

# ABM Proposal - LeanData & MyDigipal -

## October 2025

Loom video from Paul to go through the proposal: [Loom](#)

AI Video summary of this proposal: <https://youtu.be/dSzEkIkQHks>

AI Audio summary of this proposal: [LeanData - ABM Proposal MyDigipal Audio.m4a](#)

## Proposal Summary

### Who We Are

MyDigipal is a London-based B2B digital marketing agency of 17 SaaS specialists. We help enterprise tech brands turn paid media into a pipeline, combining AI-driven efficiency with human strategy. 60% of our work happens in the US, giving us strong alignment with LeanData's core markets.

### Our Mission for LeanData

**Goal:** Build a predictable, scalable demand engine that drives qualified enterprise opportunities.

**How:** By optimising Google Ads, LinkedIn, and landing experiences—all tied to measurable CRM attribution.

### What We'll Do

#### 1. Google Ads – Capture Intent

Target enterprise, high-intent keywords around RevOps and lead routing.

Build funnel layers: Search → Remarketing → YouTube.

Full-funnel attribution (MEL → SQL → Opp).

→ Value: Stronger share of voice, lower cost per SQL, higher conversion efficiency.

#### 2. LinkedIn Ads – Shape Intent & ABM Activation

Always-on demand gen targeting RevOps, Marketing Ops & Sales Ops leaders.

ABM programs using CRM-synced account lists and creative sequencing.

→ Value: Direct engagement with Tier-1 accounts and measurable pipeline impact.

#### 3. Landing Page Optimisation

UX, content, and form audits to lift demo conversion rates.

→ Value: More pipeline from existing traffic, consistent brand experience.

#### 4. Tracking, Reporting & Attribution

Audit GTM, GA4, and CRM data flows.

Custom dashboards (Power BI / Looker Studio) linking spend to pipeline.

→ Value: Full transparency, accurate reporting, and actionable insights.

## Funnel & Budget Overview (Q4 2025 Media Plan)

		Paid Search		Paid Social		ABM
		NAM	EMEA	NAM	EMEA	NAM
Oct 2025	Spend	\$24,818	\$3,920	\$37,226	\$5,880	\$7,200
	Avg. CPC	\$6	\$4	\$14	\$12	\$20
	# Clicks	4,136	980	2,659	490	360
	Conversion rate	1.2%	1.0%	3.0%	2.5%	4.0%
	# Leads	50	10	80	12	14
	Qualified rate	20%	20%	30%	30%	40%
	# Qualified leads	10	2	24	4	6
Nov 2025	Spend	\$24,818	\$3,920	\$37,226	\$5,880	\$7,200
	Avg. CPC	\$5	\$4	\$12	\$10	\$18
	# Clicks	4,964	980	3,102	588	400
	Conversion rate	1.5%	1.2%	3.5%	3.0%	4.5%
	# Leads	74	12	109	18	18
	Qualified rate	25%	25%	25%	35%	50%
	# Qualified leads	19	3	27	6	9
Dec 2025	Spend	\$12,409	\$1,960	\$18,613	\$2,940	\$3,600
	Avg. CPC	\$4	\$4	\$4	\$4	\$4
	# Clicks	3,102	490	4,653	735	900
	Conversion rate	1.5%	1.2%	3.5%	3.0%	4.5%
	# Leads	47	6	163	22	41
	Qualified rate	25%	25%	25%	35%	50%
	# Qualified leads	12	1	41	8	20
Total spend		\$62,044	\$9,800	\$93,066	\$14,700	\$18,000

Instead of rigid packages, we work on an hourly-based structure at \$100/hour, which provides the flexibility to shift resources between channels and activities depending on priorities, seasonality, and campaign learnings.

**Average monthly management fee:** \$9,000, covering all channels, strategic planning, reporting, and collaboration.

## Engagement Timeline

Weeks 1–2: Audit, access, tracking validation, quick wins

Months 1–3: Campaign rebuilds, testing, dashboards

Months 4–12: Scaling, ABM expansion, forecasting

## Expected Impact

- Higher-quality SQLs at lower cost
- Clear attribution from click → opportunity
- Stronger synergy between marketing and sales
- Predictable, data-driven scaling

## Final Word

MyDigipal = Your Growth Partner in Pipeline Efficiency.

We don't sell leads, we engineer sustainable demand.

# Full Proposal

## 1. Executive Summary

LeanData is seeking a strategic partner to drive enterprise demand generation and pipeline quality through paid media. MyDigipal is a London-based agency of 17 B2B marketing specialists focused on SaaS, technology, and ABM programs. With 60% of our operations in the US and the rest across EMEA, we bring a global approach with regional expertise.

Our proposal outlines a fully managed partnership, combining strategic leadership, paid media execution, and advanced reporting. The goal is to improve marketing efficiency, strengthen attribution to pipeline, and scale qualified lead generation across Google Ads and LinkedIn.

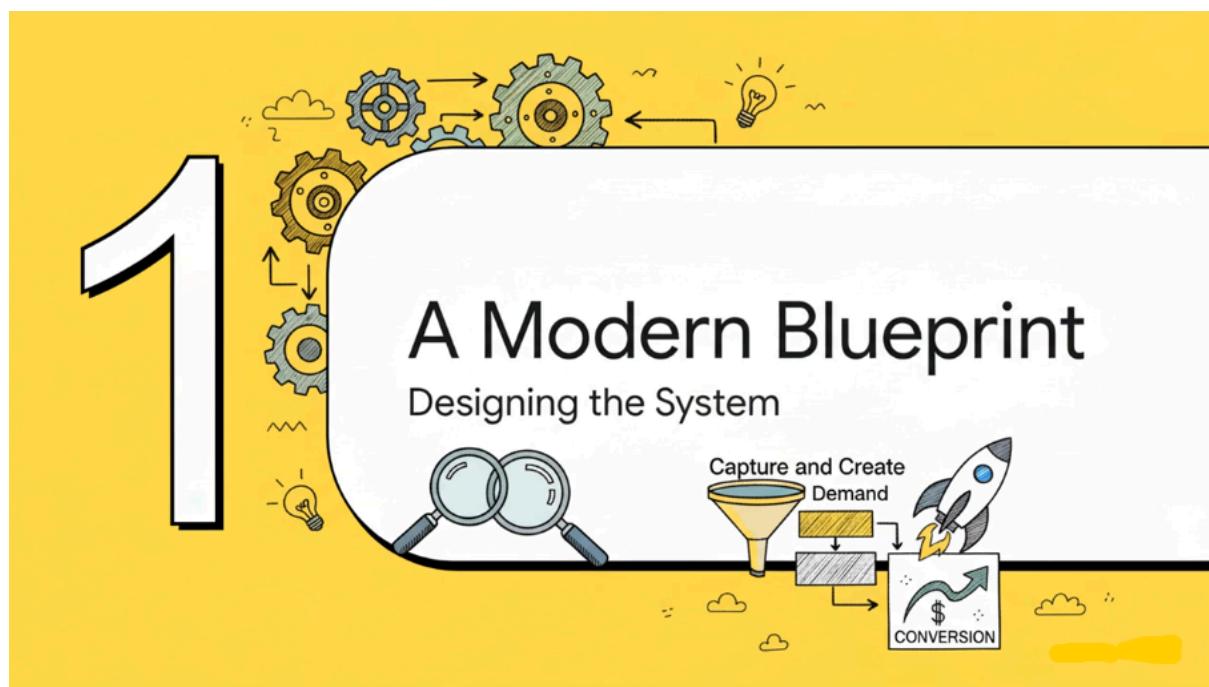


## 2. Partnership Approach & Collaboration Model

We combine **AI-driven efficiency** with **human strategy and creativity**. MyDigipal integrates seamlessly with internal marketing teams, acting as an extension rather than an external agency.

### Our framework:

1. **Discovery Phase (Weeks 1–2)**
  - Platform access, audit, and tracking validation.
  - Review past campaigns and identify quick wins.
  - Retain what works and enhance progressively without heavy rebuilds.
2. **Strategy, Optimisation & Experimentation (Months 1–3)**
  - Improve campaign structures, audience segments, and creative testing.
  - Implement integrated dashboards and CRM data sync.
3. **Scaling & Strategic Growth (Months 4–12)**
  - Introduce new campaign types and advanced segmentation.
  - Quarterly forecasting, scenario planning, and ABM expansion.



### 3. Team Structure & Expertise

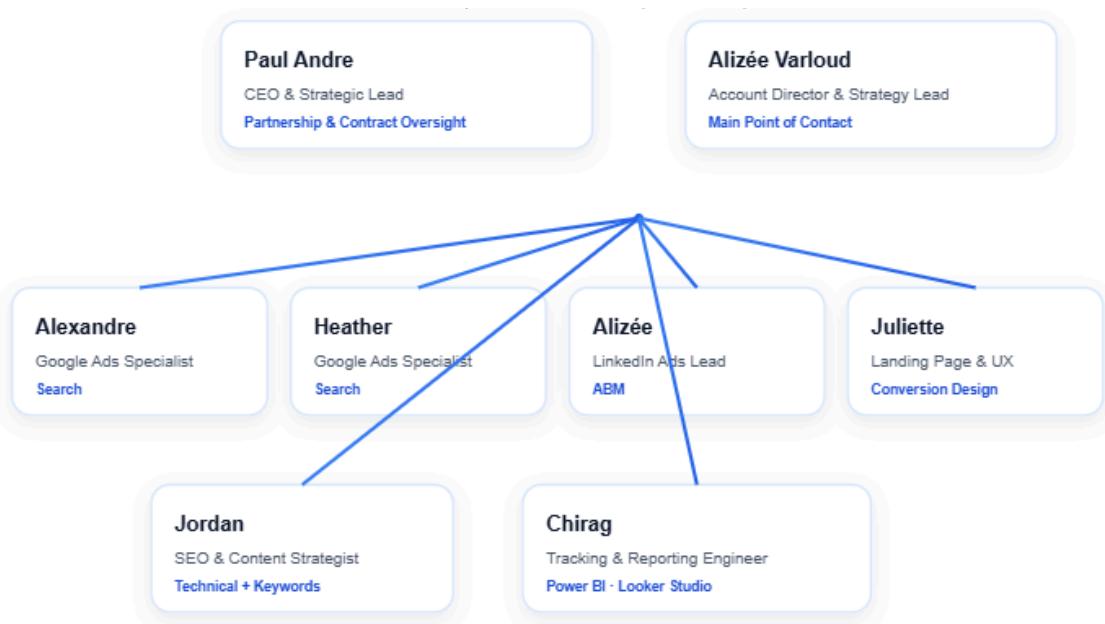


At MyDigipal, we believe successful partnerships are built on collaboration, clear communication, and accountability. Here's the core team that will work directly with LeanData:

- **Paul Andre – CEO & Strategic Lead:** Paul oversees the organisation of the full MyDigipal team and manages the contractual and partnership aspects. He ensures alignment between LeanData's objectives and the agency's delivery roadmap.
- **Alizée Varloude – Account Director & Strategy Lead:** Alizée will be LeanData's **main point of contact**, available five days a week (and on-call for urgent matters). She centralises all communications, project manages internally, and leads the strategic direction of campaigns. She will handle strategic discussions, brainstorming sessions, and share actionable plans with the execution team.
- **Campaign Management Team (3):**
  - **Alexandre** and **Heather** manage Paid Search campaigns, ensuring high-quality traffic and conversion optimisation.
  - **Alizée (LinkedIn Ads)** leads Paid Social campaigns with a strong ABM focus. Together, they coordinate campaign planning, review each other's work for accuracy, and share learnings in weekly internal syncs. Each has over seven years of hands-on experience in paid media optimisation across enterprise accounts.
- **Juliette – Landing Page & UX Specialist:** Juliette is responsible for content and landing page optimisation. She brings a strong creative sense and expertise in design, UX, and conversion flow. She collaborates closely with the campaign and SEO teams to ensure the full user journey (from ad click to lead capture) is seamless

and effective.

- **Jordan – SEO & Content Strategist:** Jordan focuses on keyword strategy and technical SEO. He ensures synergy between paid and organic initiatives, avoiding cannibalisation while identifying new keyword opportunities. He also provides recommendations for improving website performance, conversions, and SEO health.
  - **Chirag – Tracking & Reporting Engineer:** A long-time collaborator of over seven years, Chirag is an expert in analytics and attribution. He identifies and resolves tracking issues, provides technical briefs for internal fixes when needed, and develops customised reporting dashboards in **Power BI** and **Looker Studio**. His reports support weekly performance reviews and are shared transparently with LeanData.
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### Meeting Structure:

Weekly calls will be attended by **Alizée** and one of the **campaign specialists**, with **Paul** joining every other meeting for strategic alignment. Depending on the focus area, relevant specialists (e.g., **Jordan** for SEO or **Chirag** for tracking/reporting) will also join to discuss projects in depth.

### Weekly Meetings (30–45 min):

1. Review campaign performance via dashboards.
2. Channel-by-channel action plan updates.
3. Strategic recommendations for validation.

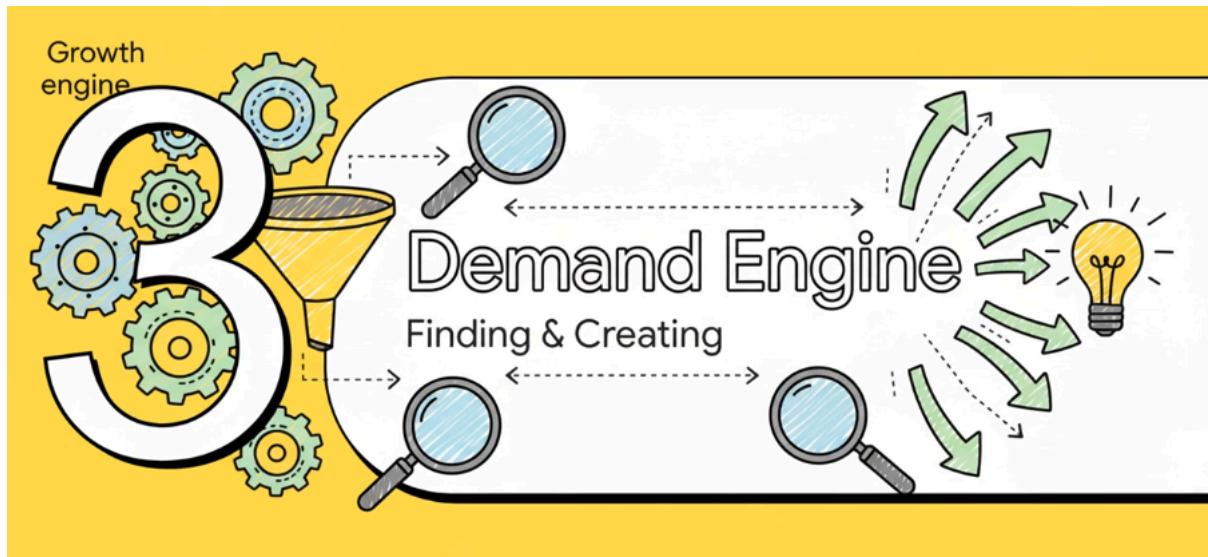
**Monthly Reviews:** Deep-dive on trends, budget allocation, and test results.

**Quarterly Business Reviews (QBRs):** Forecasting, pipeline insights, and innovation roadmap.

This structure ensures LeanData receives both strategic leadership and hands-on execution support from the experts directly managing the work.

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#### 4. Scope of Work & Channel Strategy



Quick video here: <https://youtu.be/n32LuqmOzz4>

#### Budget & Forecast

		Paid Search		Paid Social		ABM
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## A. Google Ads – Strategy & Action Plan

### Introduction:

For LeanData, Google Ads offers an ideal channel to capture high-intent enterprise search demand, dominate ground around lead-to-account (L2A) signalling and complement your ABM efforts. With LeanData's strong positioning in revenue orchestration and L2A matching, we believe activating the Google channel aggressively will help you drive pipeline from query to opportunity, especially in North America and UK/EMEA. Your tech leadership signals strong buyer intent around search terms like "lead to account matching", "SaaS revenue orchestration", "account based lead routing", etc.

### Key strategic levers:

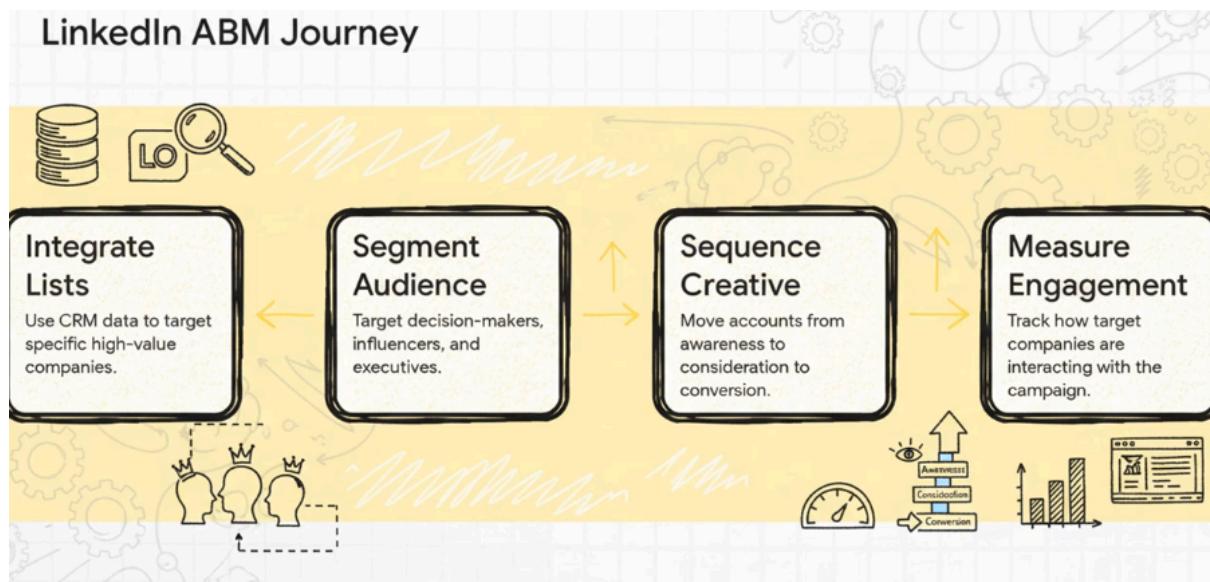
- Prioritise **Search** campaigns targeting enterprise-scale intent: high revenue accounts, 1000+ employee companies, GTM ops roles (RevOps, Marketing Ops).
- Layer in **Display / YouTube / Performance Max** once Search is performing: to build awareness and remarketing for engaged accounts.
- Strong **Remarketing & funnel layering**: ensure the traffic you attract is nurtured through to demo/MEL conversion, not just click.
- Utilise LeanData's product positioning (L2A matching, routing & attribution) to craft differentiated ad copy and landing page hooks that speak to RevOps/Marketing Operations pain points.
- Localise and globalise: US market is priority (60% of our collective focus) but extend to UK/Ireland & EMEA with tailored messaging and budget weighting.

### Action planning:

- Build core keyword clusters: "lead to account matching", "revenue orchestration platform", "lead routing automation SaaS", "account based lead routing enterprise", etc.
- Setup campaign structure: broad + phrase + exact match; ensure account-based keyword layering (company names + problem) for enterprise audience.

- Create ad groups segmented by persona: RevOps, Marketing Ops, Sales Enablement—each with tailored messaging.
- Launch Performance Max test within first 2-3 months to capture broader inventory and feed back data into core search targets.
- Build remarketing audiences: visitors who engaged with product pages, downloaded solution brief, returned to pricing page; segment by engagement level and company size.
- Develop landing page variants (working with Juliette) aligned with search messaging: problem emphasised (L2A leakage, RevOps inefficiency), proof points (LeanData algorithm), CTA (book demo).
- Integrate conversion tracking end-to-end: adjust for MEL → SQL → Opp attribution; ensure we capture quality, not just volume.
- Monitor & optimise CPL, cost per opportunity; aim to drop cost per SQL by X% quarter over quarter (to be defined in forecast).
- Monthly budget forecasting model: map if spend rises by Y, how many MELs and SQLs we expect (scenario planning).
- Ongoing copy/ad creative rotation: use AI-assisted headline/description testing but human-strategic review before rollout.
- Expand into UK/Ireland & Europe by month 4: adjust keyword lists for local terminology, adjust timezones, adjust landing page copy for localisation.

## B. LinkedIn Ads – Strategy & Action Plan



### 1. LinkedIn Paid Social (Always-On Demand Gen)

#### Introduction:

LinkedIn is a critical channel for LeanData to engage decision-makers within RevOps, Marketing Ops, and Sales Ops functions, the very personas driving demand for lead-to-account matching and revenue orchestration solutions.

Unlike Google, where users express intent via search, LinkedIn allows you to **shape that intent proactively**, driving awareness and consideration among target personas before they actively start searching.

#### Strategic Direction:

Our objective on LinkedIn is to position LeanData as the go-to solution for enterprise-level revenue operations challenges. By combining thought leadership, persona-specific messaging, and ongoing creative testing, we'll increase engagement and push qualified traffic into the funnel that can later convert through remarketing or direct demo interest.

#### Action Plan:

- **Persona-Based Targeting:** Focus on RevOps, Marketing Ops, Sales Ops, and Demand Gen leaders at mid- to large-enterprise SaaS firms (1,000+ employees).
- **Content Mix:**
  - Sponsored Content for educational value (e.g., “Why lead-to-account matching is the missing link in your RevOps stack”).
  - Carousel Ads to highlight features (Match, Route, Engage).
  - Video Ads showcasing customer success or integrations.
  - Conversation Ads for mid-funnel re-engagement (“Want to see how LeanData integrates with Salesforce?”).
- **Messaging Strategy:**

- Highlight the operational pain points (“Leads falling through the cracks? Attribution chaos between Sales and Marketing?”).
  - Contrast with the LeanData solution: reliable routing, unified reporting, and faster time-to-pipeline.
  - A/B test tone (educational vs. problem-solving vs. competitive differentiation).
- **Remarketing Layer:**
    - Build audiences from users who interacted with ads or visited the website in the last 90 days.
    - Tailor creative to stage (educational → product-focused → conversion).
  - **Regional Testing:**
    - Run parallel campaigns for North America and EMEA to adapt tone and CTAs based on market maturity.
    - For EMEA, shift focus towards “RevOps scalability” and “Sales-Marketing alignment” themes.
  - **KPIs:**
    - CTR above 0.6% average benchmark for SaaS enterprise.
    - CPL optimisation over 6–8 weeks based on persona and region.
    - Progressive increase in demo-driven conversions per quarter.

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## 2. LinkedIn ABM (Account-Based Marketing Activation)

### Introduction:

Given LeanData's focus on enterprise accounts and the alignment between marketing and sales, ABM on LinkedIn is one of the most effective levers to build meaningful engagement with specific target companies.

This strategy leverages account lists (e.g., from Salesforce, 6sense, or first-party CRM exports) to deliver hyper-relevant content and nurture key accounts through multiple stakeholders and roles.

### Strategic Direction:

We will transform your static account list into dynamic ABM journeys, where decision-makers from the same company see consistent, sequential storytelling, moving from awareness to engagement to conversion.

### Action Plan:

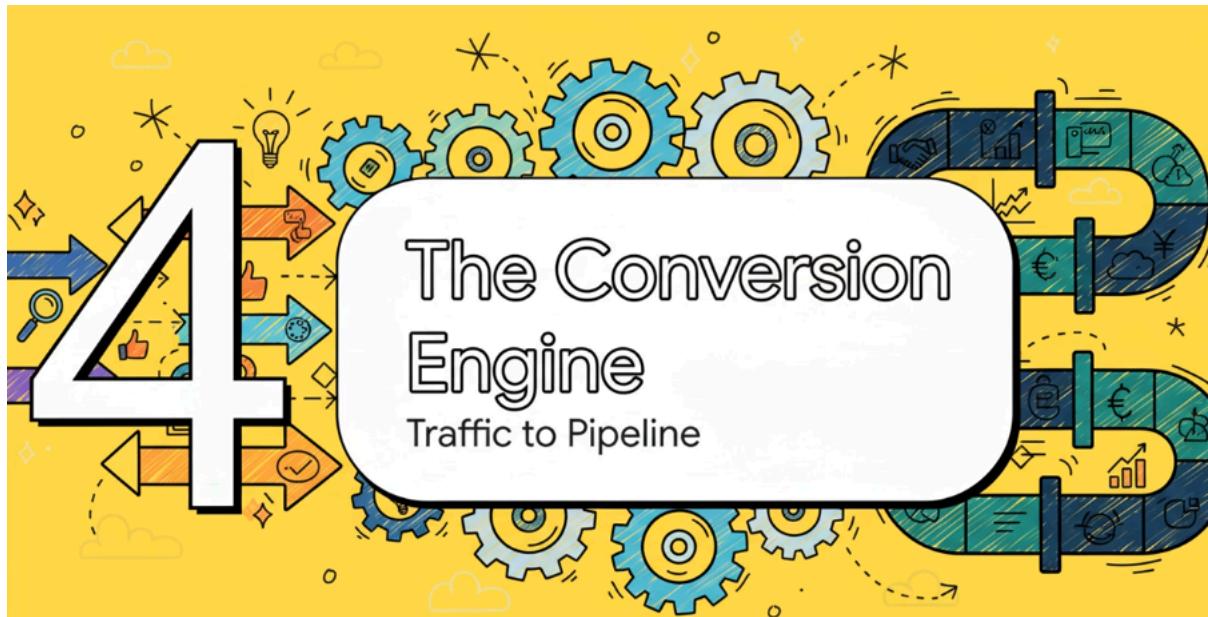
- **Account List Integration:**
  - Import and regularly refresh account lists directly from Salesforce or CRM.
  - Group accounts by intent stage or territory (e.g., Tier 1: engaged, Tier 2: dormant).
- **Audience Segmentation:**

- Decision-makers: VP/Director-level roles (Marketing Ops, Sales Ops, RevOps).
  - Influencers: Demand Gen Managers, Campaign Specialists.
  - Executive Sponsors: CRO, CMO, COO tiers for strategic messaging.
- **Creative Sequencing:**
    - Phase 1 (Awareness): Problem-solution videos or carousels (“Revenue orchestration without data silos”).
    - Phase 2 (Engagement): Use case and integration ads (“How LeanData connects seamlessly with Salesforce and HubSpot”).
    - Phase 3 (Conversion): Direct CTAs (“Book a demo with our RevOps experts”).
  - **Personalisation Elements:**
    - Custom banners or dynamic images including company names or logos (where permitted).
    - Tailored messaging referencing their pain points by vertical (e.g., SaaS, FinTech, HRTech).
  - **Measurement & Reporting:**
    - Track account engagement metrics (CTR, reach within target account list, matched accounts).
    - Evaluate lift in demo requests or site visits from target accounts.
    - Cross-reference with CRM data for MEL → SQL conversion rates.
  - **Optimisation & Testing:**
    - Test different ABM list sizes (e.g., 100 vs. 500 accounts) to balance reach and precision.
    - Refresh creative every 6 weeks to avoid ad fatigue.
    - Review account-level engagement dashboards monthly.

#### **Expected Outcome:**

By combining LinkedIn ABM with paid social always-on, LeanData can reach decision-makers early, nurture them with relevance, and close the loop with clear account-level analytics tied to pipeline impact.

## C. Landing Page Optimisation – Strategy & Action Plan



### Introduction:

Driving high-quality traffic is only half the equation. For LeanData, the real impact comes from converting that traffic into meaningful engagement, demo requests, form fills, or qualified opportunities. That's why landing page optimisation plays a central role in our approach.

Our goal is to turn LeanData's existing and future campaign pages into **high-converting, performance-ready assets**, aligned with your messaging pillars ("Orchestrate Your Revenue," "Lead-to-Account Matching," "Routing & Engagement"). Each page should be fast, intuitive, and conversion-oriented, while maintaining your brand's credibility and thought leadership tone.

### Strategic Direction:

We'll review and enhance the landing page experience across **design, UX, copy, and SEO performance**, ensuring that every paid click leads to an optimised user journey, from discovery to form submission. We'll also work closely with your in-house designer (as mentioned by Cindy) to refine layouts collaboratively, without disrupting existing workflows.

### Action Plan:

- **Conversion Experience Audit:**
  - Evaluate form placement, length, and clarity of CTAs.
  - Test scroll depth and heatmaps to identify friction points.
  - Review above-the-fold messaging to ensure value proposition clarity within the first 5 seconds.
- **Content & Messaging Structure:**
  - Align ad copy and landing page headlines for consistent narrative flow.

- Introduce short proof sections (“trusted by...”, “used by top RevOps teams”) to build trust faster.
  - Use benefit-led subheadings and bullet formatting for skimmability.
  - Include customer quotes or success metrics from case studies (e.g., Genesys, GWI).
- **Design & UX Recommendations:**
    - Simplify layouts by prioritising CTAs (“Book a Demo,” “Get a Custom ROI Estimate”).
    - Optimise mobile experience and loading speed (via GTMetrix and Core Web Vitals testing).
    - A/B test hero imagery and color contrasts to enhance attention on CTAs.
    - Suggest variants with shorter forms for lower-friction retargeting campaigns.
  - **SEO Alignment:**
    - Ensure technical elements (title tags, H1 hierarchy, alt tags, meta descriptions) are optimised for organic visibility.
    - Map target keywords to landing pages to capture high-intent “free” traffic from organic search.
    - Avoid paid keyword cannibalisation by syncing with the SEO roadmap, Jordan will oversee this alignment.
    - Internal linking between campaign pages and blog content for authority transfer and session depth.
  - **Tracking & Attribution Integration:**
    - Ensure all CTAs, forms, and button events are properly tagged via GTM.
    - Distinguish between demo, resource download, and other conversion types for cleaner attribution.
    - Validate that landing page conversions sync properly to MELs and SQLs in CRM.
  - **Collaboration with Internal Teams:**
    - Work hand-in-hand with LeanData’s in-house designer and content team to maintain brand tone.
    - Provide annotated design recommendations (Figma or Loom walkthroughs) for easy implementation.
    - Optional: create parallel test pages (MyDigipal-hosted) for faster experimentation before integrating successful elements back into production.

### **Expected Outcome:**

By combining LeanData’s strong product positioning with data-driven design, we’ll significantly improve the **conversion rate** of paid media traffic, increasing pipeline contribution without increasing spend. Optimised UX and content consistency also reinforce brand credibility among RevOps buyers, creating a more cohesive and scalable demand engine.

## D. Tracking, Reporting & Attribution – Strategy & Action Plan



### Introduction:

Accurate tracking is the foundation of every high-performing demand generation strategy. Without reliable data, even the best campaigns lose direction. For LeanData, ensuring a clean, compliant, and complete data flow, from first click to closed opportunity, will be one of our top priorities.

Our approach combines a **technical audit**, a **CRM integration review**, and the **creation of unified dashboards** to ensure every marketing effort is measurable, traceable, and actionable.

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### 1. Web Tracking & Data Collection

Before optimising ad performance, we'll ensure that all data entering your analytics ecosystem is complete and GDPR-compliant. Our goal is to guarantee that LeanData captures **every relevant user interaction** across your website.

#### Action Plan:

- **Tag Management & Analytics Setup**
  - Audit and configure **Google Tag Manager (GTM)** for clean tag structure and version control.
  - Validate **Google Analytics 4** setup, including property hierarchy, event schema, and referral exclusions.
  - Ensure cookie consent mechanisms are fully operational and GDPR/CCPA compliant.
  - Verify that consent settings trigger or restrict tags properly to maintain compliance.
- **Conversion Point Identification & Tracking**
  - Catalogue all on-site conversion events (demo request, form submissions, gated content, chatbot interactions).

- Track micro-conversions: clicks on phone numbers, email addresses, “Contact Sales” buttons, and scroll events.
  - Implement event-level tagging for each conversion using GTM and confirm accurate triggering via real-time tests.
  - Validate that all conversions flow correctly to **Google Ads**, **LinkedIn Ads**, and **Google Analytics** for consistent attribution.
  - Create clear naming conventions and categorisation to differentiate top-, mid-, and bottom-funnel actions.
- **Traffic Source Accuracy**
    - Clean UTM parameters across campaigns to ensure sessions are attributed properly.
    - Set up auto-tagging and link parameters in Google and LinkedIn Ads to ensure CRM alignment later.

**Outcome:**

A fully transparent and compliant data capture layer, ensuring LeanData's digital performance reporting is built on verified, high-integrity data.

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## 2. CRM & Attribution Flow Audit

Beyond web tracking, the second key layer is your CRM, where leads become pipeline. We'll review how data flows between your paid media channels, marketing automation, and sales systems to ensure every conversion can be traced from click to closed-won.

**Action Plan:**

- **Platform Audit & Data Flow Review:**
  - Deep-dive analysis of your CRM setup in **Salesforce**, **HubSpot**, or **Marketo**.
  - Verify tracking consistency across marketing and sales objects (Leads, Contacts, Opportunities).
  - Identify gaps in workflow automation or missing fields (e.g., campaign source, medium, form origin).
  - Map data journeys from paid channel → form fill → CRM record → SQL → Opportunity.
- **Attribution & Workflow Optimisation:**
  - Recommend enhancements to campaign attribution models and data fields.
  - Ensure bidirectional sync between CRM and ad platforms for offline conversion tracking (OCT).
  - Automate lead scoring and routing updates to reflect marketing-qualified vs. sales-qualified definitions.
  - Align conversion definitions with MEL and SQL frameworks for consistent reporting between teams.

**Outcome:**

A CRM ecosystem that acts as a **single source of truth**, enabling LeanData to track full-funnel performance and feed conversion insights back into campaign optimisation.

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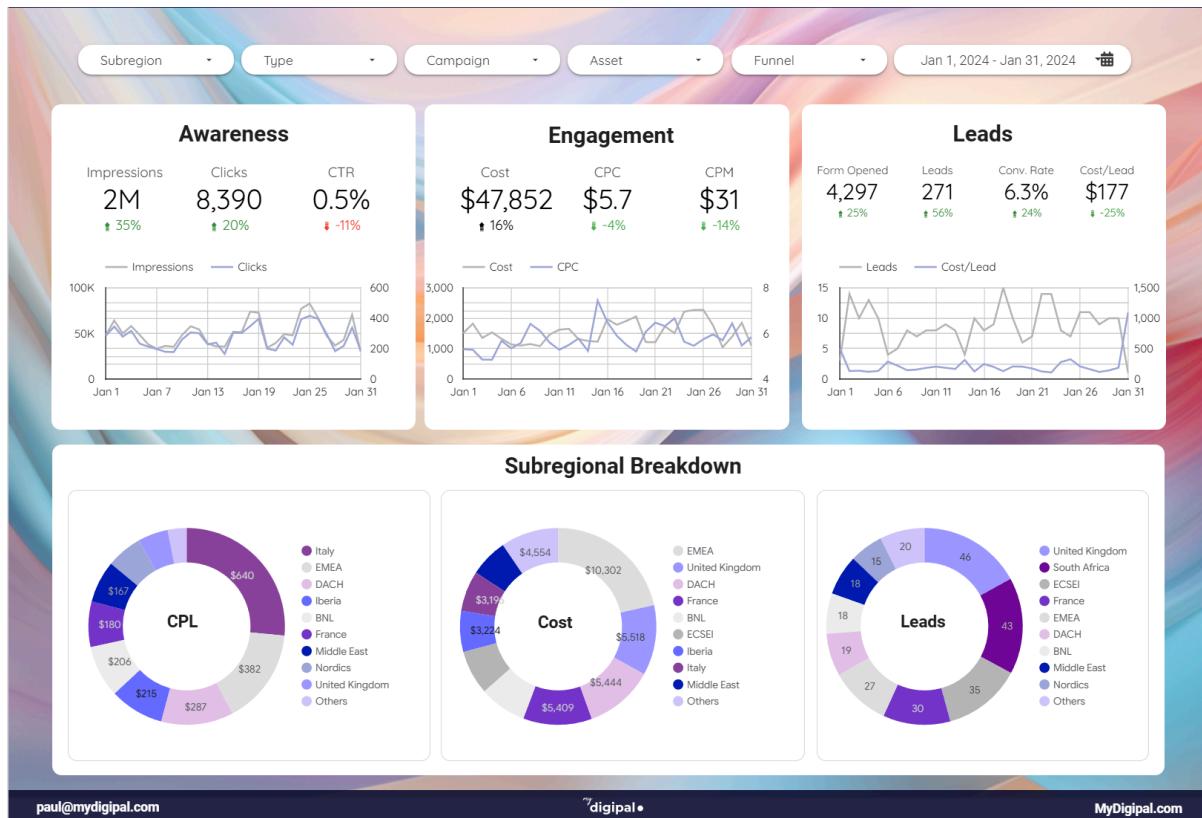
### 3. Reporting & Dashboarding

Once tracking and CRM integrity are secured, we'll centralise all performance insights into clear, interactive dashboards. These will empower your marketing and RevOps teams to visualise campaign efficiency and pipeline contribution in real-time.

**Action Plan:**

- **Tool Stack Alignment:**
  - Use LeanData's existing analytics tools first (HubSpot, Salesforce, or Marketo reports).
  - Where needed, complement these with **Power BI** and **Looker Studio** dashboards for enhanced visibility.
  - Integrate campaign, CRM, and website data sources through Supermetrics or direct APIs.
- **Dashboard Design:**
  - Create tiered reporting views:
    - **Executive Level:** high-level performance summaries, pipeline attribution, ROI.
    - **Channel Level:** CPC, CTR, CPL, SQL rate, cost per opportunity.
    - **Funnel Level:** MEL → SQL → Opportunity → Revenue tracking.
  - Incorporate dynamic filters by channel, persona, region, and funnel stage.
  - Add annotated visuals for monthly review meetings and QBRs.
- **Sample Outputs:**

## A. LinkedIn Ads performance overview

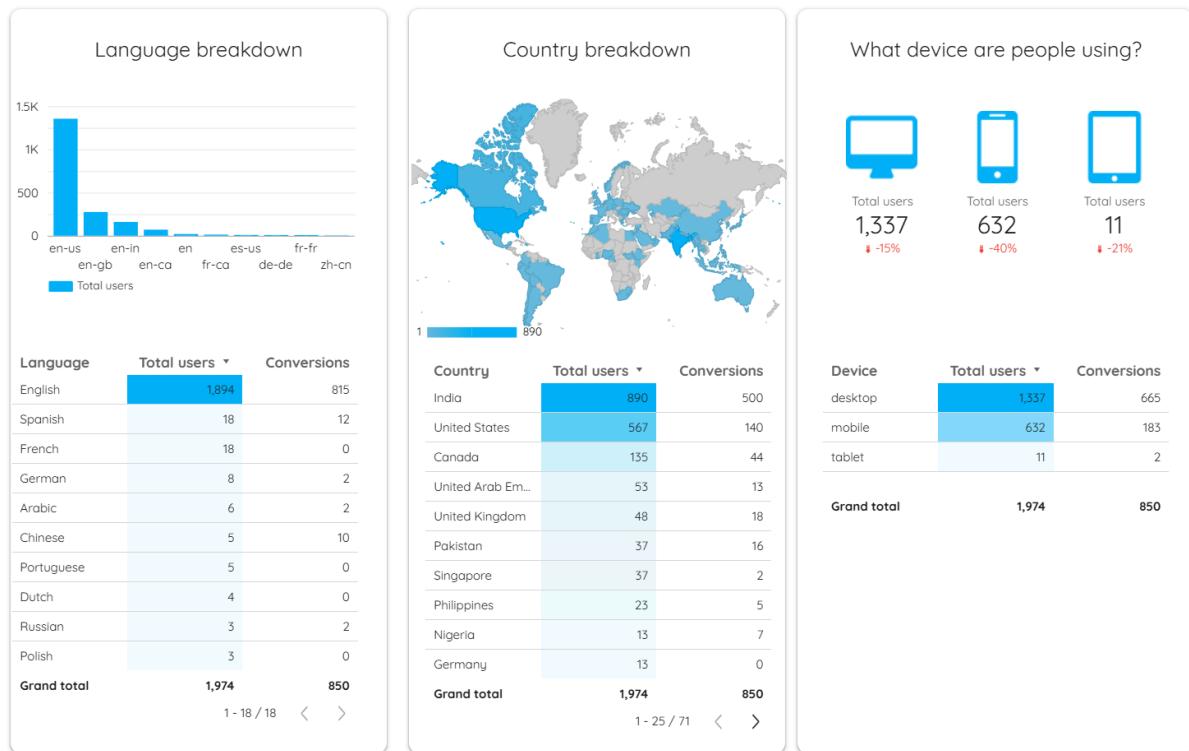


## B. LinkedIn Ads Campaign Deep Dive

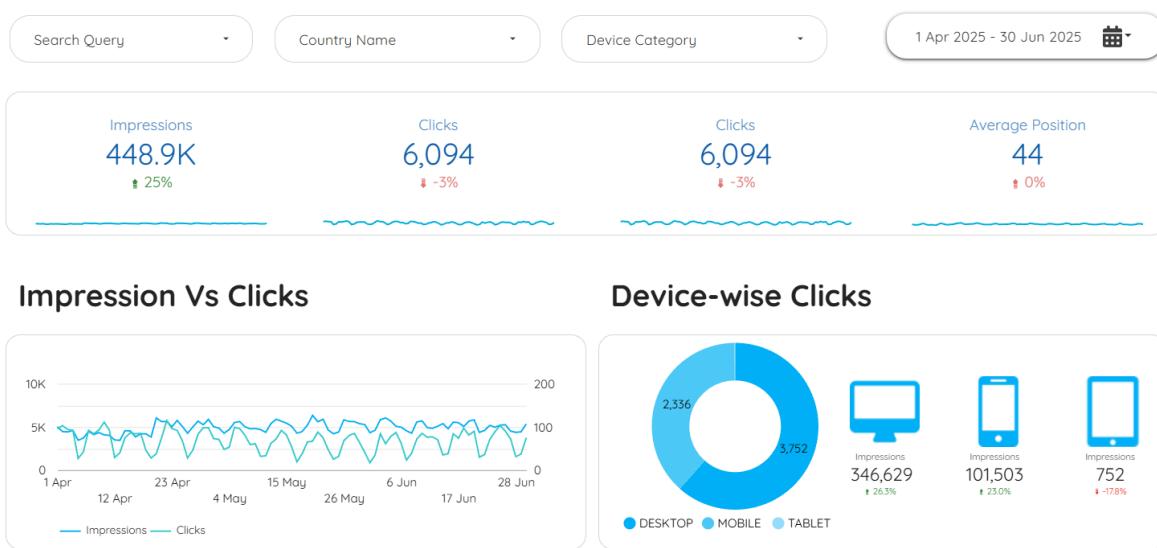
The table provides a detailed breakdown of LinkedIn Ads performance across different subregions, including cost, impressions, clicks, CTR, leads, and conversion rates.

Subregion	Cost	% Δ	Impressions	Clicks	CPC	CTR	Leads	% Δ	Cost/Lead	Δ	Conv. Rate	Δ
EMEA	\$10,302	-7.4% ↓	413.5K	2.6K	\$4.0	0.6%	27	-18.2% ↓	\$382	\$44 ↑	2%	-1% ↓
United Kingdom	\$5,517	5.1% ↑	195.1K	843	\$6.5	0.4%	46	53.3% ↑	\$120	\$-55 ↓	13%	4% ↑
DACH	\$5,450	20.1% ↑	137.5K	541	\$10.1	0.4%	19	-9.5% ↓	\$287	\$71 ↑	7%	-1% ↓
France	\$5,413	30.2% ↑	178.5K	918	\$5.9	0.5%	30	114.3% ↑	\$180	\$-117 ↓	6%	1% ↑
BNL	\$3,716	29.4% ↑	87.3K	381	\$9.8	0.4%	18	38.5% ↑	\$206	\$-14 ↓	9%	2% ↑
ECSEI	\$3,477	35.8% ↑	124.1K	808	\$4.3	0.7%	35	84.2% ↑	\$99	\$-35 ↓	8%	2% ↑
Iberia	\$3,222	30.1% ↑	99.4K	566	\$5.7	0.6%	15	200.0% ↑	\$215	\$-280 ↓	5%	3% ↑
Italy	\$3,198	15.2% ↑	28.8K	222	\$14.4	0.8%	5	-16.7% ↓	\$640	\$177 ↑	4%	-4% ↓
Middle East	\$3,003	19.8% ↑	85.3K	576	\$5.2	0.7%	18	38.5% ↑	\$167	\$-26 ↓	6%	-0% ↓
South Africa	\$2,420	47.3% ↑	77.3K	537	\$4.5	0.7%	43	168.8% ↑	\$56	\$-46 ↓	15%	2% ↑
Nordics	\$2,136	59.9% ↑	129.9K	437	\$4.9	0.3%	15	275.0% ↑	\$142	\$-191 ↓	6%	4% ↑

### C. Google Analytics 4 Performance



## D. Seo Overview



## E. SEO Search queries

Search Queries

Search Query: [dropdown] | Country Name: [dropdown] | Device Category: [dropdown]

Search Query	Clicks	Δ	Impressions	% Δ	Position	Δ	Site CTR
servion	1,173	-46 ↓	12K	-1.8% ↓	3	0 ↑	10%
zentrix ai	0	0	12K	148.4% ↑	41	7 ↑	0%
workforce optimization	0	0	8K	2571% ↑	47	-8 ↓	0%
contact center analytics	0	0	5K	235.5% ↑	86	-12 ↓	0%
servion global solutions	1,808	-73 ↓	5K	3.8% ↑	1	0 ↑	38%
cloud analytics	0	0	4K	127.9% ↑	98	5 ↑	0%
sd wan solutions	0	0	4K	53.6% ↑	50	-2 ↓	0%
conversational ivr	0	0	3K	5.9% ↑	30	1 ↑	0%
journey analytics	0	0	3K	9.5% ↑	82	0 ↑	0%
omnichannel customer e...	0	0	3K	-54.3% ↓	55	-10 ↓	0%
cx solutions	0	0	2K	5.2% ↑	47	15 ↑	0%
genesys dx	2	-1 ↓	2K	72.3% ↑	8	1 ↑	+0%
ucce	3	-1 ↓	2K	29.3% ↑	8	-0 ↓	+0%
customer experience qu...	0	-1 ↓	2K	-1.6% ↓	61	38 ↑	0%
self service automation	0	0	2K	62.7% ↑	64	-8 ↓	0%
workforce optimization s...	0	0	2K	1,592.9% ↑	53	-20 ↓	0%
super agent	0	0	2K	-7.2% ↓	12	2 ↑	0%
workforce optimisation	0	0	2K	688.4% ↑	52	-3 ↓	0%
what is customer loyalty	0	0	2K	17.70% ↑	80	-2 ↓	0%
<b>Grand total</b>	<b>6,094</b>	<b>-216 ↓</b>	<b>449K</b>	<b>25.4% ↑</b>	<b>44</b>	<b>0 ↑</b>	<b>1%</b>

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## F. Google Ads Campaign performance

Campaign Type | Campaign | Ad Group | Keyword

### Campaign

Campaign	Cost	CPC	Clicks	Impressions	CTR	Conversions
SER#Verint	\$776	\$7.0	111	1K	8%	11
SER#JourneyWorCX	\$624	\$7.5	83	3K	3%	1
SER#Discovery+LaunchPad	\$471	\$6.7	70	2K	3%	7
SER#Engage360	\$440	\$6.8	65	2K	4%	4
DIS#Remarketing	\$205	\$0.1	2,412	210K	1%	2
<b>Grand total</b>	<b>\$2,824</b>	<b>\$0.4</b>	<b>7,185</b>	<b>509K</b>	<b>1%</b>	<b>32</b>

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### Ad Group

Campaign	Ad Group	Cost	Δ	CPC	Clicks	Impressions	CTR	Conversions
SER#Verint	IVA Bot	\$767	\$682 ↑	\$7.0	110	1K	8%	11
SER#Discovery+LaunchPad	Discovery+LaunchPad	\$471	\$56 ↑	\$6.7	70	2K	3%	7
SER#Engage360	Platform Support	\$440	\$42 ↑	\$6.8	65	2K	4%	4
SER#JourneyWorCX	CX Journey Mapping & Orchestration	\$276	\$79 ↑	\$8.1	34	1K	3%	0

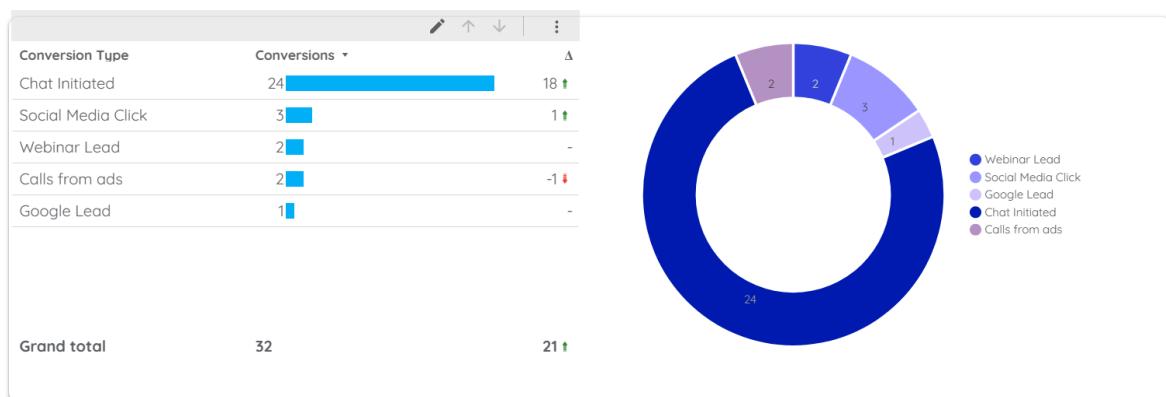
### Keywords

Ad Group | Campaign | keyword  
Enter a value

Ad Group	Keyword	Cost	Δ	CPC	Clicks	Impressions	CTR	Conversions	Δ	Leads	Search Imp. Share
Ad group 1	0	\$410	-	\$0.1	6,812	500K	1%	4	-	0	0
IVA Bot	online ai assistant	\$287	\$236 ↑	\$6.7	43	644	7%	3	2 ↑	0	10.1%
Platform Support	digital transformation services	\$176	\$15 ↑	\$6.8	26	601	4%	3	2 ↑	0	10.0%
IVA Bot	ai chat assistant	\$162	-	\$8.1	20	206	10%	0	-	0	13.6%
CX Journey Mapping & Orchestration	customer journey management	\$153	\$-27 ↓	\$7.7	20	699	3%	0	-2 ↓	0	10.0%
IVA Bot	ai assistant	\$147	\$132 ↑	\$6.4	23	234	10%	3	3 ↑	0	10.0%
Discovery+LaunchPad	AI customer experience tools	\$144	\$95 ↑	\$6.5	22	398	6%	0	0	0	10.0%
IVA Bot	virtual assistant chatbot	\$107	\$107 ↑	\$7.1	15	215	7%	5	5 ↑	0	10.9%
CX Journey Mapping & Orchestration	customer journey tools	\$107	\$98 ↑	\$8.9	12	453	3%	0	0	0	10.0%
Discovery+LaunchPad	customer satisfaction improvement	\$100	\$-56 ↓	\$6.7	15	705	2%	2	2 ↑	0	10.0%
Discoverer+LaunchP	customer experience strategy	\$99	\$-50 ↓	\$7.1	14	769	2%	2	1 ↑	0	10.0%
<b>Grand total</b>		<b>\$2,824</b>	<b>\$1,131 ↑</b>	<b>\$0.4</b>	<b>7,185</b>	<b>509K</b>	<b>1%</b>	<b>32</b>	<b>21 ↑</b>	<b>0</b>	<b>13.8%</b>

1 - 100 / 121 < >

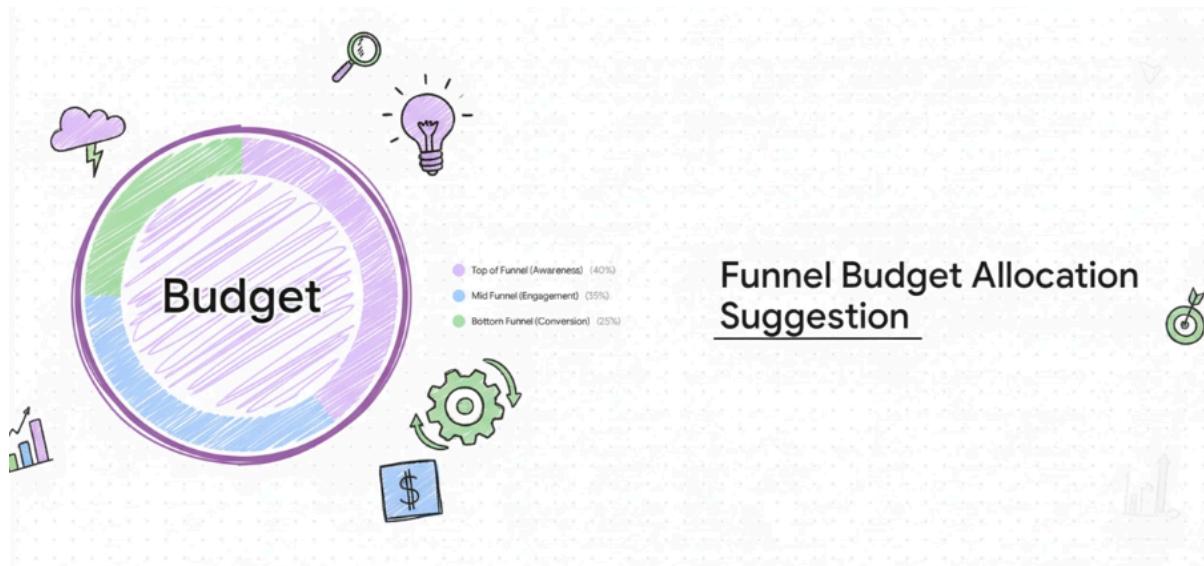
## Conversions



## G. Google Ads performance (PowerBI version)



#### 4. Forecasting Philosophy & Data Integrity



While we have a strong understanding of channel benchmarks (CPCs, CTRs, conversion rates, CPL ranges across SaaS and enterprise sectors), we know that no two businesses perform identically.

We believe in **transparency over promises**:

- We will never commit to fixed CPL or ROI targets before testing and validating campaign performance.
- Instead, we'll build LeanData's forecasting model collaboratively, using early data to refine assumptions.
- Expect accurate, data-backed projections within the first 6–8 weeks after campaign launch.
- Continuous testing, iteration, and cross-team learning will drive incremental ROI improvement.

**Our philosophy:**

“We’re not in the business of selling leads, we’re in the business of improving lead efficiency.”

By working hand-in-hand with LeanData's internal marketing and RevOps teams, we ensure reporting accuracy, actionable insights, and long-term predictability through constant collaboration rather than over-promising.

Here's an example of forecasting we did using the figures you mentioned in the RFP

### Funnel & Budget Overview (Q4 2025 Media Plan)

		Paid Search		Paid Social		ABM
		NAM	EMEA	NAM	EMEA	NAM
Oct 2025	Spend	\$24,818	\$3,920	\$37,226	\$5,880	\$7,200
	Avg. CPC	\$6	\$4	\$14	\$12	\$20
	# Clicks	4,136	980	2,659	490	360
	Conversion rate	1.2%	1.0%	3.0%	2.5%	4.0%
	# Leads	50	10	80	12	14
	Qualified rate	20%	20%	30%	30%	40%
	# Qualified leads	10	2	24	4	6
Nov 2025	Spend	\$24,818	\$3,920	\$37,226	\$5,880	7,200
	Avg. CPC	\$5	\$4	\$12	\$10	\$18
	# Clicks	4,964	980	3,102	588	400
	Conversion rate	1.5%	1.2%	3.5%	3.0%	4.5%
	# Leads	74	12	109	18	18
	Qualified rate	25%	25%	25%	35%	50%
	# Qualified leads	19	3	27	6	9
Dec 2025	Spend	\$12,409	\$1,960	\$18,613	\$2,940	3,600
	Avg. CPC	\$4	\$4	\$4	\$4	\$4
	# Clicks	3,102	490	4,653	735	900
	Conversion rate	1.5%	1.2%	3.5%	3.0%	4.5%
	# Leads	47	6	163	22	41
	Qualified rate	25%	25%	25%	35%	50%
	# Qualified leads	12	1	41	8	20
Total spend		\$62,044	\$9,800	\$93,066	\$14,700	\$18,000

We preferred to remain pessimistic when it comes to cost per lead, and work towards improving the cost per lead with various strategies & optimizations.

## 5. Tools & Platforms

- **Media:** Google Ads, LinkedIn Campaign Manager, Reddit Ads, Bing, Xing, Instantly, Mailerlite.
  - **Analytics & Tracking:** GA4, GTM, Ahrefs, 6sense, Demandbase
  - **Attribution & Reporting:** Looker Studio, Power BI, Supermetrics.
  - **CRM:** HubSpot, Salesforce, Marketo, Lemlist
  - **AI & Automation:** Apify (to get quality contacts purchased), ChatGPT-powered ad copy testing, N8N to create automations.
- 

## 6. Typical Client Budgets & Experience

We manage clients with monthly media budgets between **\$15K and \$200K per month**, primarily in SaaS and enterprise B2B, across North America, EMEA, and APAC.

Notable [collaborations](#) include:

- **GWI** – Global paid media orchestration with unified messaging.
- **Genesys** – ABM program restructuring based on intent data.
- **Symbi.ai** – Demand generation and full-funnel digital setup.



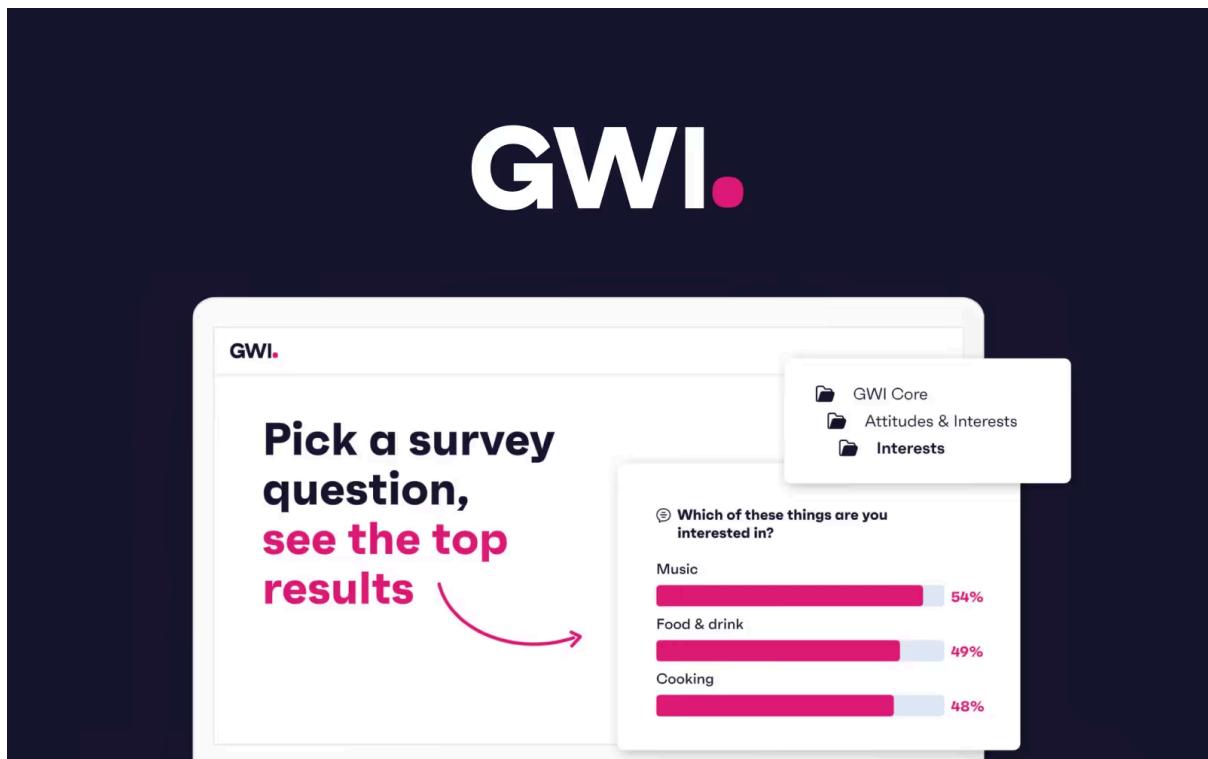
### Genesys – Revamping ABM and Streamlining Digital Marketing Operations

Genesys, a global leader in customer experience solutions, partnered with MyDigipal to overhaul its Account-Based Marketing strategy and streamline digital operations across more than 12 EMEA regions. Facing fragmented tools and limited bandwidth, LeanData needed an agile team capable of executing ABM programs and managing multiple internal platforms efficiently. We stepped in to coordinate with local marketing teams, design regionalised ad creatives, and deploy a full ABM revamp on LinkedIn. Within weeks, we implemented new workflows, automations, and campaign structures to accelerate lead flow and enhance regional collaboration. The results: **20% lower cost per lead, significant increase in pipeline attributed to ABM, and improved CTR on LinkedIn campaigns**. Our partnership also eliminated operational bottlenecks, freeing up internal resources and building long-term trust between teams.



### Symbl.ai – Building Demand Generation from the Ground Up

Symbl.ai, a conversational AI unicorn, approached MyDigipal at the start of their go-to-market journey to launch their first structured digital campaigns. We began by defining their **ideal customer profiles (ICPs)** and crafting an audience strategy across Google Ads and LinkedIn. Our team rebuilt tracking, introduced lead scoring in **Marketo**, and implemented a unified Looker Studio dashboard for full-funnel visibility. We launched their **first ABM campaign**, optimised conversion flows, and advised on CRO for key landing pages. Results: **5.2% average CTR on Google Search (vs. 2–3% industry average)**, first strategic account conversions through ABM, and a **360° reporting system** that connected performance, pipeline, and growth.



### GWI – Optimising Paid Media for Quality and Conversion Efficiency

For GWI, a global audience research company, we led a full-funnel optimisation effort across **Search, Social, and Display** to improve lead quality and funnel visibility. Starting with a comprehensive audit of their website, campaigns, and marketing operations, we restructured their **Google Ads** around high-intent keywords and rebuilt **Paid Social targeting** aligned with audience intent. We also enhanced their **CRO and nurture programs**, introducing persona-based workflows and streamlined landing pages. A custom **Looker Studio dashboard** and HubSpot reports gave them end-to-end visibility from MQL to SQL. The results: **+20% SQLs from Paid Media (Q1–Q3 2023)** and a **100% improvement in MQL-to-SQL ratio** by November 2023, all while maintaining strict budget control.

## 7. Example of works

### A. Audit

- **Audit:** We ran a full audit of the different marketing components [here](#)
- **Website:** We were able to quickly fix the website, update the homepage, manage events and add new pages (Citrix Health Checks, Troubleshooting is WIP). We also improved some of the security on the website
- **Database:** We were able to associate over 45k leads not associated with accounts to accounts in SFDC, which brought Cerner contacts from 3k to 22.5k. We also helped to clean up all emails in the database to ensure we only have mailable and reliable emails that don't damage our domain and authority
- **Reporting:** We built SFDC dashboards providing visibility on the state of the database. The general dashboard [here](#) and the Cerner one [here](#)
- **Google Ads:** We audited to account and launched targeted always-on Google Ads ensuring we drive quality traffic without wasting money on irrelevant search terms
- **LinkedIn:** We launched LinkedIn Ads for Citrix Health Checks to drive engagement and traffic to the website, also leveraging our retargeting audience
- **Lead Routing:** We updated the lead routing with the latest requirements, ensuring leads are being routed and contacted efficiently
- **Marketing Ops:** We created new automations to ensure that the data is accurate and maintained according to best practices

### B. Ad design



## C. Landing page optimization

**Campaign Landing Pages - What's Working? What's Not Working?**

<p><b>Discovery+ LaunchPad - What's Working?</b></p> <ul style="list-style-type: none"> <li>Page clearly communicates proposition around accelerating CX wins &amp; identifying journey breakdowns</li> <li>Strong outcomes are well communicated (reducing abandonment, deploying AI agents etc)</li> <li>Form placement above the fold with a single CTA is good</li> </ul> <p><b>Where Can We Improve?</b></p> <ul style="list-style-type: none"> <li>There's a lack of social proof as the page doesn't yet feature logos, testimonials or case studies which would help really help to validate the service on offer from Servion</li> <li>Currently, the offer/value isn't clearly enough communicated - we know the offer is there, but what is the \$37.5K deal and what does that cover? What do you get for that? This could be better communicated in a block of its own and be more likely to convert.</li> </ul>	<p><b>Engage360 - What's Working?</b></p> <ul style="list-style-type: none"> <li>The page clearly communicates benefit driven messaging but similar to other campaign landing pages, lacks proof which could be holding potential customers back</li> </ul> <p><b>Where Can We Improve?</b></p> <ul style="list-style-type: none"> <li>Similar to other landing pages, the page lacks proof. Can we add client logos, quotes and even previous successful deployment examples to show how it could work in action?</li> <li>The content on the page at the moment feels organic and less conversion focused. Can we work on adding more credibility elements into the landing page? Ideas include certifications but also different outcomes by industry or sector.</li> </ul>	<p><b>Verint - What's Working?</b></p> <ul style="list-style-type: none"> <li>The page is stronger with recent updates. It clearly communicates benefits and results which is easy to read and the structure is pretty good.</li> </ul> <p><b>Where Can We Improve?</b></p> <ul style="list-style-type: none"> <li>Is the content clear enough? Is there potentially a lack of clarity on Servion's role vs. Verint directly? Should it be more obvious Servion is the deployment + success partner for Verint?</li> <li>No case studies, named results or client validations. Similar to other landing pages, we need some proof to help customers make their decision.</li> <li>What about adding a small FAQ section? Particularly around implementation, timelines and security.</li> </ul>
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In short: Across live campaign lp's credibility, clarity and reassurance are going to help unlock conversions. By adding **social proof, case studies, client success (previous deployments etc), FAQs and structured offer breakdowns**, we can shift these pages from informative to much more conversion-focused.

## D. Competitor content analysis

**Strong Competitor Campaign LPs + What Can We Learn From These?**

<p><b>Ada</b> Google Ad campaign landing page: <a href="#">here</a></p> <ul style="list-style-type: none"> <li>Plug &amp; Play "no extra steps" value section showing integrations and simplicity</li> <li>Case study bands by logo &amp; industry (Monday.com, Upstream, Loop)</li> <li>Scrollable timeline</li> <li>Client logo strip</li> </ul> <p><b>What Can We Learn?</b></p> <ul style="list-style-type: none"> <li>Aside from the lp being too long, the Verint – partner positioning: "Built with Verint / Delivered by Servion" using analogous "Plug &amp; Play" layouts</li> <li>For Discovery+LaunchPad – something like the "AI Journey Management Timeline" style visual to show steps (could use the same 4-step process block recommended in previous slide so only 1 new block needs to be created and can be replicated across pages).</li> <li>We're seeing that other landing pages really feature case studies, testimonials and proof of success</li> </ul>	<p><b>Client success - tying together testimonial, case study and success story</b></p> <p>deliver extraordinary experiences on every channel</p> <p>42% reduction in average agent handle time</p> <p><a href="#">View case study</a></p> <p>"With Ada, we know the automated resolution will continue to improve as the AI agent learns and grows. There's significant flexibility in making changes and improvements. The responses and the accuracy are phenomenal."</p> <p>Tal Gult Bot Manager</p> <p><b>Can we do something similar to the partnership and ease of integration between Servion and Verint?</b></p> <p>Ada's platform is designed to seamlessly sync with the tools you use every day, like Contentful, Salesforce, and Twilio, sharing information across systems in real-time to boost the efficiency of your AI customer support.</p>
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## E. Landing page optimization, deliverable to be produced following the audit

**What We Now Need to Build (Deliverables for Web Agency)**

<b>Social Proof &amp; Credibility Blocks</b> <ul style="list-style-type: none"> <li>Customer logo strip (top of page, under hero CTA)</li> <li>Testimonial blocks (space for logo + a quote + name/role)</li> <li>Industry-specific "success tiles" (e.g. Banking: +96% digital conversion)</li> </ul>	<b>Process / "How It Works" Section (Visual, Step-Based)</b> <ul style="list-style-type: none"> <li>3-4 step visual process (e.g. Discover → Deploy → Optimize)</li> <li>Supports Discovery+LaunchPad (What you get for \$37.5K)</li> </ul>	<b>Results / Benchmark Block</b> <ul style="list-style-type: none"> <li>Visual comparison or value chart (Servion results vs competitor). If we can't use results then key differences.</li> <li>Key stats displayed boldly in hero or directly below it</li> <li>Example: "61% reduction in idle customers / 170% onboarding increase"</li> </ul>
<b>Solution in Action (Animation or Demo Visual)</b> <ul style="list-style-type: none"> <li>Small animated mockup/video on a phone (like Intercom &amp; Fin)</li> <li>Examples - AI agent powered by Servion answering a query, dashboard insight, or call automation flow</li> <li>Gives instant product imagination</li> </ul>	<b>Partner/Integration Confidence Block</b> <ul style="list-style-type: none"> <li>For Verint/Engage360: "Built with X / Delivered by Servion"</li> <li>How it works with what you're already using - easy deployment etc</li> <li>Show how this integration works and how it's easy</li> </ul>	<b>FAQ Section</b> <ul style="list-style-type: none"> <li>Space and opportunity to answer any questions clients might have</li> <li>Things that might be holding someone back from submitting a form or demo request</li> <li>Might not be used on every landing page but useful to have the functionality to add this - especially for more complex pages</li> </ul>

With these blocks added, we're confident that Servion's landing pages can match the conversion frameworks used by Fin, Intercom, Ada & HappyFox helping turn ad clicks from Google + LinkedIn into conversations.

## F. Google Ads performance review with details

**Google Ads – Campaign Overview (8th Oct – 14th Oct)**

<b>What's Working</b> <ul style="list-style-type: none"> <li>Another strong week for tracked actions with 10 total, only slightly down from 11 last week, maintaining consistent double-digit performance.</li> <li>Discovery+LaunchPad + Engage360 continue to result in tracked actions steadily – both delivered tracked actions again this week with strong CTRs in the 2.9–4% range and low CPCs (\$6.79–\$6.86)</li> <li>BPO campaign off to an excellent start – despite being newly launched, it has already generated 1 tracked action, with an outstanding CTR of 9.62% and a competitive CPC of \$5.72.</li> <li>Brand Campaign continues to perform efficiently with one of the lowest CPCs (\$2.58) and strong tracked action volume (10 total), signalling continued momentum from last week's reactivation.</li> </ul>	<b>What Needs Work</b> <ul style="list-style-type: none"> <li>Verint performance dipped this week – while traffic remains good (+24% clicks), tracked actions plateaued and CPC crept up to \$8.02. I've reviewed intent keywords and added new variants to the campaign so these are being monitored daily.</li> </ul>
<b>Recent Optimisations Driving Results</b> <ul style="list-style-type: none"> <li>Spent time on Monday this week refining keyword lists and tightening ad groups and we can see this is continuing to support strong CTRs across key campaigns (notably Engage360 and Discovery+LaunchPad).</li> <li>Testing with BPO has proven successful early — suggests scope to extend BPO-related terms.</li> <li>JourneyWorCX was struggling (only up 8% in clicks since last week whereas previous weeks we've seen bigger jumps) so early this week, I spent time on adding keyword variants.</li> </ul>	<b>Next Steps</b> <ul style="list-style-type: none"> <li>Double down on high-CTR performers (BPO, Engage360, Discovery+ LaunchPad) – expand keyword sets and increase budgets cautiously</li> <li>Refresh Verint ad copy &amp; landing alignment to stimulate tracked actions</li> </ul>

## G. LinkedIn ads creative performance review

**LinkedIn Creative Performance Insights - New Ad Performance**

**Results:**

- First one is clear top performer, 2nd two drive low but positive performance + CTR is decent. Bottom two new ads haven't driven any website visits — continue for now then potentially pause.

From left to right, top performer to lower performing

Ad Name	Website Visits	Cost per Result (\$)	CTR	Impressions
703% ROI by optimising adoption journeys - New 1	8	16.88	0.66%	1216
703% ROI by optimising adoption journeys - New 3	2	14.57	0.77%	260
Discovery+Launchpad by Servion - New 4	1	32.88	0.34%	298
Identify inefficient journeys - New 1	0		0.00%	177
703% ROI by optimising adoption journeys - D+L 5 V2	0		0.00%	88

## H. LinkedIn banner production request

3. "CCaaS OEM Industry Expertise"
  - Visual Theme: Deep industry knowledge visualization
  - Key Message: Industry-Specialized Contact Center Intelligence
  - Design Elements: Industry landscape, technology penetration map
  - Showcase depth of knowledge in the OEM space
4. "60-90 Day Positive ROI Timeline"
  - Visual Theme: Accelerated value realization
  - Key Message: Rapid path to measurable business benefits
  - Design Elements: Clear timeline showing ROI achievement within 60-90 days
  - Include tangible metrics and quick value indicators
5. "Industry Specialization"
  - Visual Theme: Grid showing different industry icons with corresponding bot solutions
  - Key Message: Industry-specific expertise
  - Design Elements: Include recognizable industry symbols, connect to bot illustrations
6. "Scale with Confidence"
  - Visual Theme: Ascending steps or building blocks showing growth
  - Key Message: Easily scalable solutions
  - Design Elements: Include growth metrics, scaling visualization

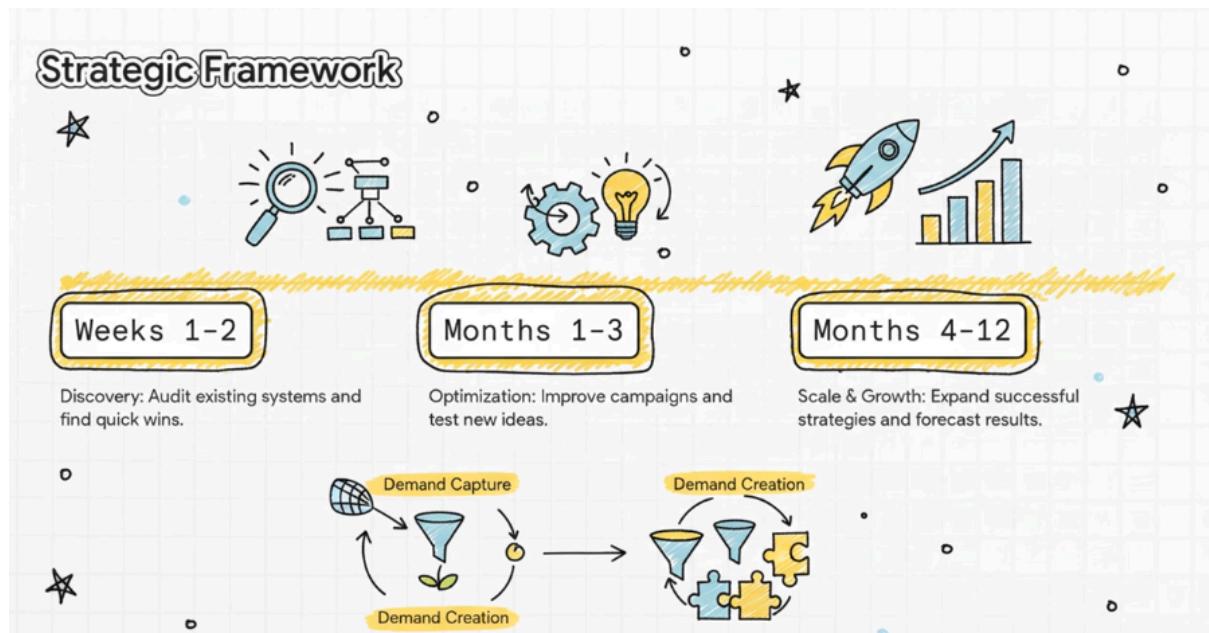
1. Smart Bots, Smarter Decisions
  - On-Image Text: "AI-powered bots powering smarter decisions"
  - Visual: AI chatbot interacting with a satisfied customer on a messaging platform
2. AI-Powered CX Revolution
  - On-Image Text: "Transform your customer experience with AI"
  - Visual: A futuristic contact center with AI-driven insights displayed on a screen
3. Empower Agents, Delight Customers
  - On-Image Text: "Give agents the tools to deliver amazing CX"
  - Visual: A contact center agent confidently handling customer inquiries with AI assistance
4. Boost Agent Capacity Instantly
  - On-Image Text: "Do more with AI—without increasing headcount"
  - Visual: A team of agents efficiently managing high call/chat volumes with AI support

## I. Google Ads content optimization

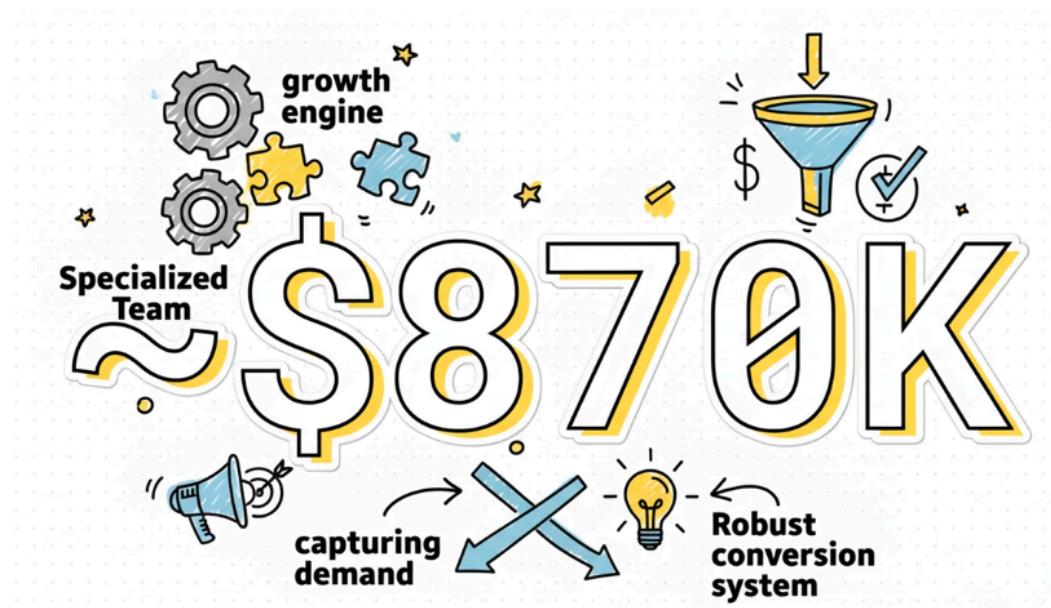
A	B	C	D	E	F	G	H	I
Campaign	Status	Ad group	Final URL	Headline 1	Headline 2	Headline 3	Headline 4	Headline 5
Verint Bots	Live	Verint Da Vinci	<a href="https://servion.com/verint-da-vinci-ai-bots/">https://servion.com/verint-da-vinci-ai-bots/</a>	Revolutionize CX with AI Bots Schedule Demo Now	Personalized 24/7 Assistance	Seamless CX Automation AI	Real-Time AI Assistance	Get Started with Verint Da Vinci Bot!
Verint Bots	Live	IVA Bot	<a href="https://servion.com/verint-da-vinci-ai-bots/iva/">https://servion.com/verint-da-vinci-ai-bots/iva/</a>	24/7 Customer Service AI	Watch Demo Video	Intelligent AI for CX Success	Boost CX with Verint IVA	24/7 Personalized Self-Serve Support
Servion	Live	JourneyWorCX - CX Journey Mapping & Orchestration	TBC	JourneyWorCX from Servion	CX Journey Fix in 60 Days	Where's Your CX Breaking?	Launch CX Journeys Faster	Need Better Journey Maps?
Servion	Live	JourneyWorCX - CX Transformation & Acceleration	TBC	JourneyWorCX by Servion	Transform CX in 60 Days	Why Wait for CX ROI?	Launch CX That Converts	Need Smarter CX Now?
Servion	Live	JourneyWorCX - AI Platform Solutions	TBC	Need a Smarter CX Stack?	CX by Servion, Reimagined	Is Your CX Platform Working?	Smarter Platforms. Better CX. Ready to Modernize CX?	
Servion	Live	JourneyWorCX - Journey Acceleration Tools	TBC	Want CX Wins in 60 Days?	Fast-Track CX by Servion	AI That Powers Better CX	Where Are You Losing Users' JourneyWorCX?	LaunchPad CX
Servion	Live	JourneyWorCX - Experience Innovation & Engagement	TBC	JourneyWorCX from Servion	Need Next-Gen CX Tools?	Modernize CX With Purpose	Build Frictionless CX Flows	AI-Powered Experience Design
Servion	Live	Discovery + LaunchPad	TBC	JourneyWorCX by Servion	Fix CX Gaps in 60 Days	Drop-Off Killing CX ROI?	Fast CX Audit & Roadmap	Need Faster CX Results?
Servion	For Review - Selva & Bruce	Virtual BPO	TBC	Scale Your CX With BPO	AI-Powered Virtual BPO	Scale CX with Servion	Your CX Done Better.	Next-Gen BPO Solutions
Servion	For Review - Selva & Bruce	OnBoard+ - AI & Automation	TBC	Automate CX With OnBoard+	Struggling With Onboarding?	Fix Abandonment in 60 Days	What's Slowing Activation?	OnBoard+ Ready to Deploy?
Servion	For Review - Selva & Bruce	Onboard+ - Journey Analytics & Strategy	TBC	OnBoard+ Journey Discovery	Start with a CX Audit	Need Friction Analysis?	CX Insights in 60 Days	Audit CX With inQuba Tools
Servion	For Review - Selva & Bruce	Onboard+ - Industry Use Cases & Outcomes	TBC	Servion OnBoard+ Works Fast	Industry-Proven OnBoarding	Struggling With Completion?	Boost Digital CX ROI Fast	Smarter CX Across Sectors
Servion	For Review - Selva & Bruce	VoiceIQ - Journey & CX Improvement	TBC	VoiceIQ for Better CX	Map Voice CX Pain Points	Too Many Repeat Calls?	Improve Call Experience	Fix Broken Voice Journeys
Servion	For Review - Selva & Bruce	VoiceIQ - AI Automation	TBC	AI Voice Agents by Servion	Automate Repetitive Calls	Deploy VoiceIQ in 60 Days	Reduce Agent Workload Fast	VoiceIQ Powered by Parloa
Servion	Live	Engage360	TBC	Engage360 by Servion	Is Your CX Underperforming?	CX Managed Services by Servion	Get 24/7 CX Platform Support	Get a CX Health Check Today!
Verint Bots	Draft / Not Live	TimeFlex Bot (Not Live)	<a href="https://development.servion.com/devsite/verint-da-vinci-ai-bots/timeflex-bot/">https://development.servion.com/devsite/verint-da-vinci-ai-bots/timeflex-bot/</a>	AI-Driven Scheduling   Verint	Try 30-Day Free Trial	AI-Powered Scheduling	Optimize Scheduling with AI	TimeFlex for Work-Life Balance
Verint Bots	Draft / Not Live	Quality Bot (Not Live)	<a href="https://development.servion.com/devsite/verint-da-vinci-ai-bots/qaq-bot/">https://development.servion.com/devsite/verint-da-vinci-ai-bots/qaq-bot/</a>	AI-Powered QA   Verint Quality Book Demo Now		AI-Powered QA Simplified	Evaluate 100% of Interactions	Automate QA Seamlessly
Verint Bots	Draft / Not Live	Knowledge Automation Bot (Not Live)	<a href="https://development.servion.com/devsite/verint-da-vinci-ai-bots/knowledge-automation-bot/">https://development.servion.com/devsite/verint-da-vinci-ai-bots/knowledge-automation-bot/</a>	Automate Knowledge Management	Get 30-Day Free Trial	Automate Knowledge Management	Boost Agent Capacity with AI	

## 8. Discovery Phase & Timeline

Phase	Duration	Deliverables
Discovery	2 weeks	Access setup, audit, CRM/tracking validation, quick wins
Optimisation Setup	Month 1	Adjust campaigns, clean data, implement dashboards
Performance Stabilisation	Months 2–3	Test iterations, refine audiences, messaging optimisation
Scale & Growth	Months 4–12	Expand funnel, iterate strategies, update forecasts



## 9. 2026 Media Plan & Budget Allocation



**Annual managed media:** ~\$870K (same level as 2025).

### Funnel Budget Allocation Suggestion (to be discussed with LeanData)

Funnel Stage	% of Budget	Objective	Example Initiatives
Top of Funnel	40%	Awareness and reach	YouTube Ads, Display, broad match search, LinkedIn thought leadership
Mid Funnel	35%	Engagement and nurture	Remarketing, persona-based LinkedIn ABM, MOF search clusters
Bottom Funnel	25%	Conversion to MELs/SQLs	High-intent search, demo CTAs, account targeting

## 10. Investment Summary

Our management model is designed to be **flexible, transparent, and scalable**, reflecting the true workload required to manage, optimise, and evolve LeanData's digital performance month after month.

Instead of rigid packages, we work on an **hourly-based structure at \$100/hour**, which provides the flexibility to shift resources between channels and activities depending on priorities, seasonality, and campaign learnings.

**Average monthly management fee: \$9,000**, covering all channels, strategic planning, reporting, and collaboration.

This fee represents an **annual engagement commitment**, allowing us to front-load strategic and setup activities in the first phase while optimising over time without exceeding the yearly allocation. If one month requires more hours (e.g., during audits or campaign launches), we balance that with lighter months later in the year to maintain the same total.

### Proportional Effort Allocation

Our time investment will be distributed approximately as follows:

Activity	% of Time	Focus
<b>Google Ads</b>	<b>35%</b>	Core acquisition driver (Search, Display, YouTube, PMAX), ongoing campaign management, keyword optimisation, and testing.
<b>LinkedIn Paid Social</b>	<b>20%</b>	Always-on demand generation targeting RevOps and Marketing Ops personas.
<b>LinkedIn ABM</b>	<b>20%</b>	Account-based orchestration, audience segmentation, personalised content sequences, and performance analysis.
<b>Landing Page Optimisation &amp; SEO Alignment</b>	<b>10%</b>	UX audits, conversion design, and on-page SEO improvements to boost lead quality.
<b>Tracking, Reporting &amp; CRM Integration</b>	<b>10%</b>	Continuous data integrity checks, dashboard updates, attribution review, and alignment with Salesforce/HubSpot.
<b>Project Management &amp; Strategic Meetings</b>	<b>5%</b>	Weekly performance syncs, internal alignment, planning, and documentation.

## Engagement Evolution Over 12 Months

Phase	Focus	Effort Intensity
<b>Months 1–2</b>	Discovery, audit, setup, tracking overhaul, campaign (re)structuring, and landing page optimisation.	<b>High effort</b> - ~130% of the average monthly hours.
<b>Months 3–6</b>	Campaign stabilisation, A/B testing, creative rollout, and initial reporting improvements.	<b>Medium-high effort</b> - ~110% of the average monthly hours.
<b>Months 7–12</b>	Continuous optimisation, scaling, and forecasting model refinement.	<b>Steady effort</b> - ~90–100% of the average monthly hours.

This structure ensures we put maximum focus on **strategic setup and quick wins early on**, then transition smoothly into **optimisation and scaling** without inflating costs.

Our approach is collaborative and adaptive, every month, we reassess priorities, shift time between channels as needed, and proactively suggest initiatives to maintain momentum and ROI growth.

Should LeanData wish to scale certain initiatives mid-year, our flexible hourly structure makes it simple to reallocate or expand capacity without renegotiation

## 11. Key Questions for Alignment

1. Which CRM and marketing automation tools are currently in use?
2. Are intent data or ABM providers (6sense, Demandbase, etc.) integrated?
3. How are MELs and SQLs defined internally?
4. What are your primary conversion events (demo, trial, contact form)?
5. Any upcoming GTM launches or campaigns planned for early 2026?
6. How is success currently measured (MEL→SQL→Opportunity)? What reporting cadence works best for your leadership team?

## 12. Conclusion



At MyDigipal, we see ourselves as more than a marketing agency, we are a **strategic extension** of our clients' teams. With 17 passionate experts across paid media, SEO, content, data, and automation, we combine the efficiency of technology with the precision and empathy of a human approach.

We have grown entirely through **referrals and client recommendations**, not through self-promotion. Our success has come from building trust, delivering measurable impact, and maintaining long-term relationships, some of which have lasted over seven years. If you wish, we can connect you directly with several of our existing clients who will gladly share their experience of working with us.

### Our Philosophy:

- **Transparency & Partnership:** We believe in open communication, shared insights, and full visibility into our processes and results.
- **Proactivity:** We don't wait for instructions; we constantly suggest improvements, tests, and ideas that drive performance forward.
- **Flexibility:** Our agile, hour-based model allows us to adapt to your needs, priorities, and internal team structure seamlessly.

### Our Relationship with AI:

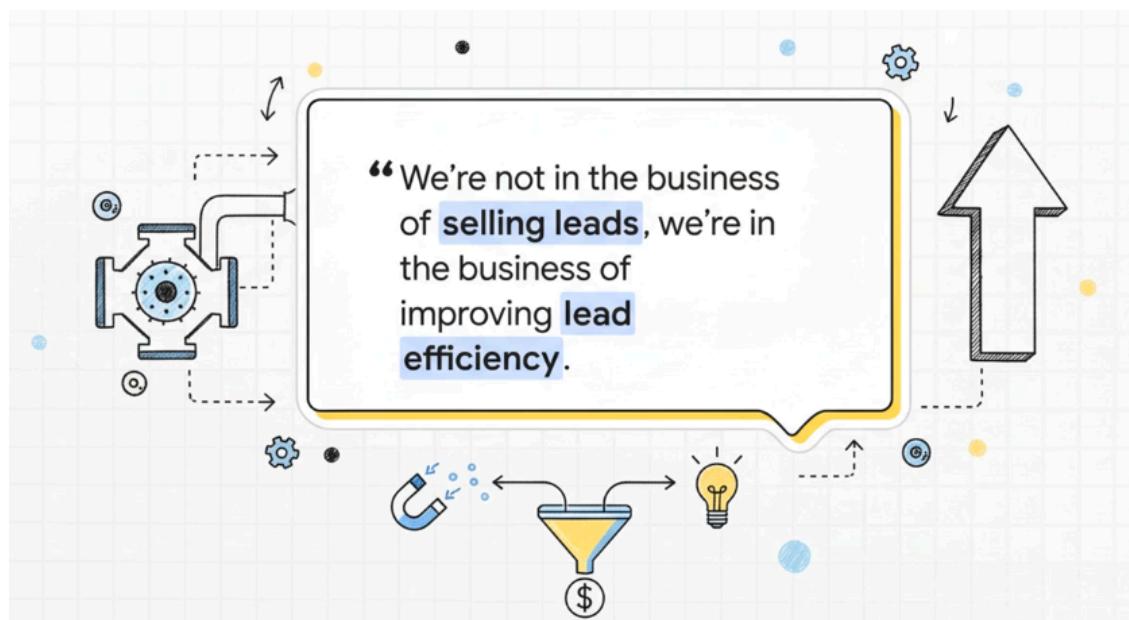
We use artificial intelligence where it truly adds value, for data analysis, ad copy testing, and workflow automation, but always under **human strategic supervision**. We see AI as a productivity enhancer, not a replacement for human thinking. Every piece of creative, every campaign strategy, and every optimisation decision remains grounded in real-world experience, creativity, and market understanding.

## Points of Contact and Availability:

- Your dedicated point of contact, **Alizée**, is available Monday to Friday, with direct access via email, phone, or her booking calendar.
- All meetings are held via Google Meet, recorded, and followed by a written summary.
- For urgent matters, we maintain a flexible allocation of “emergency hours” outside standard office times when needed.
- Weekly and monthly meetings ensure constant alignment and progress tracking.

## Our Commitment:

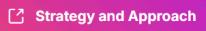
We commit to working as an **extension of LeanData's marketing department**, ensuring both strategic direction and flawless execution. We aim to help you scale efficiently, simplify complexity, and achieve meaningful, measurable growth.



 **Our Team**

We have a unique team of seasoned marketers and leaders with experience in well-known B2B business across several industries. Our team specializes in helping business like yours driving long-term growth.



 **Strategy and Approach**

We provide a holistic insights and actionable strategies to empower your executives, marketing and sales team to run programs that actually impact their pipeline quickly and for a long time.

 **Execution**

We work hand-in-hand with your internal teams. However, if you have limited execution capabilities our team of seasoned B2B marketers and experts can also support with some or all the campaign execution. We offer flexible support customised for your needs.

 **View Case Studies**