

# Automation Case Study

Part 1 : Business  
Understanding



## First one hour

- Introduction
- Delivery of Content
- No Questions

## Next 50 Minutes

- Questions
- Answers
- Do not repeat questions

## Last 10 Minutes

- Closing
- Feedback
- Keeping in touch

## Guidelines

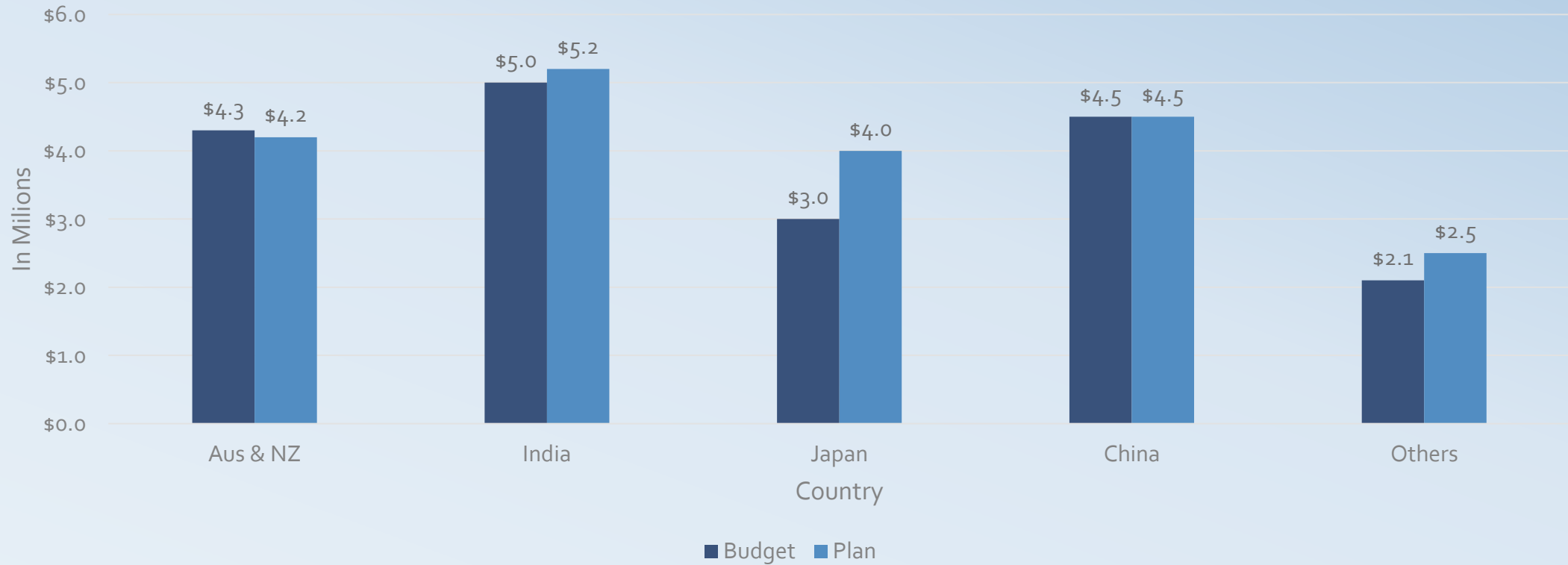
- Multinational Technology Company selling Laptops
- In such companies the **Budget** for each department is defined
- Departments such as **IT, HR, Marketing, Sales, Operations**
- The budgets are further divided into **Regions** followed by **Countries**
- Each Department/Region/Country have to get their **plans approved**
- This automation will help the individual teams validate their Budgets as per **Global Guidelines**

## Considerations

- We are going to use **Marketing Department** in this case study
- Marketing budget for **APJ regions** is defined
- The Budget has to be split into Countries, Business Units, Campaign based on different level of **Marketing Funnel**
- The **Global Budget** has been rolled out to regions. Each country has to plan as per the budget provided
- Various metrics to be created in the Marketing Funnel

## Considerations for Automation Case Study

Global Budget vs. Country Plan



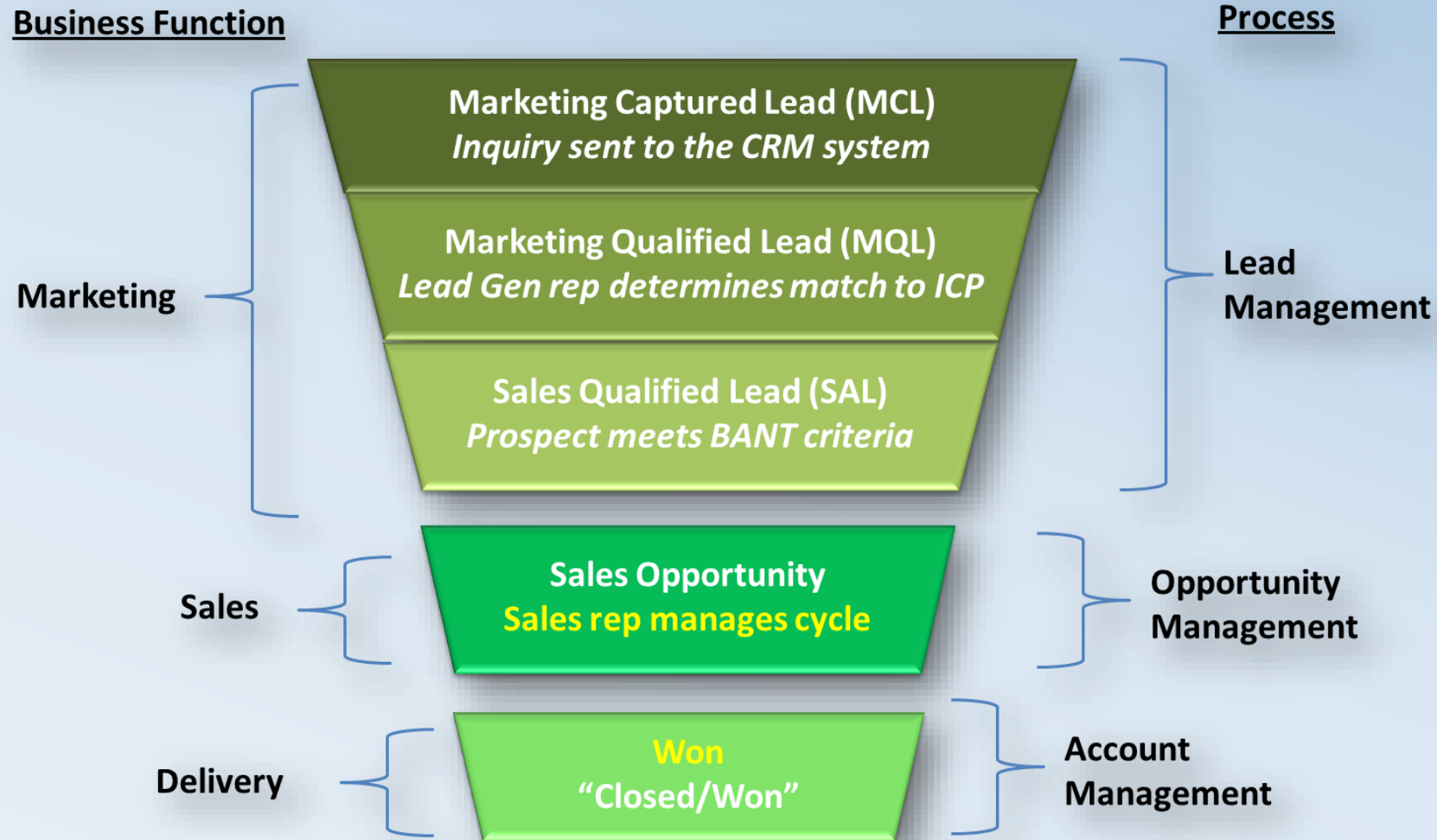
Objective: Create a automation comparing Plans vs Budget



# Asia-Pacific(APJ) Region Marketing Planning

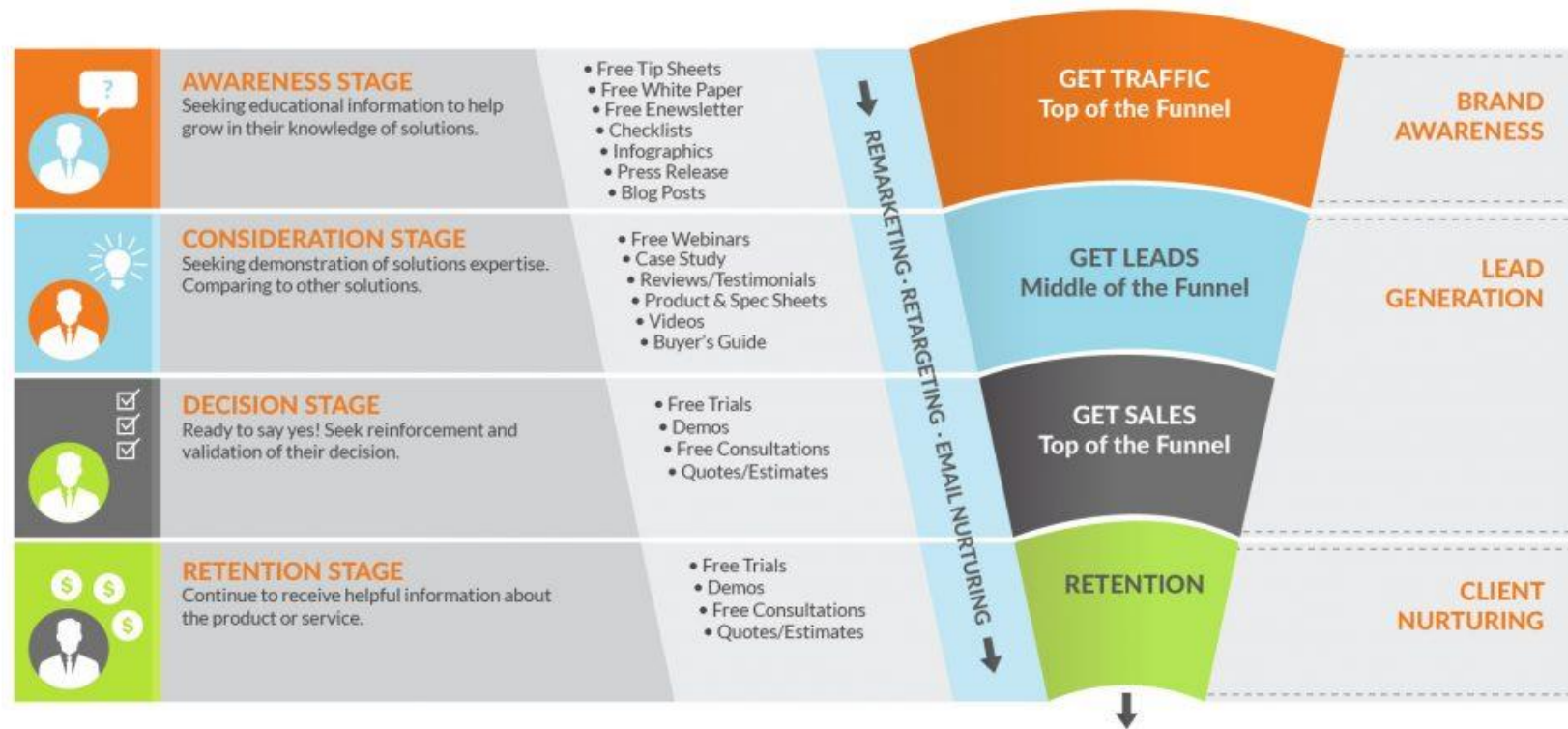
Divided into 6 Country Groups





## Marketing Funnel

Most business will have a process which you should identify



# Marketing Funnel

Most business will have a process which you should identify



# The Review Report

Filter should aid in viewing the Region plan and Country Plan

| Sub Region      | JPN              | <- Filter by Country |         |
|-----------------|------------------|----------------------|---------|
| Campaign Report |                  | FY16_Q1              | FY16_Q2 |
| Spends          | Sales Enablement |                      |         |
|                 | Demand Creation  |                      |         |
|                 | Reputation       |                      |         |
|                 | Digital Media    |                      |         |
|                 | EVENTS           |                      |         |
|                 | Awareness        |                      |         |
| Inbound         | Pipeline         |                      |         |
|                 | Revenue          |                      |         |
|                 | Leads            |                      |         |
|                 | Follow %         |                      |         |
|                 | Conversion %     |                      |         |
| Outbound        | Pipeline         |                      |         |
|                 | Revenue          |                      |         |
|                 | Targets          |                      |         |
|                 | Follow %         |                      |         |
|                 | Conversion %     |                      |         |
| Omni Channel    | Pipeline         |                      |         |
|                 | Revenue          |                      |         |

| Outbound Marketing                   | Inbound Marketing                    |
|--------------------------------------|--------------------------------------|
| Marketer-Driven,<br>"Push" Marketing | Consumer-Driven,<br>"Pull" Marketing |
| Broadcast and print advertising      | Blogging                             |
| Social media advertising             | Earned social media                  |
| Search Engine Advertising            | Search Engine Optimization           |
| Emails to purchased lists            | Emails to opt-in lists               |
| Display advertising                  | Pay per click                        |

## Terminology 1



## Terminology 2



Analytical Methods used feed into the Planning Process



# Marketing Campaigns



|    | A               | B       | C          | D           | E                  | F             | G                  | H                 | I              | J                | K            | L          | M             | N             | O         | P              | Q            | R            | S           |
|----|-----------------|---------|------------|-------------|--------------------|---------------|--------------------|-------------------|----------------|------------------|--------------|------------|---------------|---------------|-----------|----------------|--------------|--------------|-------------|
| 1  | Campaign Name   | Period  | Sub Region | Tool Region | Go To Market       | Campaign Type | Program            | Business Category | Parent Vehicle | Funnel Objective | Reporting CO | Start Date | End Date      | Start Quarter | Spends    | Accepted Leads | Target/Leads | Pipeline     | Revenue     |
| 2  | Campaign - 7438 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 1 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 220.5          | 250          | \$ 18,96,000 | \$ 3,20,305 |
| 3  | Campaign - 3080 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 1 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 220.5          | 250          | \$ 18,96,000 | \$ 3,20,305 |
| 4  | Campaign - 8144 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 16-May-16  | 29-Jul-16 HQ2 |               | \$ 19,000 | 15.444         | 19           | \$ 5,10,000  | \$ 14,535   |
| 5  | Campaign - 3950 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 30-May-16  | 29-Jul-16 HQ2 |               | \$ 4,500  | 42.471         | 52           | \$ 12,95,000 | \$ 30,969   |
| 6  | Campaign - 8411 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 30-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 19.305         | 24           | \$ 5,10,000  | \$ 10,353   |
| 7  | Campaign - 3184 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 13-Jun-16  | 29-Jul-16 HQ2 |               | \$ 40,000 | 38.61          | 50           | \$ 13,60,000 | \$ 37,383   |
| 8  | Campaign - 6842 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 19.305         | 25           | \$ 6,80,000  | \$ 20,400   |
| 9  | Campaign - 9295 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 12,500 | 0              | 0            | \$ -         | \$ -        |
| 10 | Campaign - 9936 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 04-Jul-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 11.583         | 15           | \$ 5,10,000  | \$ 8,415    |
| 11 | Campaign - 3619 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 2 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 5,000  | 0              | 0            | \$ -         | \$ -        |
| 12 | Campaign - 8850 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ 24,830 | 77.22          | 100          | \$ 5,78,000  | \$ 23,120   |
| 13 | Campaign - 4124 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 0              | 0            | \$ -         | \$ -        |
| 14 | Campaign - 7689 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 15.444         | 20           | \$ 1,02,000  | \$ 2,907    |
| 15 | Campaign - 1911 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 16-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 38.61          | 49           | \$ 3,60,000  | \$ 9,585    |
| 16 | Campaign - 9745 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 3,000  | 38.61          | 49           | \$ 2,38,000  | \$ 6,150    |
| 17 | Campaign - 7443 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 3 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 20-Jun-16  | 29-Jul-16 HQ2 |               | \$ 9,000  | 0              | 0            | \$ -         | \$ -        |
| 18 | Campaign - 7312 | FY16_Q2 | IND        | IND         | Through Partner    | Inbound       | Enterprise - 4 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 26,000 | 0              | 0            | \$ -         | \$ -        |
| 19 | Campaign - 6252 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 4 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 15.444         | 20           | \$ 1,80,000  | \$ 5,130    |
| 20 | Campaign - 4191 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 4 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 38.61          | 50           | \$ 4,80,000  | \$ 13,608   |
| 21 | Campaign - 6967 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 4 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 3,000  | 38.61          | 50           | \$ 4,80,000  | \$ 13,608   |
| 22 | Campaign - 5892 | FY16_Q2 | IND        | IND         | Through Partner    | Inbound       | Enterprise - 4 ENT | ENT               | OTHERS         | Demand Creation  | Others       | 16-May-16  | 29-Jul-16 HQ2 |               | \$ 20,000 | 205.821        | 270          | \$ 25,50,000 | \$ 7,98,507 |
| 23 | Campaign - 6191 | FY16_Q2 | IND        | IND         | Partner enablement | Inbound       | Enterprise - 4 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 0              | 0            | \$ -         | \$ -        |
| 24 | Campaign - 5469 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 4 ENT | ENT               | OTHERS         | Reputation       | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 0              | 0            | \$ -         | \$ -        |
| 25 | Campaign - 6532 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 15.444         | 20           | \$ 6,45,000  | \$ 18,382   |
| 26 | Campaign - 4858 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 16-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 38.61          | 49           | \$ 18,40,000 | \$ 48,990   |
| 27 | Campaign - 2510 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 13-Jun-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 15.444         | 20           | \$ 6,45,000  | \$ 16,447   |
| 28 | Campaign - 8706 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 04-Jul-16  | 29-Jul-16 HQ2 |               | \$ 20,000 | 15.444         | 20           | \$ 4,30,000  | \$ 6,643    |
| 29 | Campaign - 9753 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 30-May-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 0              | 0            | \$ -         | \$ -        |
| 30 | Campaign - 4313 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 1 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 3,000  | 38.61          | 49           | \$ 15,05,000 | \$ 38,893   |
| 31 | Campaign - 4408 | FY16_Q2 | IND        | IND         | Partner enablement | Inbound       | Enterprise - 1 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 20,000 | 0              | 0            | \$ -         | \$ -        |
| 32 | Campaign - 3851 | FY16_Q2 | IND        | IND         | Partner enablement | Inbound       | Enterprise - 1 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 06-Jun-16  | 29-Jul-16 HQ2 |               | \$ 26,190 | 0              | 0            | \$ -         | \$ -        |
| 33 | Campaign - 75   | FY16_Q2 | IND        | IND         | Partner enablement | Inbound       | Enterprise - 1 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 06-Jun-16  | 29-Jul-16 HQ2 |               | \$ 4,000  | 0              | 0            | \$ -         | \$ -        |
| 34 | Campaign - 6686 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 5 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ 5,000  | 0              | 0            | \$ -         | \$ -        |
| 35 | Campaign - 3164 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 5 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 15.444         | 20           | \$ 3,60,000  | \$ 10,260   |
| 36 | Campaign - 6724 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 5 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 06-Jun-16  | 29-Jul-16 HQ2 |               | \$ 3,000  | 38.61          | 46           | \$ 7,20,000  | \$ 15,696   |
| 37 | Campaign - 6055 | FY16_Q2 | IND        | IND         | Partner enablement | Inbound       | Enterprise - 5 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 22,000 | 0              | 0            | \$ -         | \$ -        |
| 38 | Campaign - 3432 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 5 ENT | ENT               | Digital Media  | Demand Creation  | Others       | 16-May-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 19.305         | 24           | \$ 4,80,000  | \$ 12,816   |
| 39 | Campaign - 84   | FY16_Q2 | IND        | IND         | Through Partner    | Inbound       | Enterprise - 6 ENT | ENT               | OTHERS         | Demand Creation  | Others       | 23-May-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 156.2715       | 200          | \$ 18,36,000 | \$ 5,35,530 |
| 40 | Campaign - 9770 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 6 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 20-Jun-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 46.332         | 60           | \$ 17,00,000 | \$ 44,166   |
| 41 | Campaign - 9689 | FY16_Q2 | IND        | IND         | Through Partner    | Inbound       | Enterprise - 6 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 09-May-16  | 29-Jul-16 HQ2 |               | \$ 30,000 | 60.984         | 80           | \$ 8,16,000  | \$ 2,52,960 |
| 42 | Campaign - 7164 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 6 ENT | ENT               | EVENTS         | Demand Creation  | Others       | 13-Jun-16  | 29-Jul-16 HQ2 |               | \$ 10,000 | 7.722          | 10           | \$ 3,40,000  | \$ 10,200   |
| 43 | Campaign - 6516 | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 6 ENT | ENT               | OTHERS         | Reputation       | Others       | 04-Jul-16  | 29-Jul-16 HQ2 |               | \$ 15,000 | 0              | 0            | \$ -         | \$ -        |
| 44 | Campaign - 448  | FY16_Q2 | IND        | IND         | Omni               | Inbound       | Enterprise - 6 ENT | ENT               | OTHERS         | Reputation       | Others       | 18-Jul-16  | 29-Jul-16 HQ2 |               | \$ 35,000 | 0              | 0            | \$ -         | \$ -        |
| 45 | Campaign - 9332 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 4 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 178.2          | 200          | \$ 13,20,000 | \$ 2,45,282 |
| 46 | Campaign - 8109 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 4 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 89.1           | 100          | \$ 7,90,000  | \$ 1,42,199 |
| 47 | Campaign - 6404 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 4 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 220.5          | 250          | \$ 18,96,000 | \$ 3,39,147 |
| 48 | Campaign - 6044 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 4 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 220.5          | 250          | \$ 18,96,000 | \$ 3,39,147 |
| 49 | Campaign - 8500 | FY16_Q2 | IND        | IND         | Omni               | Outbound      | Enterprise - 3 ENT | ENT               | OTHERS         | Sales Enablement | Others       | 02-May-16  | 29-Jul-16 HQ2 |               | \$ -      | 178.2          | 200          | \$ 15,80,000 | \$ 2,62,690 |

Campaigns Raw data filled my Country Planners

- Ideally SAS/SQL/Python/R is used to generate the reporting data
- For simplicity, we are going to use Excel(Pivots and Functions)
- Since individual countries are going to use it, we will use a country filter
- Also, we will have another filter to showcase the global plan

## Automation Strategy

# Challenge

Create Automation for Q1,Q2  
Quarters Plans

| Sub Region      | JPN              |         |         |
|-----------------|------------------|---------|---------|
| Campaign Report |                  | FY16_Q1 | FY16_Q2 |
| Spends          | Sales Enablement |         |         |
|                 | Demand Creation  |         |         |
|                 | Reputation       |         |         |
|                 | Digital Media    |         |         |
|                 | EVENTS           |         |         |
|                 | Awareness        |         |         |
| Inbound         | Pipeline         |         |         |
|                 | Revenue          |         |         |
|                 | Leads            |         |         |
|                 | Follow %         |         |         |
|                 | Conversion %     |         |         |
| Outbound        | Pipeline         |         |         |
|                 | Revenue          |         |         |
|                 | Targets          |         |         |
|                 | Follow %         |         |         |
|                 | Conversion %     |         |         |
| Omni Channel    | Pipeline         |         |         |
|                 | Revenue          |         |         |







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**Stay in touch!**