QUARTERLY BUSINESS REVIEW

Strategy & Lead Generation Improvement

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WHY WE ARE HERE

Better understand how to generate quality volume of leads and conversions
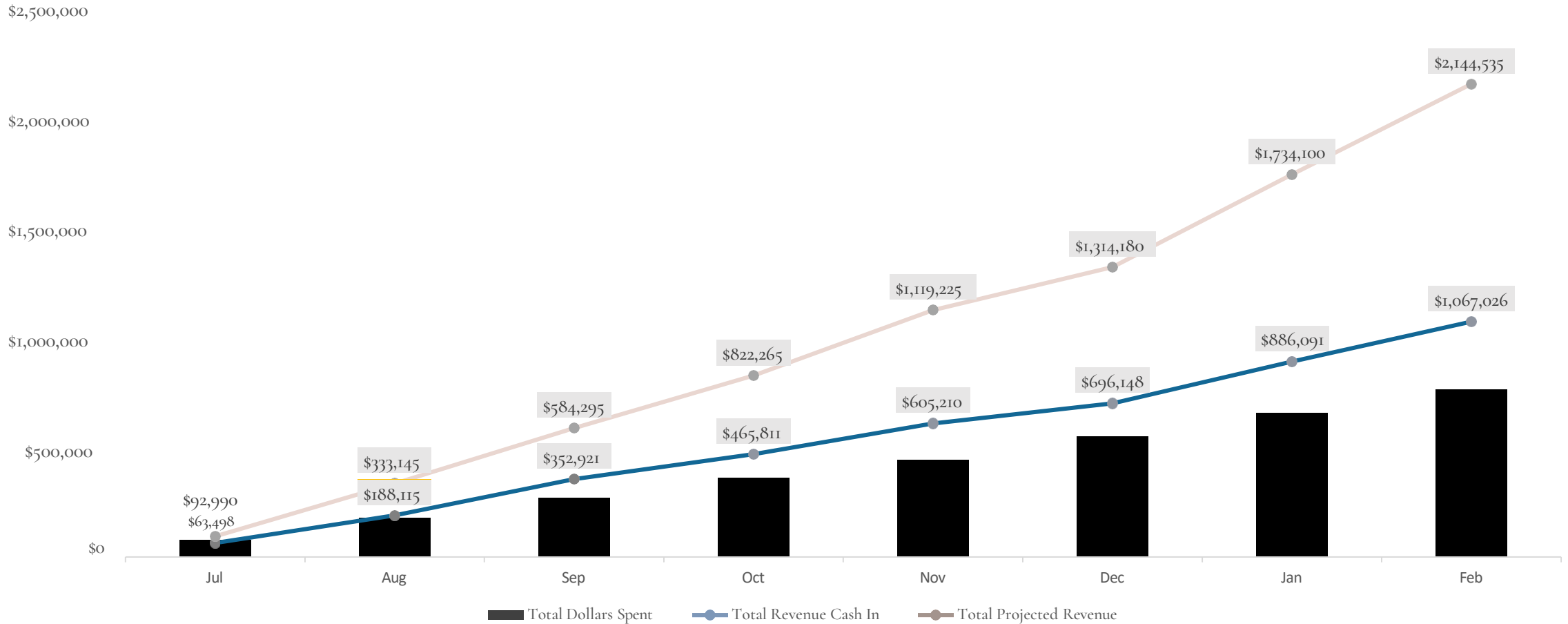
WHAT WILL BE COVERED:

- Acting on big picture insights
- What we've learned in search and social
- What we should do next

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ACTING ON BIG PICTURE INSIGHTS

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We are on an upward trend

Total Dollars Spent vs Revenue - Cash in Performance

Chart data labels:

Total Projected Revenue:
- Jul: $92,990
- Aug: $333,145
- Sep: $584,295
- Oct: $822,265
- Nov: $1,119,225
- Dec: $1,314,180
- Jan: $1,734,100
- Feb: $2,144,535

Total Revenue Cash In:
- Jul: $63,498
- Aug: $188,115
- Sep: $352,921
- Oct: $465,811
- Nov: $605,210
- Dec: $696,148
- Jan: $886,091
- Feb: $1,067,026

Y-axis: $0, $500,000, $1,000,000, $1,500,000, $2,000,000, $2,500,000

Legend: Total Dollars Spent | Total Revenue Cash In | Total Projected Revenue

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Our current strategy is closing sales at a higher rate

BUT WE SHOULD NOW THINK LONG TERM & AIM TO DRIVE MORE AWARENESS TO KEEP THE MOMENTUM

Slower lead volume in December & January prompted strategy improvements that have resulted in more leads in February

Leads to Close Rate

Legend: Leads, Close Rate

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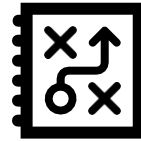MARKETING
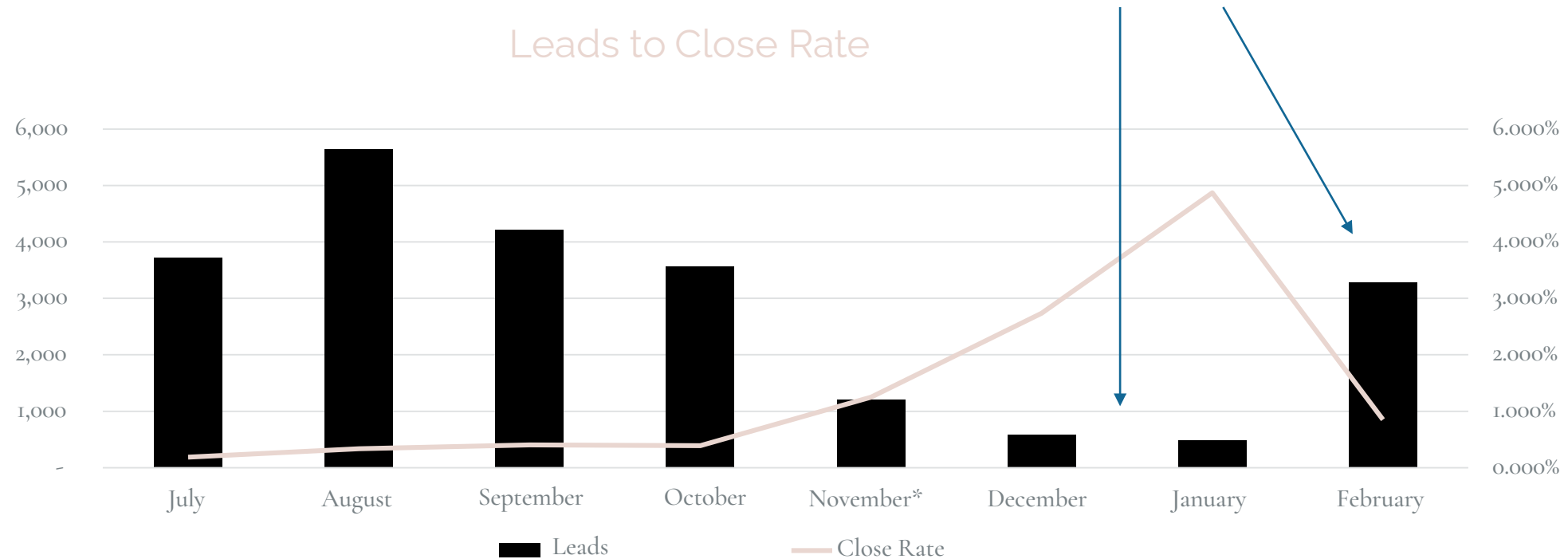
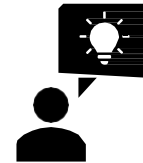# Let's improve our data story

RE-EVALUATE TIME NEEDED TO GENERATES SALES THRU MEDIA

Media exposure   List building   Lead   Sale

24-48 hours from media exposure to list building sign up or lead

30 days before seller reaches out to new prospect

Currently unclear on how long it takes each prospect/lead to become a sale

Is it possible to close this gap with current data?

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Big picture takeaways

- Now that we've been running for 6+ months, our revenue performance has been improving over time

- To create lasting results, we need to think long-term:

  - Focus on more appropriate metrics (trending numbers rather than monthly difference)
  - Better understand how long the advertising sales cycle takes
  - Ensure momentum continues

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WHAT WE'VE LEARNED FROM SEARCH & SOCIAL

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Social performance

Delivery

11.2 MM Impressions

192k Clicks

1.71% CTR

$0.76 CPC

$145,261 spend

Results

1,746 Leads

46 Sales

$348,748 Cash-In Revenue

$565,384 Projected Revenue
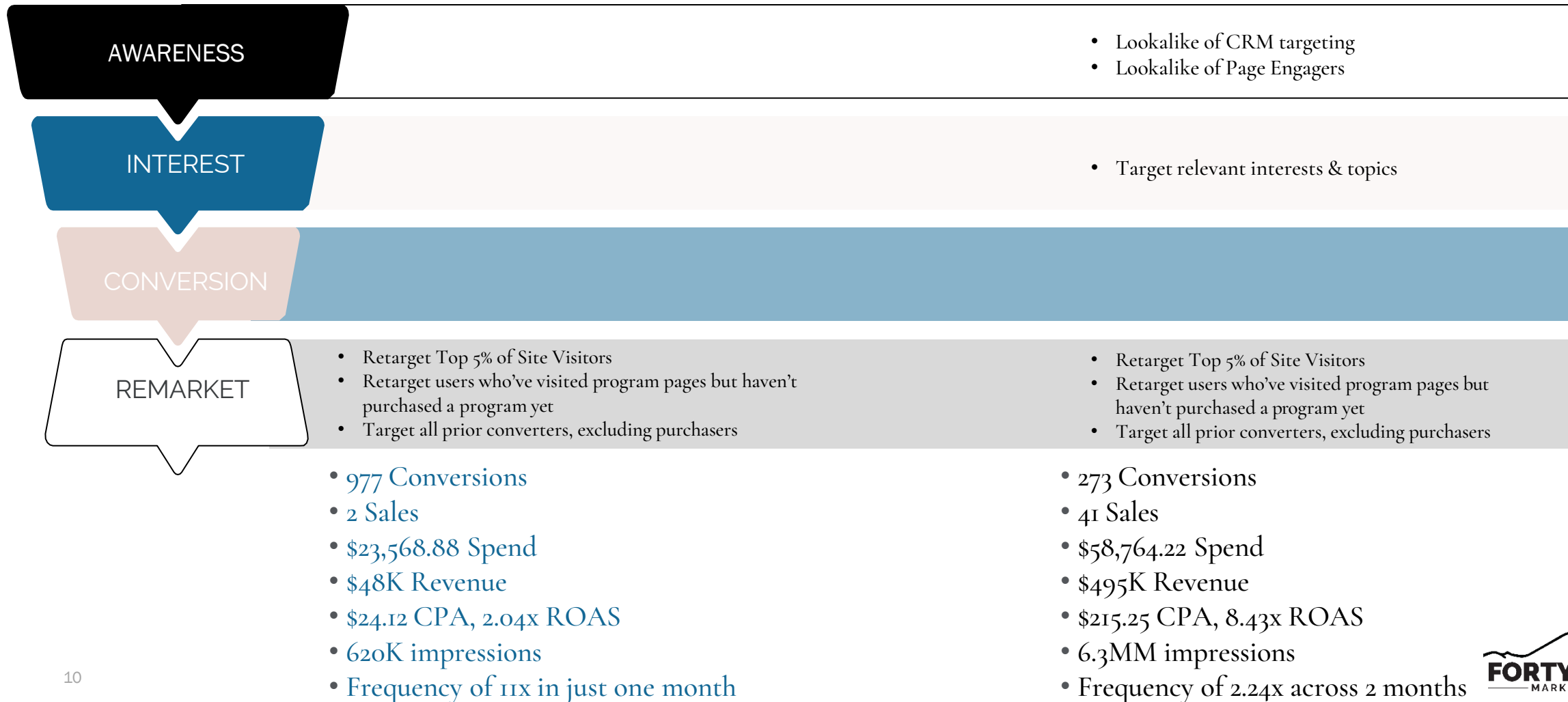
Growth

Leads grew **12x** compared

to July - October

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We are now reaching more users and driving better results on Meta

CAMPAIGN 1　　　　　　　　　　　　　　**CAMPAIGN 2**

AWARENESS
- Lookalike of CRM targeting
- Lookalike of Page Engagers

INTEREST
- Target relevant interests & topics

CONVERSION

REMARKET

Campaign 1
- Retarget Top 5% of Site Visitors
- Retarget users who've visited program pages but haven't purchased a program yet
- Target all prior converters, excluding purchasers

Campaign 2
- Retarget Top 5% of Site Visitors
- Retarget users who've visited program pages but haven't purchased a program yet
- Target all prior converters, excluding purchasers

Campaign 1 Results
- 977 Conversions
- 2 Sales
- $23,568.88 Spend
- $48K Revenue
- $24.12 CPA, 2.04x ROAS
- 620K impressions
- Frequency of 11x in just one month

Campaign 2 Results
- 273 Conversions
- 41 Sales
- $58,764.22 Spend
- $495K Revenue
- $215.25 CPA, 8.43x ROAS
- 6.3MM impressions
- Frequency of 2.24x across 2 months

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Social focus areas

Previous Successes

- BIG 7 Approach → Some countries may see growing pains while spreading awareness, but after time/market saturation, we'll likely see more movement that mimics the UK

- Recommend continued use of blended audiences (i.e. social media engagers and Interests as well as CRMs and RT)

KPIS

- We regularly report on ROAS, but would love to compare progression from the initial campaign run in the fall

- If possible, pull in sales data. This would allow Meta to optimize in real time to users more likely to drive revenue

MOBILE FIRST

- Using mobile first creative (1x1 or in vertical format 9:16) was successful in that all creative using a 1x1 ratio saw lower CPAs

- 88.6% of total spend has been to mobile devices

Social takeaways

- Social strategy and budget is working well to list build, ultimately leading to more sales and revenue than previous efforts

- Continue to use blend of audiences (including awareness and interest-based targeting to supplement our first party audiences (CRMs and RT))

- To ensure we accurately optimize, social KPI should be Cost Per RFI

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Search overview

Delivery

2.3 MM Impressions

52.4 K Clicks

2.23% CTR

$4.75 CPC

$249,152 spend

Results

1,717 Leads

27 Sales

$192,854 Cash-In Revenue

$478,475 Projected Revenue

Growth

Leads increased **306%** over

July - October

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WHY BRAND & NONBRAND MATTER

- According to Google, 48% of converting visitors switch between Brand & Non-brand terms throughout their journey to conversion

- Brand keywords naturally have higher quality scores, which improves CPCs, CPL, and quality score the entire account

- Non-branded keywords may have lower ROI due to their high CPC and competition levels, but provide additional value by growing awareness & scale for brand searches

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Increased investment in non-brand led to scale in brand

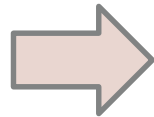## JANUARY/FEBRUARY SEARCH & REVENUE TRENDS
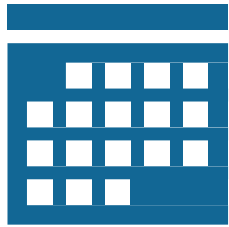
JANUARY

Invested heavily in Top Funnel Search campaigns in January since brand IMP share was effectively maxed out
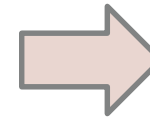
Increased NonBrand Spend +97% MoM

Increased Brand Spend +59% MoM
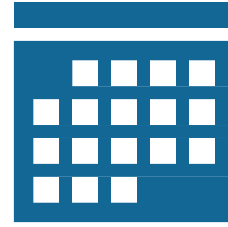
FEBRUARY

Revenue is showing a significant increase in February due to January performance

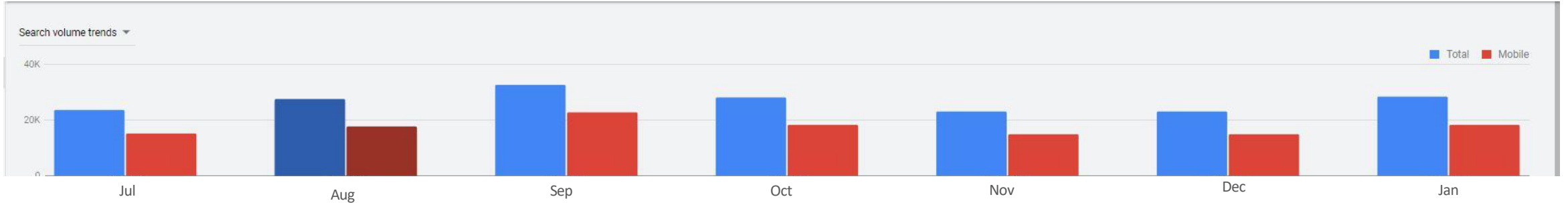Led to 100+ additional leads in Brand – US & Canada

MOVING FORWARD

Although we've seen improved performance, we were hitting 99% impression share in January and at times in February

This suggests we need help from other channels to drive volume in search

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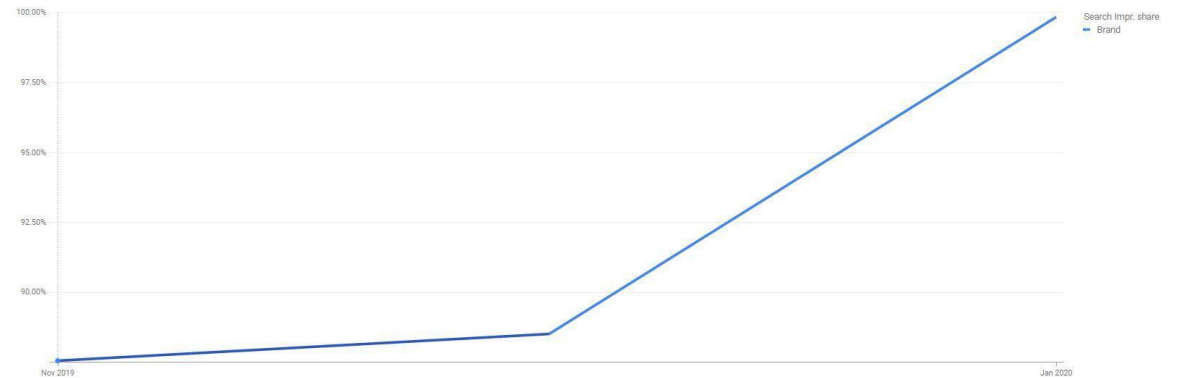# Brand impression share & search volume trends

Historical brand interest

4,000+ less Brand searches since the pause of the DSP

Brand - US in December

- $9.8k Spend
- 88.52% Impression Share
- 5% Decrease in Clicks MoM

Brand – US in January

- $15.7k Spend
- 99.84% Impression Share
- 46% Increase in Clicks MoM

Brand Impression Share

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How do we ensure continued success?

INVEST MORE IN

NON – BRAND SEARCH

AWARENESS/INTENT BUILDING CHANNELS

TO INCREASE VOLUME & POTENTIAL CONVERSIONS IN

BRAND SEARCH

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Search takeaways

- Non-brand keyword investment feeds brand success & volume

- Recommend $95K monthly budget in search with 20% - 25% going to brand & 75% - 80% to non-brand
  - Maximize spend in Brand

- With brand impression share close to 100% search will need "help" from other channels to drive more search volume

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SECTION 3

WHAT WE SHOULD DO NEXT

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Recommendation

KEEP INVESTING IN

Search/social are key driver of leads, but need assists (search especially) from other channels outside of their own ecosystems

RE-INTRODUCE

YouTube and Programmatic work well to drive awareness and engagement

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USE YT awareness & action to increase...

① ② ③

Website traffic

Increase website traffic with TrueView for Action, skippable video (:30 or less) and grow your homepage retargeting list. Capitalize on this retargeting audience through YouTube and the other channels within your media plan.

Subscribers

Increase subscribers with TrueView for Action skippable video (:30 or less) and retarget PGI YT subscribers to drive interest in lead programs. Capitalize on this engaged audience through YouTube and the other channels within your media plan.

Form Fills or Leads

Increase leads by driving YT viewers directly to the landing page with TrueView for Action skippable video (:30 or less)

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Retargeting via a DSP

CTR
0.09%

= 499,950 new site visitors

Drive website visits with display impressions.
Est. 5,555,000 impressions served

With a CTR of 0.09% we can drive 499,950 clicks to the main website

Use DV360, Facebook and Google Search to Retarget the increased website visitor's audience pool

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YouTube & DSP takeaways

- Investment incremental $20-40K/month in YouTube (higher monthly budget will allow for inclusion of brand lift study)

- Investment incremental $5K/month in the DSP

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Comprehensive action items

SOCIAL

☐ Continuation of current approach & budget

☐ KPI shift

SEARCH

☐ Brand & Non-Break Breakout

☐ $95K/mo investment

YOUTUBE

☐ Activate with:

☐ A) $20K/mo

☐ B) $40K/mo with Brand Study

DSP

☐ Activate with $5K/mo

MEASUREMENT

☐ Focus and optimize based on long-term success rather than short-term view

☐ No longer shifting strategy based on weekly data reactions

☐ Shifting view from month to month cash-in ROI to rolling projected revenue/ROI

☐ Filling gap in data loop to understand media driven sales cycle

APPROVALS

☐ Consolidated Q2-Q4 IO

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