



FloQast and BlueOcean

Partnership Review

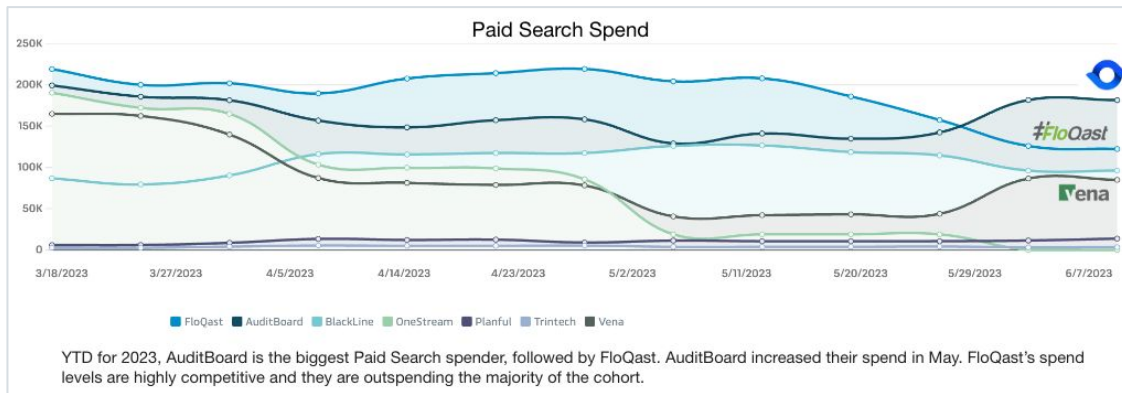
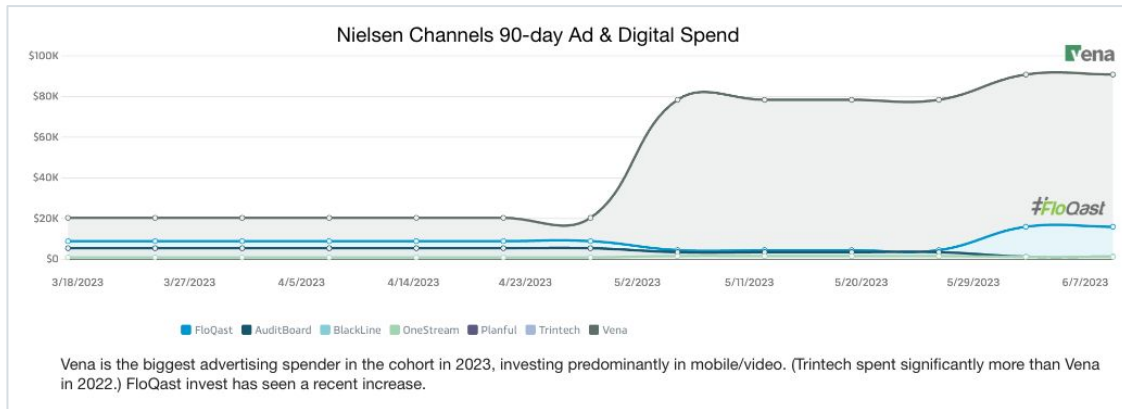
August 9th, 2023

Agenda

- Any follow-up discussion need on Ad Spend, Web Traffic, Employee reviews from June?
- Revisit Success Plan, goals, and blockers
- View of recent releases and what's coming in Product Roadmap [\(Roadmap Removed from shared PDF\)](#)
- Establish timeline from now to renewal on 11/19/23
- Review opportunities for advocacy

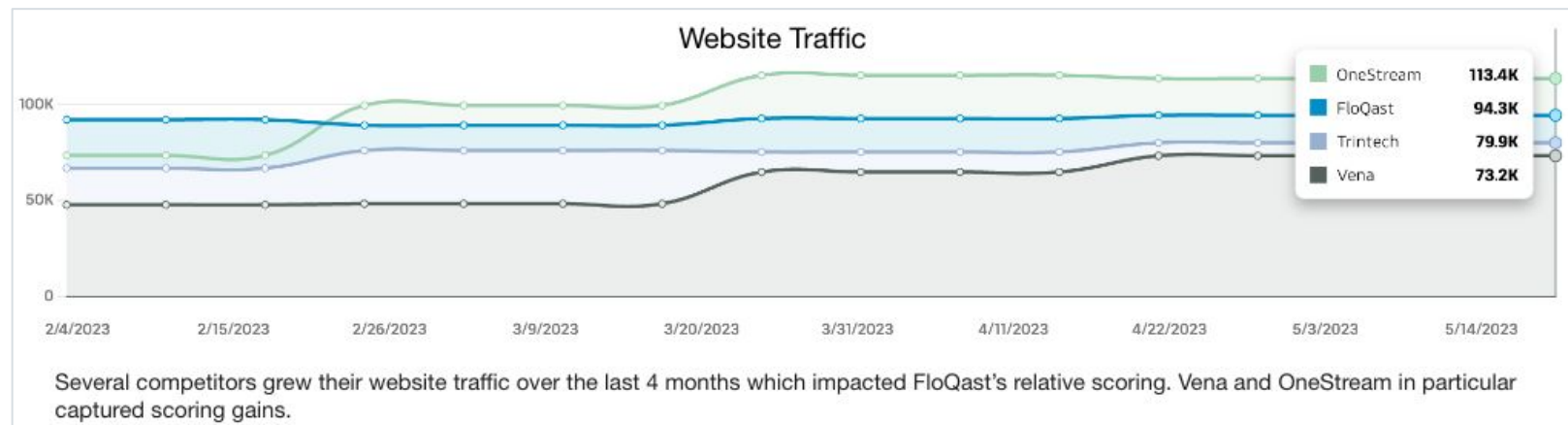
Ad Spend

The ad spend driver in the Pulse is an aggregate index and ratioed calculation between Nielsen and Paid Search spend. It's important to note that while Paid Search is a focus for FloQast, its weighting in the calculation is lower compared to more traditional Nielsen channels. An increase in spending by competitors such as Vena (Nielsen and Paid Search) plus AuditBoard (Paid Search) influenced overall scores.



Web Traffic

OneStream, Vena, and Trintech all showed increased website traffic.
Competitor increases will influence the relative scoring for FloQast.

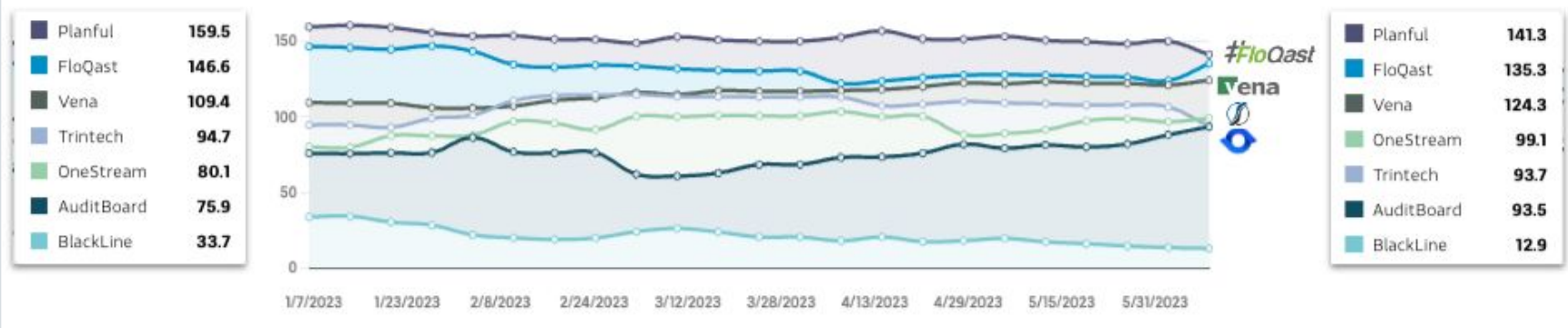


Employee Reviews

FloQast's scores have consistently remained strong overall. The brand's recent slight decline Pulse-over-Pulse is primarily due to 3 competitors (Vena, OneStream and AuditBoard) showing positive growth. This score for FloQast however, saw an uptick in just the last week.

Employee Reviews - Average Rating

An indexed ranking that measures a Brand's employee support. Updated monthly.



BlueOcean + FloQast Success Plan (8/9/23 v2)

Company Highlights

- 185 employees, 2k+ customers
- Extensive best place to work awards
- Events: Take Control in Sept; FloQast Go in March; summer On the Go series
- Agency Partners: Liquid Agency, current ABM project w/Just Global (8/23)

Objectives/Key Focus Areas

- “Reverse engineer marketing/content strategy” with competitor data? (original)
- Take Control Conference 9/13-9/14/23
- Solidify YouTube strategy (and overall content strategy)
- Have you started to factor in the LinkedIn data?

Key Challenges

- FloQast Studios separate social; ideally want to bring this into BlueOcean when possible
- Leverage BlueOcean for content strategy? Recommend Jody’s involvement here
- How have you taken action on the results of your Pulse Reports? This is a big area of oppty for FY24!

Milestones/Deliverables

- 5 Pulses delivered; 1 remains: Deliver by 9/20/23 for FY24 planning
- 2024 planning: Ed defining metrics August, planning kickoff Sept, first round Oct, budget Nov

Success Criteria/Measure

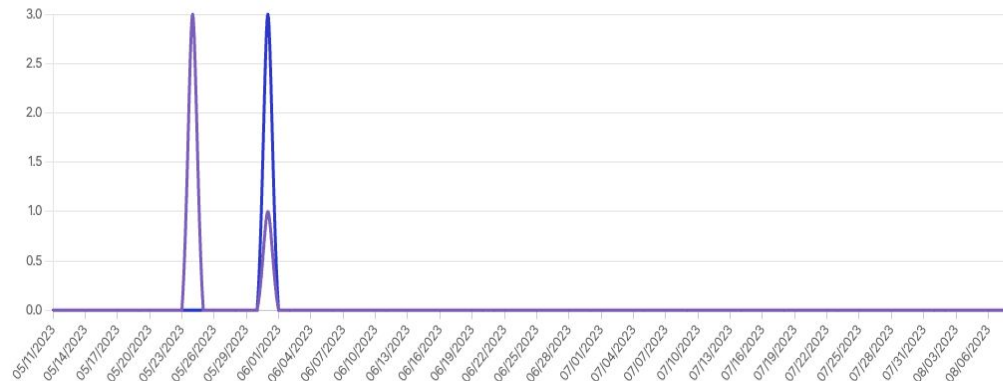
- Measurement of website/brand campaign starting in Feb 2023
- Strong audience sentiment on G2, began relationship with TrustRadius ~ April 2023
- Reframing/defining FY24 metrics in late August - use diagnostic to review

Competitive Cohort Rationale

- Removed Workiva/add AuditBoard 12/2022
- Blackline is more direct competitor across all solutions
- AuditBoard is closest competitor in Compliance specifically
- Reconfirmed set 8/2023 keep as is

Getting more from Brand Navigator

Events



Event Details

Event Name

Page - Market Index Overview >

44.4%

Page - Creative Section Global >

33.3%

Page - Creative Section - Advertising >

11.1%

Page - Creative Channels Overview >

11.1%

Login >

0.0%

Page - Content Analysis Themes >

0.0%

Page - Content Analysis Keywords >

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Page - Content Analysis Topics >

0.0%

Page - Creative Brand Personality >

0.0%

Page - Creative Channels >

0.0%

Instances

4 / 9 ↓

3 / 9 ↑

1 / 9 ↑

1 / 9 ↑

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Step 1: Evaluate how you have been using the platform.

Step 2: Explore the unexplored.

Step 3: How can Brand Navigator become a part of your weekly process? Your data refreshes on Fridays!

Step 4: Who else can benefit from BlueOcean data?

- PMMs? (Jaysen, Nicole)
- Davin?
- Victoria?
- Jody?

Improved Social Insights and *LinkedIn Added!*

- **LinkedIn** is our newest social media data source and rolling into your Blue Score.
- You can now view **social metrics by channel** directly in Brand Navigator for key metrics.
- Toggle between your **index score** and the **underlying counts**, to add context to your competitive comparisons.




Guide Building an AI-Empowered Marketing Organization

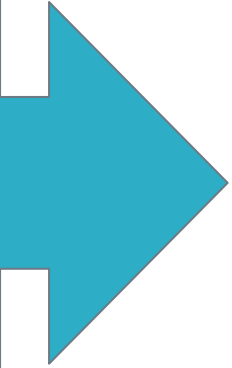
To realize the impact of AI, marketing leaders must take an active role in shaping its future. BlueOcean gathered marketing executives from leading brands at a CMO Impact workshop to share their perspectives and define a future where AI empowers, not replaces, human innovation and creativity.

- Promises and Pitfalls of AI
- Skills and Competencies needed by the modern marketer
- Changes in organizational culture to become future ready



Looking back / looking forward

- 
- How did Brand Navigator help / not help your business and brand challenges in the past year?
 - How did the service model meet / not meet your needs?
 - How did you incorporate insights / recommendations into your team's actions?
 - What is the biggest thing that surprised you since you signed the contract?

- 
- What areas of performance are you most interested in tracking moving forward?
 - What upcoming projects/campaigns/changes in your team or org do you expect in the coming year?
 - What would help your team when it comes to taking action on insight?
 - Would you be willing to participate in future product discovery/testing exercises?

Competitive set review

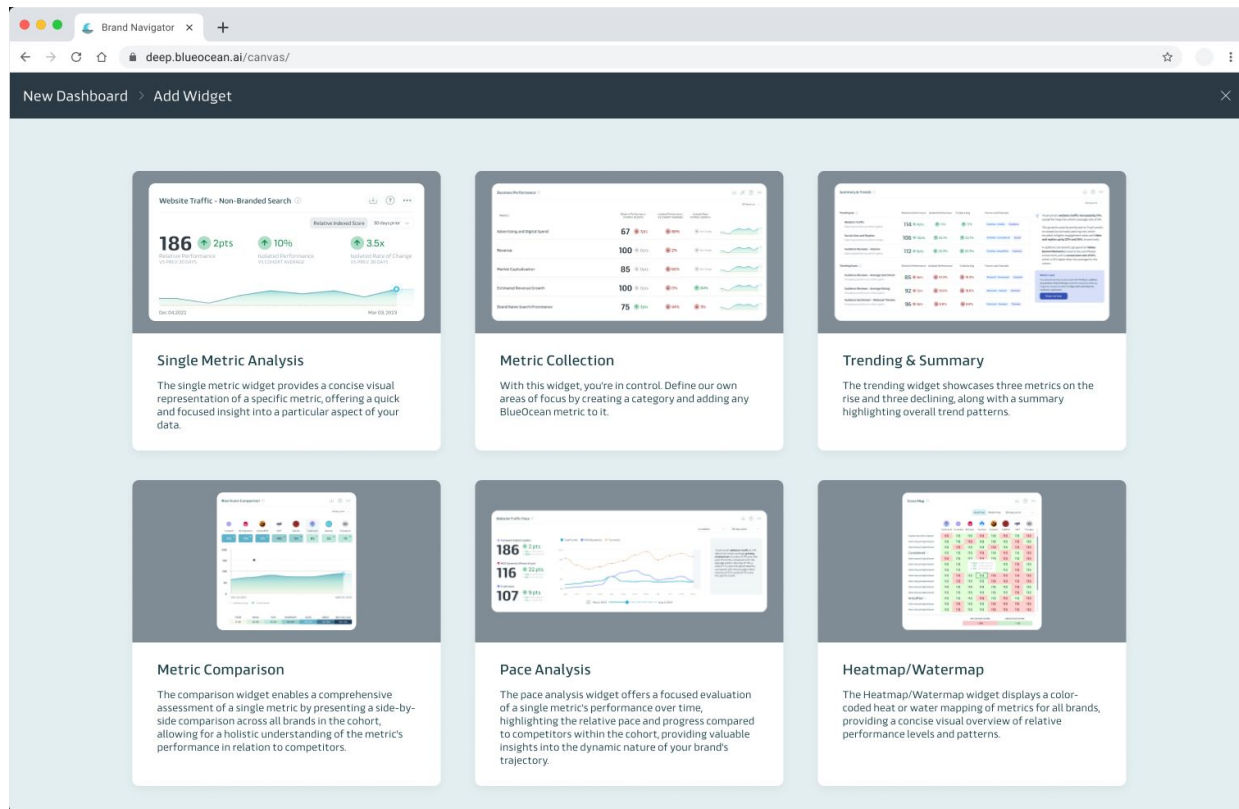
FloQast

- OneStream
- BlackLine
- AuditBoard
- Planful
- Trintech
- Vena
- Are these competitors still relevant?
- Are we looking at the right “level” (all up vs. product/solution)?
- Do we need to explore a set change, or an additional set?

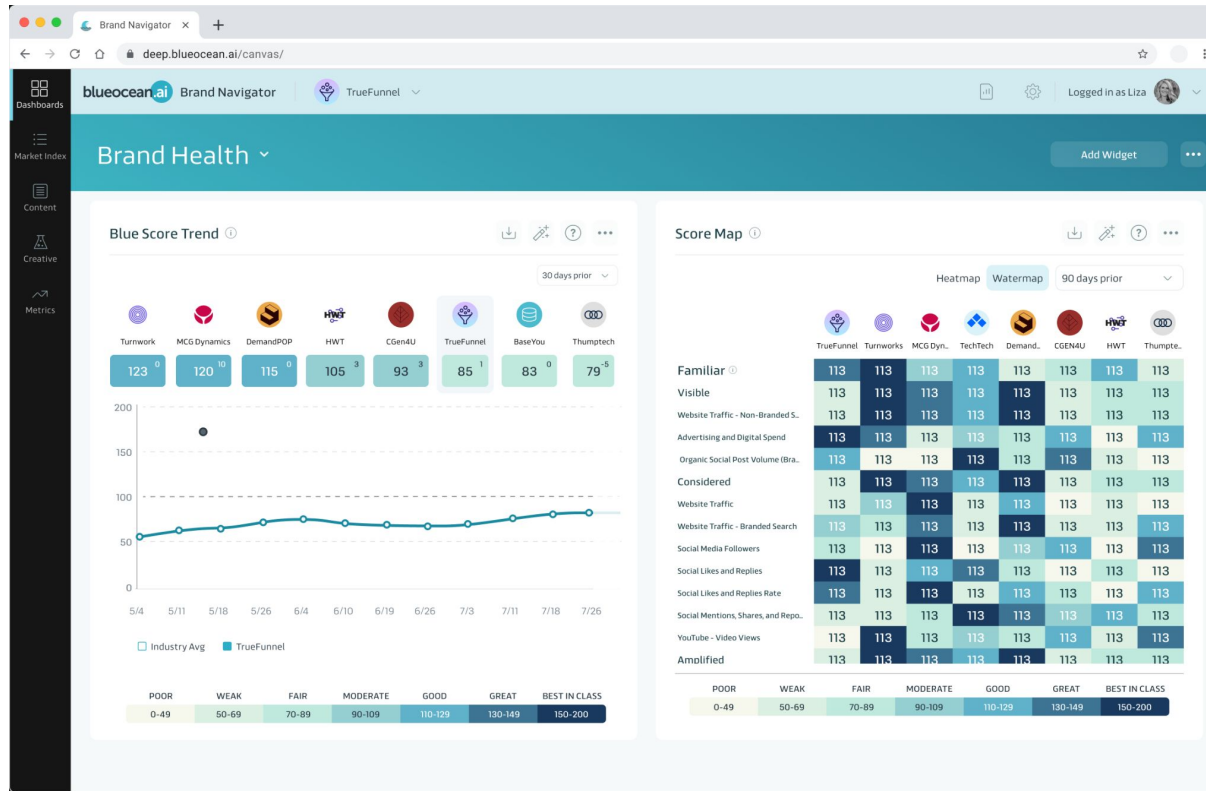
Brand Navigator use cases and outcomes

Use cases	Key Roles	Outcomes
Strengthen GTM with competitive intelligence	<ul style="list-style-type: none">• Brand Strategy• Product Marketing	<ul style="list-style-type: none">+ Accelerate impact of GTM with faster time to insights & action+ Effective prioritization of GTM investments+ Reduction in time & money spent on customer intelligence
Increase the impact of your messaging and content strategy	<ul style="list-style-type: none">• Product Marketing• Content Marketing	<ul style="list-style-type: none">+ Improved conversion from advertising, website, and sales materials+ Increased reach & engagement with social media+ Increased leads from content marketing
Optimize channel & creative strategy	<ul style="list-style-type: none">• Demand Generation• Channel Owners• Creative	<ul style="list-style-type: none">+ Improved ROI of individual channels (web/SEO, social, paid)+ Effective investment decisions across channels for greatest impact+ Higher performing creative
Increase marketing impact with confident decisions & x-org alignment	<ul style="list-style-type: none">• CMO	<ul style="list-style-type: none">+ Improved ROI of marketing investments+ Faster time to insights and actions+ Reduction in time/money spent on brand & channel analytics; stitching data together

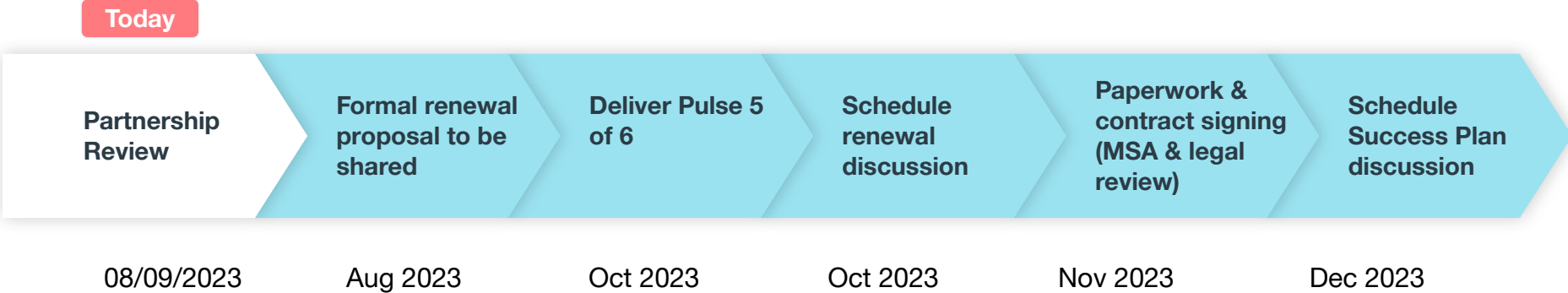
Upcoming Product Release



Upcoming Product Release



From now until renewal



Help grow the brand intelligence community

Help others in the buying process

Leave reviews on [G2](#), [Capterra](#), and [TrustRadius](#) to help other marketers who are evaluating brand intelligence solutions (and receive up to \$60 in gift cards*)

Network & share experiences

Connect with other marketing leaders to build your network and serve as a reference for BlueOcean.

Co-create thought leadership

Partner with BlueOcean on new research, how-to guidance, and modern marketing POVs that advance the category of brand intelligence.

Share your learnings & successes

Document and share your experiences with BlueOcean. Possible formats include a quote, written case study, video, and press article.



Thank you

How can we help?

customersuccess@blueocean.ai

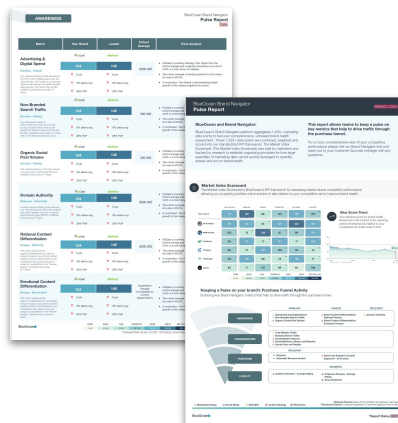
Getting the most out of Brand Navigator

Inform priorities with the brand health diagnostic



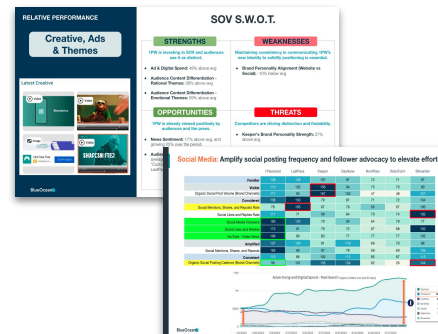
Detailed report surfaces every brand health measure to help identify your brand's strengths and opportunities

Stay on top of brand health changes with the Pulse



Tailored pulse(s) surfaces trends in priority brand metrics and helps you assess the effectiveness of your funnel

Accelerate key areas of focus with facilitated workshops



Facilitated workshops dive deeper into specific elements of your brand strategy to help you get to the next level

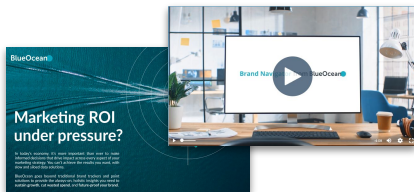
Tailored Customer Success Plan

What to Expect

Preparation

BlueOcean will help you organize, communicate and prep your team.

1. Workshop announcement & calendar invite. (4 weeks out)
2. Collaborative planning session with you. (3 weeks out)
3. Attendees provided Brand Navigator credentials & training requirements. (2 weeks out)
4. Workshop reminder email sent to your team. (4 days out)



Workshop

BlueOcean will lead you through an immersive ideation-fueled session!

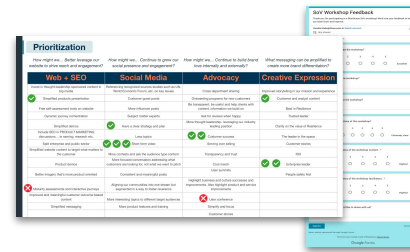
- 60-90 minutes filled with business intelligence insights and competitive examples on a topic of your choice.
- Interactive brainstorming, quizzes, and prioritization sprints leveraging engaging tech and team collaboration.



Next Steps

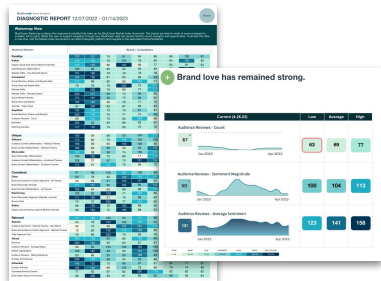
BlueOcean will help you reinforce Workshop takeaways and action plans.

- Workshop recording, presentation and your team's ideation notes distributed.
- Post-workshop survey sent to gather attendees' feedback.
- Incorporation of your prioritized actions into ongoing BlueOcean readouts and discussions.



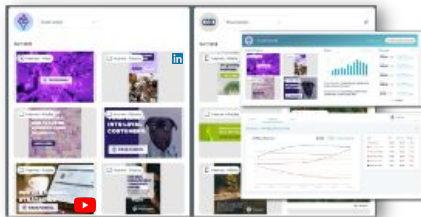
Accelerate areas of focus with interactive workshops

Diagnostic SWOT



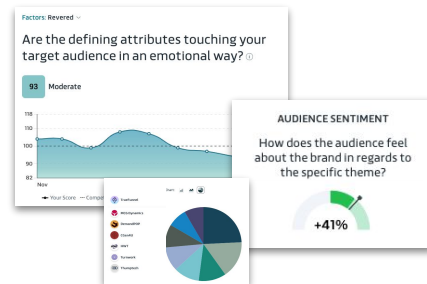
Go deeper on your brand health diagnostic to better understand opportunities and potential threats across your competitive landscape.

Share of Voice



Identify ways to expand SOV and build brand awareness using a mix of social, SEO, advocacy and creative levers.

Content & Conversations



Define strategies to achieve your brand messaging goals by exploring themes to build a distinct voice and strengthen audience connection.