

Advertising Smart Deal Creation

Problem Statement

The Advertising team lacks tools to easily create advertising opportunities containing live amazon locker locations. Often times once advertising deals are manually created via csv file upload, the locations are taken offline negating the value in our deal.

Project Overview

Create an efficient way to construct an advertising opportunity tied to amazon locker accounts entirely within Salesforce.

What It Does Do

Allows users to set criteria and generate list of available locations for Opp

Save lists for reference, approval and refining

Save queries for future use

Filter based on attributes tied to account, locker and/or advertising details

What It Doesn't Do

Incorporate brand value (advertiser or host) into filtering

What It Improves

Time necessary to create an Advertising Opportunity (+ X time)

Accuracy of Available Locations (+ X %)

Planned Iterations

fast follows, post launch improvements/additions

Advertising | Inherited Attributes

What elements are needed for the smart deal construction from each object



Locker Parent Account

The corporate account of an Amazon Locker/Counter Partner (ie, 7-Eleven)

Inherited Information

Account Name
Vertical
Portfolio Size
Brand Value (not yet incorporated)

Logic

add locations based on query
if account name = {query}:
 then available
 else not available

withhold locations based on query
if account name = {query}:
 then not available
 else available



Locker Child Account

The specific location of a Locker Account (ie, 7-Eleven 1234 madison st, some city, USA)

Inherited Information

Geography: [
 street address, state, zip,
 country
]
Grade: [
 Topology, Volume Grade
 (estimated)
]

Logic

add locations based on query
if [Any Geography Filed] = {query}:
 then available
 else not available

withhold locations based on query
if [Any Geography Field] = {query}:
 then not available
 else available

use some topology based criteria to add

if topology grade > {query}:
 then available
 else not available



Locker Opportunity Product

Contains information regarding the kiosk at the given Locker Child Account

Inherited Information

Kiosk Status
Decommission Date
Location (indoor / outdoor)
Locker Size
Install Date

Logic

Required
if Kiosk Status != "Online":
 then not available
 else available

Required
if decommission date < Advertising Parent Opp Start date:
 then not available
 else available

Add/Withhold Based on Size

Locker size (any of)
 >= than {query}
 = {query}

Required
Install Date > Advertising Parent Opp Start Date



Advertising Child Opportunity

This represents the business opportunity at a given location. it is used to track the date that an opportunity starts and ends there, the financials of that specific locations....etc

Inherited Information

Opportunity ID
Opportunity Close Date
Opportunity Status

Logic

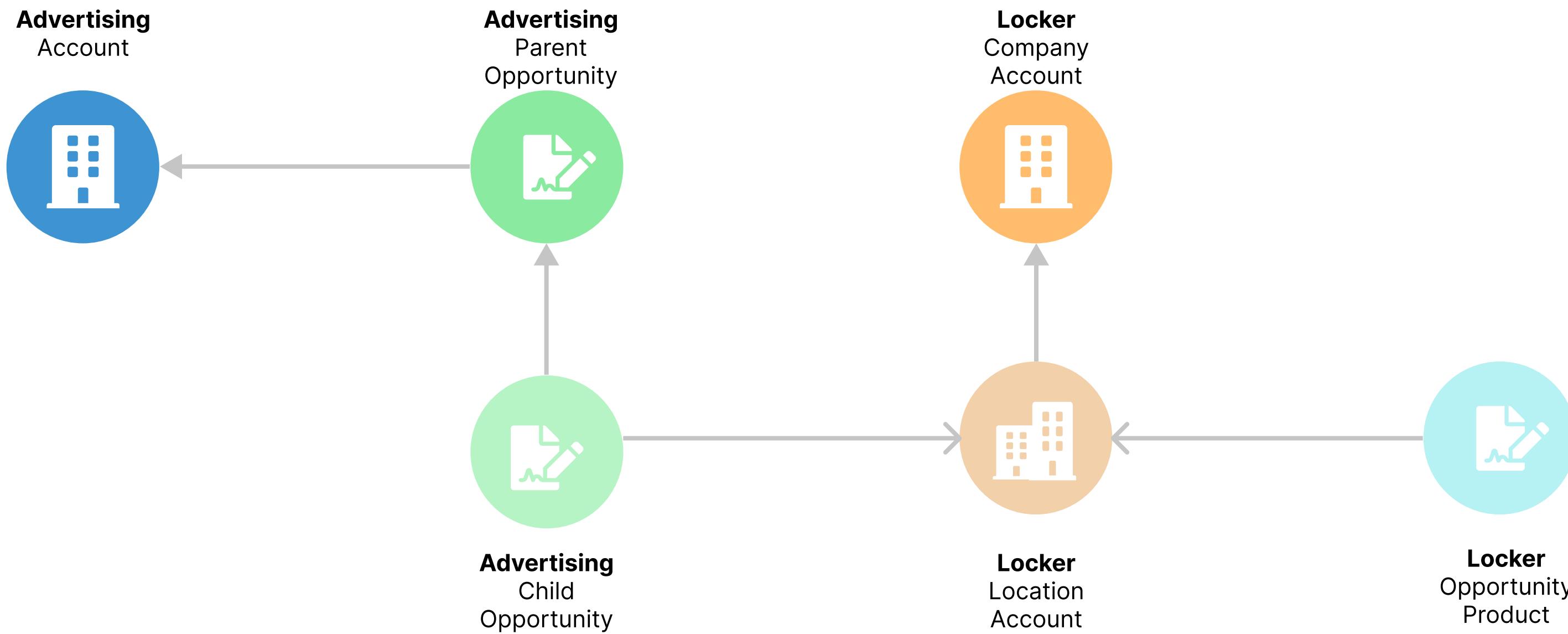
Required
Opportunity Exists: Bool
 if Opportunity Exists == True:
 if close date > this Advertising Parent Opp Start Date
 then not available
 else available

Option

has had an advertising opp before: bool

Add/Withhold based on install date

Advertising | Salesforce Architecture & Flow



Advertising Account

Who is spending money with Amazon



Advertising Parent Opportunity

The umbrella opportunity. This is used to (1) track the pursuit of the overall piece of business (2) aggregate the information from each location



Advertising Child Opportunity

This represents the business opportunity at a given location. It is used to track the date that an opportunity starts and ends there, the financials of that specific locations....etc



Locker Parent Account

The corporate account of an Amazon Locker/Counter Partner (ie, 7-Eleven)



Locker Child Account

The specific location of a Locker Account (ie, 7-Eleven 1234 madison st, some city, USA)



Locker Opportunity Product

Contains information regarding the kiosk at the given Locker Child Account

Advertising | UI Example

Search... X

Location Opportunities

Opportunity

Total Locations: 1500 (Sets a MAX # of locations. If left blank, all locations)

Had Ads Before: True (3 values: True, False, Both)

Campaign Start: 01/12/2024 (Campaign End: 02/15/2024) (if creating from Opp, pull in these dates)

Account

Name: 7-Eleven, Chevron (Exclude)

Vertical: Convenience Store (Include)

Geography

City: Detroit (Exclude)

State: (Exclude)

Zip: (Exclude)

Country: US (Include)

Locker Details

Locker Size: Greater Than 6 (Exclude)

Locker Gen: Equals 3 (Only)

Install Date: After 10/31/2022 (Only)

Location: Indoor (3 values: Indoor, Outdoor, Both)

Locations

1,284 (Potential Filters to Add: Topology Variables - Location Grade, Estimated Package Volume (store visits), Brand Score - once deployed)

Buttons

Cancel Generate List

Volume Information Company NPS Suppliers Bulk Kiosk Updates

+ Follow Change Owner Delete Clone

Closed Won

Upcoming & Overdue

No activities to show. Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Chatter Feed

Question Poll Post

What would you like to know?

Contact Roles (2)

Mike Albo Vice President and General Manager

Sarah Brenner Manager

View All

Files (0) Upload Files Or drop files

Notes (0)

Files (0) Upload Files Or drop files

Advertising | Options



Constructing A Smart Deal
Words

Options

Words



Add Incremental Locations
Account Name



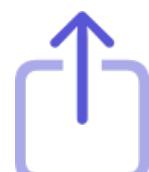
Add All Locations To Opp
create child opps for all accounts listed



Save Query
Save the query but not the locations



Save List
Save the Locations



Share List
Send to colleague for review
Export as csv



Refine Query
Save the query but not the locations

Advertising | Query Front & Back End - Example 1

FRONT END

What it looks like to the user

Smart Create

Opportunity

Total Locations	1500	Had Ads Before	True ▾
Campaign Start	01/12/2024	Campaign End	02/15/2024

Account

Name ▾	7-Eleven, Chevron	Exclude ▾
Vertical	Convenience Store ▾	Include ▾

Geography

City	Detroit	Exclude ▾
State		Exclude ▾
Zip		Exclude ▾
Country	US	Include ▾

Locker Details

Locker Size	Greater Than ▾	6	Exclude ▾
Locker Gen	Equals ▾	3	Only ▾
Install Date	After ▾	10/31/2022	Only ▾
Location	Indoor ▾		Only ▾

Locations

1,284

BACK END

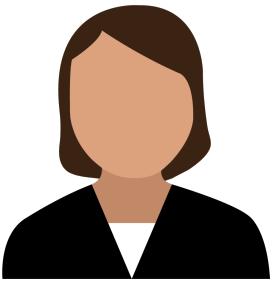
What happens on the backend

Select
account18id

FROM someCreatedTable
WHERE

```
parentAccount.name NOT IN "7-Eleven, Chevron"  
parentAccount.vertical IS "convenience store"  
locationAccount.city IS NOT "Detroit"  
locationAccount.country IS "US"  
oppProduct.LockerSize <= 6,  
oppProduct.LockerGen = 3,  
oppProduct.installDate > "10/31/2022",  
oppProduct.Location = "Indoor"  
adlocationOpp.ID != Null  
oppProduct.KioskStatus = "Active"  
adLocationOpp.StartDate IS NOT BETWEEN query.CampaignStartDate and query.CampaignEndDate  
adLocationOpp.EndDate IS NOT BETWEEN query.CampaignStartDate and query.CampaignEndDate  
ORDER BY locationAccount.topologyScore desc  
LIMIT 1500
```

Advertising | Stakeholder Impacts



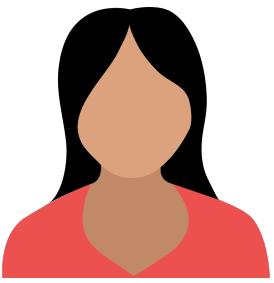
HOST

Store Owner, Store Manager

As A Host This will....

What Actions Do I Need To Take?

words words words



ADVERTISING

Constructing Deals/Campaigns // mb - update this

As A Team Member This will..

What Actions Do I Need To Take?

words, words, words,



VENDOR

Wraps...etc

As A Vendor this will

What Actions Do I Need To Take?

words, words, words,



MANAGER

Team Leader

As A Team Leader this will

What Actions Do I Need To Take?

words, words, words,

Advertising | Query Front & Back End - Example 2

FRONT END

What it looks like to the user

Smart Create

Opportunity

Total Locations	<input type="text"/>	Had Ads Before	<input type="button" value="False"/>
Campaign Start	<input type="button" value="01/12/2024"/>	Campaign End	<input type="button" value="02/15/2024"/>

Account

Name	<input type="text" value="7-Eleven, Chevron"/>	Exclude	<input type="button"/>
Vertical	<input type="button" value="Convenience Store"/>	Equals	<input type="button"/>

Geography

City	<input type="text"/>	Exclude	<input type="button"/>
State	<input type="text"/>	Exclude	<input type="button"/>
Zip	<input type="text"/>	Exclude	<input type="button"/>
Country	<input type="text" value="US"/>	Include	<input type="button"/>

Locker Details

Locker Size	Greater Than	<input type="button" value="6"/>	Exclude	<input type="button"/>
Locker Gen	Equals	<input type="button" value="4"/>	Only	<input type="button"/>
Install Date	After	<input type="button" value="10/31/2022"/>	Only	<input type="button"/>
Location	<input type="text" value="Indoor"/>	Equals <input type="button"/>		

Locations

1,284

BACK END

What happens on the backend

Select

account18id

FROM someCreatedTable

WHERE

parentAccount.name IN "7-Eleven, Chevron"

parentAccount.vertical = "convenience store"

locationAccount.city != "Detroit"

locationAccount.country = "US"

oppProduct.LockerSize != 6,

oppProduct.LockerGen = 4,

oppProduct.installDate > "10/31/2022",

oppProduct.Location = "Indoor"

adlocationOpp.ID = Null

oppProduct.KioskStatus = "Active"

adLocationOpp.StartDate IS NOT BETWEEN query.CampaignStartDate and query.CampaignEndDate

adLocationOpp.EndDate IS NOT BETWEEN query.CampaignStartDate and query.CampaignEndDate

ORDER BY locationAccount.topologyScore desc