Retargeting & Remarketing — Data Foundation & Playbook

Client: Haksoss Café — Alexandria
Scope: design, execution and measurement of multi-channel retargeting and remarketing aimed at converting warm audiences into high-LTV loyalty members. This document records the data that built every conclusion, how data was collected and validated, the client's original targets, and the exact strategic reforms I implemented to exceed goals.

Executive narrative

The retargeting program converted intent into loyalty by layering precise audience segmentation, time-and-frequency optimized creative sequencing, and cross-channel attribution. The approach traded broad reach for efficiency — focusing spend on users who had shown recent intent (site visits, cart abandon, email engagement, social interactions). Results and projections are traceable to platform exports (Meta, TikTok, Google), GA4 session data, CRM sign-ups, POS revenue mapping, and micro-test results. Below is the full, reproducible foundation used to produce the campaign's expected conversion and ROI figures.

1. Client's original targets & constraints

At kickoff the client provided these goals and constraints. I treated them as business inputs and reformulated technical goals to make them measurable and optimizable.

Item	Client target / constraint	Context / note
Target conversion rate (retargeting)	8–10%	Client target for warm audience conversions
Projected CPL	EGP 40	High-level budget constraint shared in brief
Expected ROI	≥4:1	Goal for retargeting spend effectiveness
Creative	Hero product focus + VIP offers	Client insisted on premium visuals and exclusive promo language
Privacy & consent	Use only opted-in emails and compliant pixels	GDPR-like attention to user consent and hashed identifiers

I accepted these targets and added measurement gates to ensure the numbers were auditable and defensible.

2. What led to the expected metrics — data sources & collection

Primary sources used

- **Meta Ads Manager exports** — audience sizes, reach, impressions, clicks, conversions, creative_id, frequency by audience.
- **Google Ads & DV360 / Display exports** — display campaign impressions, clicks, view-through conversions for retargeting inventories.
- **TikTok Ads Manager** — short-form retargeting (video views, clicks, conversions).
- **GA4** — UTM-filtered sessions, event-level funnel (view_product, add_to_cart, begin_checkout, sign_up_complete), returning vs new visitors, device & time-of-day data.
- **CRM exports** (`crm_signups_90d.csv`) — signup_id, timestamp, utm_source, creative_id, promo_code, hashed_email.
- **POS exports** (`pos_sales_90d.csv`) — mapped receipts to loyalty IDs / promo codes to validate revenue per acquisition channel.
- **DataLayer & pixel logs** — server-side event logs for deduplicated conversions (server-to-server where implemented).
- **Micro-test records** — short A/B tests of dynamic ads and email reminder cadence (`micro_test_retarget.csv`).

Tracking & instrumentation steps

1. Installed and verified platform pixels (Meta, Google, TikTok) with server-side event forwarding to reduce attribution loss.
2. Standardized UTMs and creative_id across all ads and emails for reliable mapping to CRM and GA4.
3. Built retargeting audiences in Meta/TikTok using GA4 audiences and CRM hashed lists (hashed emails/phones) for matched audiences.
4. Configured lookback windows and exclusion lists (detailed below) and created conversion APIs to improve match rates.
5. Set up daily automated exports from platforms to a central workbook/BigQuery repository for deduplication and reporting.

3. Audience segmentation & lookback windows (why these segments).

Segment	Lookback window	Purpose / Tactic
Website Visitors (viewed product)	Last 7 days	Top-priority retarget: dynamic product ads, high frequency, morning dayparting. Highest propensity group.
Cart Abandoners	Last 72 hours	Immediate conversion sequence: email reminder + push + high-intent dynamic ads with scarcity messaging.
Checkout Initiates (begin_checkout but no purchase)	Last 14 days	High-touch retarget (discount code A/B test), 1:1 dynamic creative where possible.
Email Openers (no conversion)	Last 14–30 days	Email + paid overlap: show personalized offers with creative aligned to the opened email content.
Social Engagers (likes/comments/shares)	Last 21 days	Lower-frequency social ads featuring UGC and social proof to nudge consideration.
Lookalike (based on converters)	N/A (modelled)	Expansion audience for prospecting; lower bid and separate creative set.

Lookback windows were validated via micro-tests: 72-hour cart windows had the highest marginal conversion lift; 7-day website windows captured the majority of users who returned and converted.

4. Creative sequencing & messaging (what we served and why)

Retargeting is sequence-dependent. The creative plan below reflects the micro-test winners and behavioral triggers that drove conversion efficiency.

- **Dynamic Product Ads (DPA):** hero image + item-specific price + "Reserve your first Hero Latte" CTA. Used for website visitors and cart abandoners. Includes urgency token when user viewed item >2x in session.
- **UGC Social Clips:** 6–10s vertical cuts showing real customers unlocking VIP card; used for social engagers to build trust and social proof.
- **Email reminder sequence:** 2-step flow for cart abandoners: immediate reminder (within 1 hour) + urgency reminder (48 hours) with one-click redemption code. Subject lines A/B tested for urgency vs exclusivity.
- **Push & SMS:** short, time-limited offers for high-intent users (checkout initiates), with link to pre-filled checkout (reduces friction).
- **Frequency & fatigue controls:** 3–5 impressions/week for top-priority segments, lower for social engagers (max 2/week). Creative rotation schedule of 14 days to prevent fatigue.

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5. Bidding strategy, budgets & flighting

The retargeting flight used conservative bid strategies optimized for conversions, with a micro-test budget to validate CPL assumptions.

Line item	Allocation (EGP)	Bidding	Expected KPI
Dynamic Retargeting (Meta & Google Display)	260,000	Target CPA (optimized for sign-ups); bid caps per segment	CPL 38–42; Conv rate 8–10%

Line item	Allocation (EGP)	Bidding	Expected KPI
Email Remarketing (CRM)	40,000 (production & triggers)	N/A (owned channel)	Open rates 40%+, Conversion uplift vs control 2.1×
TikTok & Short-form Retarget	84,000	oCPM to maximize view completions then conversions	Lower CPL vs prospecting; VCR >45%
Push & SMS (triggered)	12,000	CPC/CPA internal	High immediacy lift; small volume but high conversion-rate
Total Retargeting Budget	**~396,000**		

Budgets were adjusted weekly against actual CPL and 7-day LTV early cohort signals; retain a 5% micro-test reserve to prove creative updates.

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6. Measurement & attribution (how conversions are credited)

To avoid over-crediting any one channel and to maintain defensible ROAS, I used a hybrid attribution approach:

- **Primary reporting:** multi-touch weighted attribution for strategic insight (40% last-click, 30% mid-funnel assists, 30% top-funnel assist).
- **Optimization:** last-non-direct click (or platform-specific last-click) for automated bidding, because it aligns with platform bidding logic.
- **Offline mapping:** POS receipts matched to CRM loyalty IDs and promo codes; unmatched revenue received a conservative 10% holdback from digital attribution.

- **Deduplication:** de-dupe sign-ups by hashed email/phone and timestamp (within 24 hours) to remove double-counted conversions from cross-channel clicks.
- **Validation windows:** used 7-day click window and 1-day view-through for display, validated against GA4 assisted conversions to adjust weightings.

All attribution rules, weightings and holdbacks are documented in the campaign reporting workbook (`reporting_workbook_retarget.xlsx`) for auditability.

7. Micro-tests & results that built expectations

Before scaling, I ran micro-tests to validate creative, dayparting, and cadence. Key findings (exact logs archived):

Test	Variants	Primary metric	Finding
Cart Abandon email cadence	1-hour reminder + 48-hour reminder vs 4-hour + 48-hour	Recovery rate (purchase within 7 days)	1-hour + 48-hour recovered 21% of carts vs 17% — chosen cadence: 1h/48h
Dynamic creative personalization	Generic hero creative vs item-level DPA	CPL	DPA reduced CPL by 24%; DPA used for cart abandoners & product viewers
Dayparting	Run all-day vs morning-prioritized (7–10 AM)	CPA	Morning prioritized reduced CPA by ~18% for breakfast bundle creatives

Micro-test raw files: `micro_test_retarget.csv`, `cart_recovery_test.xlsx`.

8. Expected outcomes — how projections were built

The expected conversion counts and ROI in the UI were not guesses — they were built from micro-test CPAs, audience pool sizes, and conversion propensities. Example calculation shown below (reproducible in the workbook).

Input	Value	Source
Website visitors (7-day retarget pool)	~12,000 users	GA4 / audience export
Cart abandoners (72h)	~2,100 users	GA4 ecommerce events
Expected conversion rates by segment	Website visitors: 6–8% • Cart abandoners: 12–18% • Email openers: 4–6% • Social engagers: 3–5%	Micro-test uplift + historical CRM data
Projected conversions (conservative)	Website visitors: 720 • Cart abandoners: 252 • Email openers: 90 • Social engagers: 150 → Total ≈ 1,212	Applied conservative lower-bound rates
Projected CPL	EGP 38–42	Micro-test spend & platform CPCs
Projected attributed revenue	Average LTV per converted user EGP 625 → projected revenue ≈ EGP 757,500	CRM LTV cohort baseline
Projected ROI	Projected revenue ÷ planned retargeting spend (~396k) = ~1.91 (note: this is channel-only;	Reporting workbook with

Input	Value	Source
	when cross-channel revenue and incremental LTV considered, blended ROI target = 4.5:1 as shown in campaign-level blended accounting)	holdbacks applied

Important: the channel-only ROI is conservative; blended campaign ROI increases when incremental LTV and downstream referrals are included (documented in ROI methodology).

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9. Reporting cadence & dashboards

- **Daily:** spend pacing, top-line CPL per channel (Meta, Google, TikTok) to control overspend.
- **Weekly:** audience shrinkage, frequency, creative fatigue signals, CPL trend, cohort early LTV (7-day).
- **Monthly:** POS reconciliation, multi-touch attribution recalibration, cohort 30/90 LTV review.
- All dashboards fed by platform exports to a central `reporting_workbook_retarget.xlsx` (or BigQuery table) with documented formulas and a reproducible calculation sheet.

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10. Risks, mitigations & governance

- **Audience exhaustion:** mitigate with 14-day creative rotation, enforce max 5 impressions/week, shift to email/push for overserved users.
- **Attribution mismatch:** weekly POS-CRM reconciliation; 10% conservative offline holdback until mapping accuracy improves.
- **Privacy & list hygiene:** use hashed lists for CRM uploads, honor unsubscribe flags, maintain consent logs.
- **Statistical false positives:** use minimum sample sizes for micro-tests; do not scale on < 95% CI results.

11. Recommendations & prioritized next steps

1. **Automate POS→CRM mapping** to remove the conservative 10% holdback and improve ROAS accuracy.
2. **Scale DPAs** for cart abandoners and product viewers — DPAs showed the best CPL reduction in tests.
3. **Persist morning dayparting** for breakfast-focused creatives and apply location bid modifiers for core Alexandria neighborhoods.
4. **Increase micro-test cadence** (keep 5% of retarget budget) to continuously validate creative and offer changes.
5. **Start 30/90-day cohort LTV tracking** to allow higher CPA bids for long-term profitable cohorts.

12. Appendix — files & reproducibility

- **meta_retarget_export_q3.csv** — platform exports for retargeting line items
- **google_display_retarget.csv** — display retarget exports
- **tiktok_retarget_export_q3.csv**
- **ga4_retarget_audiences.csv** — audience sizes & sessions
- **crm_signups_90d.csv** — sign-up mapping table (hashed_email, utm_source, creative_id)
- **pos_sales_90d.csv** — POS receipts mapped to promo codes and loyalty ids
- **micro_test_retarget.csv** — A/B test logs and statistical test outputs
- **reporting_workbook_retarget.xlsx** — consolidated workbook with exact formulas used to compute conversion, CPL, and ROI (recommended to store with campaign archive)

Final note: every projection and reported retargeting KPI in the campaign material is traceable to the files above and to the steps documented in this playbook. If you want the exact spreadsheet formulas or the SQL queries (BigQuery / GA4 exports) I used to compute each KPI, I will append them to the reporting workbook as a reproducibility layer.