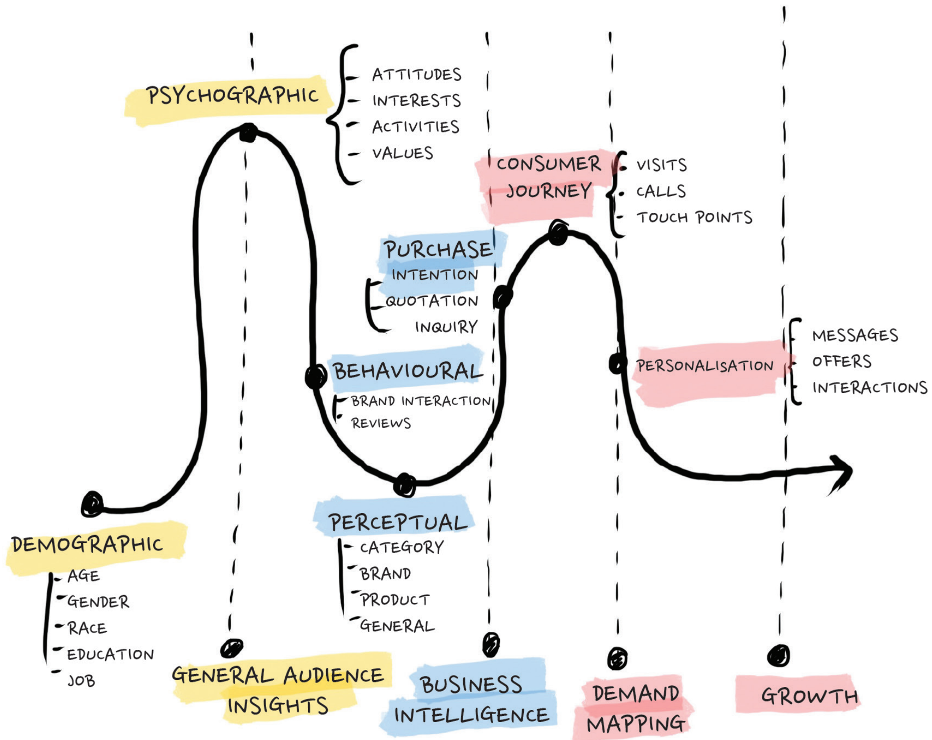
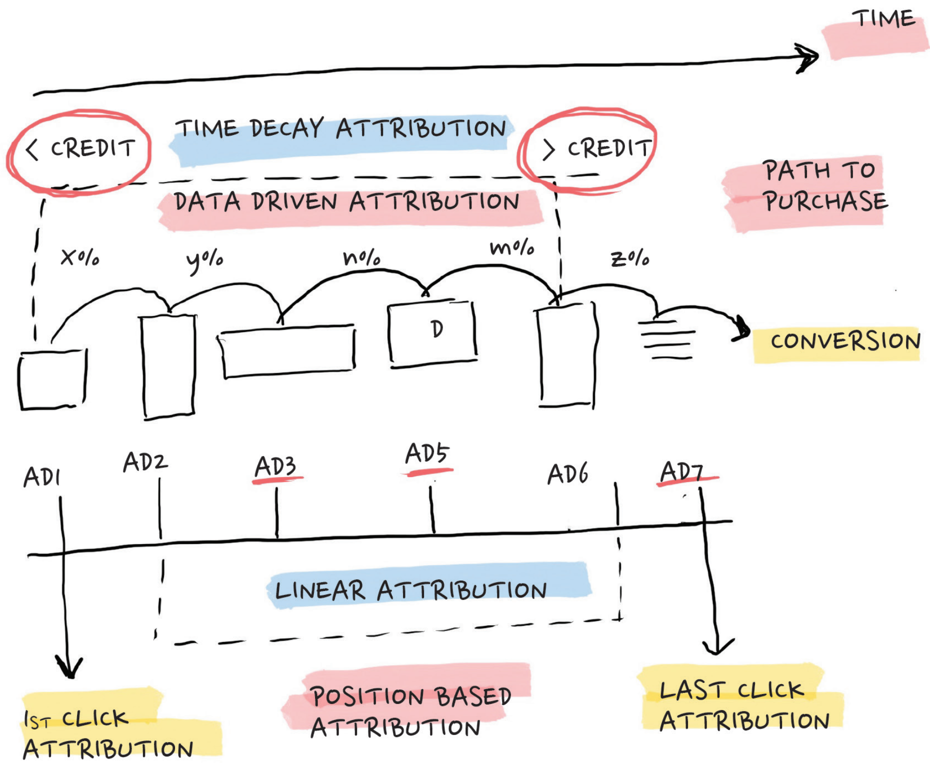
FROM DEMOGRAPHIC DATA TO PERSONALISATION

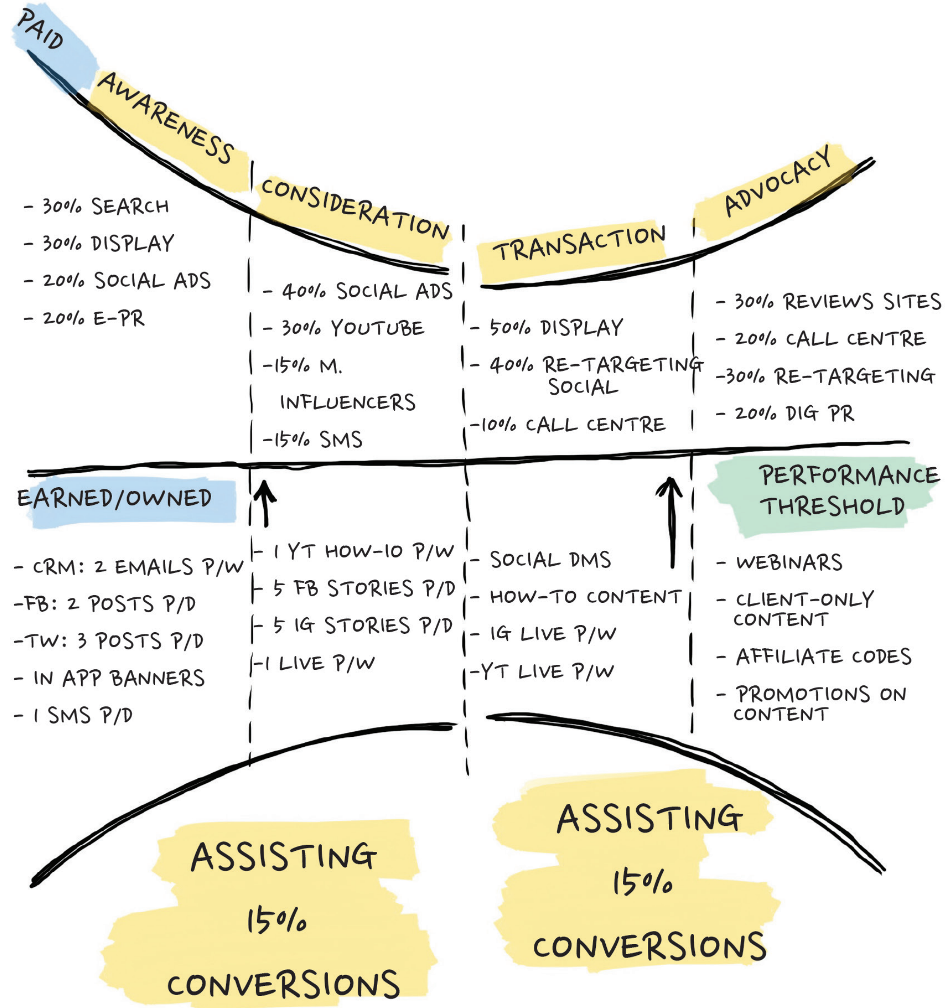


1. There are different types of classifications when looking at data. We have been on a journey for the last few years from general demographic data, to creating dynamic consumer journeys and personalised experiences, fuelled by data.
2. Historically we have been working with demographic signals, (age, gender, income, marital status, etc.). Still, those signals are limiting because they put our audiences in the same buckets, and it's hard to achieve any level of personalisation.
3. We then moved into psychographic data. It is harder to get, but more available, signals like interests, activities, and attitudes help us better define our audiences, but it still is limiting.
4. After psychographic information, we moved to behavioural data. And here's when things get interesting, because we can see how consumers react to different stimuli in their lives, what they do, what motivates them, when, etc.
5. Looking at perceptual data helps us answer critical questions, because we can then correlate how customers interact with categories, brands, and products and how they perceive them in the purchase cycle. Here's when we start mapping the possible demand.
6. Purchase intention allows us to look at conversion probability at the bottom of the funnel/end of the wheel. Sets, like price inquiry, price browsing, and quotation forms also give us an idea of how to estimate conversion costs, custom attribution models, and overall investment strategies.
7. Having all the previous data signals will allow you to build multiple consumer journeys where you can map out the possible interactions, touchpoints, and to which key messages an audience could respond. Build at least three of these journeys per phase and test effectiveness with attribution models **(See model #21)**.
8. Once you see what works for each cluster, you can craft personalised experiences based on the creative engineering principle explained in **models #28, 29 and 30**.



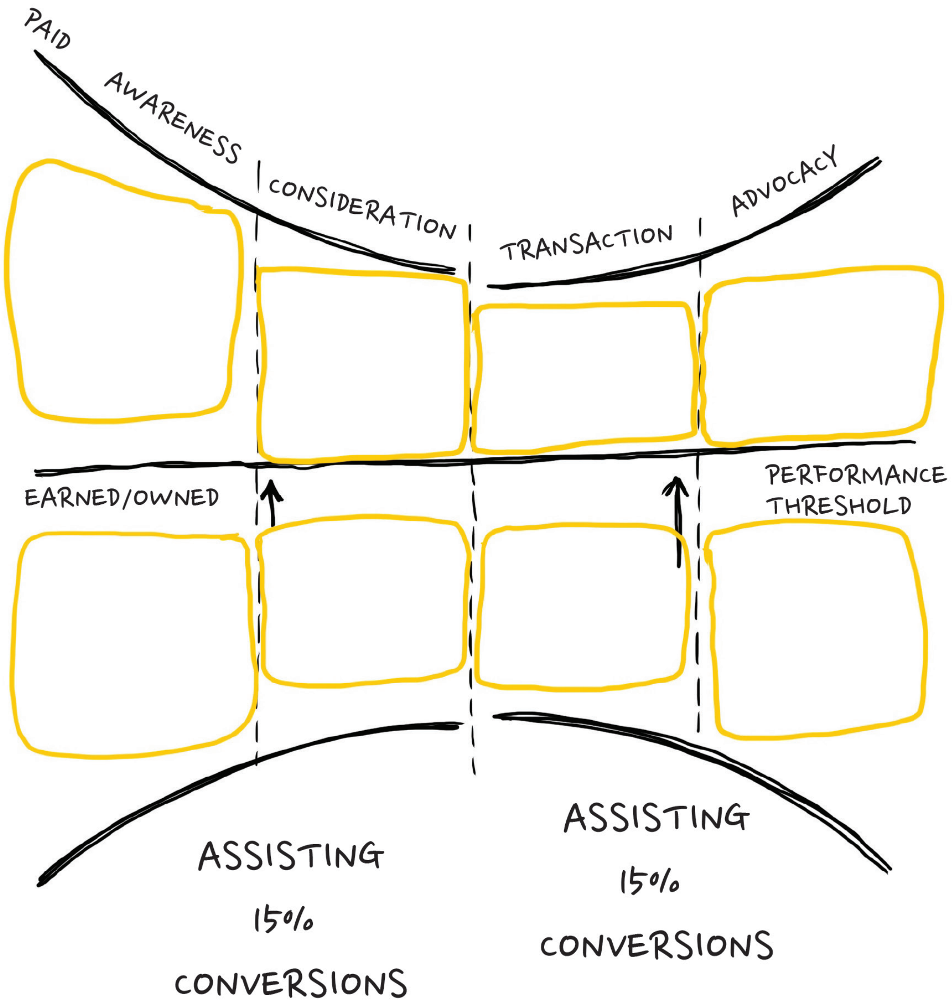
ATTRIBUTION MODELS

1. Attribution models help us identify the value and weight of all interactions in a consumer's journey. Users go through different touch points before deciding and giving credit to the first or last interaction, is usually problematic when looking at performance data.
2. There are different attribution models: first click, last click, time decay, linear, position-based, and data-driven.
3. The first and last click are self-explanatory. They attribute the conversion to the first and last user interaction.
4. Time decay models give more credit/weight to interactions closer to the conversion time.
5. Linear models give equal credit/weight to all the interactions.
6. Position-based models give 40% credit/weight to the first and last interaction, and the remaining 20% is distributed across the rest.
7. Data-driven attribution, (in Google) uses machine learning to give credit to the interactions that caused the conversion. It is a dynamic and more accurate model.
8. We're building our attribution models to correlate not only the source of the conversion, but the configuration of the chain of messages that drove the users to it. For example, the first message was the mix of Benefit 2 and Incentive 4, but we retargeted with Feature 1 and Incentive 1 and so on. **See model #31**.
9. Attribution is essential when correlating the creative/messaging journey and the touchpoints that drove a user to convert to the actual interactions. Once we map those two and analyse the initial segmentation, we can optimise performance strategies.



DEMAND GENERATION ECOSYSTEMS

1. The importance of integrating touchpoints is explained by a mathematical approach in this model. Often digital marketers operate different touchpoints in silos, sacrificing performance and lifetime value.
2. This is another approach to channel planning in digital marketing, with a strong focus on integration and percentage distribution of efforts.
3. First, determine the phases of your demand generation strategy. You can use the wheel **(see model #11)** or a bowtie, as used here.
4. Divide each phase into two groups, (Paid touchpoints and Earned/ Owned touchpoints).
5. Assign a percentage to each channel per phase, (this is to determine how much budget, frequency and number of executions you allocate to them).
6. Assign a performance threshold per phase, (what is acceptable and what is not). This will come from your KPIs. Remember the 1% of the 1% rule in display and conversion models, **(see model #4)**.
7. Earned and owned channels should assist at least 15% of your conversions per phase, if they're set up correctly.
8. Test different messages per phase to avoid one of the most common mistakes in performance marketing: retargeting audiences with the same initial message and repeatedly ignoring the role of the touchpoint itself.
9. Adjust the initial distribution according to its performance after 12 days. This is a healthy time to let the paid algorithms perform and learn.



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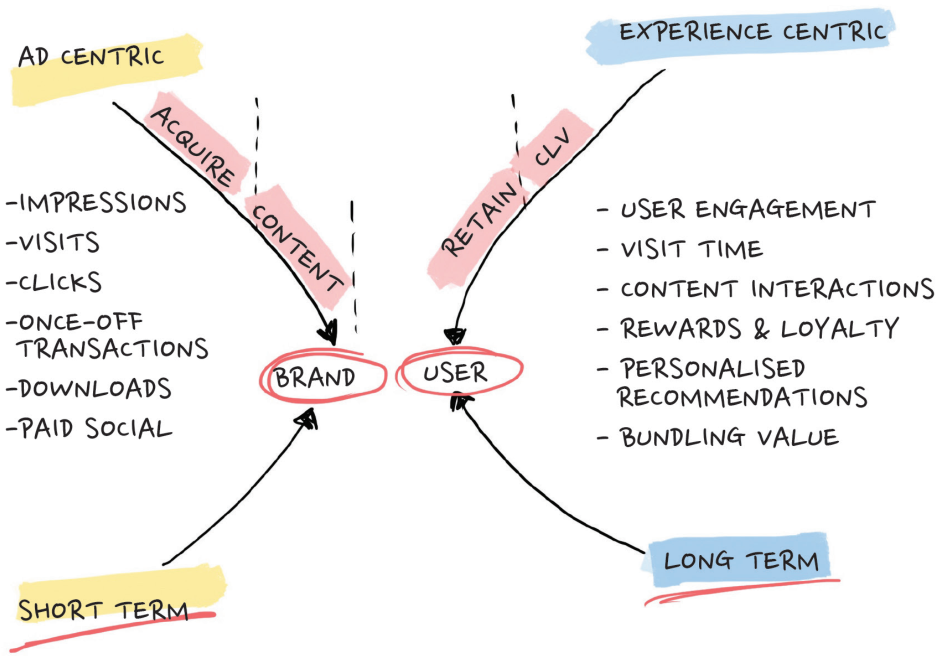
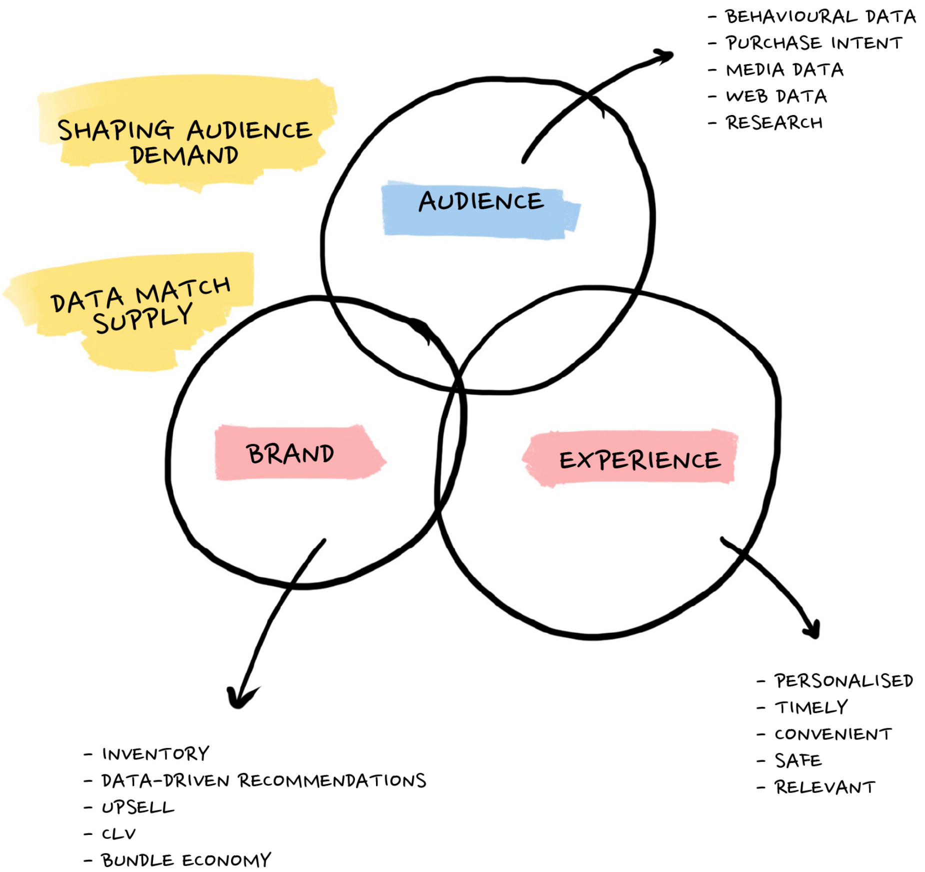
AD CENTRIC VS EXPERIENCE CENTRIC

(THE SUBSCRIPTION FRAMEWORK)



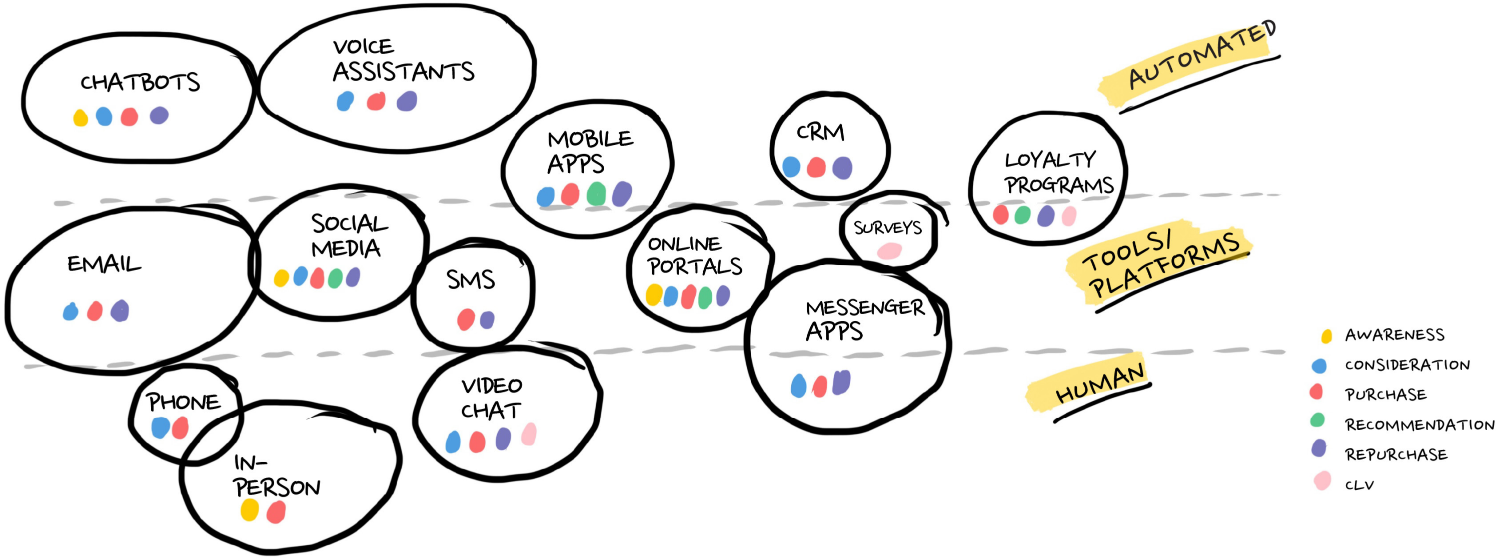
1. What is on the left of this model, is what is commonly done; what is on the right, is what should be done.
2. We are entering a subscription economy, and it's reshaping how we plan, execute and measure digital strategies.
3. An ad-centric approach is not sustainable, because it focuses on superficial metrics and once-off transactions, (see left of the model). They're also brand-centric and depend primarily on investment at all times.
4. Long-term strategies in the subscription economy are experience and user-centric.
5. They're designed to understand what drives a user to perform specific actions and by using data graphs, (or data in motion) to deliver better recommendations, as a consequence of previous user engagements.
6. It is vital to track and cluster every user's action, to ensure constant value in what is regularly offered to them.
7. Interactions must be rewarded, (not necessarily with money or incentives), but with value to ensure a habit is built.
8. The experience is dynamic and shaped to the users' preferences. This needs to reflect in the property itself, CRM and content efforts.
9. I recommended you measure behavioural metrics rather than basic marketing metrics.
10. An acceptable churn rate in subscription platforms is 4-7%.



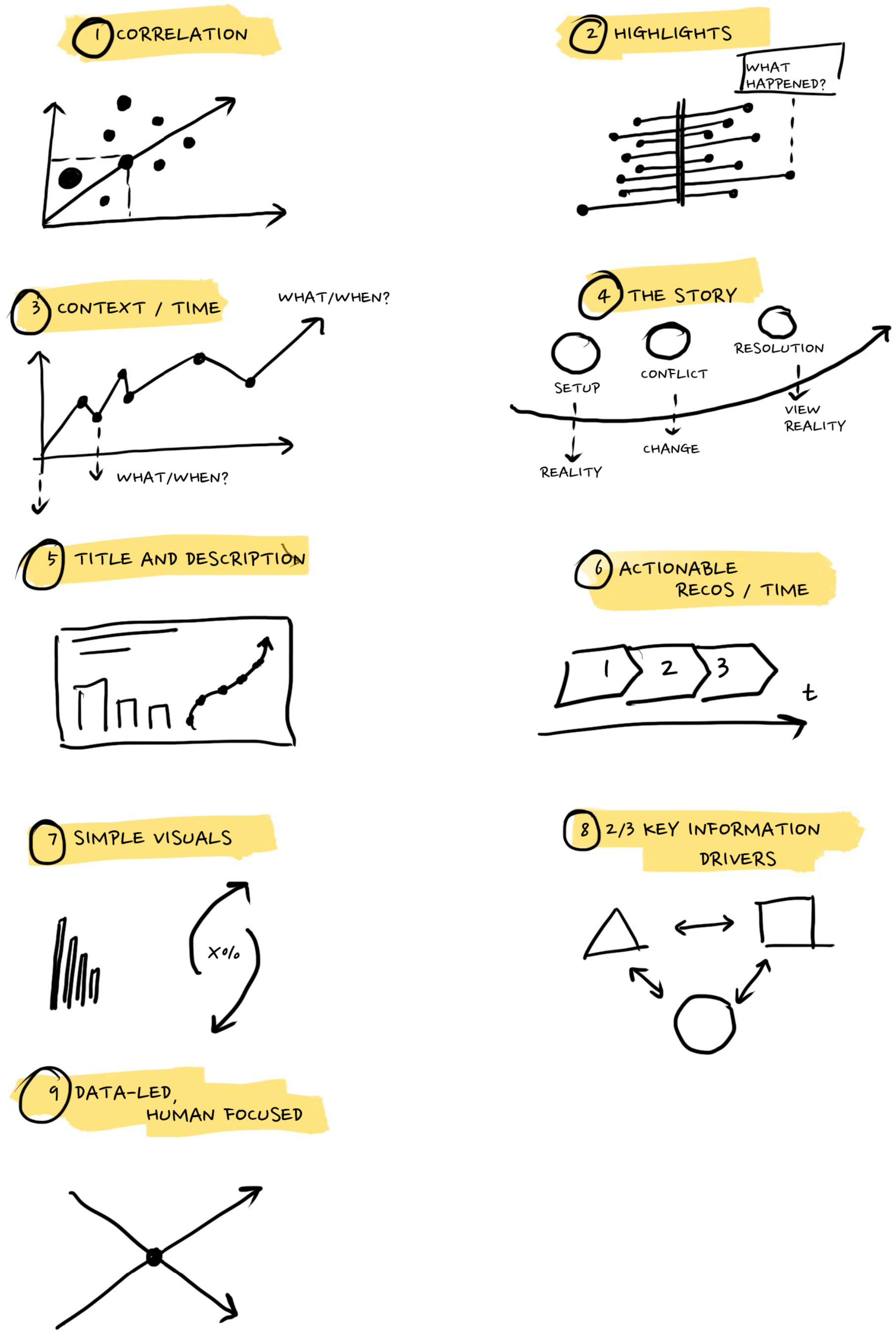
RESHAPING DEMAND MODEL

1. Start by mapping your available inventory and high-price/value products or services and correlating it to location availability, (if applicable).
2. Analyse your audience data regarding demand and purchase intent, (by looking at search, media, web and research data).
3. Quantify the demand by product or service.
4. If a product/service is unavailable or you want to push another one, recommend it contextually to the user. We call it the next best thing.
5. Another way to shape demand with data is by creating specific bundled recommendations.
6. Deliver a personalised data-driven experience; even if you don't have product availability. Users appreciate recommendations close and relevant to their initial interest.
7. Shaping the demand based on available supply using audience data, brand recommendations, and a good experience will turn into profit and value.
8. Remember, most people will eat the Margherita pizza even if you give them 20 other options. Use this principle to shape your demand strategy.

CUSTOMER SERVICE ECOSYSTEMS



1. As digital experiences become more transactional and value-driven, we must be more present and use technology to deliver the best experience and service, possible.
2. In this model, you will find three big categories of solutions when looking at customer service touchpoints: Human, tools and platforms (assisted) and automated.
3. A recommended approach to what platform or touchpoint to choose in a given phase, is to assess the common customer questions and how many there are per phase.
4. If there's a possibility to cluster questions and map them in a decision tree, chatbots, voice assistants and automated tools can help alleviate the role of human interactions down the journey.
5. It is essential to design ALL experiences with a customer service purpose, to answer questions and assist a brand's conversion goal.
6. For example, when planning your social media strategy, have a pillar dedicated to answering specific questions in the form of content.
7. Also, do not duplicate efforts. If you have a chatbot or a video platform to engage with your consumers at the end of the consumer journey, have some resources dedicated to those platforms with conversion KPIs, instead of serving everyone everywhere.
8. The same principle applies when consumers are in the awareness or consideration phases, and do not spend too much time or energy answering common questions with human interactions, where automated tools would help.
9. An excellent platform to look into is Twilio for messaging, video and email automated customer service.
10. And for custom AI voice assistants, VoiceFlow doesn't require any coding experience, and you can map out the interactions yourself.

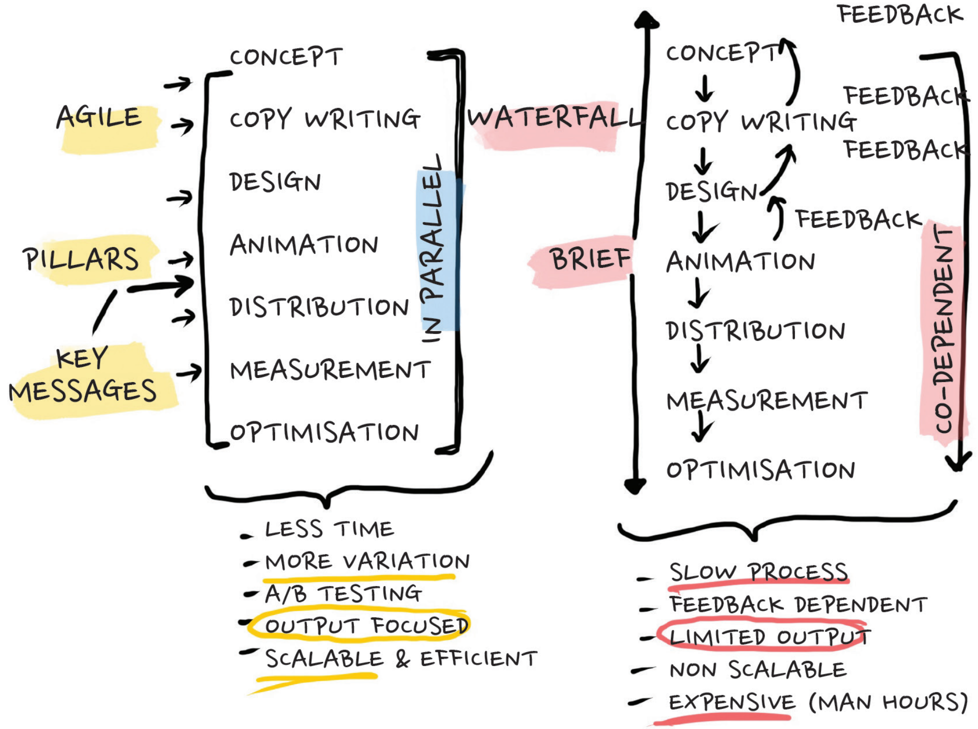


DATA STORYTELLING PRINCIPLES

1. Data storytelling is like any other form of storytelling. It needs an introduction where you describe the context. A middle where you discuss the tension or challenge and a conclusion/next steps / recommendations.
2. Here are nine principles when exploring data storytelling.
3. The first one is the power of correlation: It gives the viewer an idea of why things are happening and how dependent or independent variables are.
4. Highlight findings on your story/graphs and write in a textbox why it is a highlight to your story.
5. Add a function of time to your analysis. If there are peaks or valleys, select them and describe what happened, when in the function of what?
6. Use clear one-line titles and descriptions that give context to your graphs.
7. ALWAYS conclude and give recommendations with forecasted results over time. **(See model #63)**
8. Be very simple with your visuals; don't try to highlight too many things and make them too busy, (I'm guilty of this).
9. Your graphs should focus on a few essential information drivers.
10. You are analysing data, but humans will perform the decisions and actions. Tell a human story powered by data.

CHAPTER 3

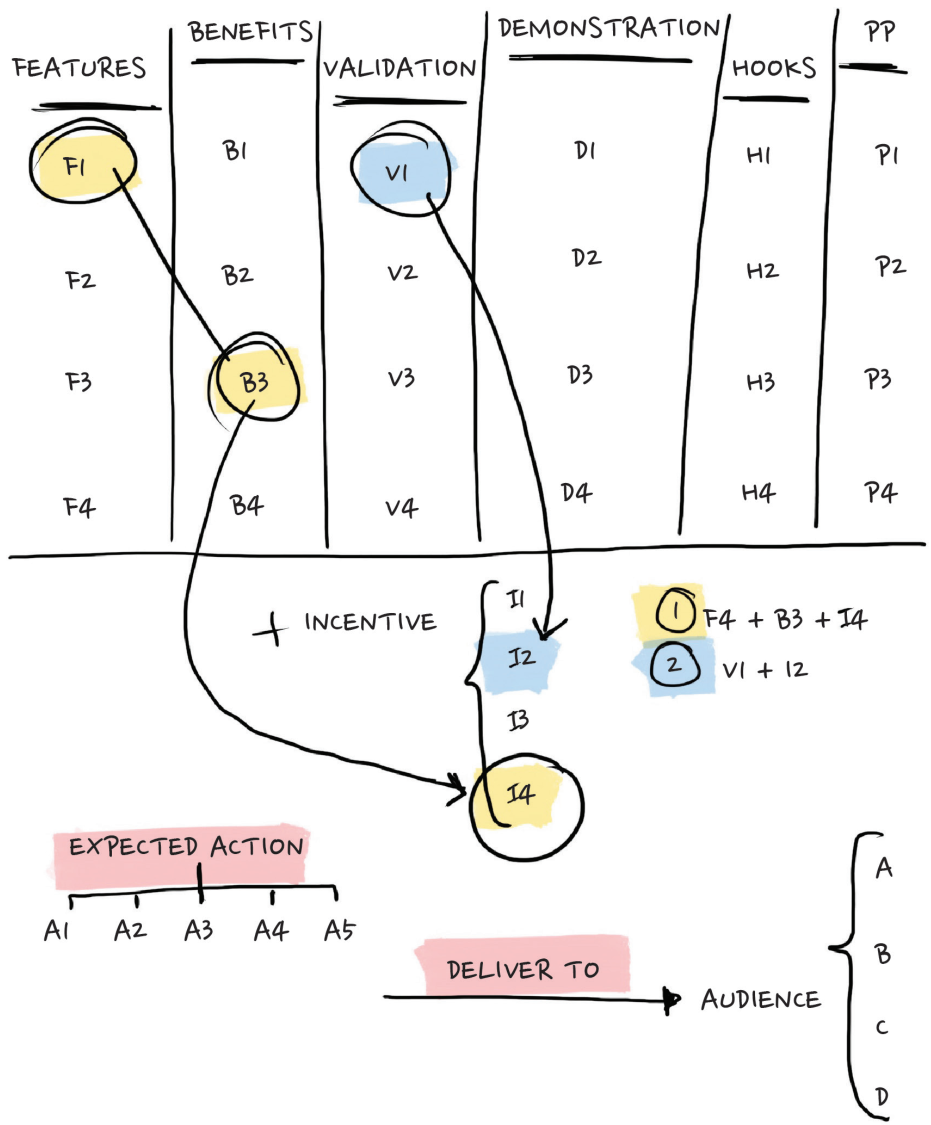
MODELS FOR DATA-DRIVEN CREATIVITY



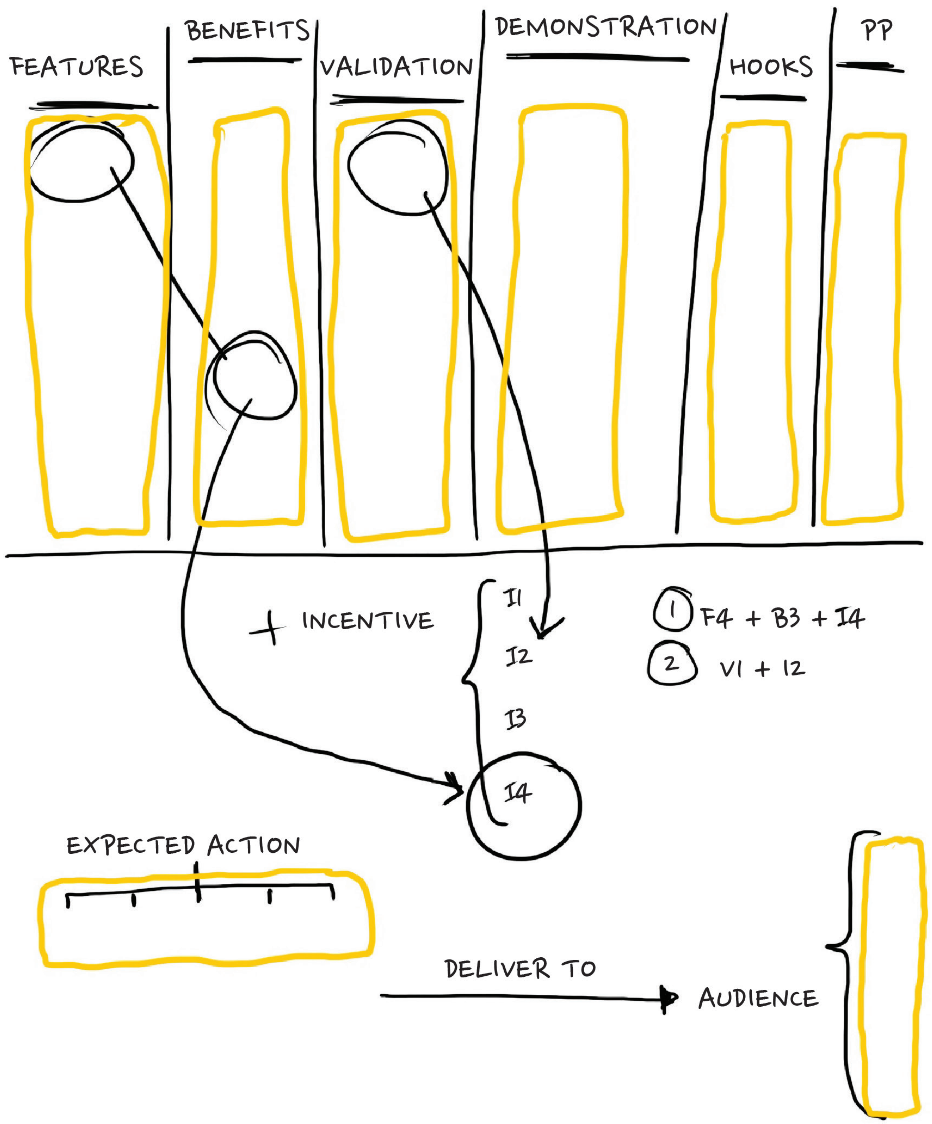
AGILE METHODOLOGY FOR DIGITAL PRODUCTION

1. This model changed how we traditionally produced assets and allowed us to be faster, scale up and better at it.
2. Traditional traffic processes at agencies, start with a brief that goes to strategy, concept, copy, internal and client revision, design, revision, etc. And we don't have time for that anymore.
3. Also, the operational costs of working this way are too high due to multiple client and internal revisions, and all the parties involved.
4. This process unlocked a changed way to produce differently, inspired by agile and lean methodologies.
5. When receiving a brief, determine 3-5 key messages or work under the creative engineering seen on **model #28**.
6. Then, develop a modular copy under the structure seen on **model #29**.
7. Same with designers and animators. Design templatized assets. You will be able to place the copy and scale up.
8. All of this happens simultaneously and in sprints; with no client or internal revisions other than QA.
9. Once all the assets are produced under different pillars, you can share them with the client, (you can produce as many as 300 options in 24 hours).
10. More details follow.

CREATIVE ENGINEERING - MESSAGE CONSTRUCTS



1. In the following three models, an approach to digital production, I call it Creative Engineering; and it is a great system, not only to be faster and better, but to be more efficient and data-driven.
2. When working on a brief, list the following items related to the product or service you will be creating assets for: Features, benefits, validation, (from customers or markets), demonstration, (market evidence), hooks to buy, problems and pains it solves and which incentives you have, to complement the message.
3. The principle of creative engineering, is to write key messages by mixing one or two of the above with an incentive, several calls to action and measuring performance.
4. Not all products or services will have all six categories, but if you can list four categories minimum, (4 items on each of them) and five incentives, this will give you a lot of options to assemble later, as seen on **model #30**.
5. Depending on the user's expected action, (determined by your strategy, as seen in **model #11**), you can list multiple calls to action for each category and map out a message journey, as seen in **model #31**.
6. Test multiple message configurations with different audience clusters, (we've seen unexpected positive outputs from these experiments). Small investments and lots of experimentation will reveal unexpected, but positive results.
7. The principle of creative engineering, applies to any asset in advertising that can be measured and attributed to specific consumer action.
8. Creative engineering will help you get into a creative optimisation space, done manually or by training machine. You will discover models to predict the most effective creativity, as the results start coming in.
9. When listing all of the above, and interchanging messages with incentives and calls to action, you will soon get an understanding of what specific audiences react to. Which also will allow you to optimise your messaging and placements.
10. For copy assembling details, see the next model.



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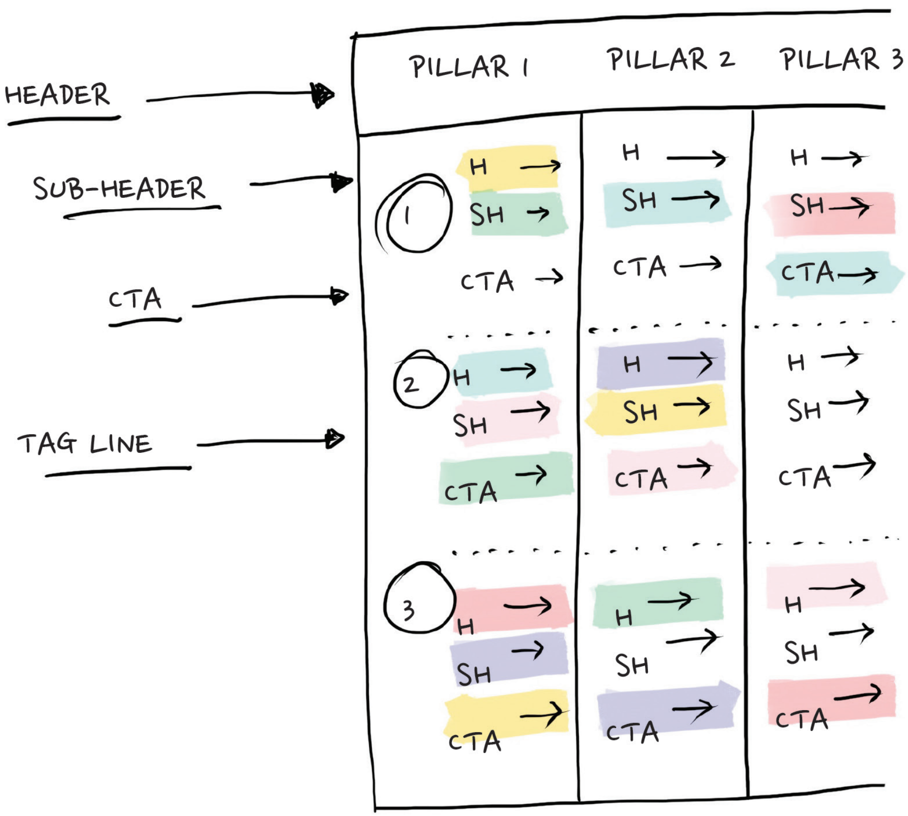
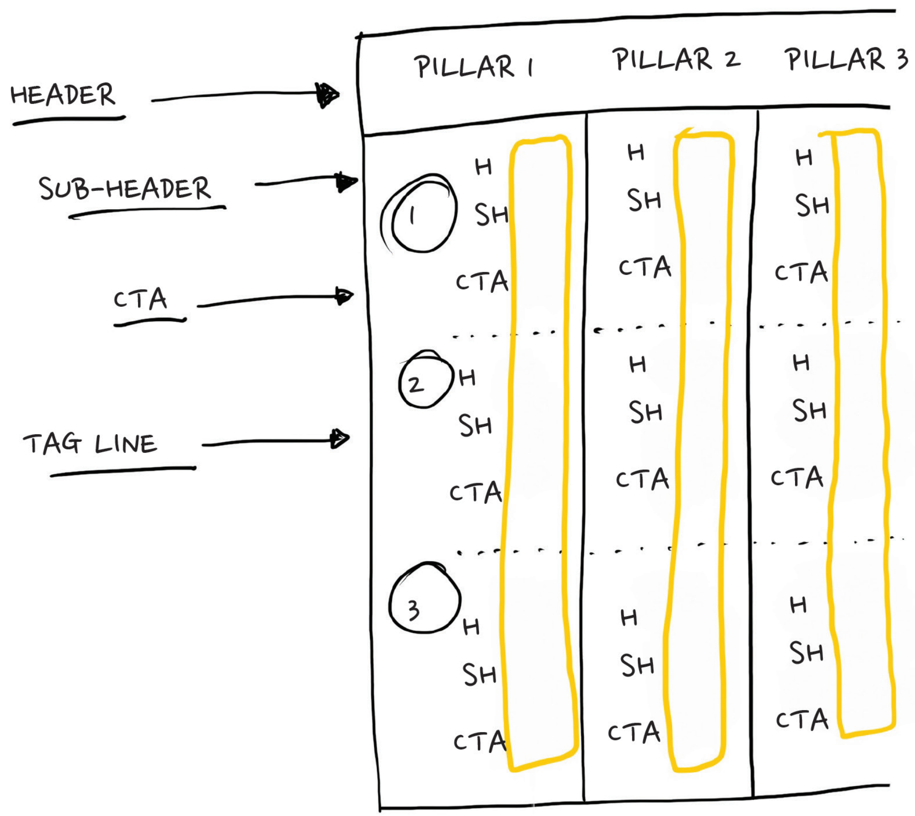


CREATIVE ENGINEERING - COPYWRITING AT SCALE

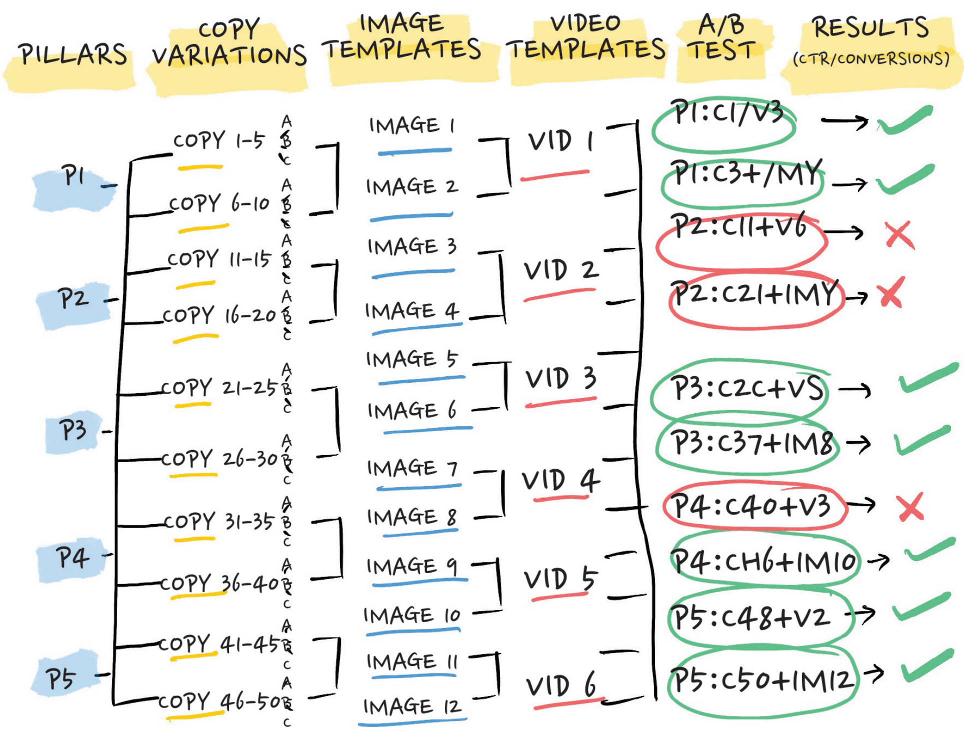
1. Once you determine your key messaging and incentives matrix, as seen in the previous model, you can start writing copy under a specific structure, so all the lines per category can be mixed. This will give you multiple variations to test.
2. The structure of the copy must have three variable components and one non-variable component, like this: Header, sub-header and call to action as the variables, and brand tagline, (if applicable), as the non-variable.
3. Write up the header copy for each of the pillars, then the sub-header copy and finally, some calls to action, (Explore, See more, Buy now, I'm interested, etc.), making sure they work in all possible variations when mixed.
4. You can start with nine lines of copy under three pillars, (three each), but you will have many more variations as you mix up all headers with sub-headers and calls to action.
5. Label all the components as seen in taxonomy **model #53**, for creative optimisation and performance purposes.
6. Apply all copy variations to multiple backgrounds and creative configurations for creative A/B testing, as seen in **model #65**.
7. With this framework, you will save hours of writing copy, and you will be able to produce creative assets at scale, under a data-driven strategic framework.
8. The following model explains the assembling of assets, Copy + Image/Video/HTML/GIF.



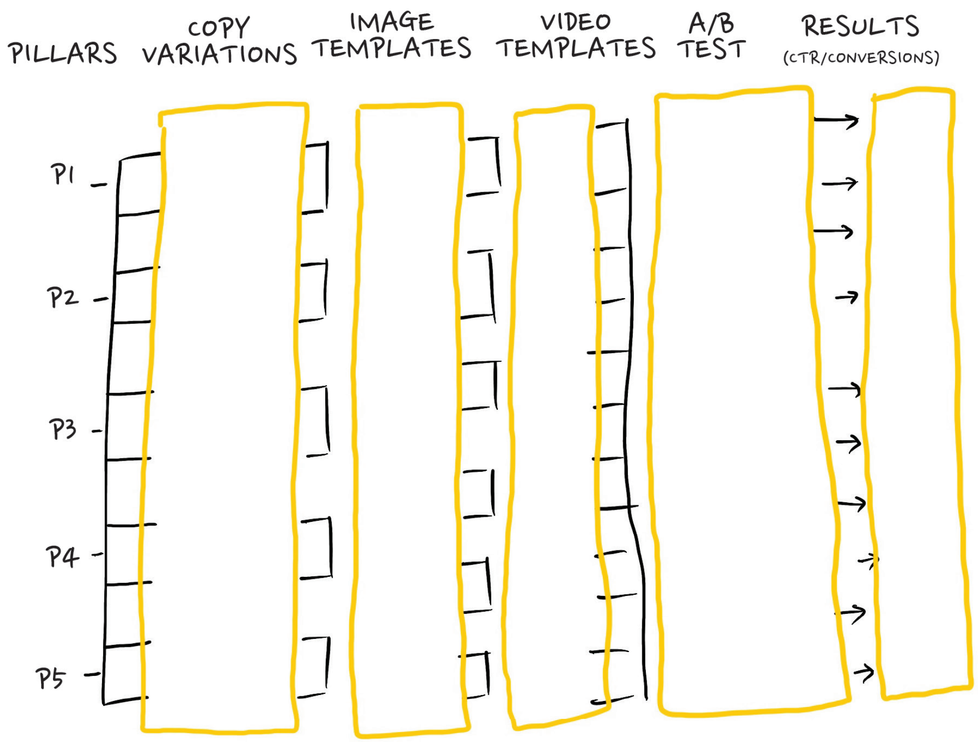
TEMPLATE

Fill in the model with your own data.

CREATIVE ENGINEERING - ASSEMBLING



1. Time to assemble. If implemented correctly, these models will allow your team to produce fast and scalable assets, to test and optimise in real-time, (if the data is available) without any tools.
2. You can take the copy you developed, as explained in **models #28 and 29**, or you can determine key messaging pillars; for example, product, main campaign message, promotions, family, lifestyle, or whatever suits your strategy.
3. Choose ten lines of copy per pillar. That copy must be written under the Header, Sub-header and Call to Action structure, as in the previous model.
4. Design at least three image templates per pillar. You won't need any copy for these templates; leave the copy as a placeholder, but make sure the template graphically respects the pillar's key message. For example, suppose the pillar is safety of an app. In that case, the image should show the app interface with payment gateways logos or a lock, or if it's the design of a car, you can have a template made with images of the car and a placeholder copy. Depending on your desired output, these templates can be static, HTML, social formats, video or animated GIFs.
5. Animate at least one video per pillar, same as above, respecting the pillar and leaving a placeholder for copy testing. This is rooted in the principle of lean methodologies, where all parts are produced simultaneously and assembled faster.
6. Mix as many copies as possible in the templates and label them according to what's in them, as in **model #53**.
7. Test as many variations as possible in organic and paid channels, to determine the most effective copy construct, over which creative format.
8. After identifying the top performing ad sets, (I recommend you test them for at least ten days on paid channels and cycles of 24 hours on social as in **model #66**), remove ones not performing and scale up ones that are.



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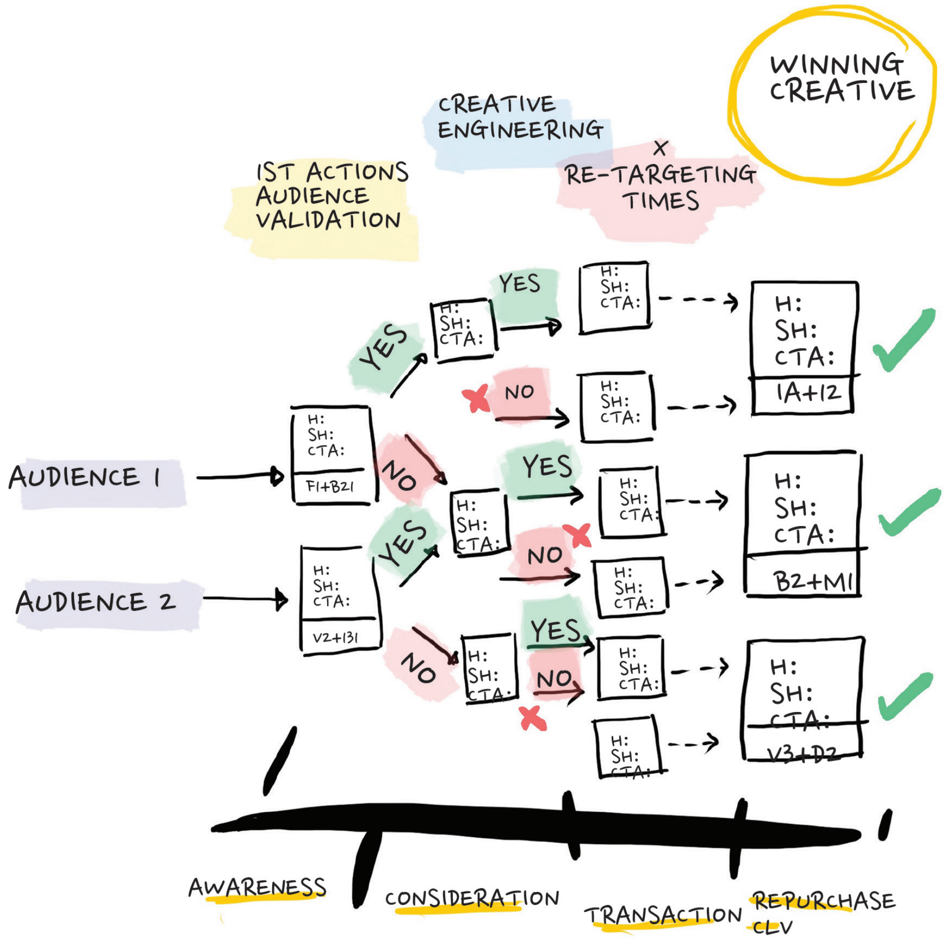
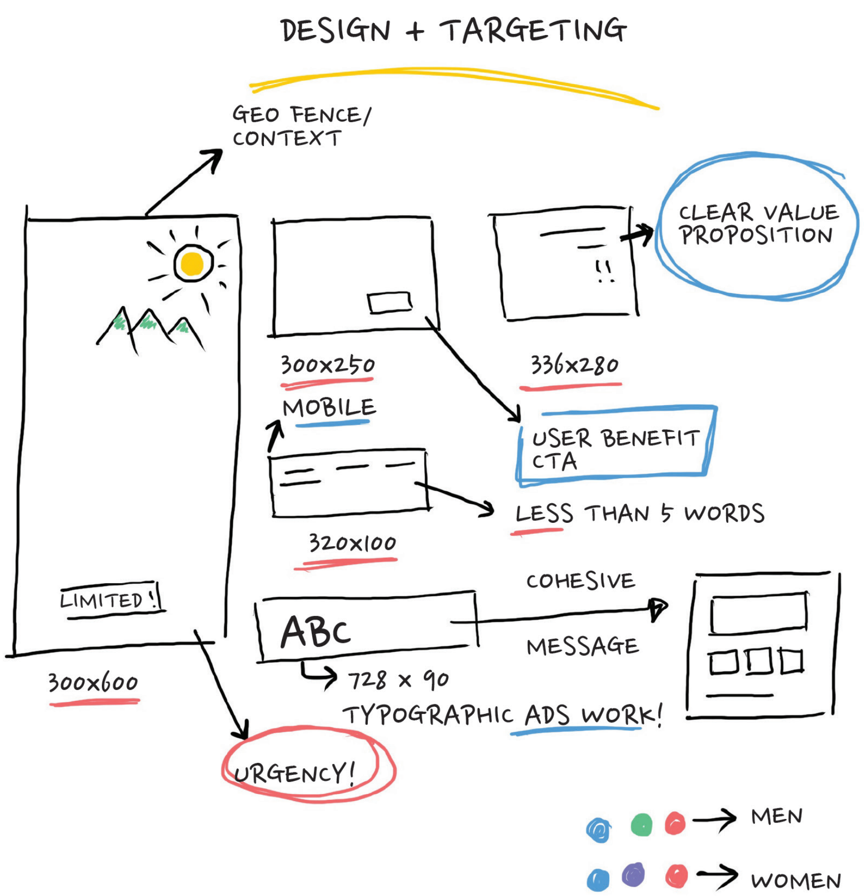
CREATIVE OPTIMISATION IN CONSUMER JOURNEYS



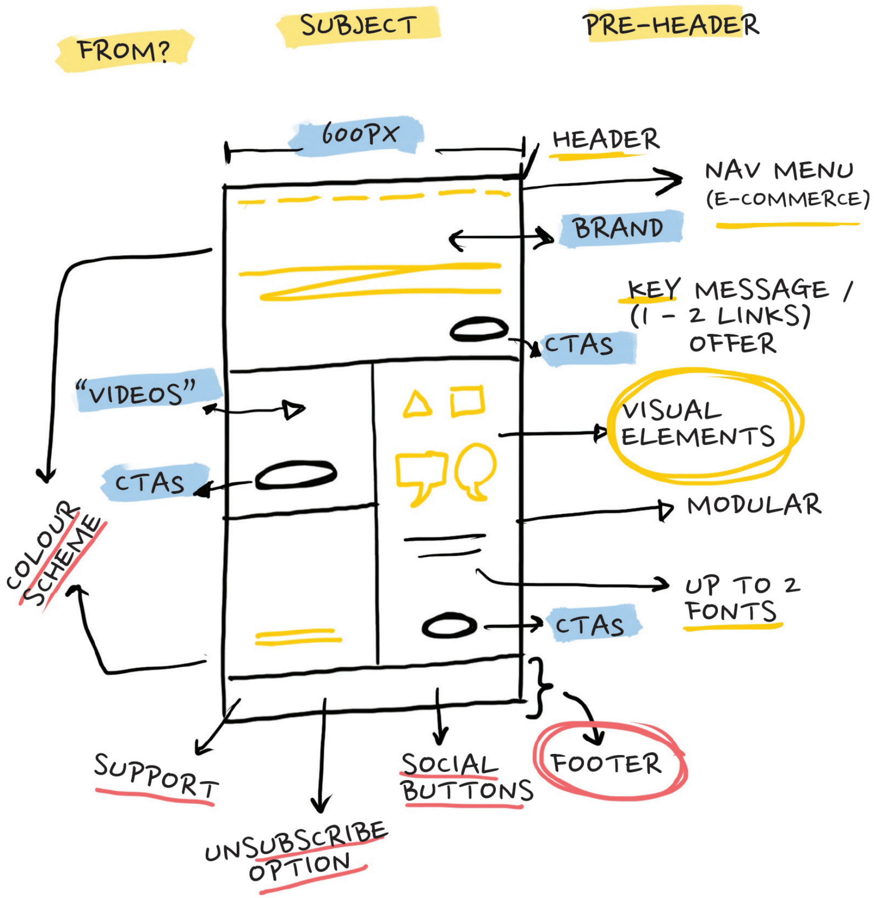
1. This model will help you map winning creative configurations along a consumer journey.
2. It is important to map different creative executions considering different audiences and stages of the journey, because it is a mistake to retarget audiences with the same message they clicked on initially.
3. When building the creative pieces, make sure you use the principles of creative engineering, as in **models #28, 29 and 30**.
4. Then map decision trees before placing the ads, as the model shows. If yes (User clicks) then_____(what is the next message to show), if not then______.
5. When working with Data-Driven attribution models, **(see model #21)**, one of the parameters to analyse, is the creative cascade of messages that trigger the conversions; this can be done as well by using cluster analysis or anomaly detection, as in **models #54 and 55**.
6. In most industries, a user needs to be retargeted between 4-8 times, (plus emails, sms' and other channels) to get them to convert. So, for each cluster/audience, you need to build relevant messages for two scenarios. A. When the user clicks. B. When the user is retargeted, and at some point doesn't click.
7. As you start collecting data, it is important to decide which set of creatives were the best-performing for each audience, product and platform.
8. Also, depending on the attribution model you use, determine what the role of each piece of creative was along the journey.
9. If the model is time decay, map how long it takes an audience to convert, related to a specific set of assets.
10. Test, learn and adjust.



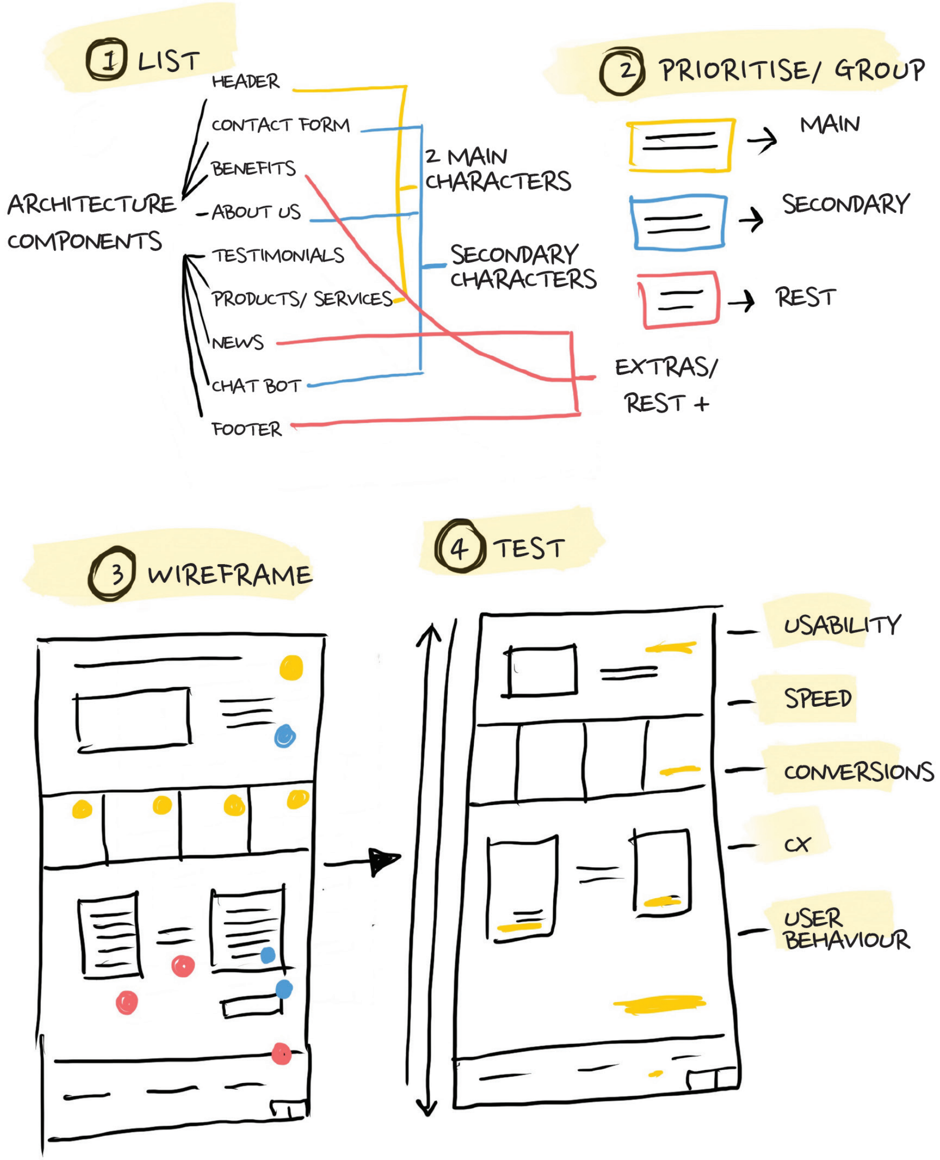
DISPLAY ADVERTISING - DESIGN + TARGETING PRINCIPLES

1. Some of the best-performing sizes for display ads are: 300x600, 300x250, 320x100, 728x90 and 336x280, in no particular order.
2. Here are some principles that work when designing display ads:
    a. Make sure the destination page/landing page is contextual to the display ad; this is often overlooked and is one of the main reasons for bounce or drop-offs in shopping carts.
    b. Use geographic data for context, (i.e. weather data, events, social/cultural triggers, day and time of the year, celebrations, etc.)
    c. Typographic ads work! Don't overdo it. Plain background and a simple, readable message perform well across most industries.
    d. When writing the copy, use less than five words to deliver the message.
    e. Urgency is one of the best performance drivers (i.e. Limited time, Only X left, Offer ends etc.) **See model #17**.
    f. Always prioritise having a clear value proposition over a brand message.
    g. Men prefer Blue, Green and Red colours.
    h. Women prefer Blue, Purple and Red colours.
3. Test multiple designs with ad copy and CTAs, and analyse the best performing days of all your creative clusters.

EMAIL MARKETING - DESIGN PRINCIPLES

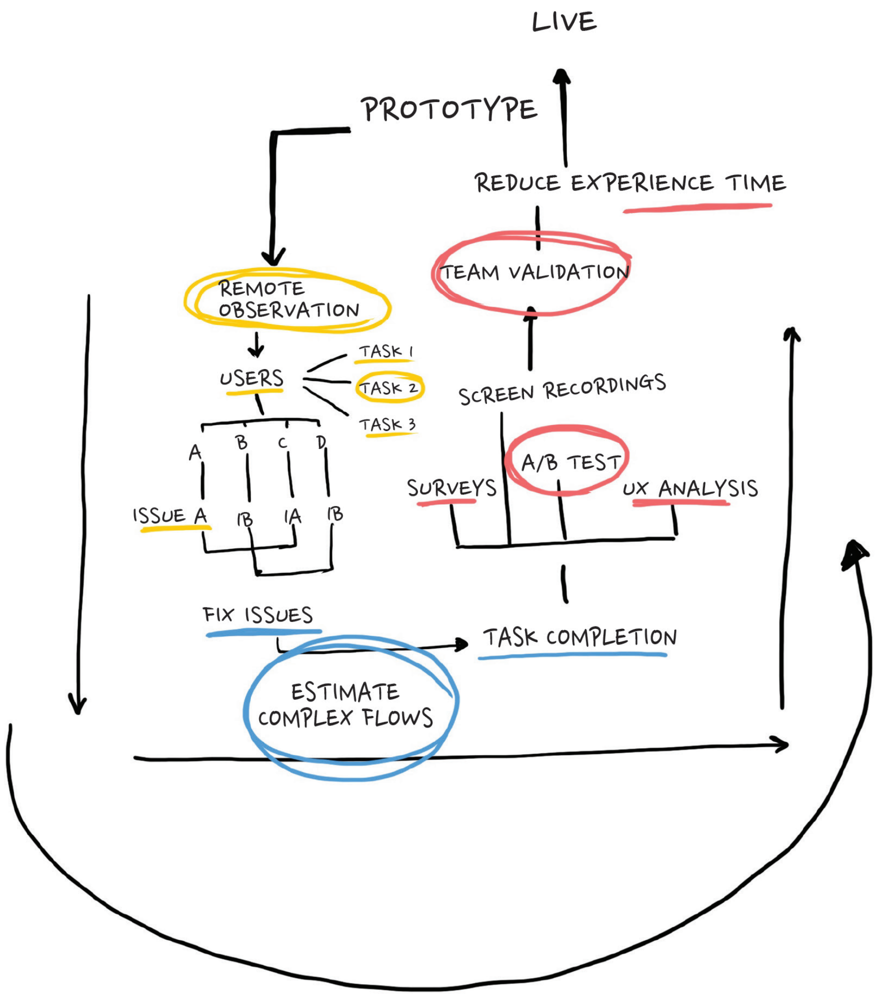


1. Personalise the Subject and add a pre-header, (description for context).
2. When designing, don't go over 600px width. Use 300px for your header, and make sure you convince the reader to keep scrolling.
3. Design a modular architecture, starting with a header, add a navigation menu, (for e-commerce) and clear branding, (colour scheme, logos and copy).
4. Don't use more than two fonts.
5. Write a clear subject: Puns, questions, recipient's name, benefits, power words and emojis.
6. Deliver the key message in the header.
7. Use call-to-action buttons in all modules, (but the whole piece must be clickable).
8. Custom images work better than stock images. Make an effort.
9. Add short GIFs to your email design. If you need to downsize, them use Ezgif.
10. Video is still king, especially on emailers. Add an image with a, "Fake" play button, the video won't reproduce in the email, but you'll get the click and traffic to your website.
11. Respect your brand colour scheme across the design.
12. Don't overlook the footer: Add an unsubscribe button, social media icons and contact information minimum.



CREATING WEBSITES - THE MOVIE PRINCIPLE

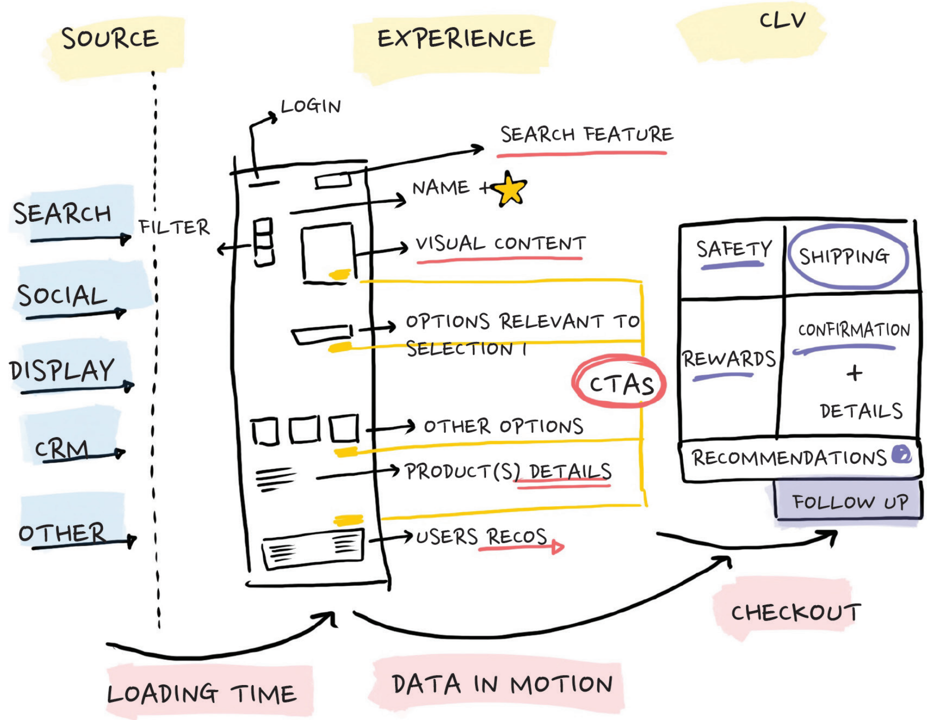
1. When building web platforms, (from landing pages to portals) or apps, I use a simple method. I call it the movie principle.
2. It consists of listing all the sections or components of the platform, (i.e. Header, contact form, about us, products and services, chatbot, footer, etc.).
3. Then choosing two main characters, as if I was writing a script for a movie.
4. After defining the first two characters, choose two or three secondary characters and extras.
5. Once that classification is done, you will get an idea of the priority of the content in the platform, either through design blocks, size of the elements or placement.
6. The next step is to design wireframes on paper, a tablet or a professional tool like moqups, miro or mockflow.
7. Make sure your wireframes reflect the prioritisation of the characters.
8. Then it's time to design and test, as in **model #35**. Look for usability issues, speed, the path to conversion, general UX, UI and CX applications and how users browse the platform.
9. Be open to changing the components' priority, as your usability tests come back with results which suggest so.
10. I highly recommend recording some of your users' sessions to see how they browse and interact with the components of the platform. A good tool for this is Hotjar.



USABILITY TESTING

1. One of the most effective methods for usability testing, is remote observation.
2. This consists of giving users different tasks on the platform and gathering information about their experience completing these tasks.
3. When noticing issues, these need to be captured and grouped.
4. If there are patterns in the issues, these need to be addressed.
5. This aims to eliminate complex flows and focus on delivering the best experience possible.
6. Once the task is completed, it is important to survey the users and gather their perceptions and thoughts on the platform.
7. It is also recommended to create multiple journeys for one single task and observe.
8. Another remote observation method, is using screen recording technology, (such as HotJar, VWO or MouseFlow).
9. By using the previous techniques and tools, you can identify and pre-validate what works and what doesn't, in your platform.
10. Gather your team, address issues and fix what needs to be done. Always focus on fewer clicks/taps, less time and a convenient, safe and personal experience.

E-COMMERCE PLATFORMS - PRINCIPLES

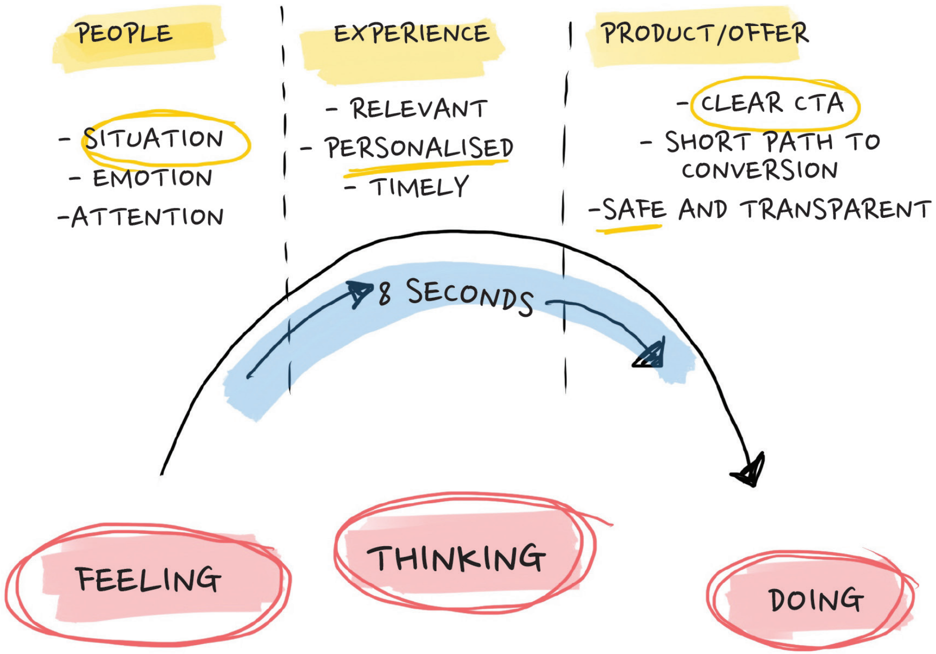


1. E-commerce is one of the key components and fastest growing practices in marketing these days. Some principles.
2. When driving traffic to your e-commerce platform, ensure the message that drove the user to it, is cohesive with what they find on the site or landing page.
3. Use visual content like galleries, videos and clear descriptions.
4. Have contextual recommendations of other products or services next to the one the user is browsing.
5. Be very clear with the product/service description.
6. Loading time and good mobile experiences are critical in this space.
7. Other users' recommendations and ratings will boost your conversions.
8. On checkout and post-sale, deliver clear messages of safety, shipping details, (if applicable), rewards for behaviour, confirmation and details, other recommendations and follow-up information via email or SMS notifications.
9. Plan your CLV strategy **(see model #62)** by following up, ensuring the customer is satisfied, recommending other products in a timely manner and providing good customer service. The first sale is the easy part; repurchase, recommendation and lifetime value are where the money is.
10. Test multiple conversion journeys, minimise clicks and focus on convenience, rewards, (i.e. 10% off your first purchase or product bundles), safety and data privacy.

CHAPTER 4

CONTENT AND SOCIAL MEDIA MODELS

THE CONTENT ATTENTION CYCLE



1. Good content on digital platforms, focuses on people and their experiences rather than products/offers.
2. The attention span of a user with online advertising is roughly 8 seconds, and this model is a proven formula to make the best out of that short time.
3. Start by showing people or something related to human emotion, situation or connection. In other words, make them feel something; anything.
4. Then make them think by being relevant to their experience(s). You can deliver this by being contextual and personalised with your content.
5. Leave the product/service for the end. Once the user understands and feels connected with your message, the doing part will happen.
6. Test different calls to action and the way you deliver the brand message. You've done the hardest part already. Now it's all about the right stimulus to get the user to do what you want them to do.
7. Make sure that the message you deliver in the piece, is cohesive with what is on the other side of the click, (test multiple messages with different landing pages).
8. Focus on safety and urgency when you can. This applies especially to e-commerce journeys.
9. One of the main reasons for users to bounce off platforms, is because they don't find what they clicked for immediately. Instead, they land on generic pages. That is why having multiple landing pages relevant to the initial message, is one of the best-proven practices in e-commerce. **See model #36**.

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SOCIAL MEDIA STRATEGIES FRAMEWORK

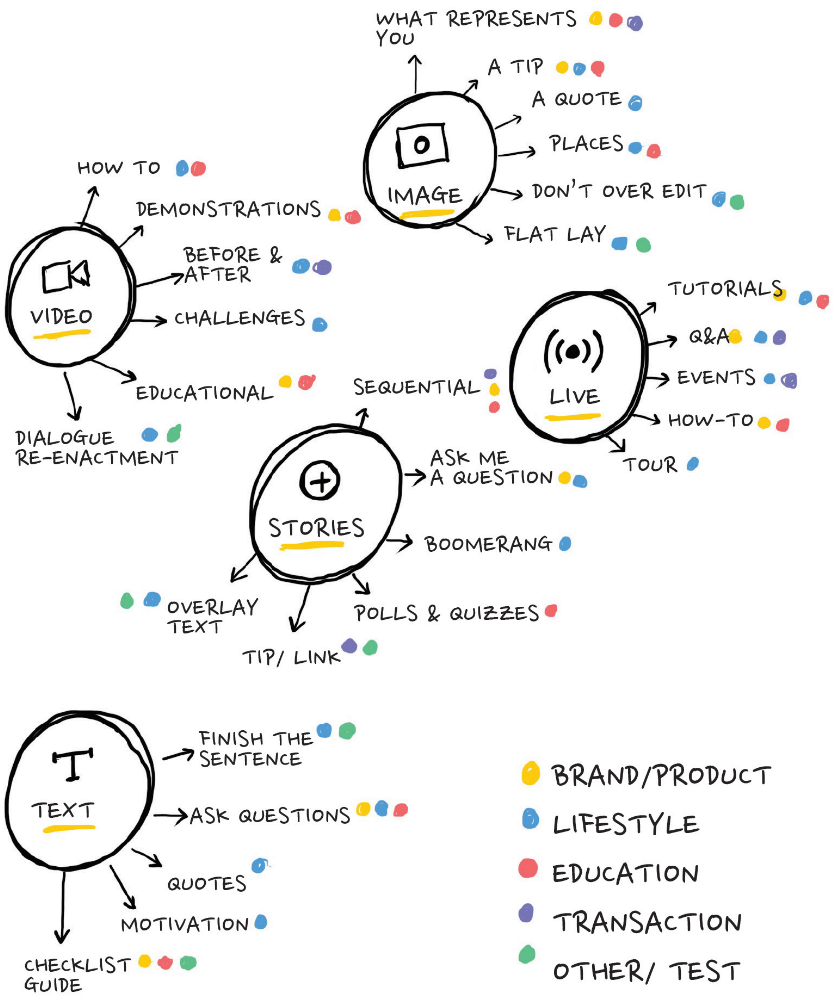
PLATFORM/ RECOS	FREQUENCY	WHAT?	FORMAT, LINKS & OUTLETS
FB	- 1-2 POSTS P/D - 5-7 STORIES -+ RESPONSES COMMENTS DMS - 1 LIVE P/W	- 50% KEY PILLARS - 30% ENGAGED - 20% CURATED - 2-3 #	- 60% VIDEO - 40% IMAGES - 2 LINKS P/D - 1 POLL P/D
IG	- 1 POST P/D (OR REELS) - 7-10 STORIES P/D -+ RESPONSES COMMENTS DMS - 1 LIVE P/W	- 70% KEY PILLARS - 30% ENGAGING - 7-10 #	- 40% VIDEO - 40% IMAGES - 20% BOOMERANG - 1 LINK P/D (STORIES) - 2 POLLS/ QUESTIONING P/D
TW	- 7-10 TWEETS P/D -+ RESPONSES COMMENTS DMS	- 33% KEY PILLARS - 33% CURATED - 33% ENGAGING - 1-2 #	- 20% TEXT - 40% VIDEO - 40% IMAGE - 1 POLL P/D
TIKTOK	- 1-3 TIMES P/D -+ RESPONSES	- 30% KEY PILLARS - 70% ENGAGING - 3-5 #	-100 % VIDEO
YOUTUBE	-1 P/W - 3-5 SHORTS P/W -+ RESPONSES	- 50% KEY PILLARS - 50% ENGAGING	-100 % VIDEO

1. Social media strategies also require a multi-dimensional approach. This is done by defining pillars, the quantity of content, formats, outlets, social commerce initiatives and more. This model gives an approach per platform, based on research and our experience.
2. Frequency per channel has to be looked at, from not only pieces of content on main timelines, but stories/shorts, responses to comments, direct messages and LIVE formats.
3. There are also different approaches when looking at what to post.
4. Some of the content should be created from the key pillars, some from engaging dynamics, (like gamified interactive pieces), and some curated from your followers. Also, keep in mind the number of hashtags recommended per platform.
5. Video keeps growing, but now audiences react to artisanal video content, created on devices with minor editing. Super productions, (with exceptions) take too much time and don't necessarily correlate to better engagement.
6. Each platform has a different mix of formats, as seen on the model above, but test and optimise the best formats based on your initial strategy. **See model #40**.

PLATFORM/ RECOS	FREQUENCY	WHAT?	FORMAT, LINKS & OUTLETS

TEMPLATE

Fill in the model with your own data.



CONTENT THAT WORKS - CREATIVE RECOMMENDATIONS

1. Build pillars before executing, to measure those pillars' effectiveness with your audience. **(See model #40)**
2. After doing hundreds of social audits, we have determined the most common pillars used by brands are: Brand/product, lifestyle, education, promotions, transactional/social commerce content, contests and tests.
3. Here are some ideas for different formats of content in digital marketing.
   a. **Video:** How-to, demonstrations, before & after, challenges, educational, dialogue re-enactments.
   b. **Images:** What represents you, a tip, a quote, show places, don't overedit, flat lay (compositions).
   c. **Live content:** Tutorials, Q&A, events, how-to, tour places, what's in your bag.
   d. **Stories:** Sequential, ask me a question, boomerangs, polls & quizzes, tap/link, overlay text.
   e. **Text:** Finish the sentence, quotes, ask questions, motivation, and checklist guide.
4. Determine what the audience engages with the most, per channel and pillar.
5. Build content strategies custom-made for each channel.
6. Measure and test constantly.
7. Content is data in motion. Learn from it and refine your strategy as you collect your audience's signals and reactions to it.

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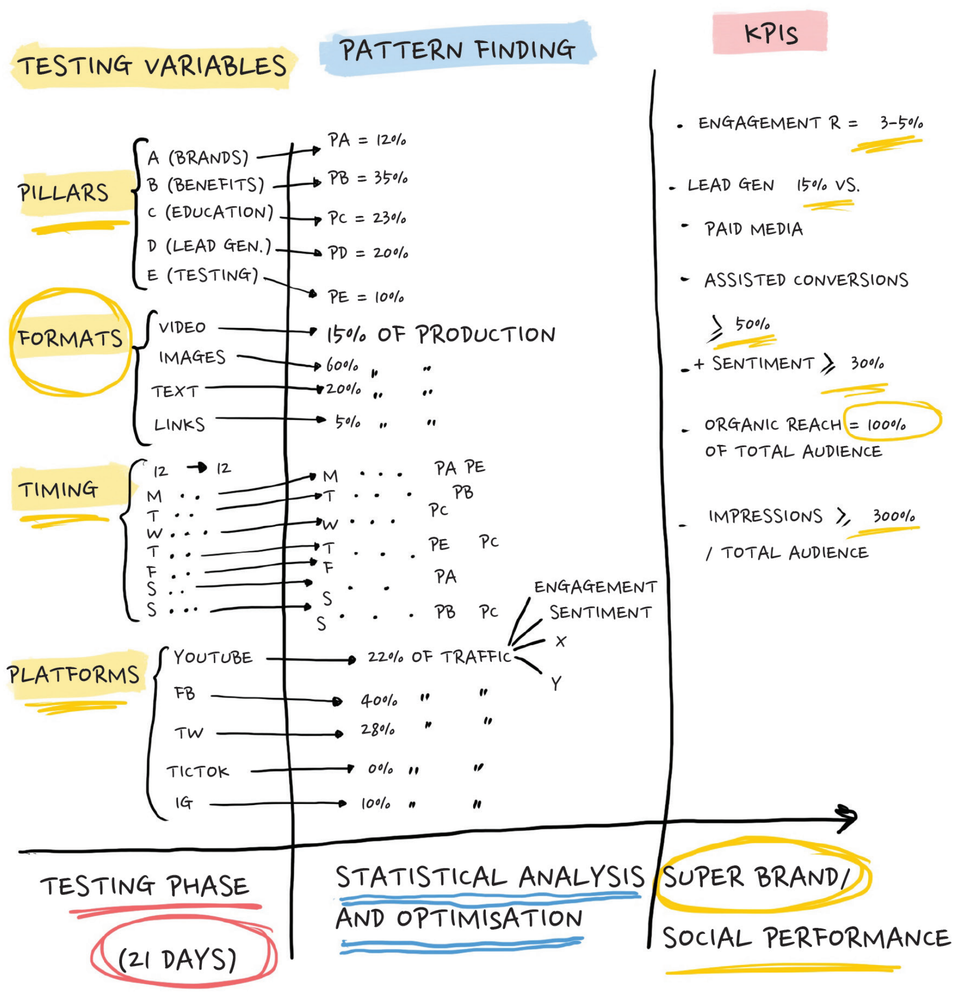
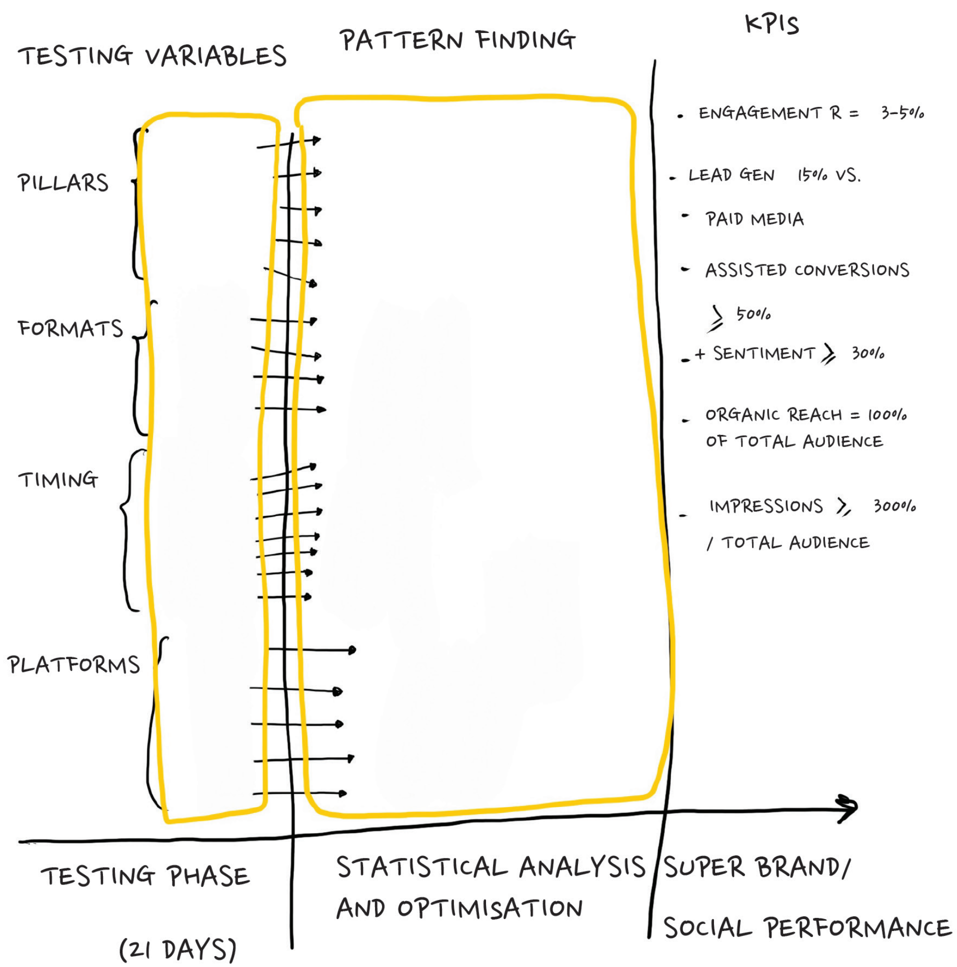
HOW TO BUILD SUPER BRANDS ON SOCIAL MEDIA



1. This is a statistical approach to content/social media marketing.
2. Start by determining at least four content pillars for testing.
3. Usually, we build the content structure around Brand, Lifestyle, Functional/Gamified content, and a Testing pillar that changes, depending on performance.
4. Produce 20% of the content for the main pillars and 10% for the testing.
5. Make sure you produce multiple formats, (images, videos, GIFs, links, text, and variations) and assign them a value as you publish. This is for multivariable analysis.
6. Map out a calendar for testing from Monday to Sunday at random times, (often, the most unexpected times are the best performing ones). Label the best performing times to later predict, as seen in **models #58 and 59**.
7. Spend 21 days testing as many pieces as possible and keep track of what pillar, format, day/time, and on which platform it was served.
8. Write down organic engagement rates, reach and impressions on each piece of content, every 6-12 hours for the first 24 hours.
9. Keep an eye on the correlation between high-engaging pieces with their pillar, format and time. When you see three or more overperforming ones, set them aside for further testing, **see model #70**.
10. After 21 days, cluster the best performing pieces and correlate the results by platform. Then re-write the content mix by pillar, format and estimated timings for publishing.
11. When you find the patterns of the best performing content, you will be able to beat industry average engagement rates, (by post) by two times, add links to the content to assist conversions and keep an eye on the sentiment it generates from comments and emojis (on Facebook).
12. We have built super brands, (3X engagement, 5X organic reach and 20%+ assisted conversions from social media) with this framework for multiple brands.



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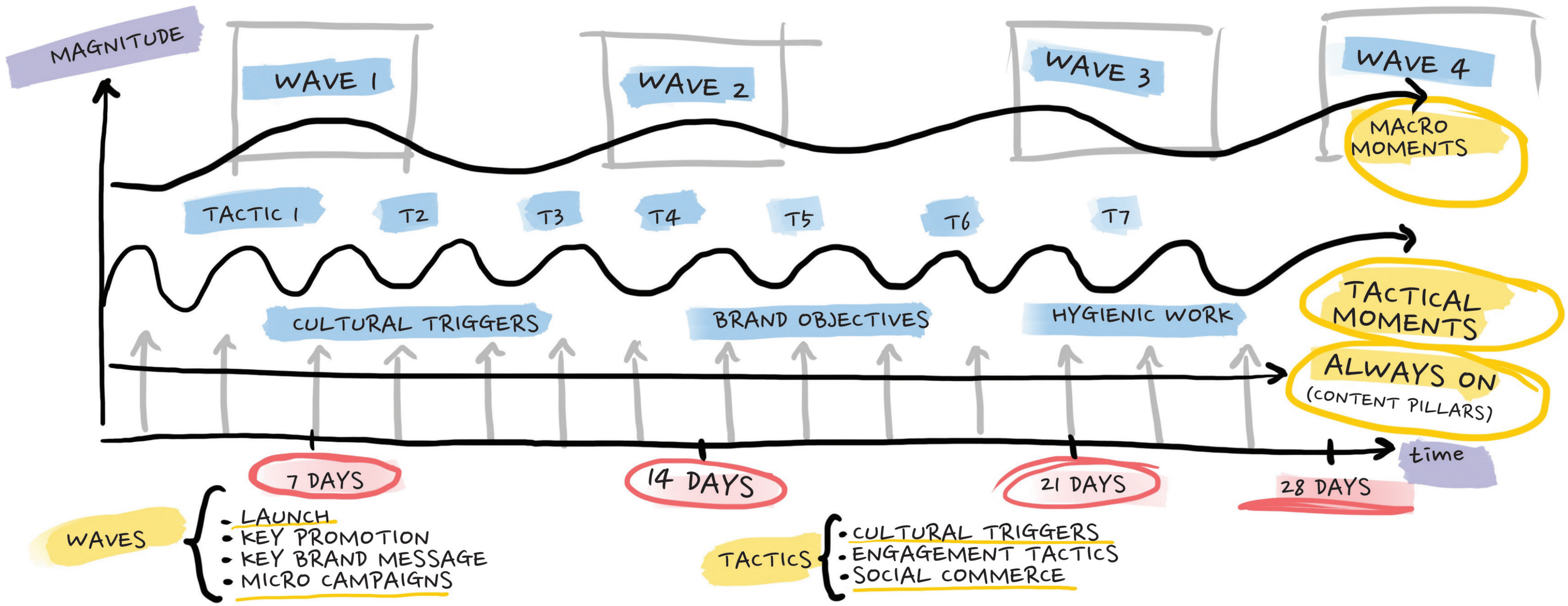
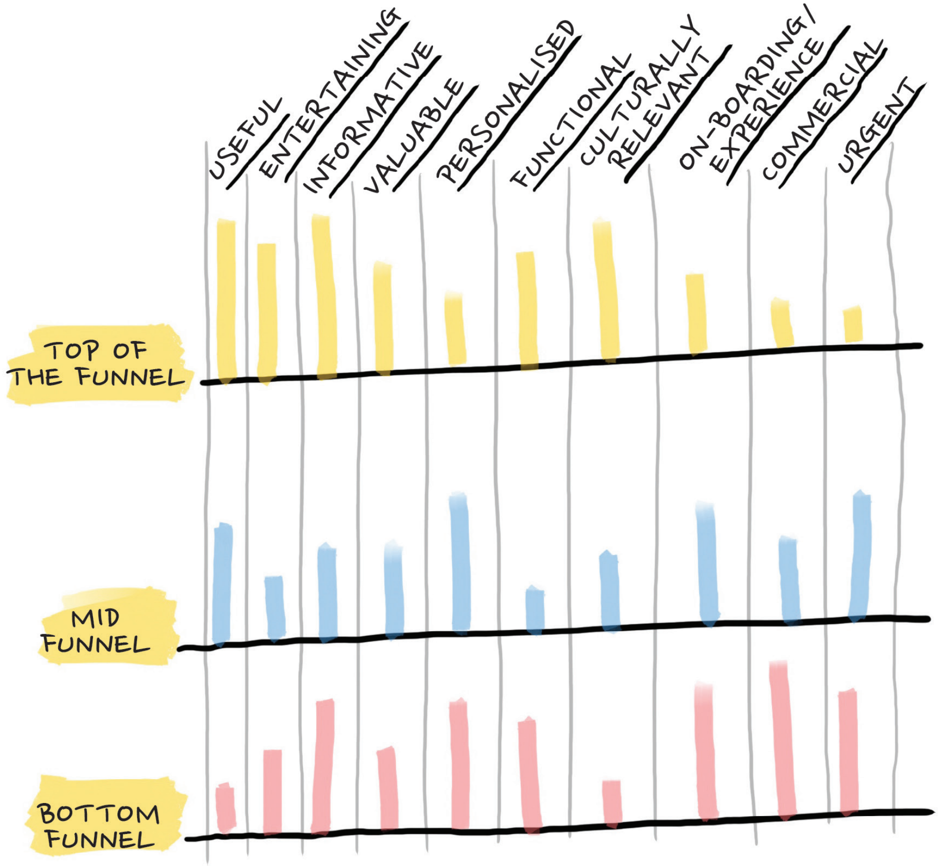
CONTENT MAGNITUDE WAVES MODEL



1. When planning content strategies, we approach them from three different perspectives.
    a. Macro-moments: Big social campaigns and announcements such as launches or brand events. Ideally, try to do two to four of these per month, (they don't need offline support or big budgets, just better-crafted content in longer formats driving some conversion such as cross traffic, leads or sales).
    b. Tactical moments: Medium-size content efforts with less production than the main wave, but still with a transactional purpose. If possible, aim to have two to three good engaging tactics per week.
    c. Always-on: Content produced on the spot comes from the key pillars determined by the overall strategy. They require less production and more frequency; **see model #38**.
2. These waves need to be aligned with the brand's key objectives, from basic social metrics, (reach, engagement, etc.) to assisting conversions in social stores or other channels. **See model #45**.
3. Cultural triggers are a good source of inspiration for always-on and tactical content. Keep an eye on what's happening in general conversations inside and outside the category and join the conversation.
4. For bigger campaign work, test longer video and/or LIVE formats and for always-on content, shorter video, boomerangs, static images, GIF, etc. If you need some inspiration on what kind of content to produce, **see model #39**.

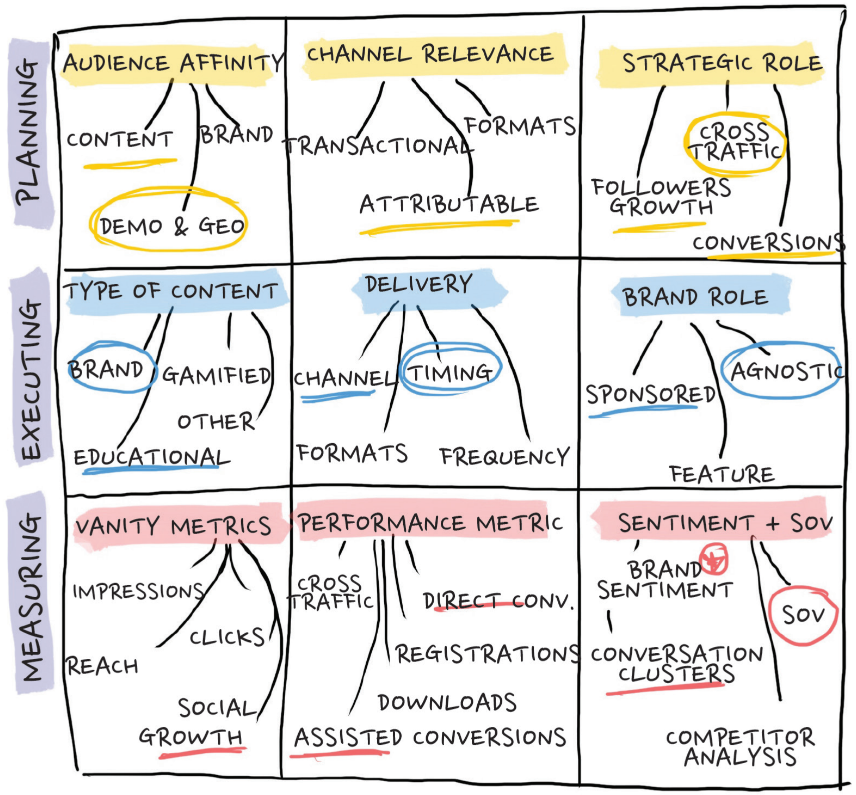
CONTENT ATTRIBUTION TO CONVERSIONS



1. Content marketing is key in conversion strategies. That's why we measure it from different perspectives using taxonomy models. **See model #53**
2. This model suggests you deploy content, (either organic or paid) on three different moments of conversion: Top, mid and bottom of the funnel or wheel.
3. When producing the content, determine which pillars will play a role in each stage.
4. For example, in technology, using informative and onboarding content on top of the funnel has proven to perform better than when promoting entertaining or functional pieces.
5. Once you have your user's attention or interaction, show them something else. For example, in the automotive industry, urgency messages have proven to close the deal at the bottom of the funnel, (limited time, editions, units, etc.).
6. Every industry or category is different, but when labelling the content and understanding the creative's contribution in each of the funnel stages, you'll be able to understand your user better and increase your conversion rates.
7. It is also important to tag the content and make it part of the attribution model in place. A common mistake is just measuring paid media and ignoring the role of content on the conversions, which biases the data and doesn't allow for creative and channel optimisation.
8. Optimise the content journeys to maximise performance in each stage, **see model #31**.

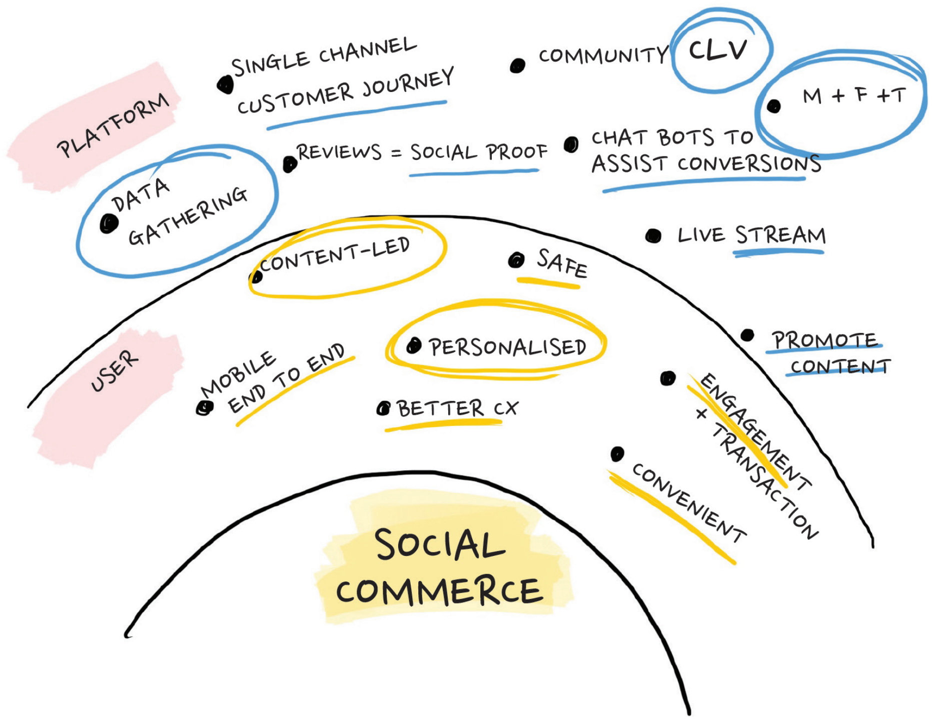
INFLUENCER MARKETING FRAMEWORK

1. When building influencer marketing strategies, it is important to look beyond the person's following and engagement numbers.
2. Focus on three main stages to ensure your strategy is effective: Plan, execute and measure.
3. In the planning phase, start by matching your influencer candidates with your brand's audience affinity, channel relevance and strategic role as follows:
    a. Is the content they create relatable to your brand?
    b. Look into demographic and geographic data.
    c. Is their channel's engagement what your brand needs, (i.e. transactional, awareness only, engaging, reputation builder, etc.)?
    d. What formats do they use? Are they the right ones for your brand?
    e. Are their channels attributable? (Are they open to tagging the content, using codes, sharing links, etc.?).
    f. What is the strategic contribution of the partnership? Will they help you with cross-traffic, growing followers, or conversions? **See model #45**.
4. In the execution phase, keep in mind the following:
    a. What kind of content can they create for you: Is it a Demo, a brand mention, an educational piece, or a contest? This is important and often overlooked.
    b. What formats are the best performing ones, short video, images, gifs, on which outlets, stories, timeline, live? This is also crucial for the performance of your partnership.
    c. What is the best day and time for them to deliver the content under two parameters: A. Their audience engagement? B. Your brand properties' conversion time?
    d. What is the role of the brand? White label, sponsored, in partnership? How important and visible is the brand in the publication?



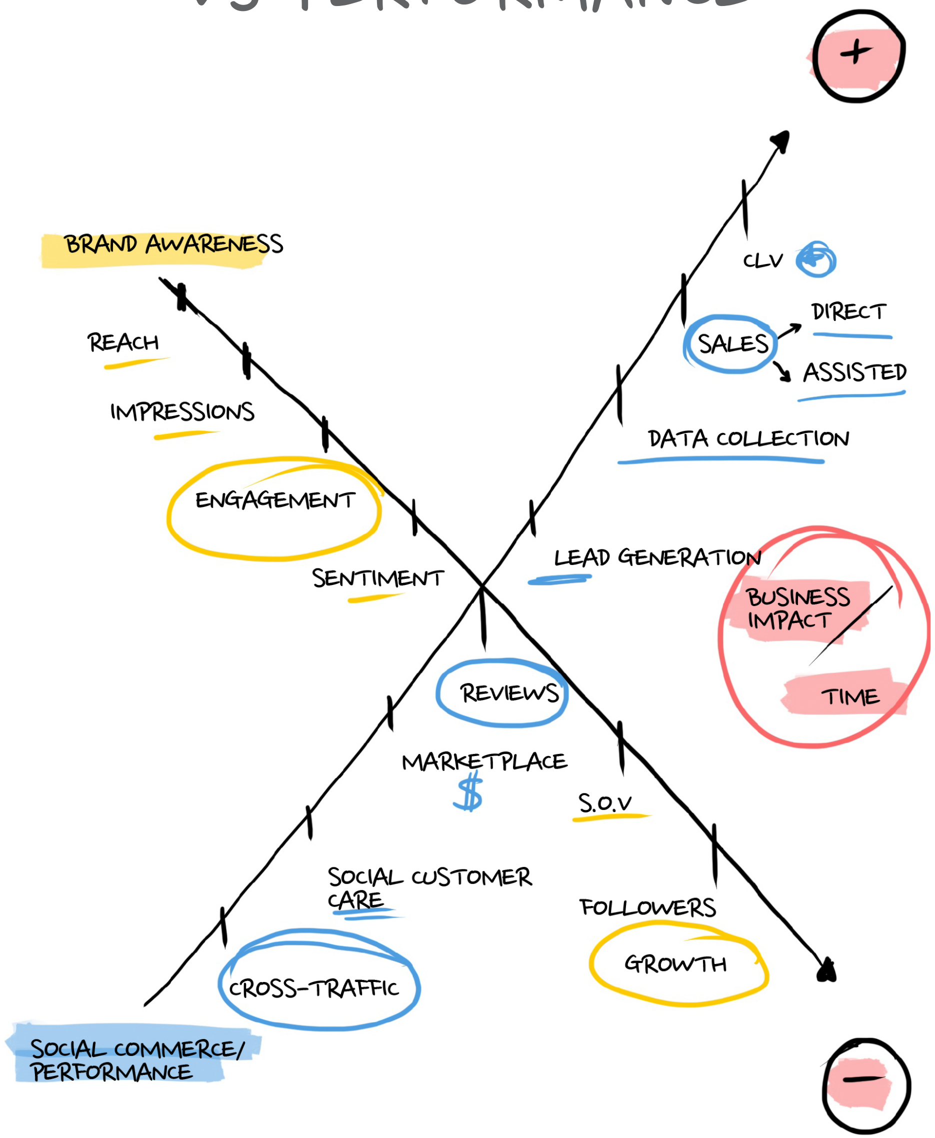
5. When measuring, there are three key sets of metrics to keep an eye on:
    a. Vanity metrics: Impressions, accounts reached, clicks, followers gained.
    b. Performance metrics: Cross-traffic, assisted conversions, codes redeemed, registrations, downloads, etc.
    c. Sentiment and share of voice: Brand sentiment gained during the partnership, conversation clusters, brand associations, competitor analysis and SoV during the promotion.

SOCIAL COMMERCE PRINCIPLES



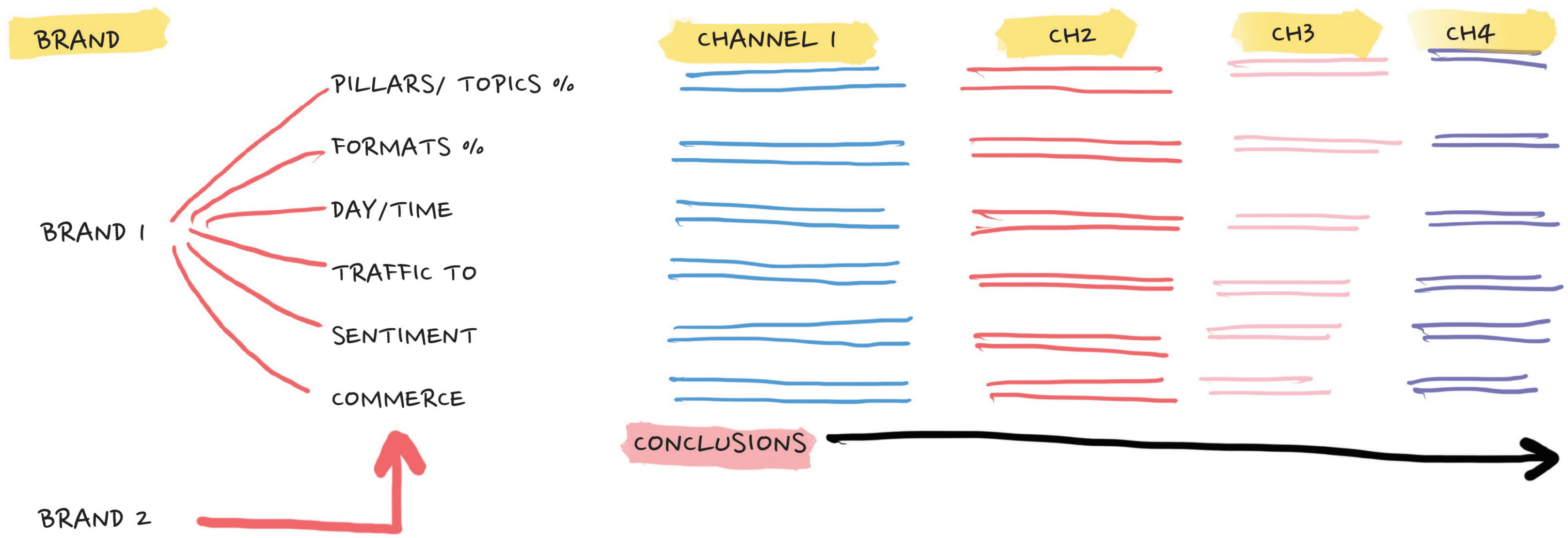
1. Social commerce is a powerful practice to assist or generate direct conversions in digital marketing.
2. Look at social commerce from two perspectives: the user and the platform.
3. **Users** - When creating social commerce strategies, it's essential to:
   a. Think mobile, end to end.
   b. Make it content-led, not product-led. Remember you're trying to sell on content platforms organised by relevance algorithms, instead of commerce filters such as regular marketplaces.
   c. Develop a good personalised customer experience, safe and transparent.
   d. Users will engage before transacting. Design engaging journeys.
   e. Users don't want to leave Social Media platforms. Make it convenient and all in one place, even the checkout and logistic follow-up.
4. **Platform** - Social media platforms are dynamic, virtual communities where you can:
   a. Collect data from individual users through their engagement and purchase journeys.
   b. Deliver a single channel consumer journey, from demand with ads or content to payment gateway integration, follow-up notifications and chats.
   c. Motivate reviews: The stranger with previous experience is still the main driver to get users to transact, even if they don't know who left the review, especially if they do.
   d. Go beyond once-off transactions and build lifetime value. Social channels are great for this because of the personalisation level and data you get from them.
   e. Use the live stream features to sell. Product demonstrations, how-to's, before-after, affiliates, influencers etc., are great ways to sell on social media.
   f. Plan under three key factors: Message/Pillar, Format and Timing.
   g. Promote the content/ads of what you're selling to relevant communities by using the behavioural targeting features on the platforms.

SOCIAL MEDIA: AWARENESS VS PERFORMANCE



1. Social media is now one of the main channels to drive performance for brands, and we are living a transitional period of measurement and attribution of success to social efforts.
2. In this model, see the difference between Brand Awareness based strategies and Social Commerce / Performance strategies.
3. A necessary clarification to make, is massive reach and impressions in content strategies don't necessarily have a direct impact on performance. Unless they drive traffic to other channels or support a social store, they don't contribute to other than vanity metrics.
4. Another myth is the more followers a brand has, the more it converts. That is also false. On the contrary, it is challenging to have massive communities, because the overall organic reach and engagement decline, unless there is a solidly built content strategy behind it.
5. When looking at Brand Awareness strategies, the most common metrics are reach, impressions, engagement, sentiment, the share of voice and follower growth over time.
6. The focus will shift as you enter the Social Commerce / Performance space. The main focus now becomes: driving cross-traffic from social channels; using social media for customer care to assist conversions and customer lifetime value; a marketplace for end-to-end transactions, a constant review forum for lead generation; zero and first-party data collection, direct and assisted sales and CLV.
7. The role of social media has been debated for years, and we struggled to justify spending time and money on channels solely for reputation. That has changed now, as these channels provide the technology and experience to become more transactional, trusted touchpoints for customer support and key for long-term customer value.
8. Vanity metrics are still important to validate the content and engage with audiences, but they are not the only numbers we need to look into anymore. The landscape is much broader now, and clients are becoming more demanding regarding the role of social media strategies.

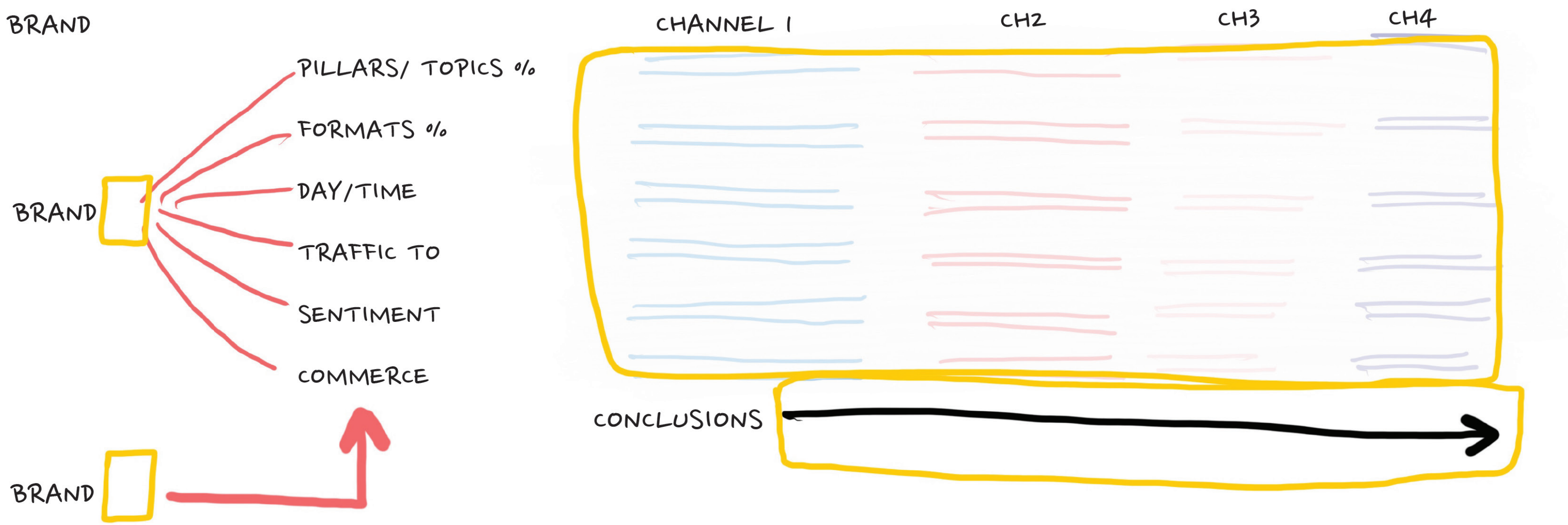
ONE-PAGER SOCIAL AUDITS



1. When auditing social media platforms, (owned or competitors), I recommend assessing seven key components on each of the audited channels.
2. The first, and perhaps the most critical one, is the percentage of content pieces per pillar, brands are pushing. Determine the key pillars by simply doing regression analysis. Count the pieces, label the pillars and by monitoring over 90 days, you can assess the brand's content strategy per channel.
3. The second one has to do with the formats used. How many videos, images, boomerangs, plain texts, and live formats are they posting?
4. Then zoom into understanding what day and time, they are talking about what. This is key, because it will give you an indication of the role of social in e-commerce ecosystems.
5. Determine if they send traffic from their content to websites, apps or other channels. If so, count how much and where to. Also very useful when assessing social commerce strategies.
6. What is the sentiment their content generates? Forget about tools, look at people's comments and reactions on Facebook to a few content pieces, and you'll be able to understand the sentiment. Is it a recommendations forum? (Users tag other users to recommend a specific product or service?)
7. Then, look into their e-commerce strategies natively in the channels. Do they have shops? Is the fulfilment done on social media? Does it direct to another platform? This is also key when looking into performance marketing audits.
8. And finally, look into their customer care efforts. Do they have chatbots, virtual assistants, and people behind their chats? How long does it take them to respond, or do they solve the common problems?

TEMPLATE

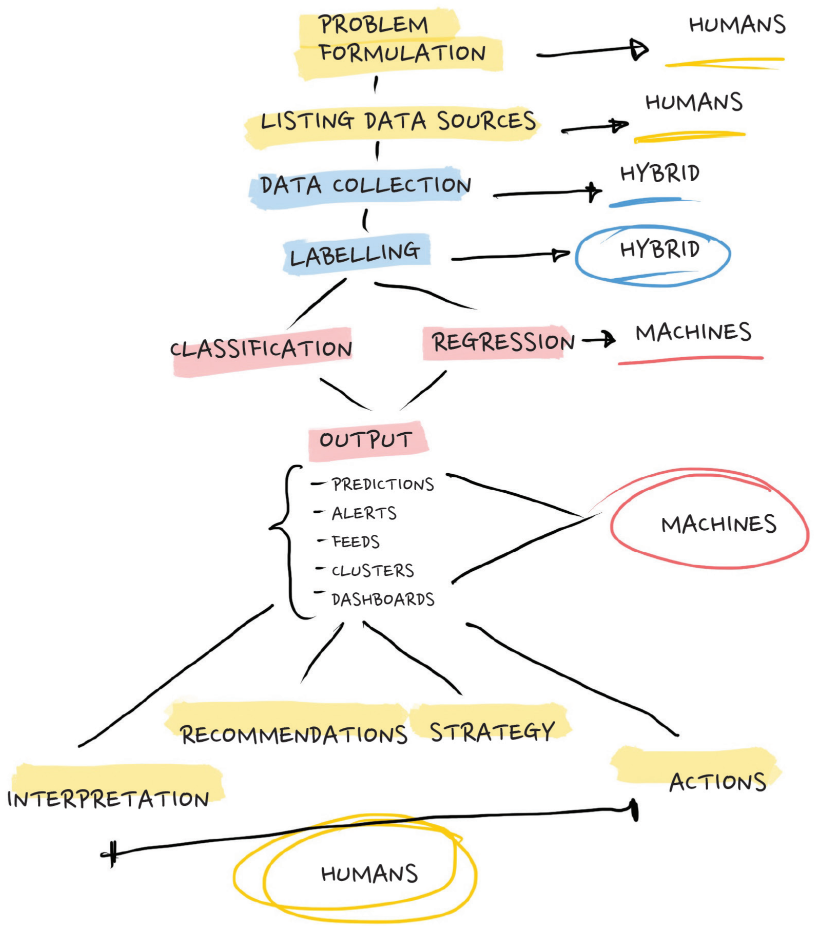
Fill in the model with your own data.



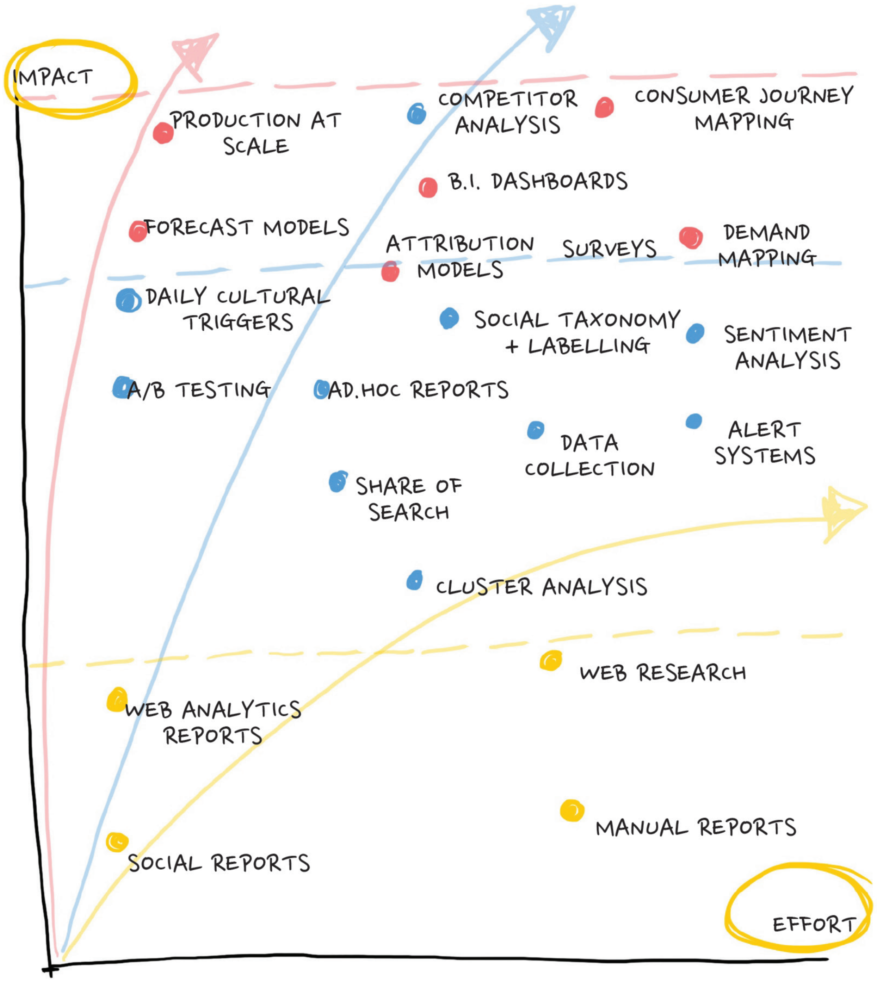
CHAPTER 5

DATA MODELS

THE ROLE OF HUMANS VS MACHINES IN DATA

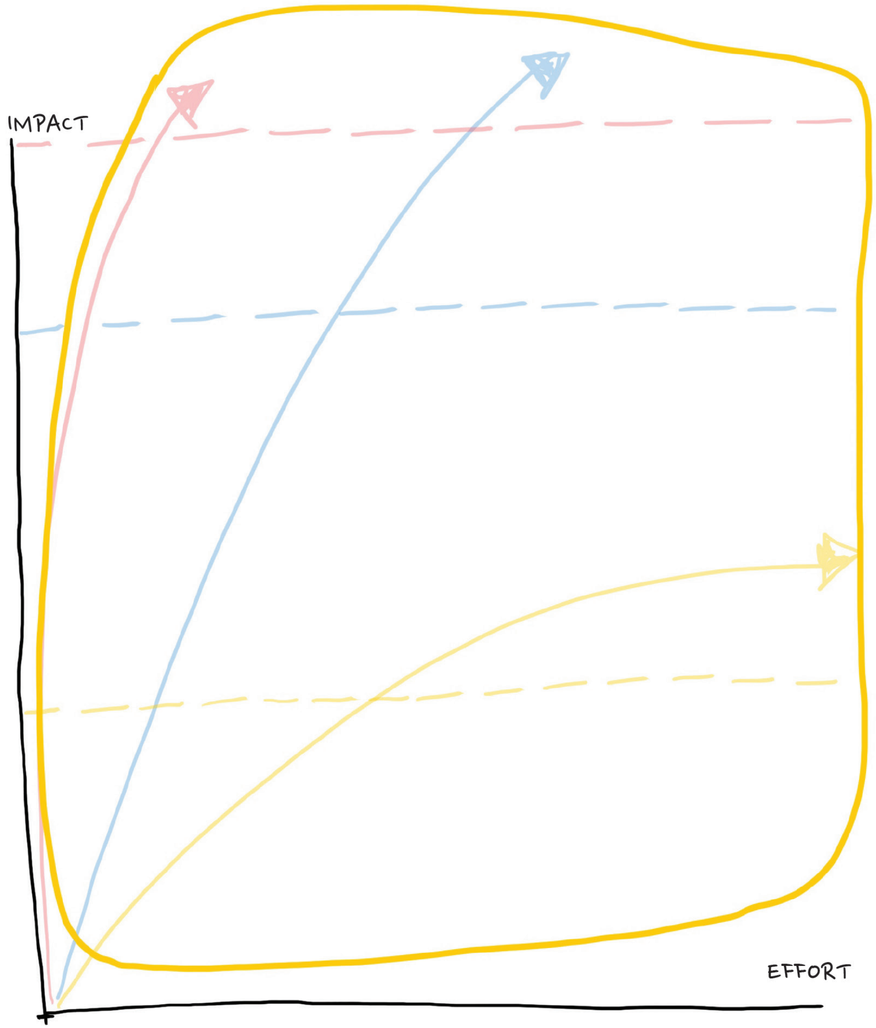


1. This model illustrates the role of humans and machines in data processing.
2. Understanding the role of humans is critical to delivering a coherent and relevant output in any data practice. There is a common misconception machines do all the work, even concluding and recommending.
3. We start by formulating a problem or a question. Humans do this, and it is the most important component of the model.
4. Then we list the data sources available that could contribute to solving the problem, also done by humans.
5. After this, we go to the data collection part. This is a hybrid process. We can capture it manually, as seen on **model #49** or with tools/ scrapers.
6. Then we label the data. Usually, it's done by humans, but we're testing Natural language processing (NLP) technology to help us with the taxonomy, as seen in **model #53**.
7. After labelling, we go into processing. The most common models are classification and regression. This is done by machine intelligence fuelled by human-formulated algorithms, unless the sets are too small. If that's the case, we use simple data storytelling, as seen in **model #26**.
8. Then we get to the output(s) component. These can be from alerts, **(see model #56)**, predictions, feeds, clusters or dashboards, as seen in **model #57**. These are produced by machines/tools.
9. Finally, we go to the most important part of them all, the recommendations and actions. Humans formulate these. So, the process starts and ends with human input.
10. The problem formulation, data interpretation logics (algorithms, correlation models, etc.), and conclusions are human-driven.



DATA PRACTICES: EFFORT VS IMPACT

1. This model will help you prioritise your data/digital practices, based on the principles of effort and impact.
2. The first step is to list your capabilities and/or current practices.
3. Then place them in the matrix as shown in the model.
4. Low impact/high effort practices, (in our experience) are manual reports and web research. This could change, depending on your business needs.
5. Social media and web analytics reports are low-effort, low-impact practices.
6. A/B testing, finding cultural triggers, forecast models and production at scale are high impact low-effort practices.
7. Attribution models, custom dashboards, competitor analysis, the share of search, cluster models and ad-hoc reports are mid-effort high-impact practices.
8. Data collection, taxonomy, alerts systems and surveys are high-effort mid to high-impact practices.
9. Consumer journey mapping and demand mapping are high-effort / high-impact practices.
10. A good way to assess your practices in this model and to plan for the future, is by auditing your current talent, processes and tools.

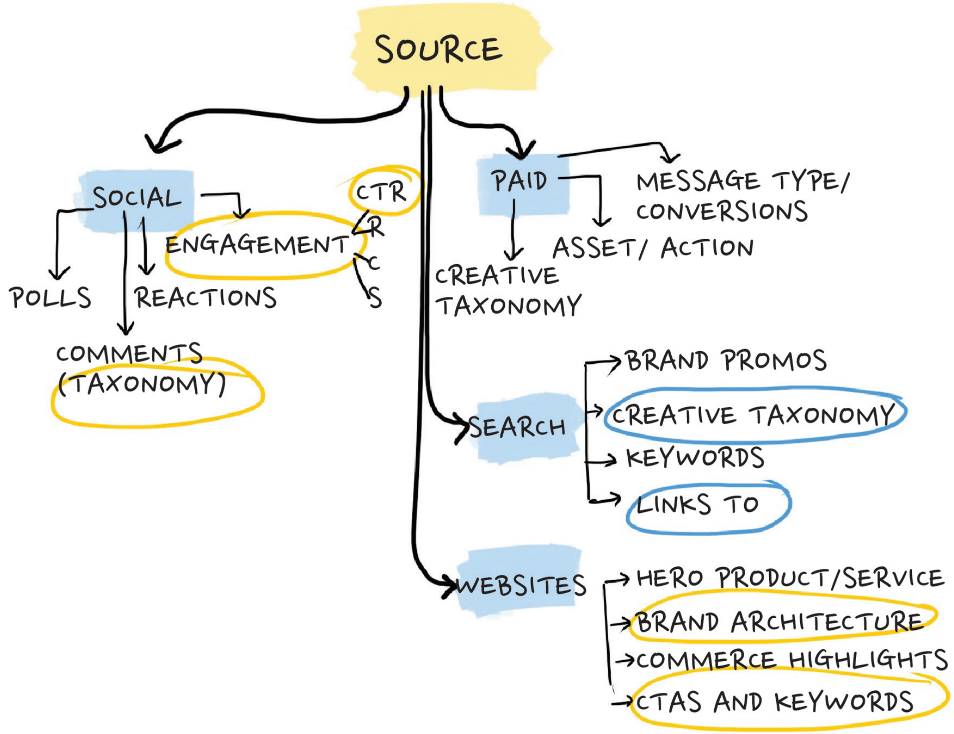


TEMPLATE

Fill in the model with your own data.

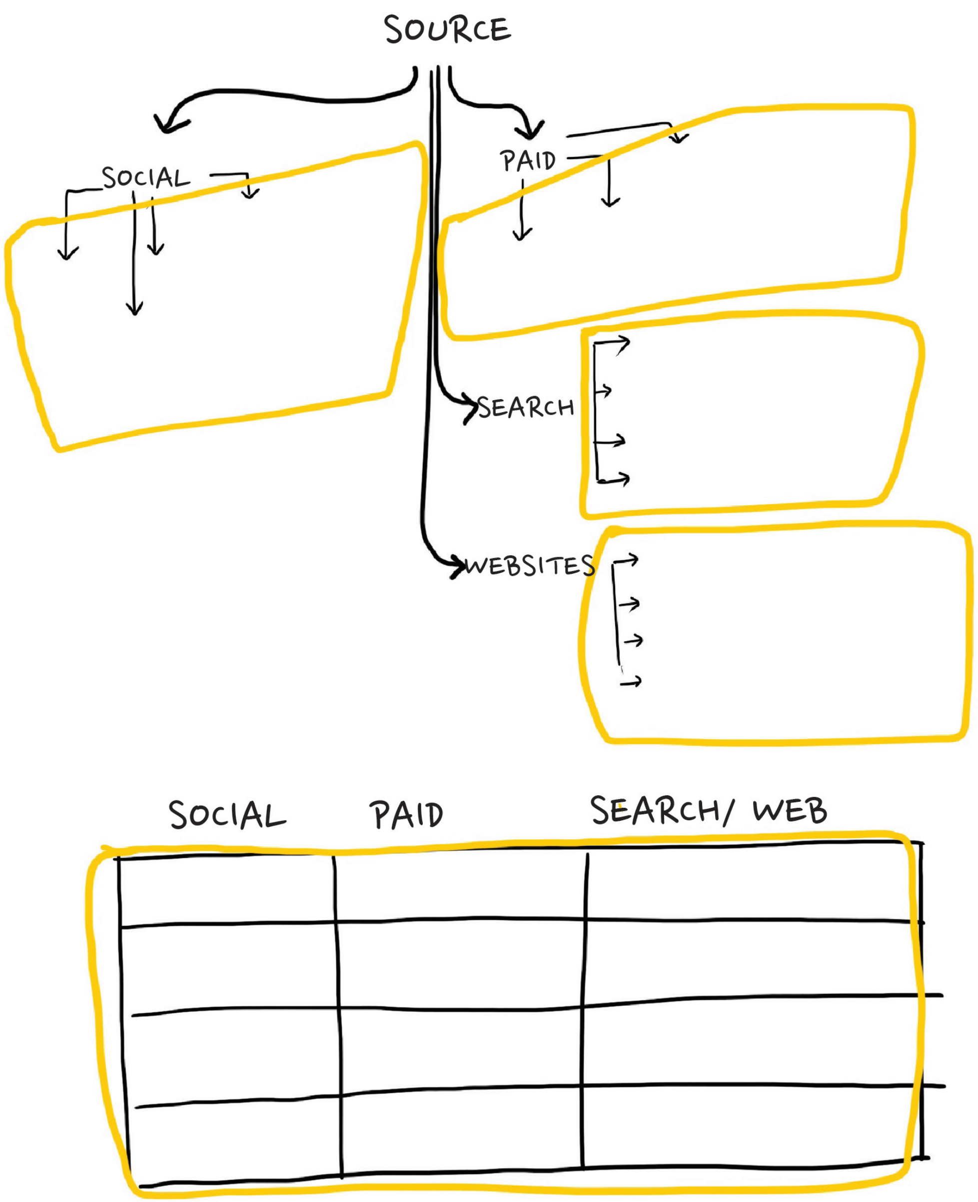
49

ZERO-PARTY DATA COLLECTION



SOCIAL	PAID	SEARCH/ WEB
A, B, C, D	F, B, V, D, H, PP	PRODUCTS A, B, C, D
+ / -	TYPO, PHOTO, COLOUR	CTA, A, B, C, D
H S N MAD	T GIF	PRODUCTS A, B, C, D
	CTA, A, B, C, D	CTA, A, B, C, D

1. How to collect and clean data is one of the most common questions in our industry. A few ideas for starting.
2. Keep in mind when working in marketing, many of the signals you will analyse are qualitative. You will need to develop taxonomy or classification models to quantify them, as seen in **model #53**.
3. Be willing to capture data manually.
4. Grow your sets by adding/capturing data daily if possible.
5. You'll start seeing some patterns with 3-5 features with the first 100 signals captured.
6. Social media polls are a great way to capture zero-party data. See **model #50**.
7. Free tools and resources are a good way to start capturing your own, competitors' and industry data.
8. Some of the most accessible and constant signals to capture are: Share of search (Google Trends), Social Media data (Organic and Paid), Paid media data (Display and video, creative analysis, quantitative placements and formats, AdBeat), SEM and keyword analysis (SemRush), email marketing strategies (Mailcharts), customer care both human and machine-driven (Chatbots, call centres, CRM data). More details are in **model #51**.
9. Capture zero-party data from at least three sources and layer them to hypothesise.
10. A lot of your competitors' data is public. Also, you don't need tools to capture it, just patience and a bit of excel or google sheets knowledge, that's all.



TEMPLATE

Fill in the model with your own data.

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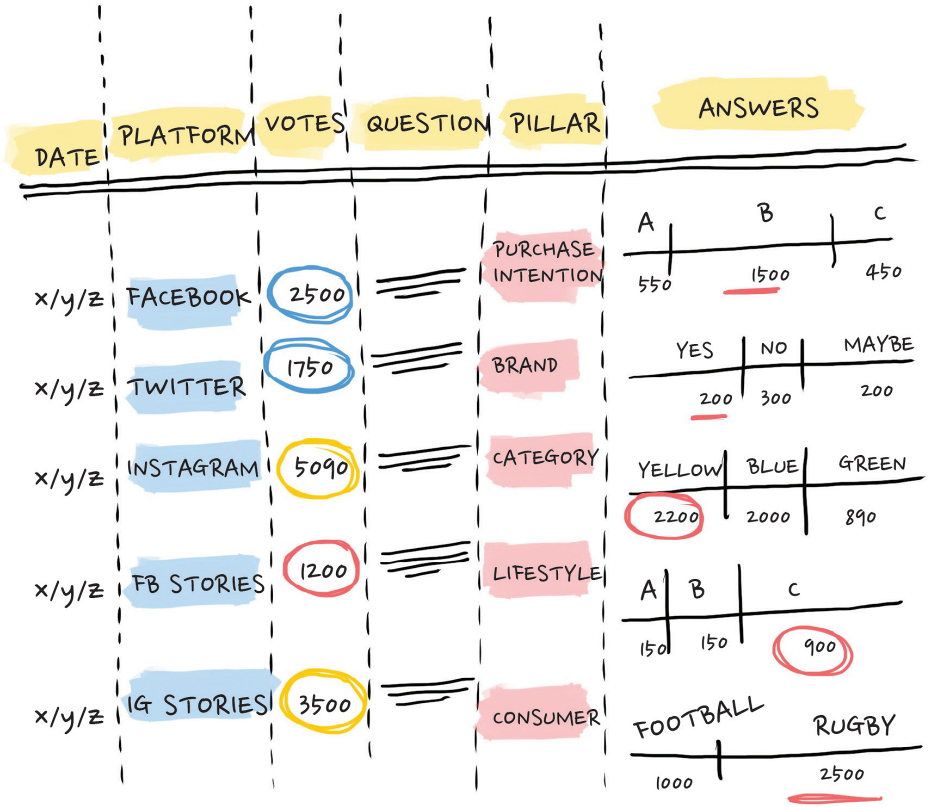


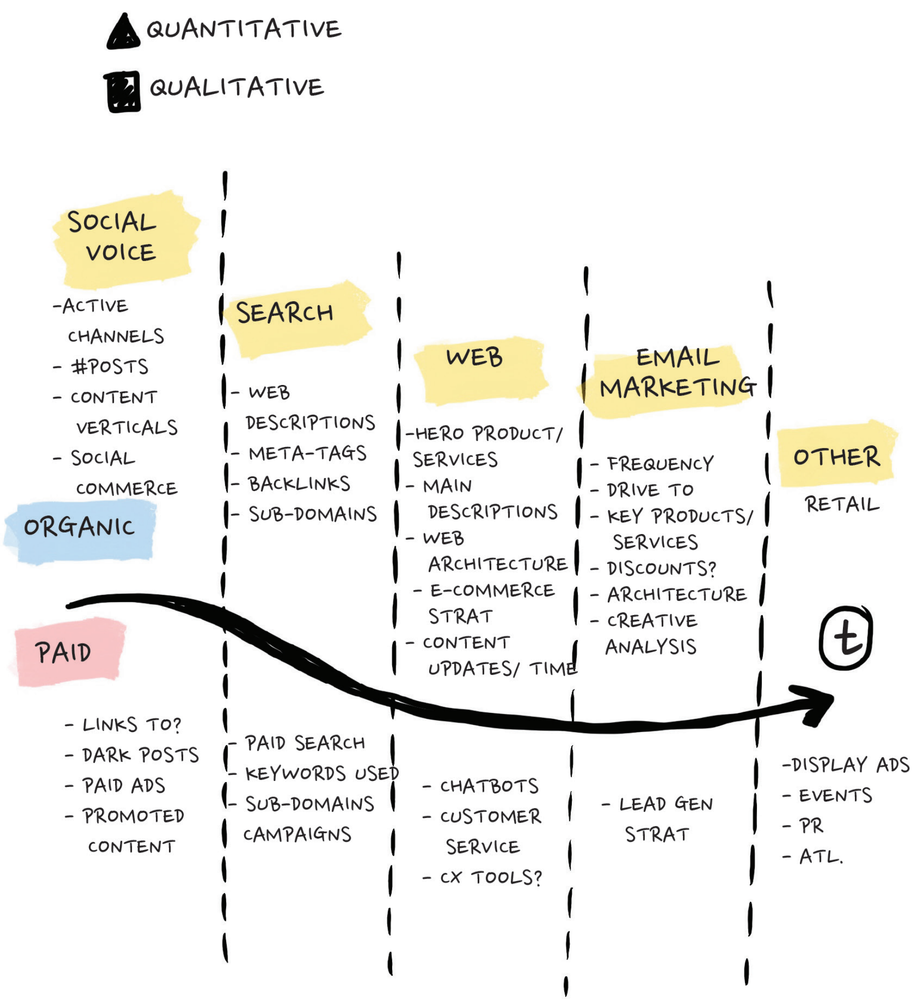
COLLECTING 1ST-PARTY DATA WITH SOCIAL MEDIA POLLS

1. Social media polls are a great way to collect zero/ first-party behavioural, perceptual and intention data.
2. This practice has two options: timeline/feed and story polls.
3. The first step is to create pillars or clusters to group your data on, (i.e. Brand, Lifestyle, Technology, Sports, and Consumption).
4. Post the poll with 2, 3 or 4 options for answers depending on the platform.
5. Collect your data on a sheet as follows: Platform, date and time, number of votes, pillar and the breakdown of the answers.
6. If you find something interesting in your poll data, follow up with related questions to validate hypotheses.
7. You can consider promoting the poll to increase the sample size if the poll gets good results.
8. Focus on three or four main pillars and use the findings to create better content and ads and to improve your offering.
9. These polls are also helpful to pre-validate product/service ideas before going live, also to test functionalities, incentives and business models.
10. You can post Polls on Facebook, (Timeline and Stories), twitter timeline, Instagram stories and LinkedIn timeline.

DATE	PLATFORM	VOTES	QUESTION	PILLAR	ANSWERS

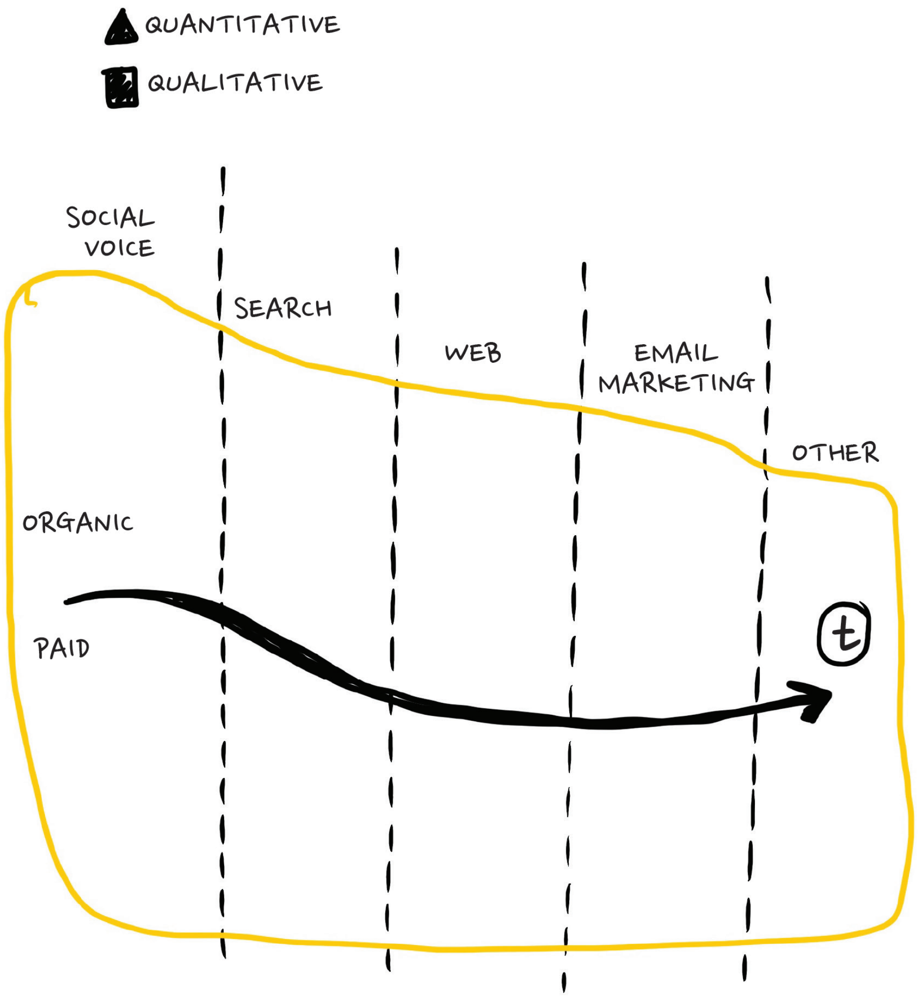
TEMPLATE

Fill in the model with your own data.



COMPETITOR ANALYSIS - DATA COLLECTION

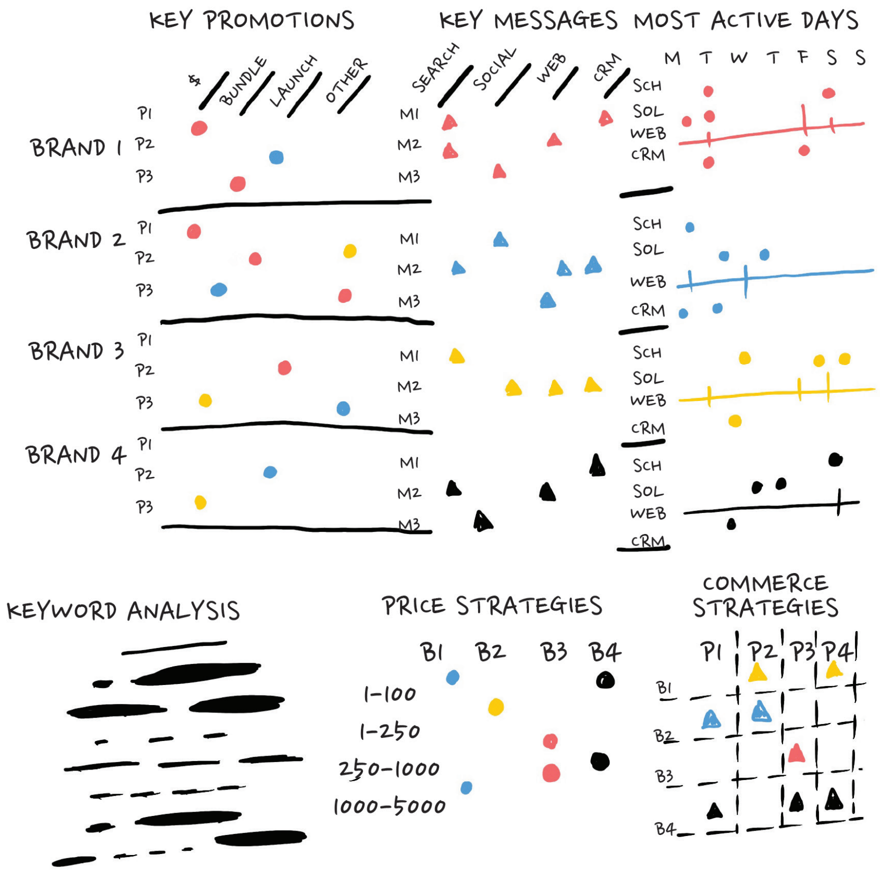
1. Create a sheet to capture quantitative and qualitative data, (this can be done on Google Sheets or a simple Excel spreadsheet).
2. List the channels you will analyse by clustering them under organic, paid and retail, (if the offline analysis is needed) categories.
3. Determine intervals of time to capture your data per channel.
4. In this model, you'll find some free/freemium and public sources to capture data from multiple sources.
5. Social media data is the easiest way to analyse a competitor's strategy: label their type of content (by pillars) and the links they're sending traffic to. Quantify their social presence by channels and number of publications/time and even look at their social paid campaigns (Facebook ads library).
6. You can also analyse websites and landing pages by capturing the type of products or services they use as hero offerings, the tone used, predominant calls to action, button architecture and content updates.
7. I highly recommend you subscribe to your competitors' or benchmark brands' newsletters, to assess how often they're sending emails and SMSes and the content of those efforts.
8. Another useful way to understand your competitors' strategy is to analyse their web traffic and keyword strategy. Tools like Similarweb, Ubersuggest or SemRush will help you do this.
9. In this model, you will find multiple recommendations per channel to capture and layer data, to understand your competitors' strategies.
10. Using this data, create models to assess your competitors' key messages, hero products, promotion cycles, incentive strategies, day and time they invest in specific channels, CRM cycles, channel integration and investment strategies.



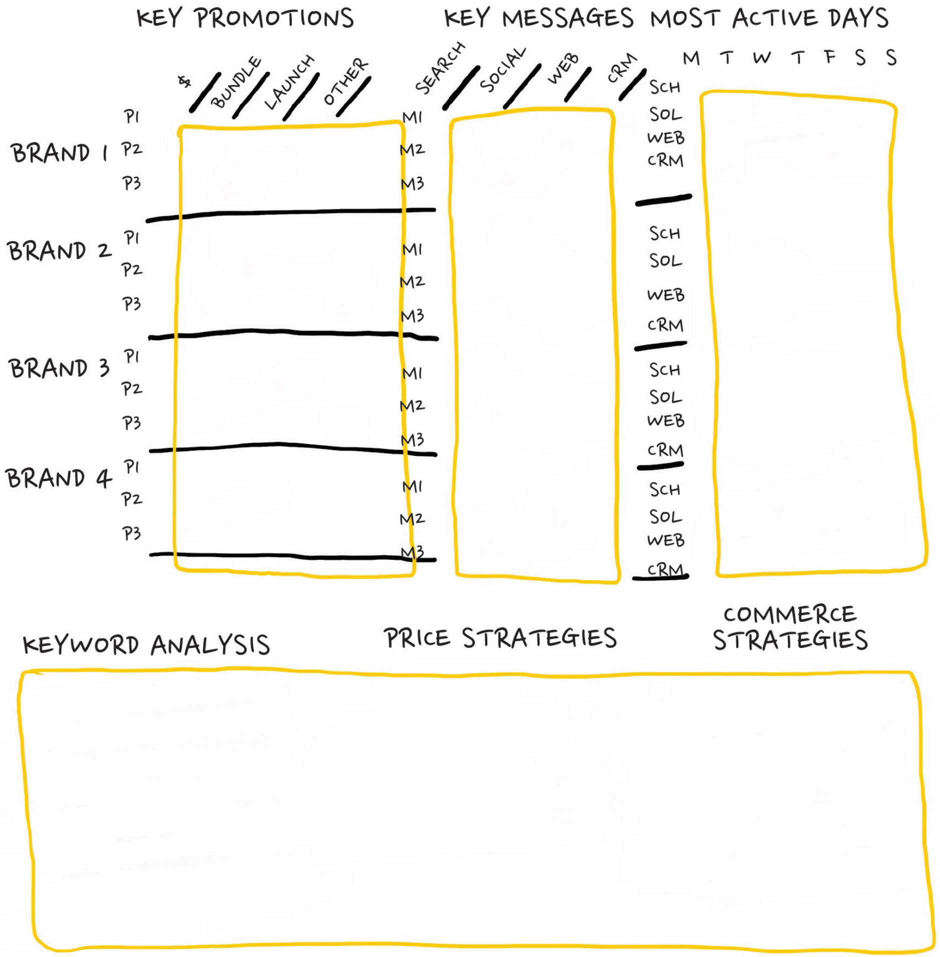
TEMPLATE

Fill in the model with your own data.

COMPETITOR ANALYSIS - DATA VISUALISATION



1. Once you collect all the data, the following steps are to clean, organise, and visualise it.
2. The first step is to check all the values and features are correct. Remember you are dealing with quantitative and qualitative data, with very different values i.e. traffic to a website could be in the millions, prices in the thousands, number of posts on a social platform in tenths and promotions in single digits.
3. As per the previous point, make sure you are correlating/analysing apples with apples. It is a common mistake to build models of features that don't make sense with one another.
4. Quantify the key promotions of a competitor by looking at all of their digital channels and labelling their key messages, **(see model #51)**. If the promotion has a monetary value, add it to the set. It will make sense later when comparing it to other brands.
5. Another important feature to analyse is the key messages or brand pillars used. You can do this by going to their social channels and labelling the topics of their publications. You'll notice all brands choose 3-5 key messages and put more weight on 1-2 of those. That is how you determine their communication strategy.
6. When capturing all of your competitors' pricing strategies over time, you will identify clusters by segments and how those fluctuate, depending on seasonal promotions.
7. Another key practice is to capture all of their most used words on social media, Meta tags on site descriptions, call to action on banners, etc. This will reveal what copy strategies they use for conversions.
8. Lastly, create a taxonomy model to capture all of their creative practices. That is, type of images they use, predominant colours, formats on social media and length of videos. With this information, you'll be able to dissect your competitors' demand strategies.
9. Simple cartesian plans, bar charts, pie charts, and tag clouds are a good starting point to visualise all of your findings, but if possible, capture all this data on liv
10. Google sheets and connect them to any FREE data visualisation tool like Flourish, Infogram, Google Data Studio or Tableau.



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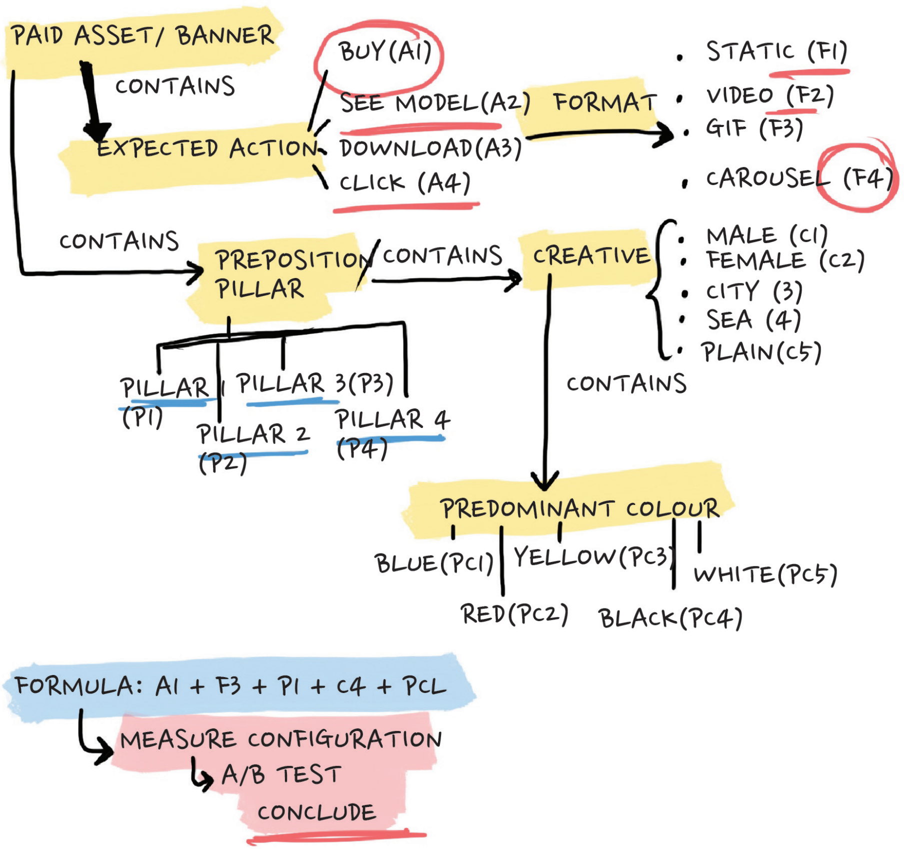
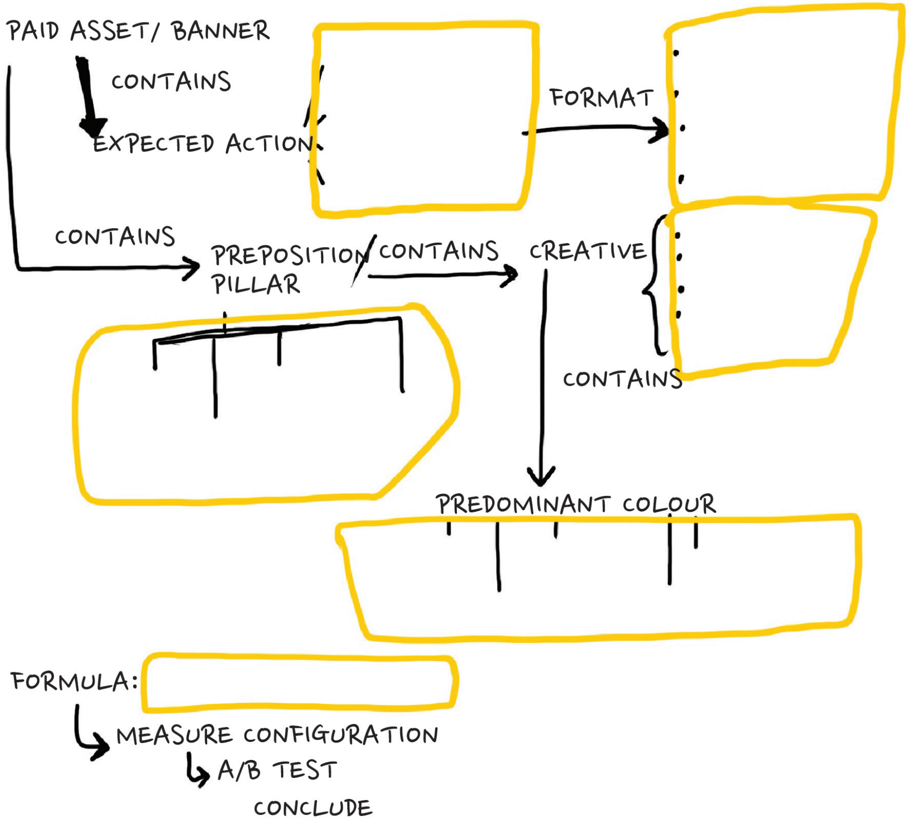
Fill in the model with your own data.

TAXONOMY MODELS FOR DATA QUANTIFICATION



1. This practice is the foundation of data classification. We use it primarily to quantify qualitative data, build correlation models and cluster information.
2. Start by determining at least three features constant in all your analysis (i.e. colour, call to action, format, platform, predominant creative, and type of offer).
3. In the example above, you will see how we analyse the performance of digital paid assets by labelling: Expected action, format, pillar, proposition, predominant colour and creative.
4. Then, we create a formula containing labels (i.e., A1+F3+P1+C4+PC2 - A for action, F for the format, etc.).
5. Each of the formulas is analysed versus results the assets generate in any platform, (organic or paid). Then we scale up and test the correlation of the asset and its results, with similar executions.
6. In most cases, we can conclude the right formula to generate the best results. For example, the creative pieces with a predominant configuration of a female, outdoor background, with a call to action to learn more in 728x90 size out performs the second best cluster of assets by ten times.
7. Taxonomy and correlation analysis also allow us to build predictive and prescriptive models once the hypothesis is validated.
8. On organic channels, analyse in 24-hour cycles. On paid platforms, let the assets run for at least ten days. When layering multiple signals, conclude after 20 days of multi-variable testing.



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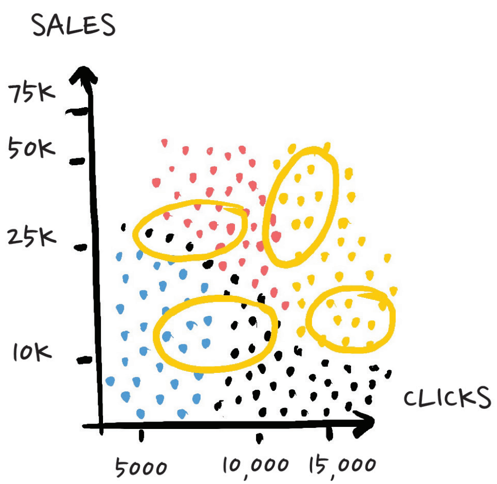
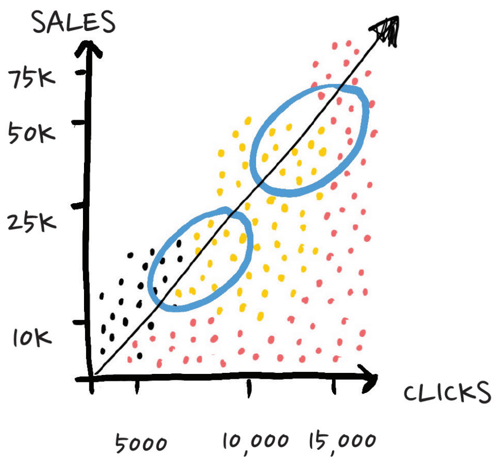
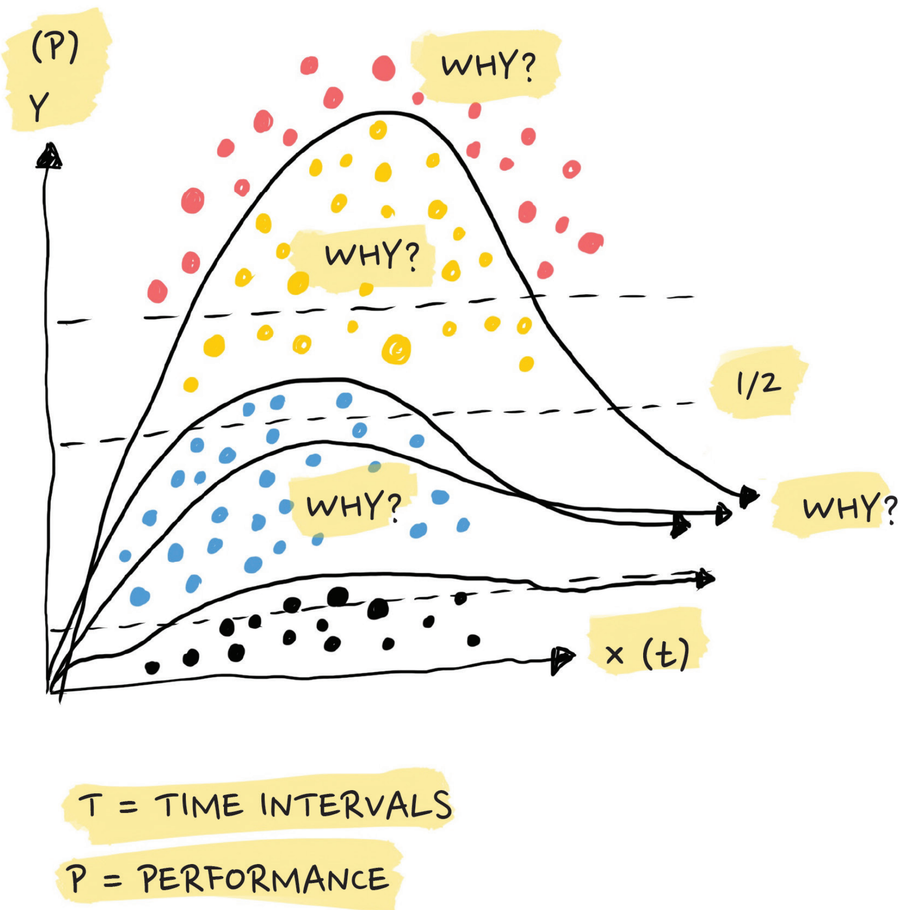
CLUSTER ANALYSIS





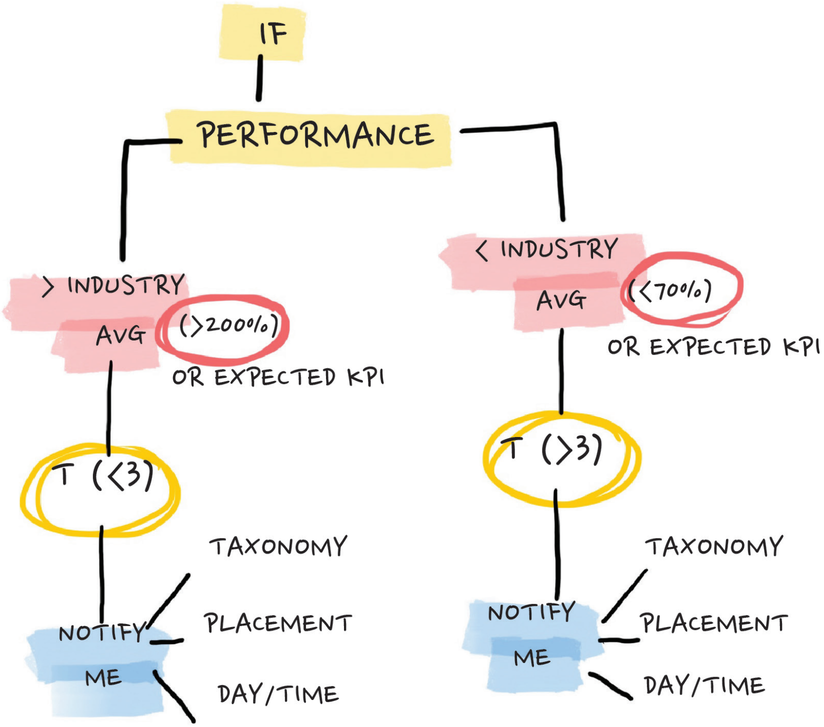
1. Cluster analysis is a common practice in data analysis to group elements close to each other in value(s).
2. Apply clustering models to analyse the incidence of certain factors and how they correlate to each other, when measuring certain results.
3. The main parameter to consider when clustering data, is the distance between the areas in the data space.
4. In the example on the left, I've illustrated how we can cluster sales of different products ($) versus clicks to a property. What we look for in models like these, is the proximity of high-priced tickets to the lowest amount of clicks possible to lower the CPA, (Cost per action). Later, we look into the creative configuration, interactions journey and media placement to make optimisation decisions.
5. In the other example, we analyse clusters of downloads, versus churn when activating acquisition campaigns. This is under the premise, the more downloads we get, the faster the churn rates grow. We often look for the sweet spot between the speed of downloads we need to reach, to avoid passing a 30% churn rate.
6. Doing this type of analysis, you can decide what kind of investment or distribution you would need to allocate to reach a certain objective over time, and later correlate it to all your campaign variables.
7. Set, "acceptable" clusters when building your initial models, i.e. I am willing to spend between 1 to 2,5 USD per lead, and my daily goal is 100 leads minimum. Then when deploying your assets, you will know how much you spend to reach that goal per day. Later divide all those values over time and find your sweet spot. Optimise accordingly.
8. The value of these models, (in my experience) is not in what we see in two dimensions, (like investment/downloads) but in finding the correct value of investment/time and looking into the strategic and creative configurations to get there and to improve them.
9. Another important consideration is data fatigue or performance decrease, often happens in our industry, and cluster analysis is a great way to spot when they start to show; allowing you to take action like changing creative pieces, optimising targeting strategies, and incentives, etc.



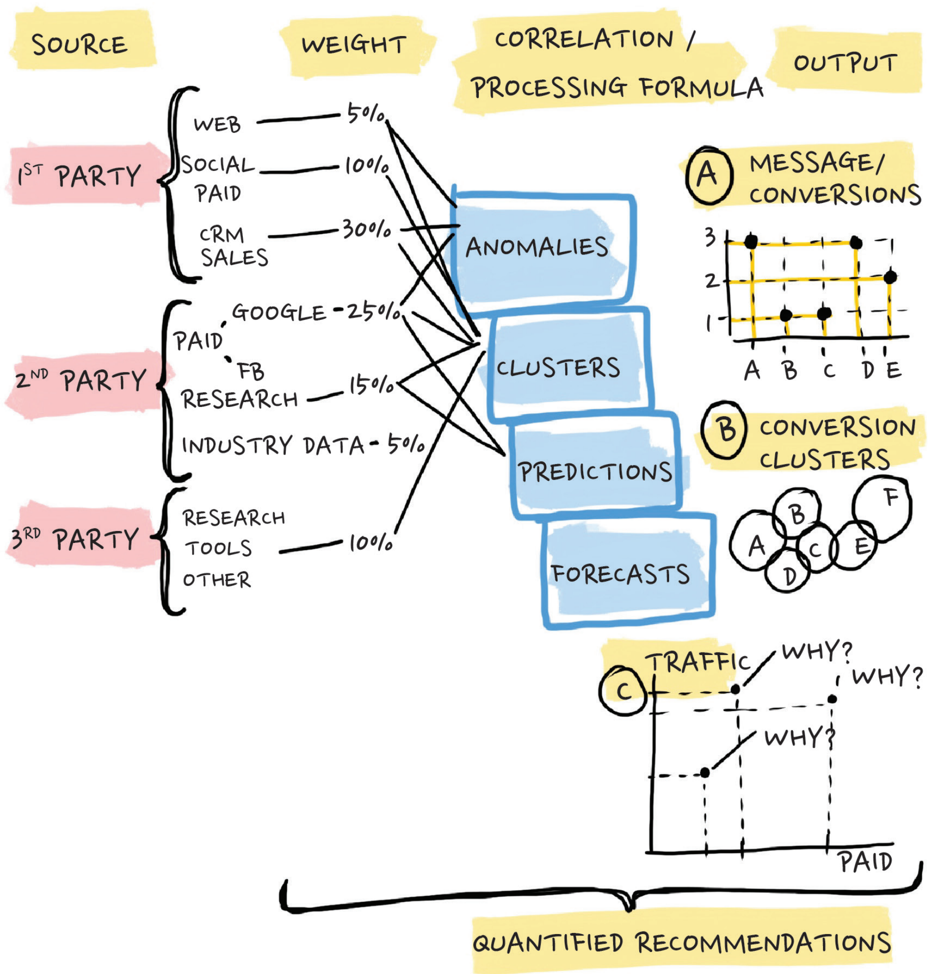
ANOMALY DETECTION

1. Anomaly detection or outlier analysis, is used to identify events which deviate from normal behaviour on a dataset. In our industry, it is very important to do this type of analysis to determine when performance is good, bad or average.
2. First, determine an average metric for everything you are measuring, (from your own past 1st party data or industry averages).
3. Then decide what the accepted anomaly for a bad scenario is. I recommend going to 30% below average or historical results and 50% over. This depends on what you are measuring, the platform, the industry, etc. But it is a good starting point.
4. Set timeframes for measurement to identify recurrent patterns, (i.e. ten days for paid media, a week for social media, and three readings for CRM or email marketing).
5. When you see a recurrent pattern above 50% or under 30%, flag the anomaly.
6. Analyse the factors for the anomaly, (type of message, predominant colours, nature of call to action). Also, the day and time of the piece running is a good indicator.
7. Set aside a list of all the common factors on the recurrent anomalies.
8. Create testing experiments replicating those factors.
9. Measure and hypothesise.
10. If the anomaly becomes constant, scale up but keep testing other iterations, to avoid fatigue.

ALERT SYSTEMS



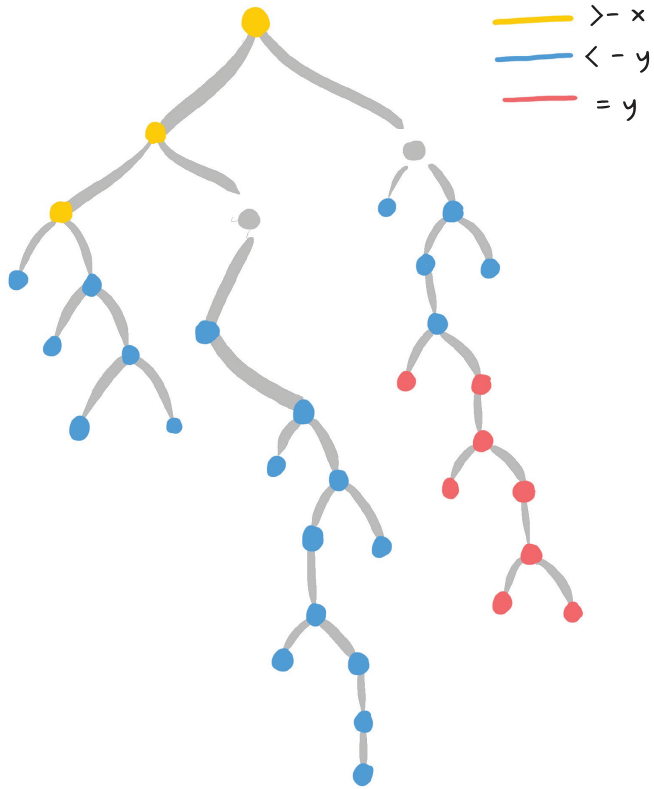
1. When relying on historical reports, (weekly, biweekly, monthly, etc.), you are at risk of missing out on real-time opportunities. That is why in our data journey, we have moved away from them by building alert systems and real-time dashboards. **See model #1**.
2. We set up alert systems to be notified when an anomaly occurs, so we can act immediately.
3. Depending on what you want to measure, determine what the industry and market averages are, (consider global benchmarks). Also, assess your historic performance by determining what is acceptable, overperforming and underperforming.
4. Set up a threshold over the industry average or selected KPI, (this is to determine a positive anomaly performance).
5. Determine a low-performance mark, compared to the industry average or set KPI. You can also set your anomalies based on your custom metrics. **See model #55**.
6. Set up alerts if any of the above happen three or more times in a given time interval, (depending on the platform).
7. If that is the case, extract the taxonomy, placement, and time of rollout of the assets causing the anomaly on your readings. This is to replicate a positive performance or change a negative one.
8. If the anomaly is positive, scale the configuration, (creative and placement) to test close variations and increase the campaign's performance.
9. On the contrary, if there's a pattern of underperforming assets in short time intervals, extract the why, by reading the taxonomy, placement and date of rollout and change the assets.
10. For taxonomy and performance deep dives, **see models #53 and #4**.
11. From a technical perspective, these frameworks can be set on your data visualisation tools or simply by looking at the data sets in intervals of 6, 12 and 24 hours.



REAL-TIME DASHBOARDS

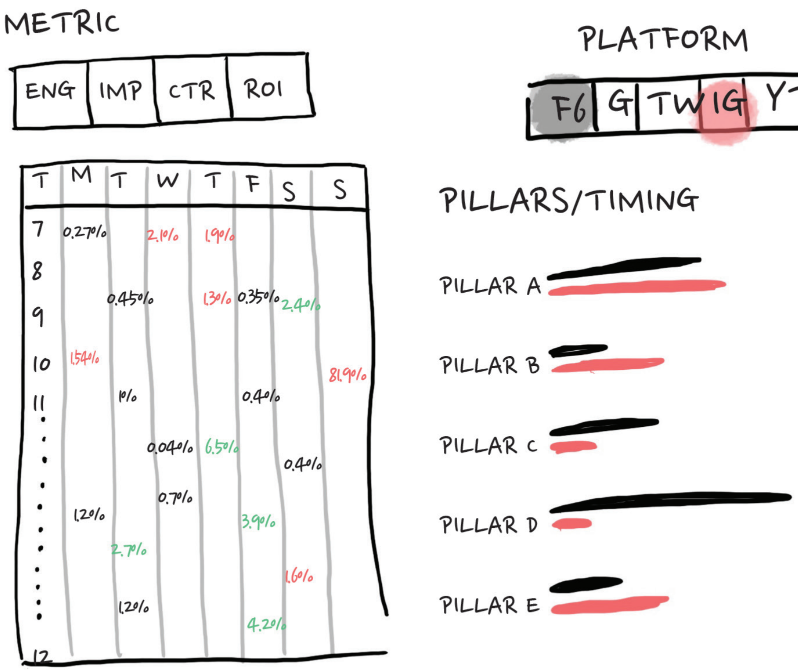
1. A dashboard's main benefits are to update data automatically and to process how we see real-time opportunities. They are fed with historical and real-time information.
2. Before getting into the technical aspect of dashboards, it is key to start with questions. The first one is: What do you want the dashboard to answer?
3. The best way to connect data visualisation tools to sources of information is with APIs and extensions, (i.e. Super metrics or Google Ads Connector in the case of Data Studio and Google ads).
4. Start simple. I highly recommend starting with an approach of data centralisation, before building any custom models — an all-in-one place approach.
5. Look to correlate two or more data sources or sets over time. Depending on what answer you are looking for, correlation is a good way to start.
6. Make sure your data is clean and makes sense. Start by quantifying what's qualitative with taxonomy models. **See model #53**.
7. When building more complex or custom models, I recommend you weight the different data points, by allocating them a value or importance in the equation.
8. Choose a technique based on the expected output, (forecast, clusters, regression, prediction, correlation, etc.).
9. Create alert systems or mechanisms for when anomalies happen, as in **models #55 and 56**.
10. Focus on clear outputs in intervals of time.
11. Use those outputs to determine your next steps and recommend quantitative solutions.

PREDICTIVE ANALYSIS



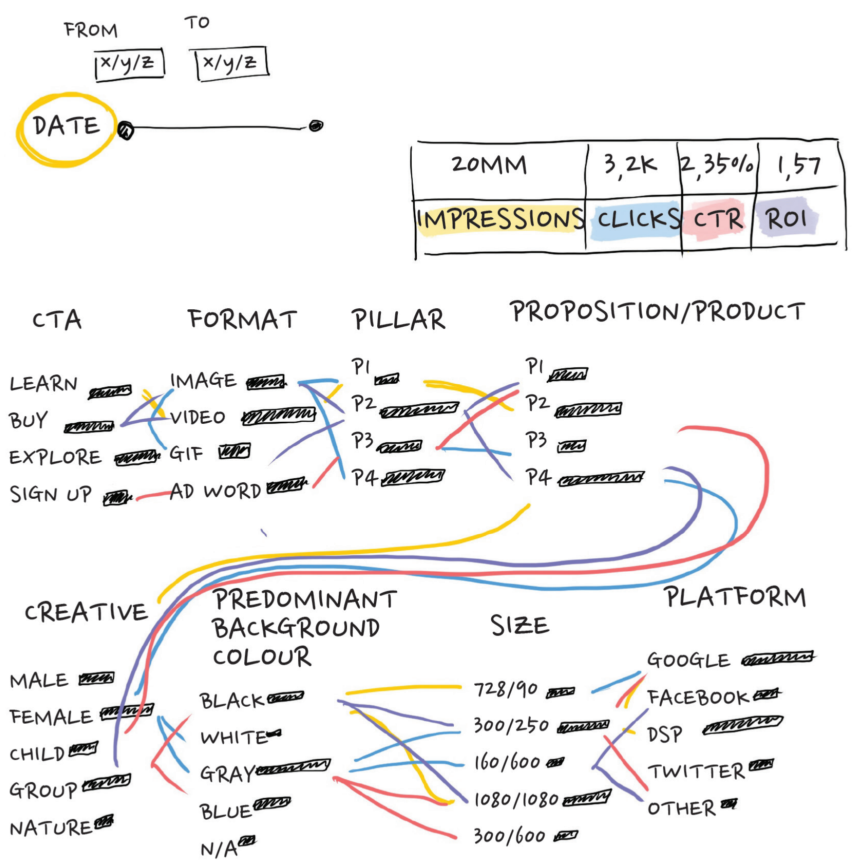
1. The purpose of this practice is to use data, statistical models and machine intelligence to predict a specific outcome.
2. By collecting, labelling and analysing data, (manually or with tools), you will be able to find patterns in the data to predict an outcome or avoid mistakes.
3. The most common way to do predictive modelling, is by taking past data and using regression analysis.
4. Start by hypothesising a set of independent variables, (like demographic or web data, **see models #19 and 20**) statistically correlated to a specific behaviour or action, like purchase cycles or customer lifetime value.
5. Make sure your data is labelled correctly and is representative of the population you are analysing. A common problem with predictive and prescriptive analysis is false assumptions, biased data or wrong correlations. For data labelling **see model #53**.
6. Capture historical and/or real-time data and assign them a value, (weight). Sales data, social engagement, web analytics, paid media data, loyalty data, subscription data, etc.
7. Train your model to, "learn" what are good and bad outputs based on performance parameters.
8. Find strong correlations between the data points to validate or deny your hypothesis.
9. If you don't have a tool or experience in data science or statistics, you can use BigML, a free tool to deploy machine learning models by simply importing datasets.
10. It is important to feed your model with new variations of the datasets so it, "learns" new scenarios or validates initial hypotheses.
11. Consumer behaviours change rapidly. Therefore, predictive models need to be constantly revised and their scores updated.

PREDICTIVE ANALYSIS - TIME



1. How to predict the best day and time to run organic content and paid media campaigns.
2. First, list the pillars or key messages of your digital strategy.
3. I will focus on Social Media for explanation purposes, but this principle applies to any other digital touchpoint.
4. When publishing content on a social media platform, label the content, (format, pillar, and mark the day and time of the publication).
5. Collect data after 24 hours, (all the social metrics).
6. For example: If you post a video about Product Benefits, wait for 24 hours and collect reach, impressions, engagement, and sentiment generated and write all data on a sheet.
7. Do this for all platforms for at least three weeks. Depending on the frequency, you will start noticing a correlation pattern on the most engaging pillars per day and time on each platform.
8. The more metrics you correlate, the more accurate the prediction.
9. By doing this, you can allocate pieces of content into a consumer journey map.
10. For example, suppose you know a specific pillar at a certain time generates the most impressions, but not good engagement. In that case, you can hypothesise around that pillar being good for the awareness phase of your strategy.
11. Same with the pieces that drive the most clicks and conversions.
12. This model will also allow you to step into predictive analytics, because you can see the probability of a pillar being effective on a given day and time.
13. Once you see patterns on what type of content works when creating a predictive calendar. For example, you can now plan Pillar A in format Video will perform best on Monday evening and Thursday morning.
14. Leave room for testing new mixes, or you will fatigue the model.
15. Apply this model to influencer marketing efforts, as seen in **model #43**.

DIGITAL MEDIA - DATA ANALYSIS

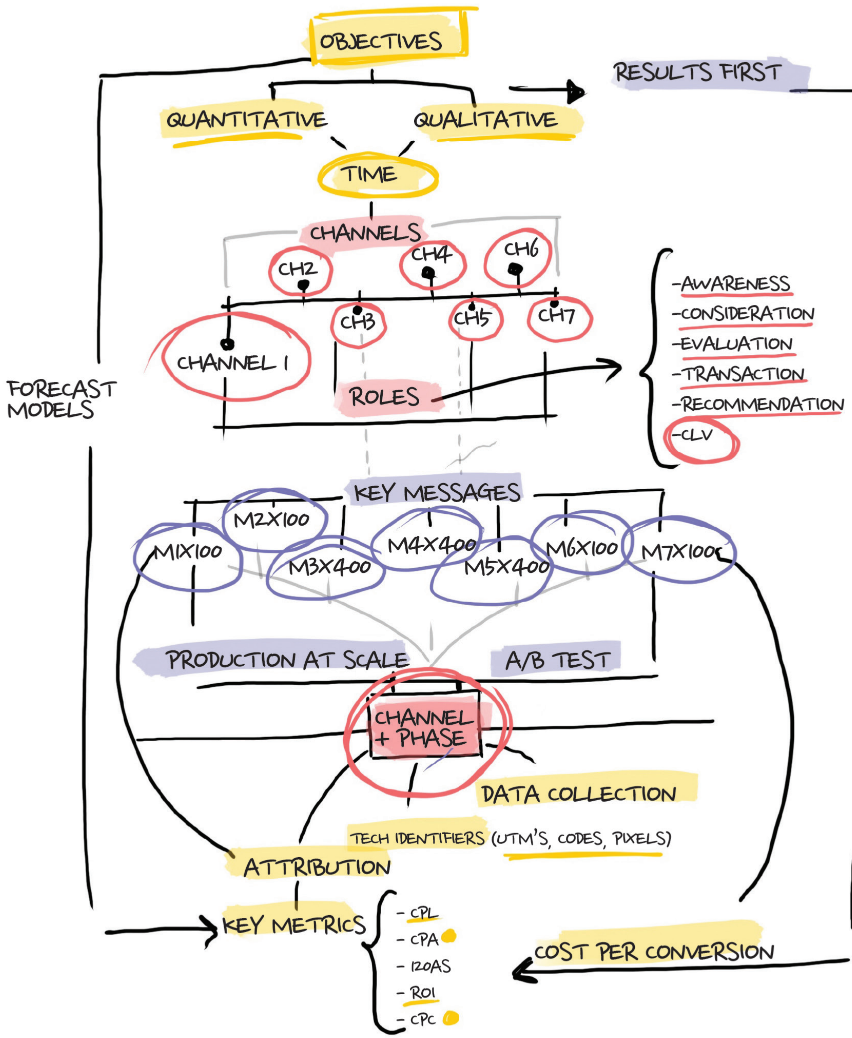


1. This model was built to move away from just looking at impressions and clicks, to start understanding the correlations between the creative configuration, and the results to predict better outcomes. **See model #58**.
2. When creating your media assets, make sure you do it systematically, as in the creative engineering **models #28 - 30**.
3. This is critical to be able to rapidly analyse the incidence of a particular mix on key metrics.
4. In this model, you will see eight key features to label on organic and paid assets, and four key metrics to co-relate them for optimisation purposes.
5. In no particular order:
   a. Type of creative: Male, female, vehicle, nature, family, city, indoor, outdoor.
   b. Predominant colour: White, black, red, yellow, blue, purple, other.
   c. Size: 728x90, 399x250, 160x600, 1080x1080, others.
   d. Platform: GDN, UAP, FB dark post, promoted story, Tw, DSP, other.
   e. Format: Video, Image, Gif, Text ad, carousel, etc.
   f. Proposition/product: P1, P2, P3, P4.
   g. CTA: Learn more, buy, explore, see more, sign up, etc.
6. Key metrics: Impressions, clicks, CTR, ROAS, ROI, CPA, CPL.
7. A common finding in these models, is every key metric delivers the best performance possible with a creative mix different to the rest. Cluster the best performing creative mix and scale up. **See model #54**.
8. It is highly recommended to build these models per channel, audience, targeting cluster and objective to later optimise creative assets on each of the phases of the wheel/funnel.

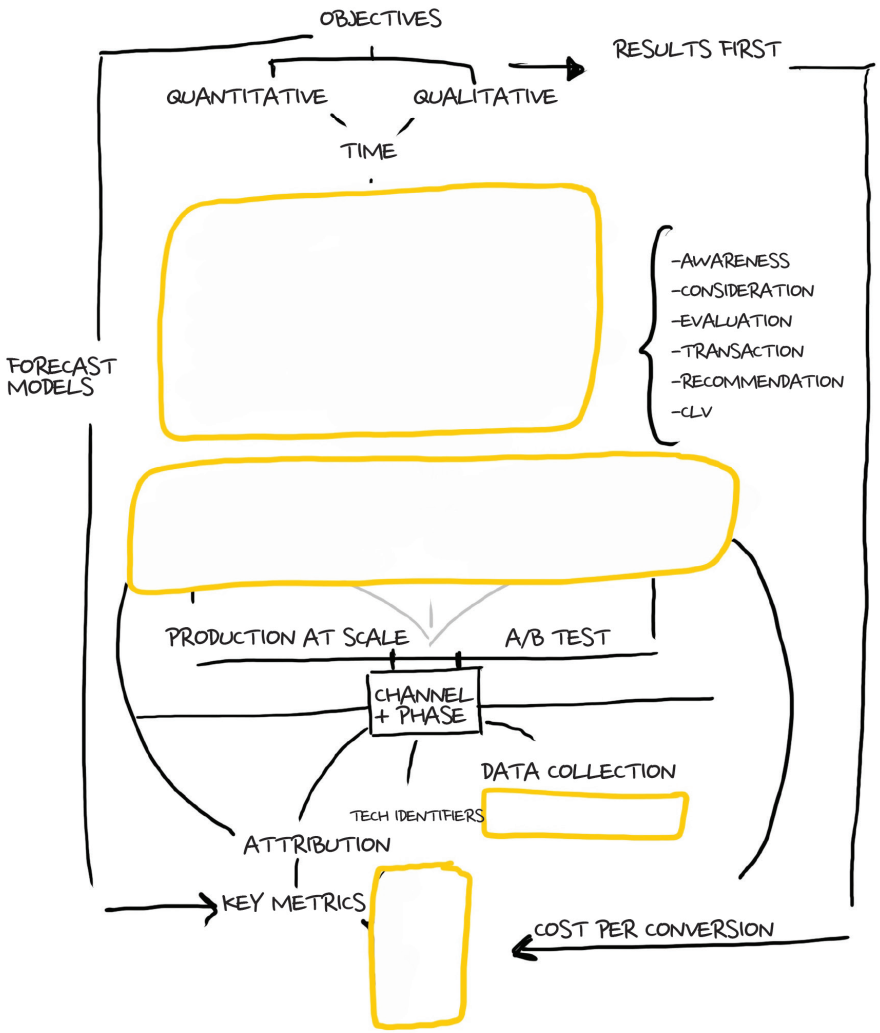
CHAPTER 6

PERFORMANCE MODELS

PERFORMANCE MARKETING



1. The essence of performance marketing is based on inverted funnels or an objectives-first approach, as opposed to budgeting on channels and fishing for results.
2. Start by defining quantitative and qualitative objectives up front. This can be done by using past acquisition data or looking at industry performance data.
3. Determine the channels you'll use on your strategy, with a clear role for each of the stages of the journeys and clear metrics per channel, (it is different to track and attribute video views, clicks or downloads to a specific strategy).
4. Plan for key messages created per channel and per role in the journey. This is key to understanding the message configuration of each conversion as they start happening. Often marketers deploy one message only and retarget users with the same piece, which hurts the strategy's performance.
5. You can use the production at scale and creative engineering frameworks. **See models #27-30**.
6. Set up a clear and, if possible data-driven attribution model as in **model #21**.
7. Use as many tech identifiers as possible, (In-app tracking, UTM, Pixels, tagging on pages, etc.).
8. Avoid only measuring impressions, clicks and visits and look deeper into cost per action, cost per return visitor, ROI on specific actions and conversion journeys from channels and messaging perspectives.
9. This framework depends on testing multiple variables constantly, such as messages, channels, calls to action, retargeting journeys, CRM and email marketing and various formats.
10. Apply forecast models, **(model #63)** to quantify your opportunity and ensure your objectives are met.



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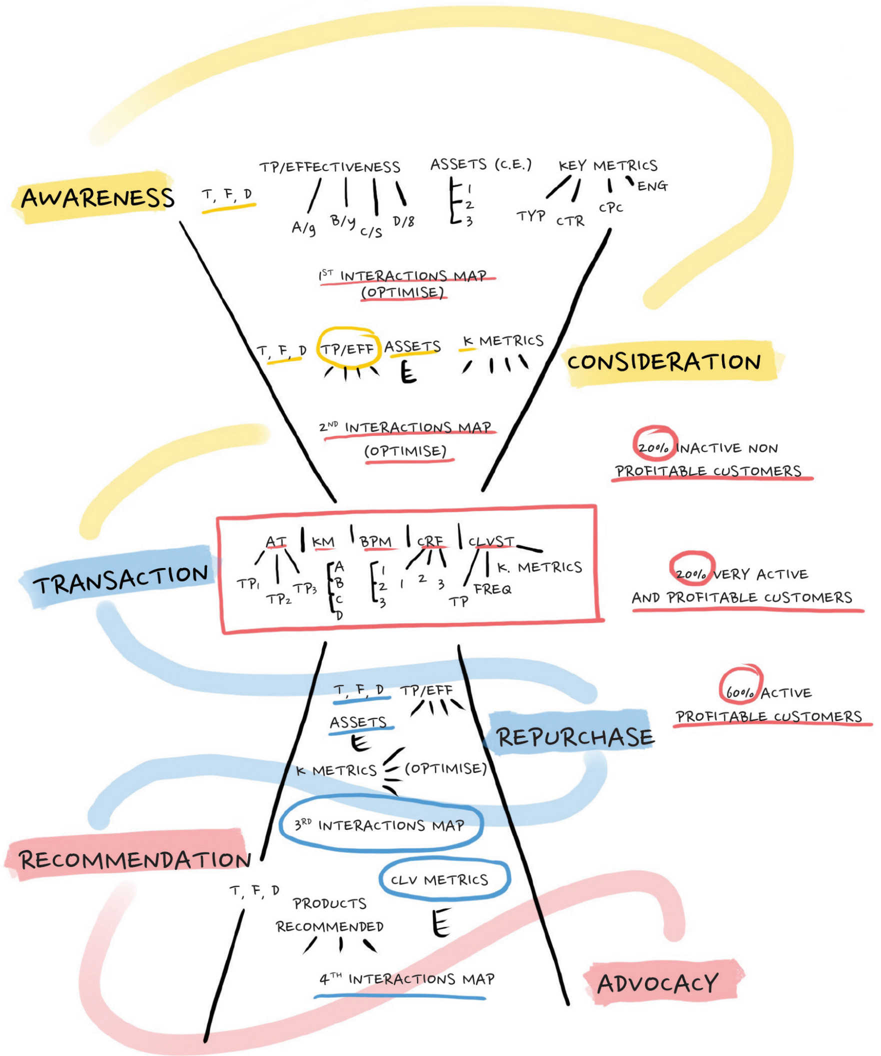
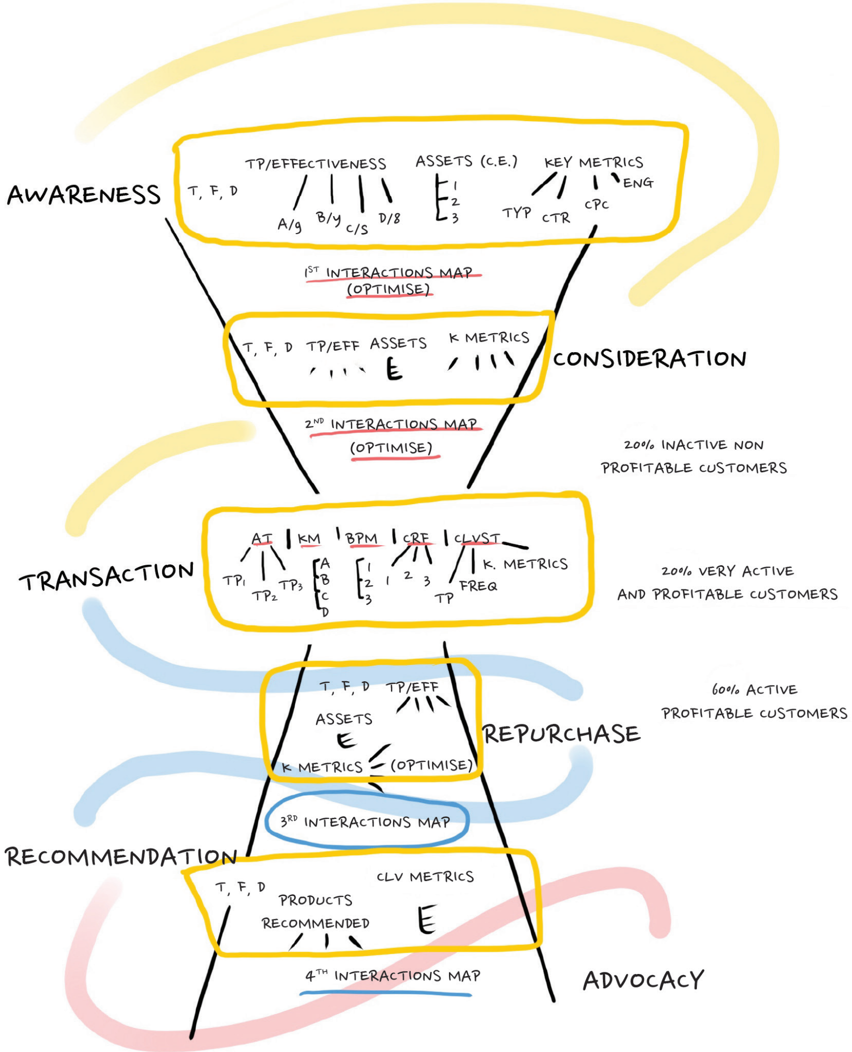
CUSTOMER LIFETIME VALUE (CLV) FRAMEWORK



1. This model will help you focus your efforts on building a sustainable CLV strategy.
2. On each of the stages of the strategy, (awareness, consideration, transaction, repurchase, recommendation and advocacy), there are different actions and analysis points, which allow you to create four interaction maps, one on each phase.
3. In the awareness phase, first determine what you want the audience to think, feel and do.
4. Then list the touchpoints you will use, and as you start implementing, give each of them an effectiveness score from 1 (lowest), to 5 (highest). This is based on data or as you start collecting it.
5. Create assets under the creative engineering framework, (**see model #30**) to test per phase.
6. Collect key metrics and conclude. By doing this, you will be able to design a first interaction map and get onto the next phase. Repeat the process in all phases.
7. When you get to the transaction phase, assess your attribution model per touchpoints, determine the best-performing messages, key metrics, conversion rate factors and your CLV strategy.
8. Deploy your repurchase strategy by repeating the process above. From gathering data here, you will be able to draft your 4th interaction map.
9. Do the same for the recommendation and advocacy phases.
10. At this point, you will have four interaction maps that will tell you which messages, touchpoints, formats, and key metrics are the best for each phase.
11. Overlay your four interaction maps to get a blueprint of your strategy. This model works really well with the performance wheel seen in **model #11**
12. Your starting point mix of customers on a CLV strategy is:
    a. 20% very active, very profitable customers.
    b. 60% active, profitable customers.
    c. 20% inactive, non-profitable customers



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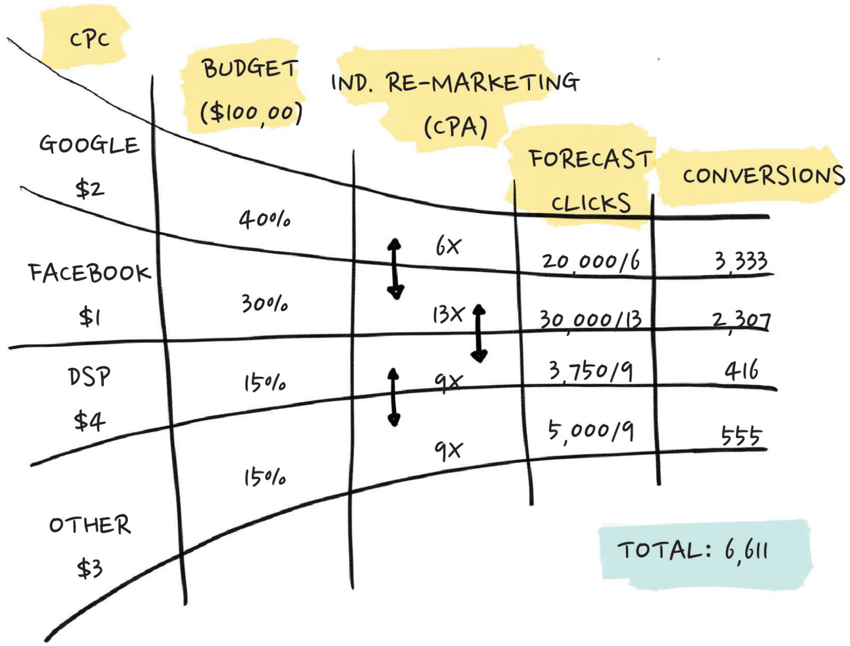
FORECAST ANALYSIS



OBJECTIVE: 50,000 N/U
MONTHLY FORECAST: 6,611 N/U
CHURN: 70%

RETENTION: 1984 A/U
TIME FORECAST: 26 MONTHS

NEW USERS = N/U
ACTIVE USERS = A/U

1. This model is handy when quantifying an opportunity in the performance space. You will need past media and acquisition data or some industry averages to work with.
2. It is important to clarify this is a linear model, where you will assume the user will only interact with one property repeatedly, until the conversion happens, (which is unlikely in the real world, but a good indication). This is useful when not having conversion data from your client or the other end.
3. Since CPCs are relatively close to each other in the most popular paid channels, this model is fairly accurate, again, at least to get an indication of what your budget will get you.
4. This is an example, of a forecast model in a scenario of app downloads.
5. Start by quantifying the paid model based on historical and/or industry data, (CPC, CPM, CTR, Open rates, etc.).
6. Assign a budget percentage to each of the paid channels you use.
7. Consumers don't perform the action on the first click. Estimate how many clicks you would need from a user to, in this case, download the app. (Use a basic linear attribution model, **see model #21**).
8. Use cross multiplication to solve for x (Total performance). In this case, how many clicks will you get with the budget you have? If one click = X and you need Y clicks for a download. How much does a download cost?
9. Then divide the total budget over the download cost, and you will have your forecast model.
10. This is also a good first step to getting into custom attribution models and consumer journey mapping.

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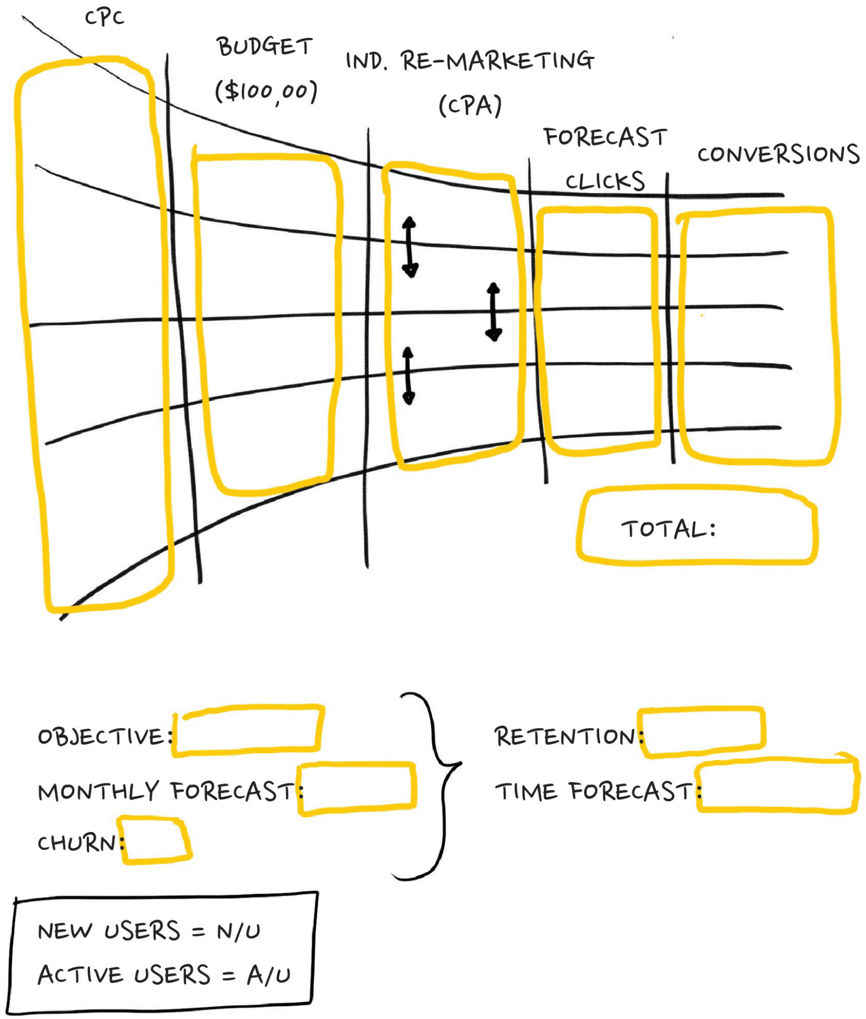
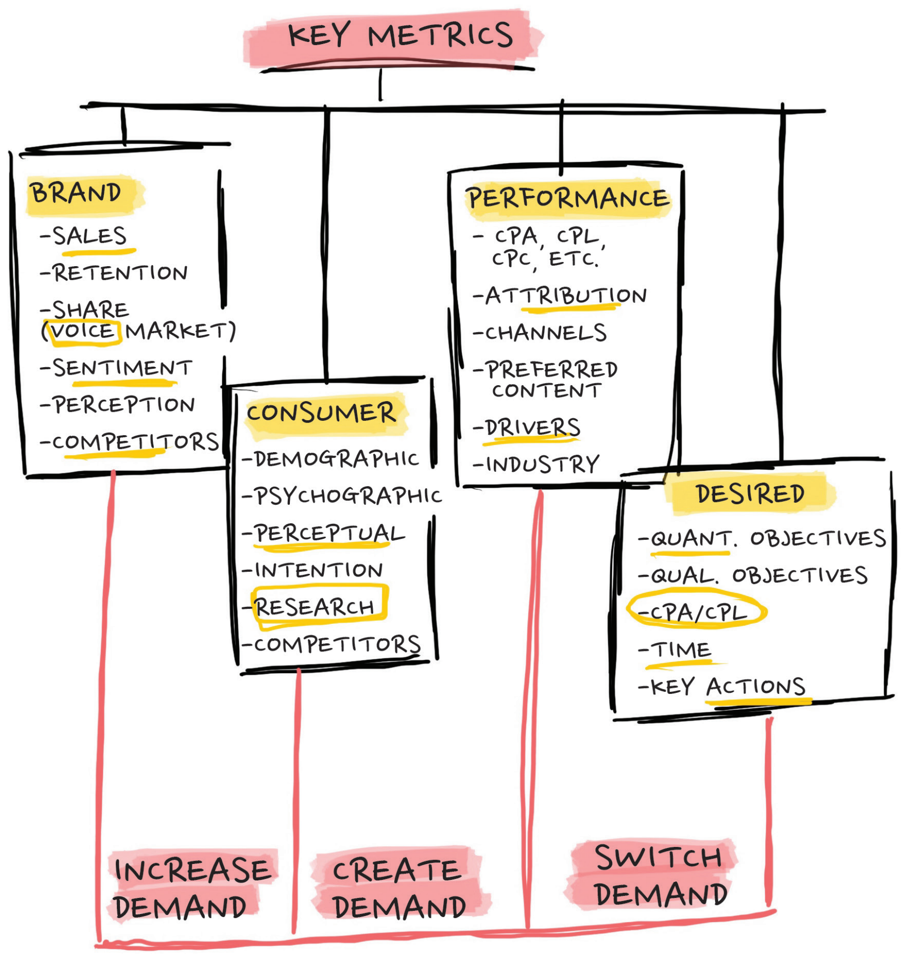
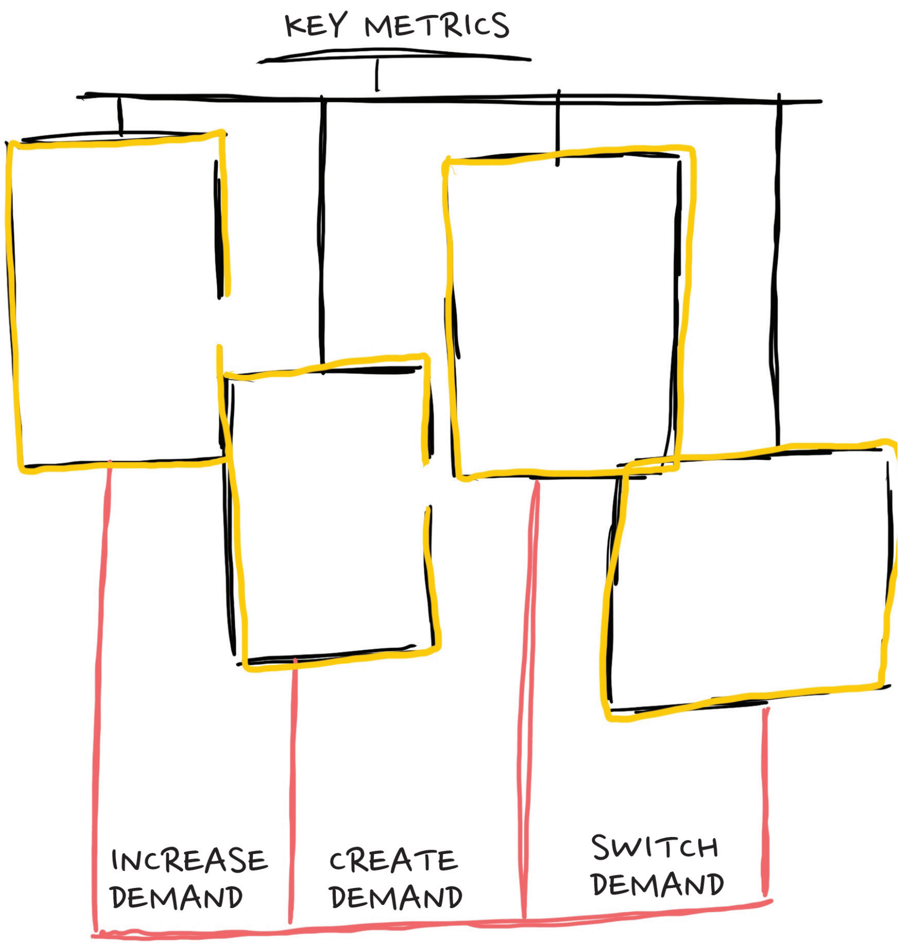




DEMAND METRICS

1. Moving away from vanity and superficial metrics is a key transition to entering a better digital and data practice.
2. For this, we have been measuring and attributing under the concept of demand. From increasing to creating and switching demand, (consumers).
3. Some key metrics when looking into demand increase for brands are sales, penetration, the share of voice and market, sentiment, perception and competitors' data.
4. When looking at consumers, it is important to look into: Demographic, psychographic, perceptual, intention, research and competitors data.
5. In the performance space: CPA, CPL, CPC, CPM, etc. Attribution data, channel performance, preferred content, drivers of conversions and industry data.
6. When looking at desired/objectives data, it is key to determine quantitative and qualitative objectives, key actions to deliver these objectives, channels, past data (CPA, CPL, CPC, etc.), and the time to meet objectives.
7. When overlaying these metrics, you will get a good understanding of the metrics that contribute to your business objectives.
8. Once you start collecting and correlating this data, you can test predictive models **(model #58)** and build more data-driven strategies.



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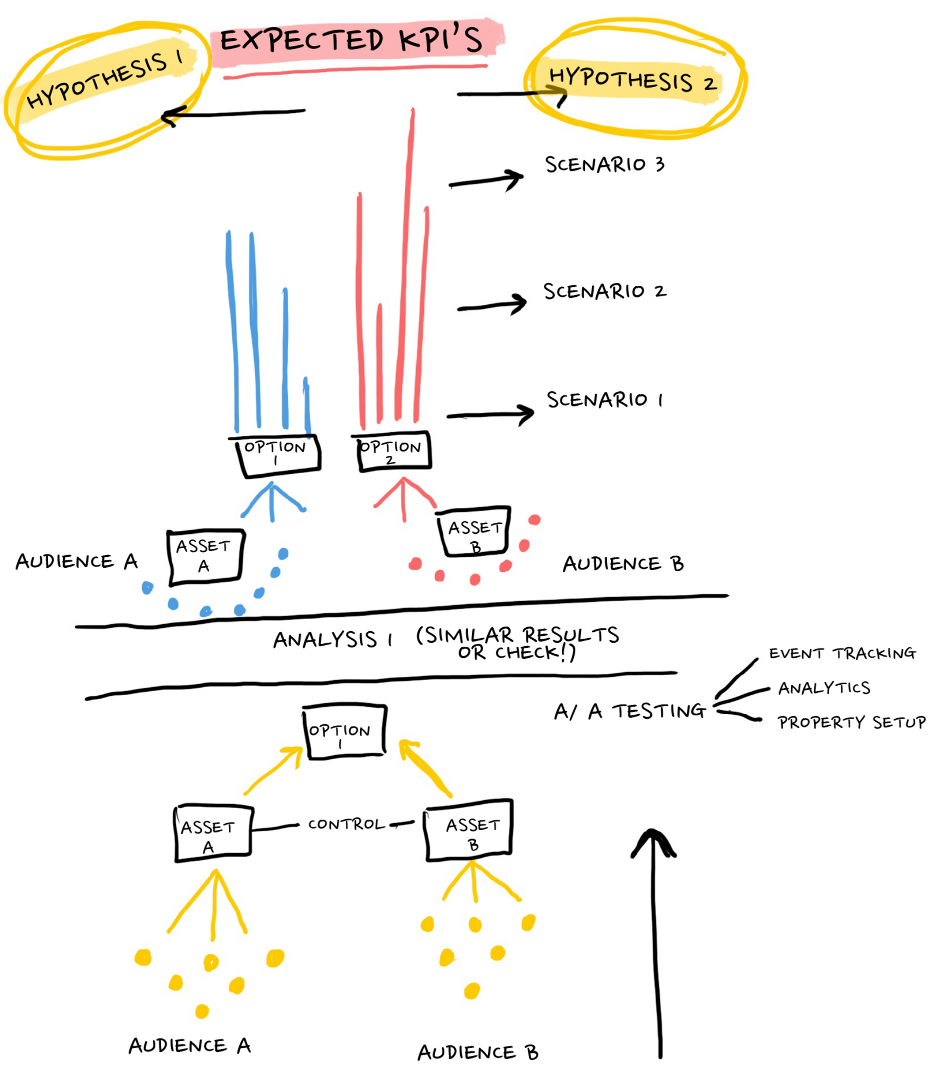
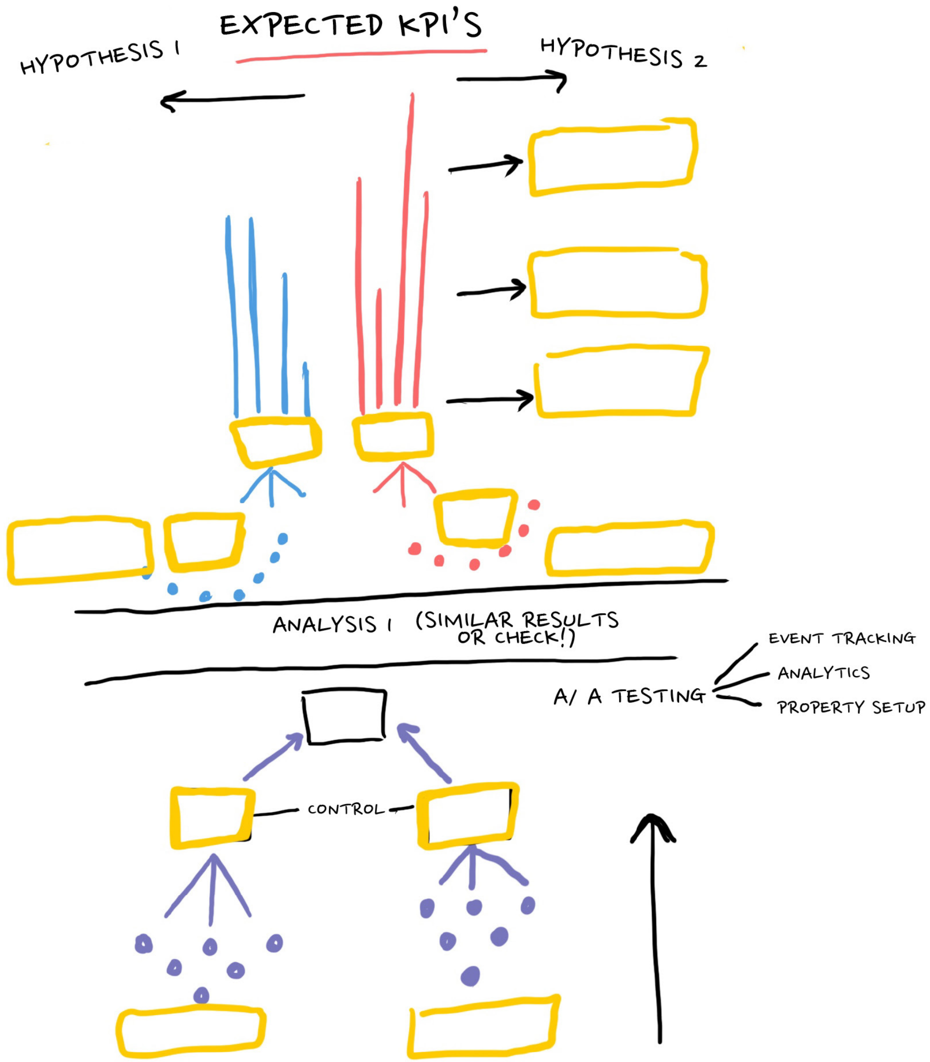


A/B TESTING FRAMEWORK

1. A/B testing is a key set of practices to ensure getting the best out of performance strategies. In this model shows where and how to start.
2. Start A/A testing by comparing the same audiences, ads/creative and destination touchpoint.
3. This is done to assess if the testing framework and its parameters are set up correctly.
4. Analyse if the initial run throws similar results, (expected). If not, look into event tracking, pixels, click tags, analytics, ad-serving platform setup and the property to find any problems.
5. Once A/A testing is validated, you are cleared to go into A/B testing.
6. Start by choosing how many factors you want to test and for how long.
7. Some of those factors are audiences, creative (design, call to action, formats, etc.), landing pages, expected action, budget, etc.
8. Determine three layers of KPIs, from worst to the best case scenario.
9. Run tests with similar budgets or audience sizes, (in the case of social) and collect the data from all possible scenarios.
10. Once you start seeing patterns regarding good performing pieces, targeting and destination touchpoints, design experiment variations, run them and validate findings.
11. In most cases, the bigger the sample, (or longer the experiment runs), the better and more accurate the results.
12. Scale up what works and replace/change what does not.



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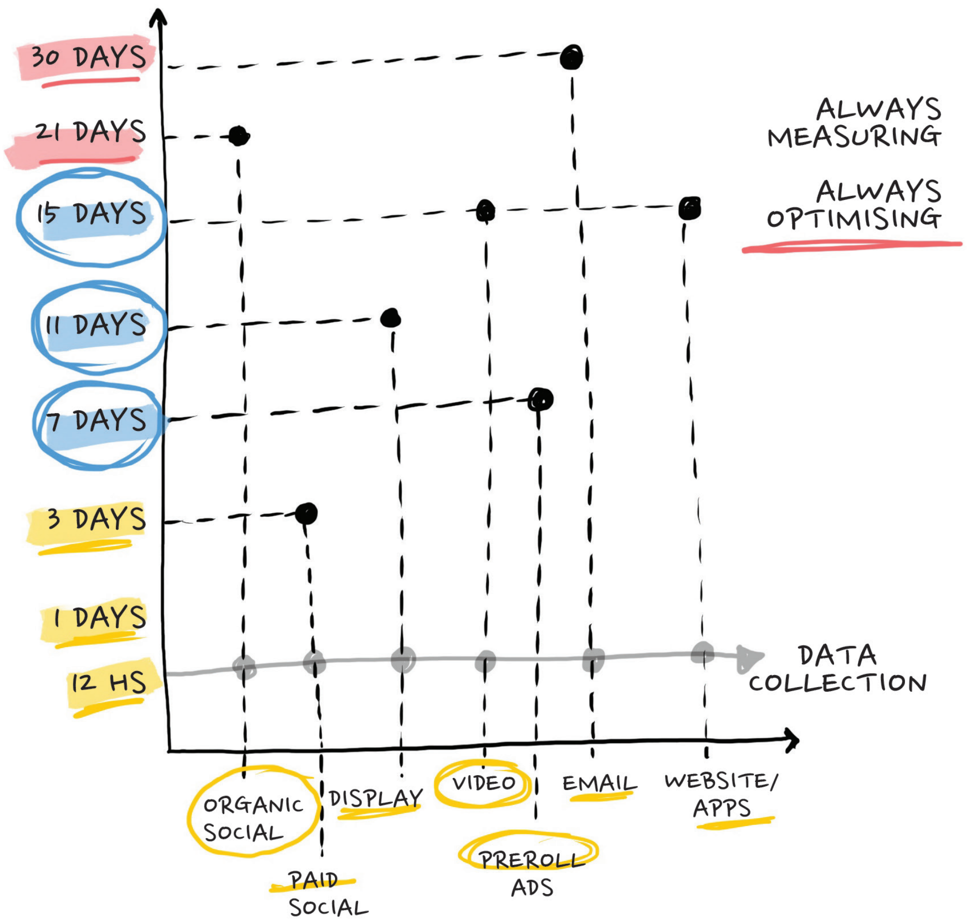
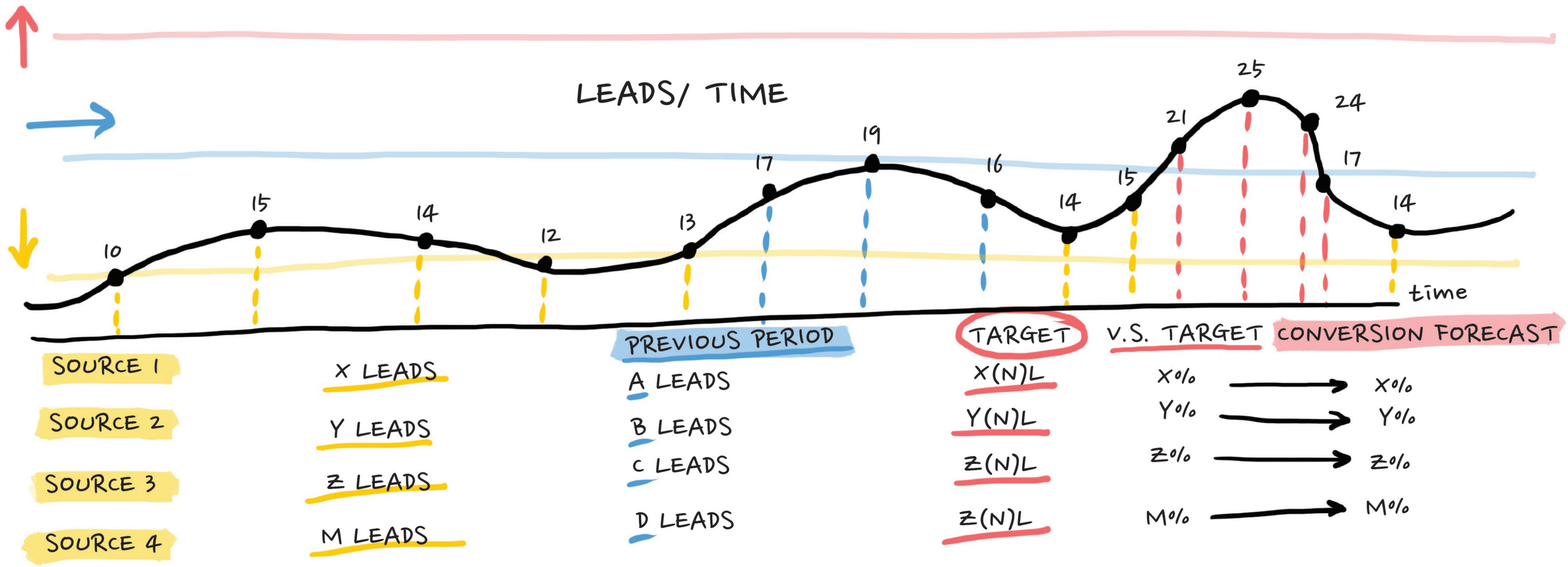


LEARNING AND OPTIMISATION CYCLES PER TOUCHPOINT

1. All touchpoints in digital marketing have different learning and optimisation cycles. It is a common mistake not to wait enough or too long, to take action.
2. For example, organic content on social media, (if posting frequently and testing multiple pillars) should take 21 days to show patterns of what works and what doesn't.
3. Paid content is much quicker, depending on the budget and length of the campaign, but after three days of testing two or more assets, you should be able to start finishing.
4. When testing display advertising campaigns, it is important to wait ten or more days to finalise, (also depending on the time and budget of the campaign).
5. For video ads, if testing multiple campaigns, it is recommended to wait at least 15 days before finalising and taking action.
6. For email marketing campaigns, (if you send one or more assets per week), a good optimisation strategy would be to start on day 30, after seeing multiple pieces perform.
7. When looking into content strategies on websites, (like blogs or portals), after two weeks, you should start seeing what content performs best, (versus bounce rates, backlinking, direct traffic, etc.).
8. Always measure. Always optimise.

LEAD QUALIFICATION AND OPTIMISATION FRAMEWORK

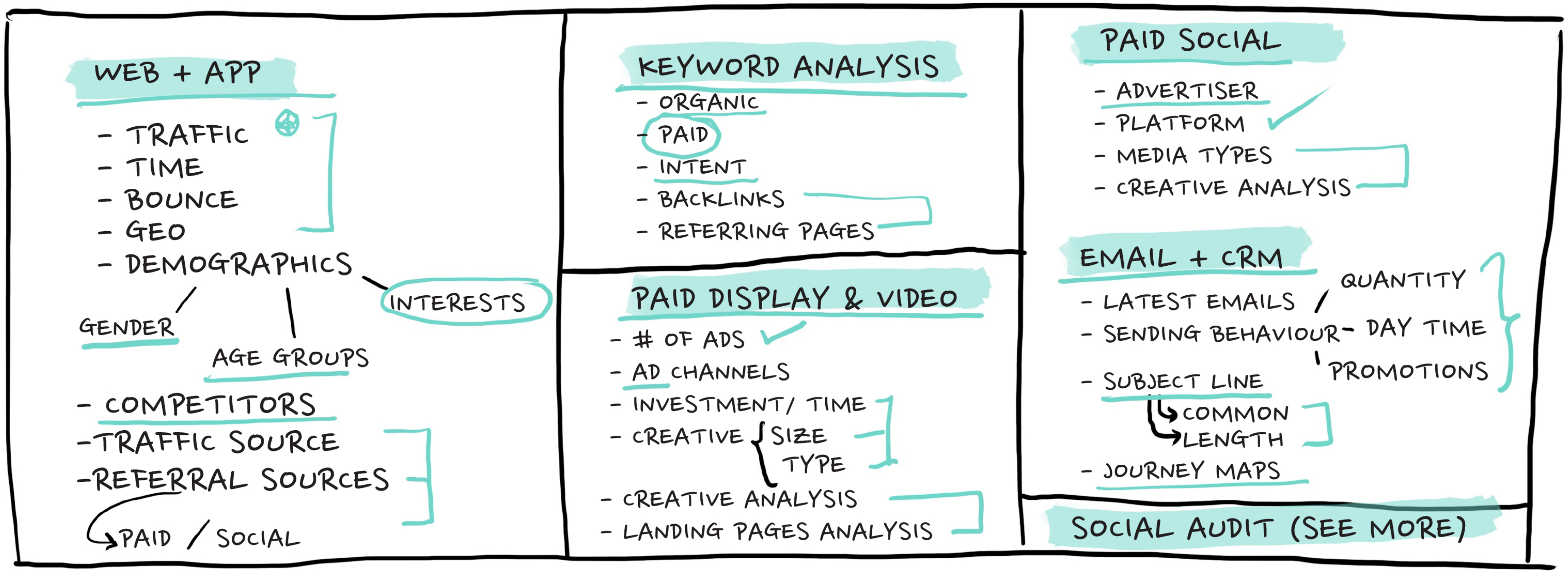


1. When working on lead generation strategies, it is important to determine a daily goal and what the minimum leads are you would consider acceptable, based on your parameters.
2. As the leads start to come in, separate the sources of the leads, (depending on your attribution model). Give each source a level of importance, based on the probability of conversion. For example, for some categories, social media leads are the most in quantity, but the least likely to convert into sales. It's a probability game.
3. Compare the leads you are receiving, to a previous period for reference in which the budget spent, was the same or similar. This will show you an indication of better or worse messaging, targeting and demand overall.
4. Compare the leads received daily to the total target, (this can be calculated by dividing the expected total number of leads in a month, divided by 30 days). If you don't get the expected leads on a given day, you will have to add them to the next period.
5. Work with conversion forecasts to start this exercise, and assign a value in $ to each of your leads. Minimum expected and maximum you are willing to spend per lead. This will give you a good framework to start testing.
6. Optimise as you learn. Look at the best-performing channels, messages, conversion cycles, and best days of the week. Some categories will show a peak towards the end of the week and valleys in the middle. If needed, forecast your lead strategy differently when you spend more money, (and generate more leads) at the end of the week and the least in the middle.
7. The expected lead distribution doesn't have to be set on an equal basis every day. Some days are better than others. Spend more time and money then, keeping in mind audiences are more likely to convert at specific days and times, more than others.

CHAPTER 7

OTHER REPORTS, TOOLS AND PLATFORMS

GENERAL DIGITAL AUDITS AND REPORTS



1. This model will show you how to build general digital audits and reports for your brand or competitors. These metrics, (over 40) are free from some tools - see below.
2. Start by analysing web/app metrics such as traffic, visits time, bounce rates, demographic data, competitors, referrals, and social sources. For this, you can use a free tool called Similar Web.
3. Then look into keywords analytics: For this, you can use SemRush. Data like organic and paid keywords, intent, backlinks and referring pages for your and your competitors' properties.
4. Another fundamental analysis within your audit, is to look into paid display advertising and video campaigns. This can be done with a tool called AdBeat. This will allow you to see how many paid ads are live, channels, investment over time, and the sizes and formats used. By looking at the pieces, you can do some creative analysis and substantiation.
5. Then social media and paid on Facebook Ads Library, where you can see any brand's live assets for creative analysis, and understand promotion strategies.
6. Finally, for email marketing and CRM analysis, you can see any brand's strategy on Mailcharts. Data like latest emails, quantity, sending behaviour, (day/time), promotions, subject line data, (standard length) and journey maps.
7. These tools are freemium and provide enough data to map any brand's digital channel efforts. This data allows you to zoom in on strategies and creative work, for guidance and inspiration.
8. I recommend you refresh the data and analysis at least once a week.

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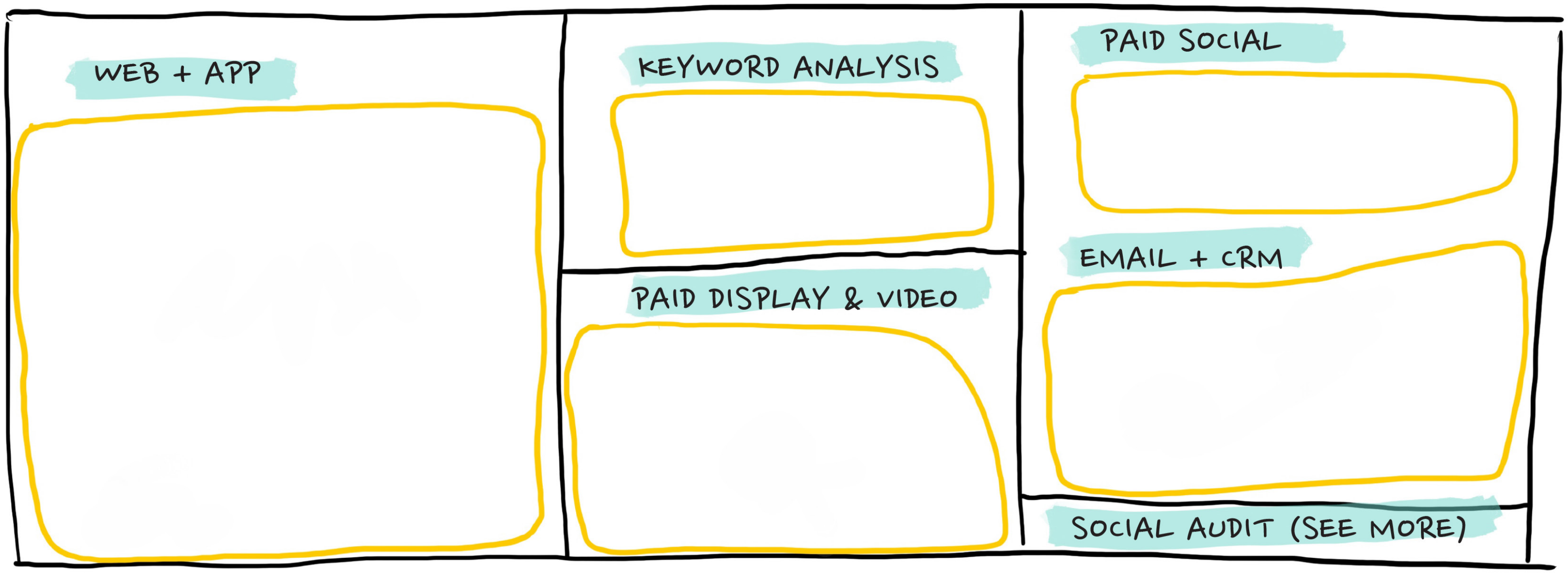
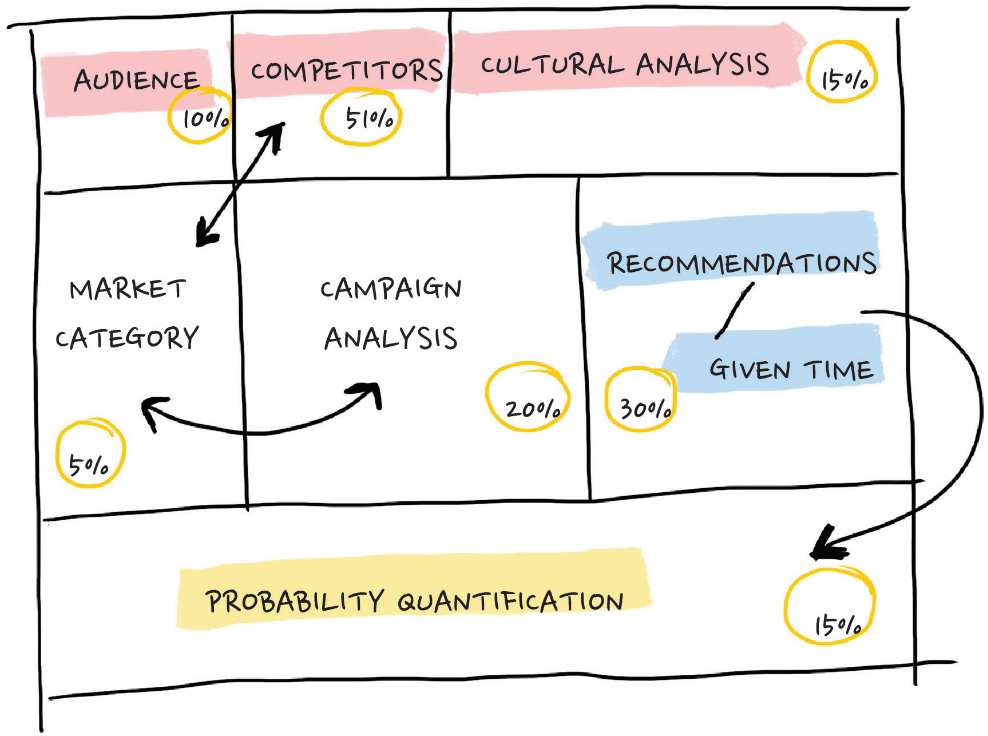
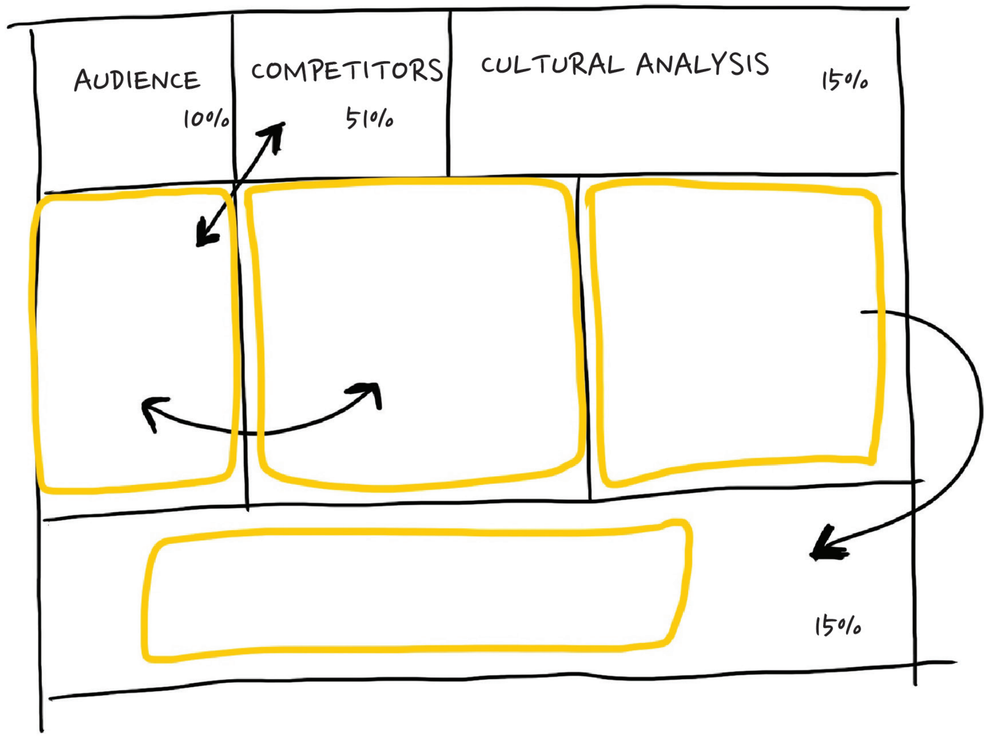




AD-HOC REPORTS

1. An ad-hoc report is built to gather data and make future actionable recommendations, not just to report events. This is the difference between an ad-hoc report and a historical standard one.
2. These reports vary depending on the type of information we are delivering, but the most common structure is: Audience insights, competitors' data, cultural analysis like audience clusters, market category, (local and global), campaign analysis, recommendations over time and a possible quantification of those recommendations while forecasting results, **(see model #63)**
3. Assign a percentage of importance to each of the components, based on your client's expectations and your priorities for delivering certain information. The output must reflect those percentages in the depth of analysis you're offering.
4. Probability quantification, is an exercise in which you can forecast what the recommendations will accomplish over a specific period, usually until the following report is delivered. That way, you and your client are putting skin in the game.
5. A good ad-hoc report is written with clear, actionable recommendations at the end of it. These recommendations must be simple to execute and simple to measure their effectiveness, in the next interval of the report.
6. Also, these reports are malleable and easy to adapt to new questions from the client or internal teams.
7. The recommended frequency is once per week.



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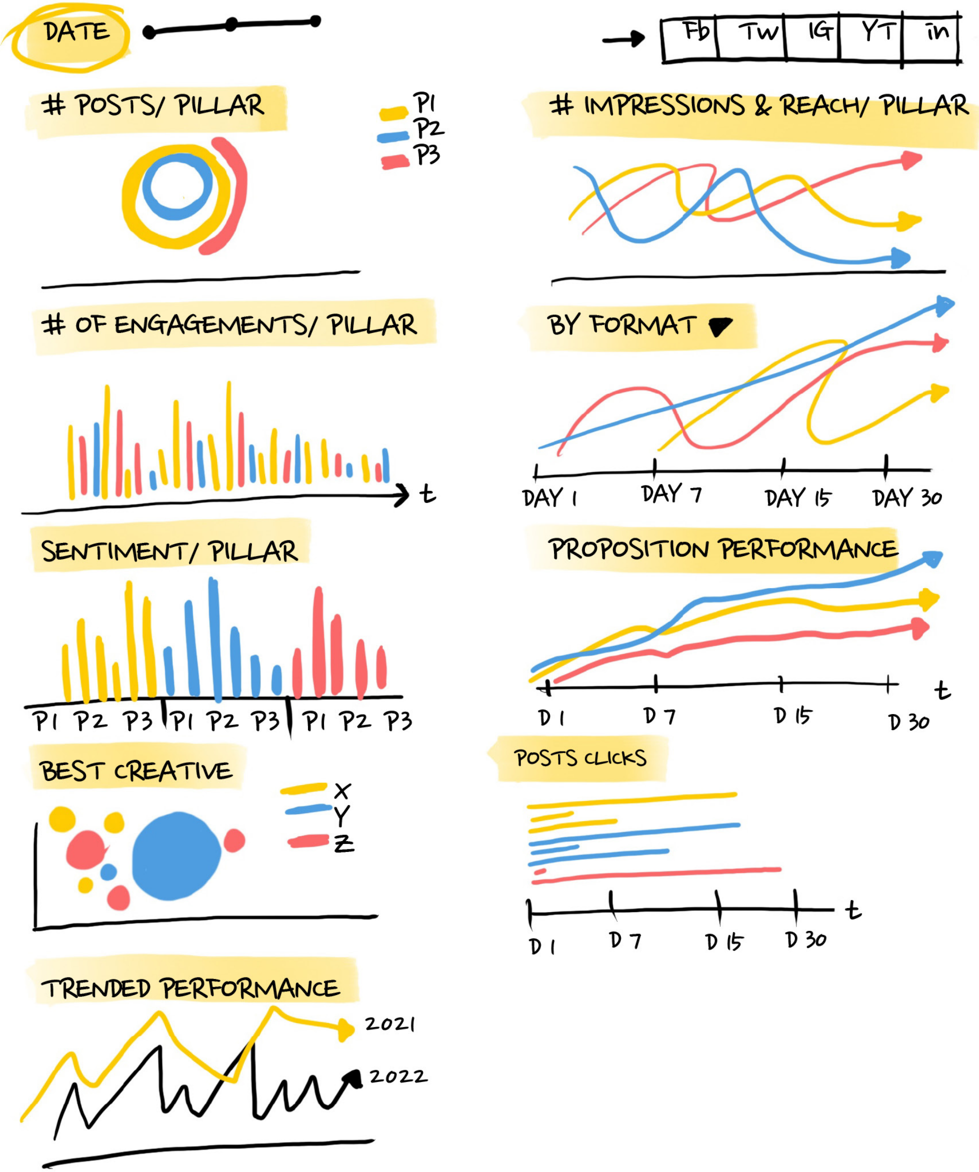
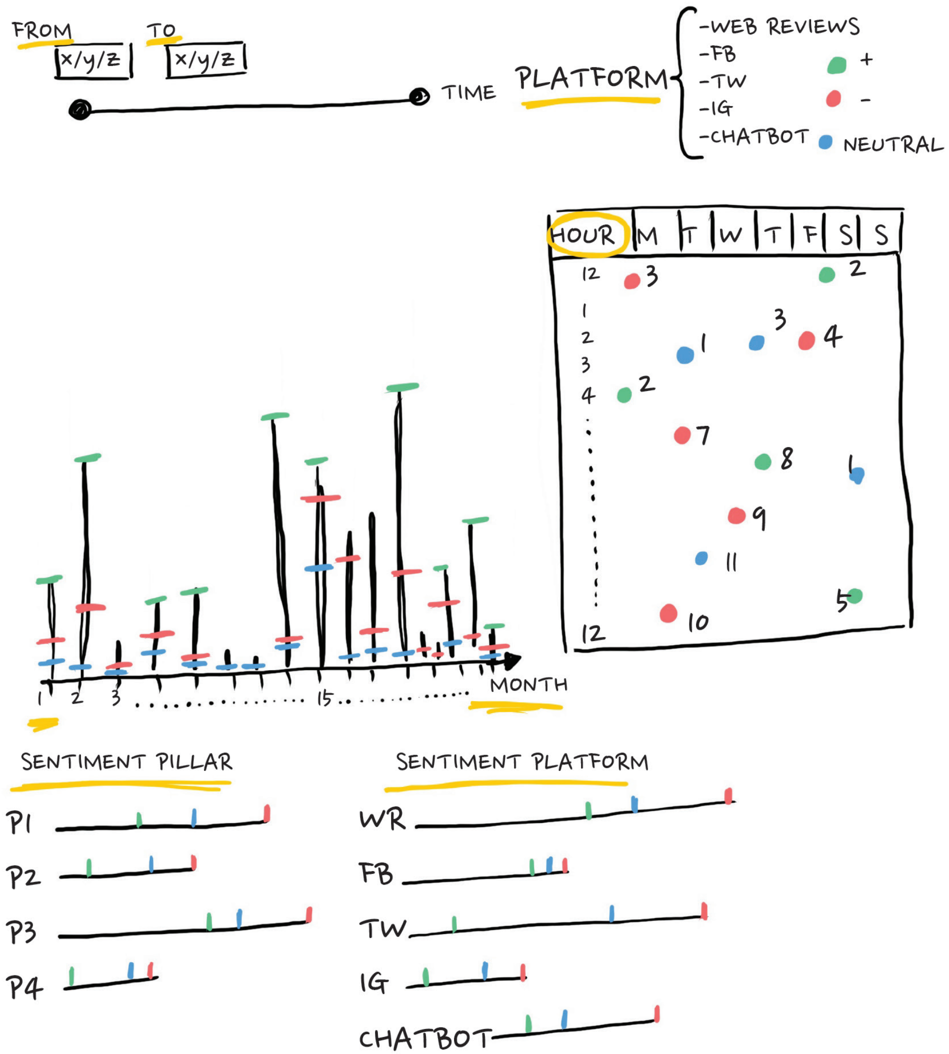


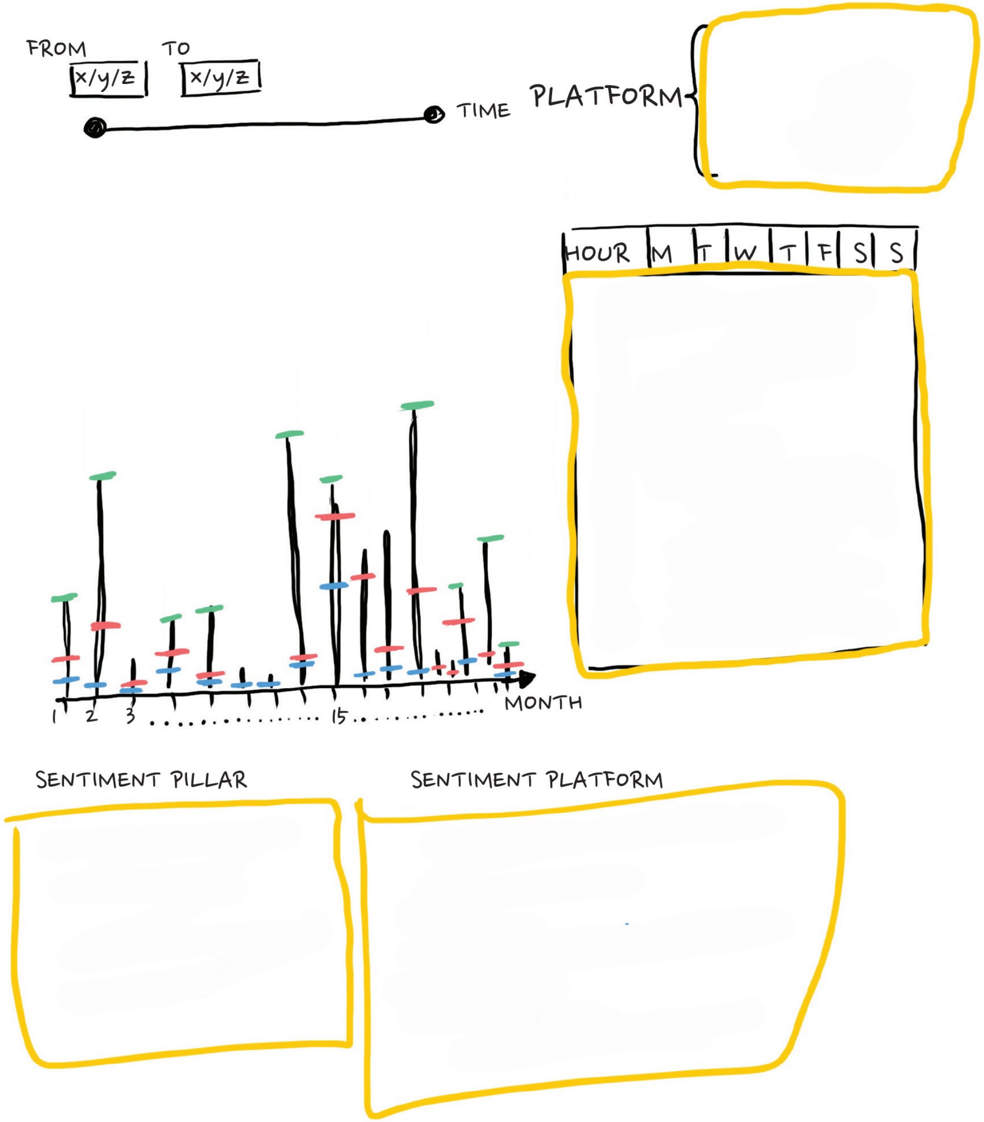
SOCIAL MEDIA CORRELATION MODELS

1. When building social media reports, it is crucial to do it under correlation principles; not in silos.
2. If the content is labelled by pillar or proposition, **(see model #53)**, then you will be able to get a more in-depth analysis.
3. Start by counting how many pieces of content you produce per pillar, on all platforms.
4. Then measure each of those pillars against impressions and reach. You will find more pieces don't necessarily mean better metrics.
5. Do the same by analysing how much engagement each pillar is driving. As you discover which pillar is the highest performing one, produce more content under it.
6. Analyse the performance of all formats. Sometimes simple formats like GIF or typographic pieces outperform video and static images, depending on the day/time, platform and pillar.
7. You can also look into the correlation between each of the pillars and the sentiment it generates. An excellent way to do this is by tagging all content in Sprout Social and collecting each piece of content's reactions, (or emotions), then analysing if a specific pillar is driving negative sentiment and address it. **See model #71**.
8. Another critical factor is the correlation between creative configuration and social media performance. What are the best-performing messages over specific expected actions (CTR, social selling, sentiment boost, reach, etc.)?
9. Compare trended performance, by looking into the current and previous periods to ensure they constantly improve.
10. Finally, ensure your social media strategy delivers in spaces other than vanity metrics. Look into social commerce and performance marketing. **See model #45**.



CUSTOMER SERVICE AND SENTIMENT ANALYSIS

1. Listening tools struggle to cluster sentiment analysis from audiences for multiple reasons: Semantic and syntactic analysis, natural language processing technologies, dialects and lack of open sources.
2. When analysing how audiences react or feel towards a brand, there are different ways to collect data and get some feel of it, **(see model #49)**.
3. Start by creating a data collection sheet with the following fields: Platform, outlet (comment, DM, reply, other), day and time, sentiment +/-, pillar).
4. Capture daily data from all your channels and assign a pillar and attributed sentiment.
5. Mark the exact hour when the queries are being triggered, (this is for time analysis, associated with sentiment in the future for crisis management).
6. Label the content triggering specific sentiment responses. This is to optimise your content strategy with behavioural reactions from your audience.
7. After two to three weeks of collecting data, you'll be able to build data graphs or simple dashboards with enough information to begin understanding how your audience, "feels" towards your brand and content at a given time.
8. When discovering the patterns, design follow-up recommendations or content strategy to anticipate and prevent escalation from the issues or negative comments you constantly get.



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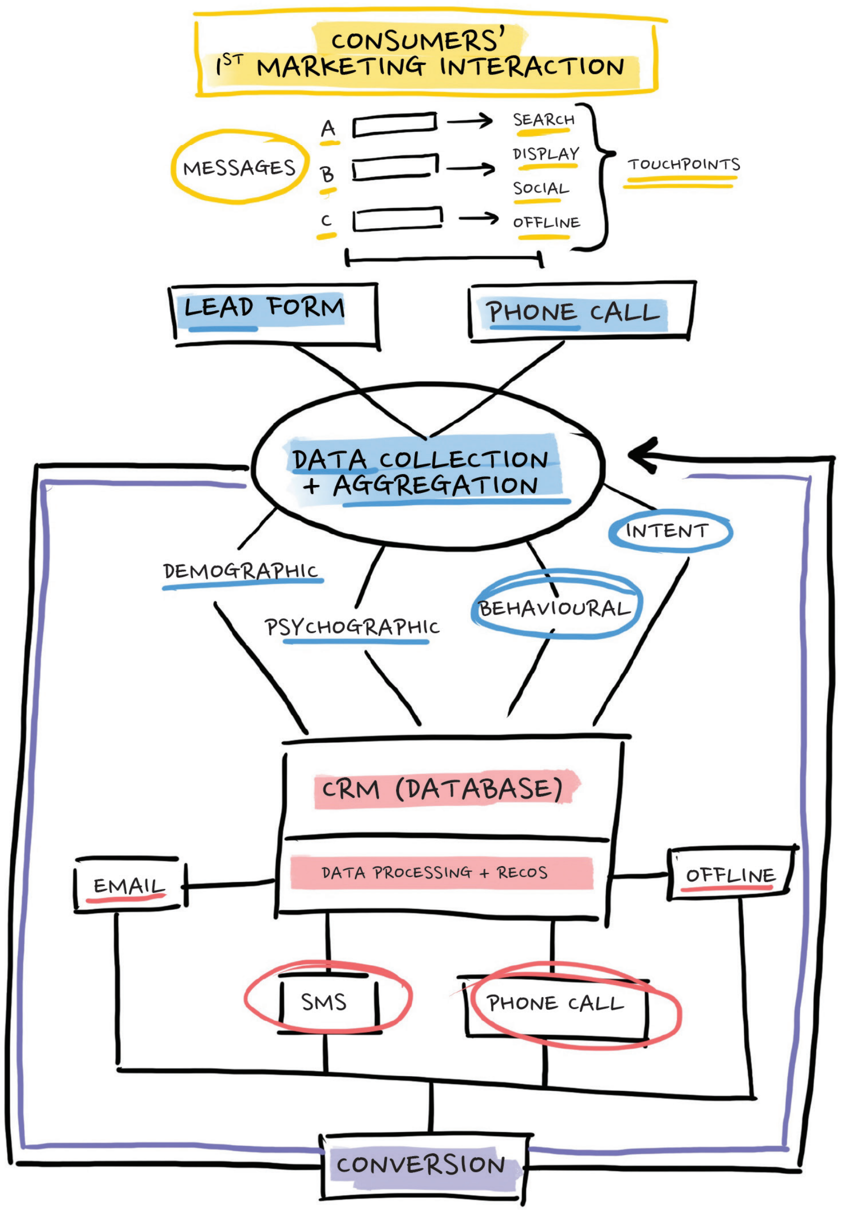
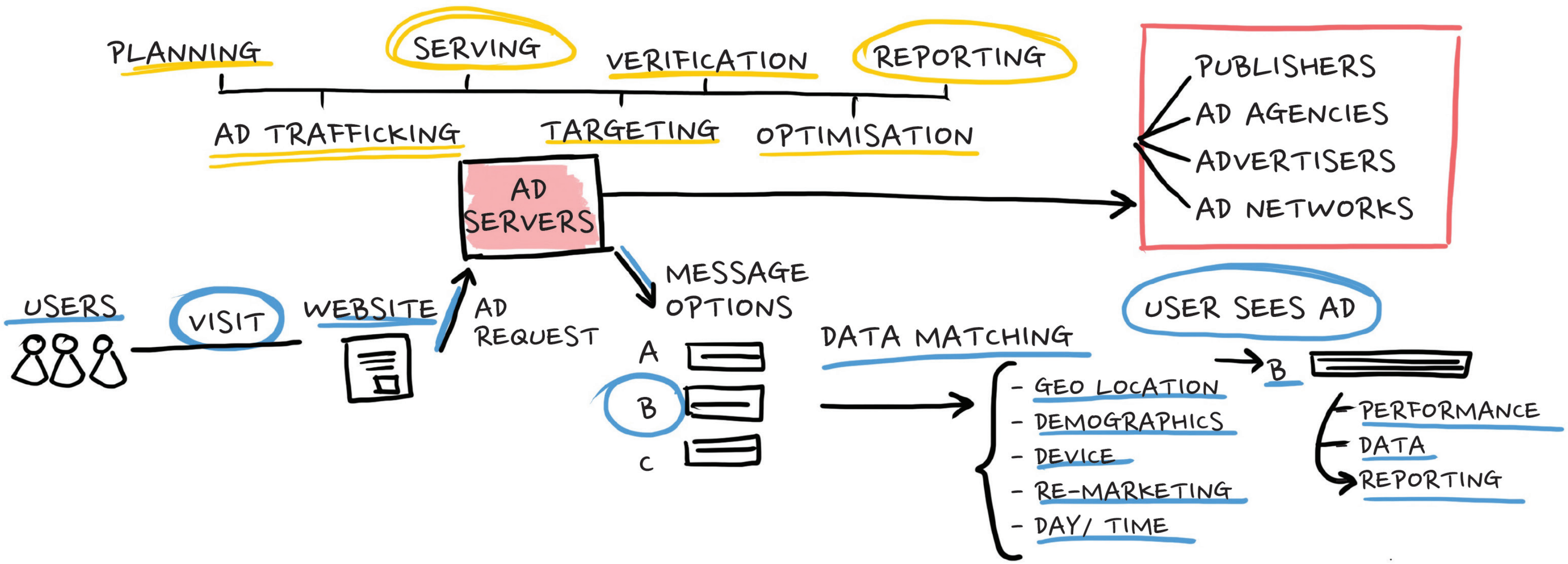


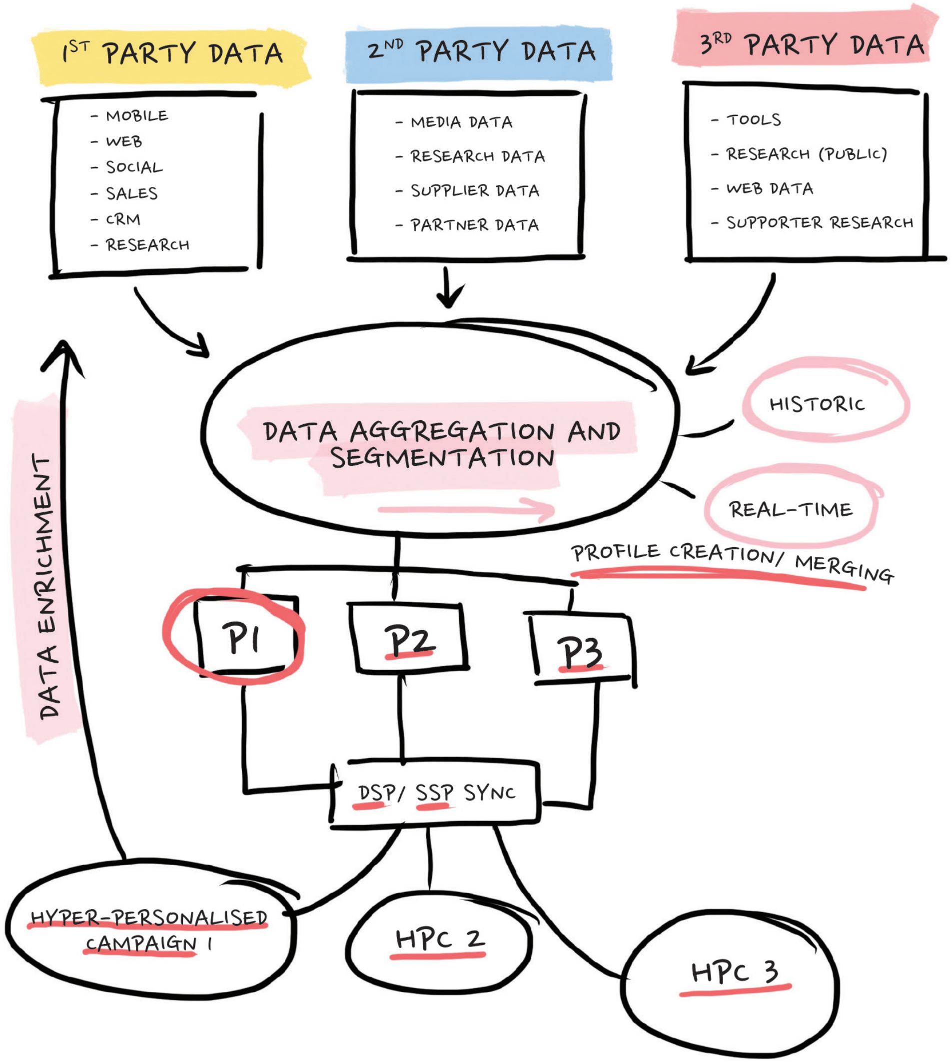
HOW CRM SYSTEMS WORK

1. CRM platforms help capture, organise and use data for converting customers.
2. They are vital to delivering better customer experiences and ensuring lifetime value in a world saturated with touchpoints, options, data and digital noise.
3. They are recommended when working in commercial space—going from online demand to lead capture and conversions.
4. Once users interact with a brand online, they start generating data. CRM platforms are crucial when the customer fills up a contact form, makes a phone call or leaves their info on any data collection technology, like chatbots and virtual assistants.
5. The data gets aggregated to create a customer profile based on their demographic, psychographic, intention and behavioural data. **See model #20**.
6. From data aggregation, these systems help generate follow-up and personalised recommendations for each consumer.
7. Those recommendations can go from a follow-up call on a given day, an automated email reminding the customer to redeem a code or a promotion, **(see model #17)** or assigning a client to a sales member of your team.
8. Once the initial conversion happens, one of the benefits of CRM systems is a cyclical analysis for repurchase or ancillary sales.
9. Another significant added value of this technology is you can follow up and provide better customer service at an individual level.
10. Some freemium platforms to start experimenting with CRM technology are Totango, Mailchimp and Monday.com.

AD SERVERS, AD NETWORKS AND HOW THEY WORK



1. Ad servers are technologies that allow advertisers, publishers and ad networks to plan, run and report their advertising campaigns.
2. There are first and third-party ad servers.
3. An ad server allows you to plan, serve, target, verify, optimise and report on your campaigns.
4. When a user visits a web property, there is an ad request based on the user's data and the ad server, "decides" what ad to show. If the user clicks on the ad, the ad server collects the data for optimisation and reporting purposes.
5. Ad networks allow advertisers and publishers to transact media buys.
6. The fundamental difference between the two, is ad servers are for campaign management, and ad networks are marketplaces.
7. Ad networks collect unsold inventory from publishers and sell it at a lower cost, depending on the demand. This is known as RTB or real-time bidding.
8. This technology also compiles multiple publishers based on the type of content they post and packages all of their inventory for contextual ad sales to advertisers, (i.e. numerous lifestyle, cooking or sports publishers).
9. The principles of these technologies are heavily rooted in data, from demographic, geolocation, devices, remarketing, and day/time to behavioural analytics from each user.
10. Most ad networks now offer CPA, (cost per action or acquisition) models.
11. Google ads manager and Open X are examples of popular ad serving technologies, and AdMob and Google Display Network (GDN) of ad networks.



DMPS AND HOW THEY WORK

1. DMPs or Data Management Platforms are modern technologies used to collect, organise and activate 1st, 2nd and 3rd party data from various online and offline sources, to build customer profiles to deliver targeted advertising and personalisation.
2. A DMP can anonymise this data to then, “provide it” to DSPs and SSPs, (demand and supply-side platforms) to improve targeting and customer experience.
3. You can also build, “look-alike” audiences on DMPs under the premise of targeting people with similar interests and demographics, to broaden your ads’ reach.
4. DMPs also allow marketers to manage multiple campaigns on multiple devices simultaneously.
5. Campaign optimisation is a crucial feature of DMP platforms. As they enrich the customer’s data, it, “learns” which segments and subsegments convert better for future programmatic efforts.
6. Customer experience and personalisation are the Holy Grail in digital marketing and data today, (my perception). DMP technology is one of the ways to deliver on both of these.
7. They also help you minimise waste, (lost impressions, targeting the wrong audiences) and amplify return on marketing investment. An excellent example is generating audience extensions from publishers’ anonymised data exchange.

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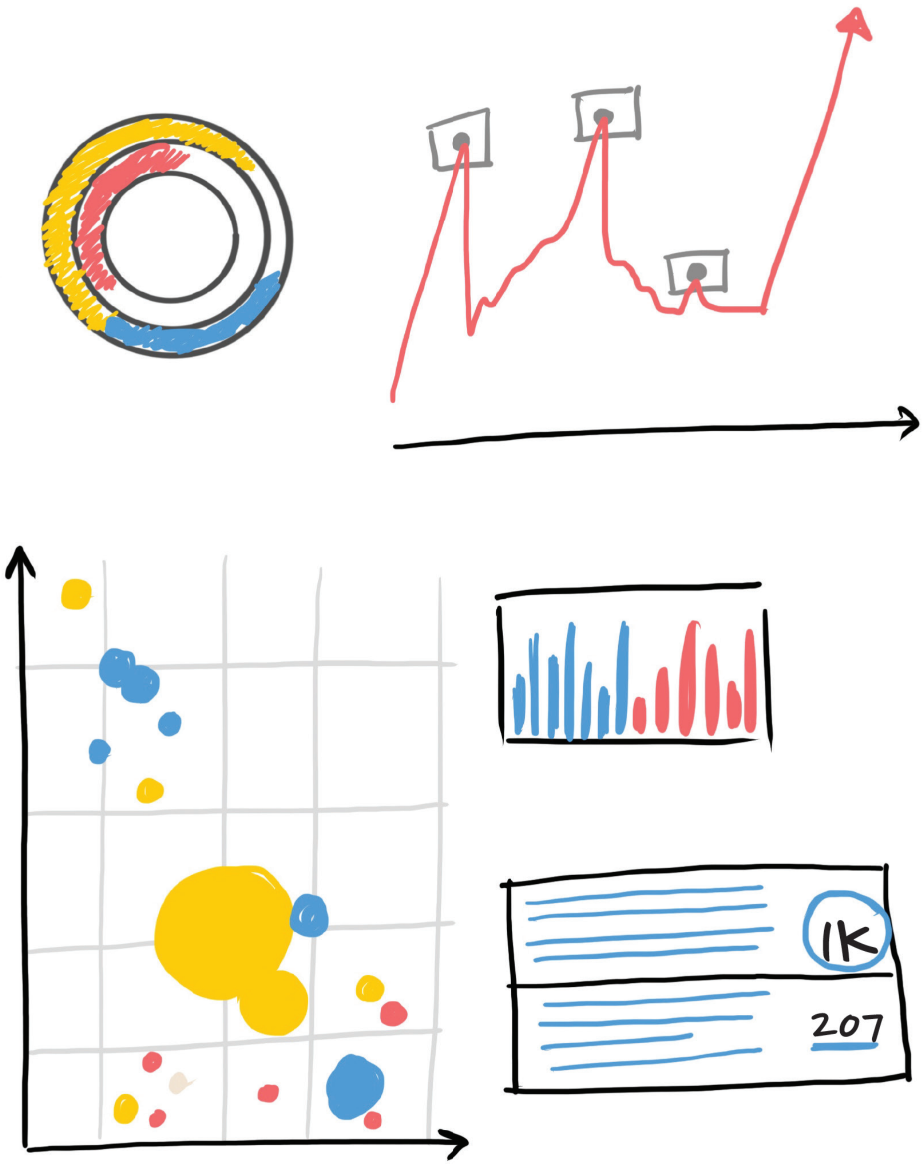

RECOMMENDED TOOLS AND PLATFORMS

1. As seen in **models #3 and 7**, tools are essential to good digital and data practices. That is why I will share my favourite freemium tools in this model.
2. For web analytics: Similar Web.
3. For SEO, keyword research and web analytics: SemRush and Ubersuggest.
4. For social media reporting, competitor analysis and listening: RivalIQ and Answer the public.
5. For display and video advertising analysis: AdBeat and MOAT.
6. For email marketing competitor analysis: MailCharts.
7. For social paid analysis: Facebook ads library.
8. For social media tagging/labelling: Sprout Social.
9. For AI-generated copy: Copysmity AI.
10. For voice assistants: Voiceflow.
11. For chatbots and messaging technologies: Twilio.
12. For AI modelling (without coding): BigML.
13. For general user data: Statista.
14. For usability testing and wireframe design: HotJar, VWO, moqups and miro.

CONCLUSION AND CLOSING

I hope this book inspires you to dive deeper into digital marketing and data. As I write this last page, I have completed another 50 new models that didn't make it into this book, because I had already finished the content some weeks back. Maybe they'll make it into the second edition of Scribbles; who knows? My point is these practices change quicker than we can keep up, but that's what makes them exciting, (at least for me).

And since you've been reading bullet points all this time, let's wrap up with some final ones:

1. Go and try things; there's no right or wrong here.
2. Focus on formulating the right questions, hypotheses and insights. Then get data to work towards them.
3. Accidents are almost impossible to replicate - measure and understand why things happen.
4. Work under frameworks or systems that are objective-first, scalable and output-focused.
5. You don't need to know mathematics or statistics to do this; all you need is to put your logic to work... hard!
6. Some of today's digital marketing and data analytics foundations are built around multivariable testing, correlation analysis and optimisation principles.
7. I wrote 90% of these models under stress or discomfort, (pitches, briefs and tight deadlines), which taught me one of life's valuable lessons. Discomfort is the world's greatest muse.
8. A little secret: Many years ago, I finished 4 Google certifications (AdWords, YouTube, Google Analytics and SEO) – useful in the extreme.
9. Remember: People, processes and tools.
10. Last, but not least, if you have an idea, plan, project or dream, go and make it happen. I had everything against me writing this book, and here I am, thanking you for reading it. Go and do things!

YOUR TURN, GO AND SCRIBBLE!


HUNCH
MAIN PROBLEM
EVIDENCE
SOLUTION
WHY?

THE FUNDAMENTALS **1.** The data pyramid **2.** From raw data to predictions and prescriptions **3.** Digital transformation framework **4.** The 1% of the 1% - The digital economy **5.** Digital challenges and accountable entities **6.** From Tactics to Systems: The evidence framework **7.** The data triangle to build a DATA culture **8.** Data monetisation **9.** Problem reduction logic **10.** Company training programs **DIGITAL AND DATA STRATEGY MODELS** **11.** The performance wheel **12**. Dimensions of a digital strategy **13.** Data-driven archetypes **14.** Brand economics briefs **15.** Acquisition vs Adoption strategies **16.** User Adoption Framework **17.** The conversion drivers **18.** Consumer interactions mapping **19.** Signals and messaging mapping **20.** From demographic data to personalisation **21.** Attribution models **22.** Demand generation ecosystems **23.** Ad centric vs Experience centric (The subscription framework) **24.** Reshaping demand model **25.** Customer service ecosystems **26.** Data storytelling principles **MODELS FOR DATA-DRIVEN CREATIVITY** **27.** Agile methodology for digital production **28.** Creative engineering - Message constructs **29.** Creative engineering – Copywriting at scale **30.** Creative engineering - Assembling **31.** Creative optimisation in consumer journeys **32.** Display advertising - Design + Targeting principles **33.** Email marketing - Design principles **34.** Creating websites – The movie principle **35.** Usability testing **36.** E-commerce platforms - Principles **CONTENT AND SOCIAL MEDIA MODELS** **37.** The content attention cycle **38.** Social media strategies framework **39.** Content that works - Creative recommendations **40.** How to build super brands on social media **41.** Content magnitude waves model **42.** Content attribution to conversions **43.** Influencer marketing framework **44.** Social commerce principles **45.** Social media: Awareness vs Performance **46.** One-pager social audits **DATA MODELS** **47.** The role of Humans vs Machines in Data **48.** Data practices: Effort vs Impact **49.** Zero-party data collection **50.** Collecting 1st-party data with social media polls **51.** Competitor analysis – Data Collection **52.** Competitor analysis – Data Visualisation **53**. Taxonomy models for data quantification **54.** Cluster analysis **55.** Anomaly Detection **56.** Alert systems **57.** Real-Time Dashboards **58.** Predictive analysis **59.** Predictive analysis - Time **60.** Digital media - Data Analysis **PERFORMANCE MODELS** **61.** Performance marketing **62.** Customer lifetime value (CLV) framework **63.** Forecast analysis **64.** Demand metrics **65.** A/B Testing Framework **66.** Learning and optimisation cycles per touchpoint **67.** Lead qualification and optimisation framework **OTHER REPORTS, TOOLS AND PLATFORMS** **68.** General digital audits and/or reports **69.** Ad-hoc reports **70.** Social media correlation models **71.** Customer service and sentiment analysis **72.** How CRM systems work **73.** Ad servers, ad networks and how they work **74.** DMPs and how they work **75.** Recommended tools and platforms