Sojern Insights Portal

GA PM Final Presentation

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Pulling insights is a painful and time-consuming process that lacks consistency of quality

How might we make it more efficient to present quality insights to our clients?

If AMs and AEs had an efficient and effective way to pull and present insights,

they would pull insights more often and feel more confident presenting to the client

Chad

Persona Characteristics

- *Highly experienced sales executive*
- *Strongly believes in Sojern and exudes passion for our brand and our product*
- *Always looking for new and exciting ways to engage clients*

Persona Goals

- *Would love to see clients try new things but wants to provide them with a strong reason to believe*
- *Craves internal resources to assist with better communicating to new and existing clients*
- *MAKE MONEY!*

Mitchell

Persona Characteristics

- *Account manager*
- *Loves to dive into the details and uncover how things work*
- *Uses data to*
  - *Justify account actions taken*
  - *Expose new opportunities*
  - *Provide education/new information*

Persona Goals

- *Needs to pull insights and provide reporting to the clients*
- *Wants to feel like the expert and share his expertise both internally and externally*
- *Loves to see data come to life*

Product Goals

- Reduce AM time spent
- New client generation - increase revenue
- Enable richer cross-functional campaign tracking

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Product Themes

- Enable Custom Insight Generation
- Enable Output Freedom
- Utilize data to increase revenue/add value to campaigns
- Create efficiencies in report analysis

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Product Features - MVP

- Advertiser Data Selector
- Report Output Selector
- Saved Reports

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How will we determine success?

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Key Performance Indicators
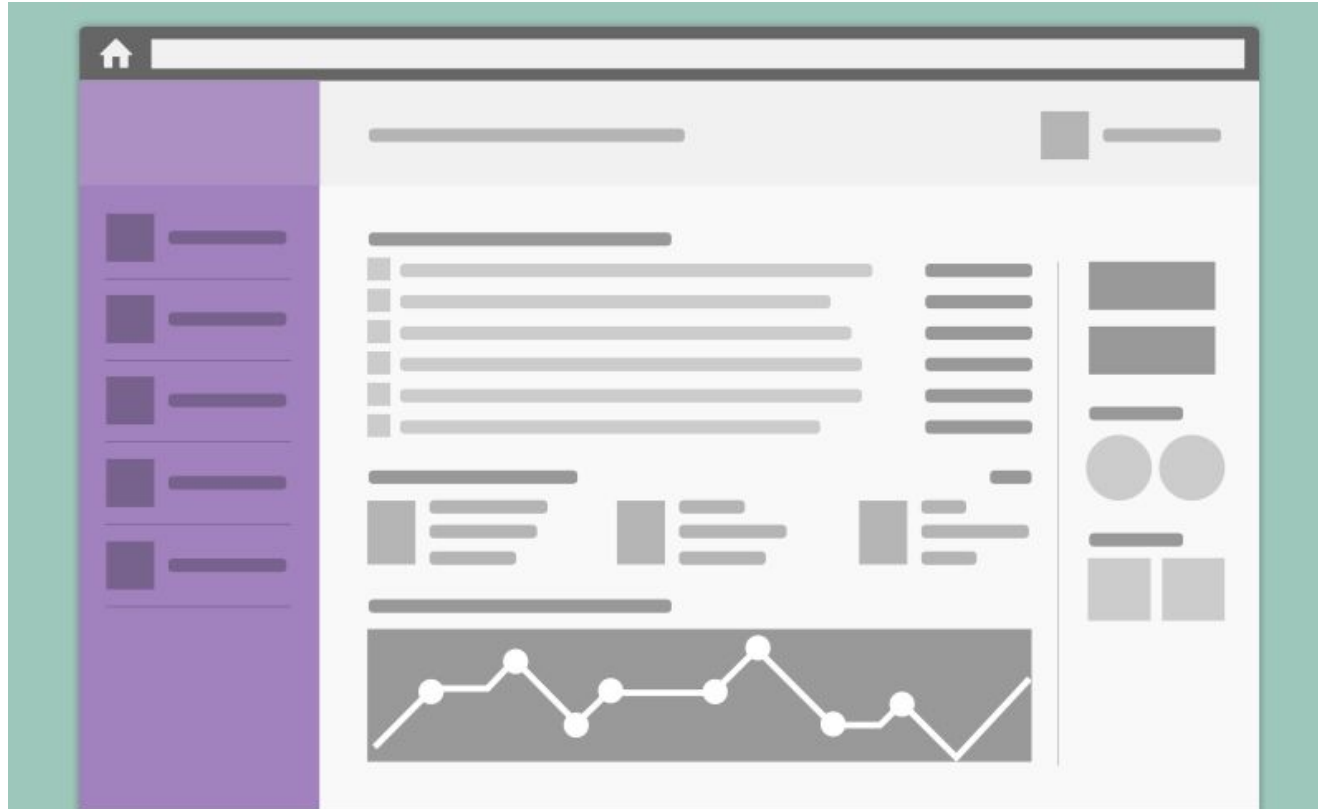
User Logins Per Month

Average Monthly Report Downloads
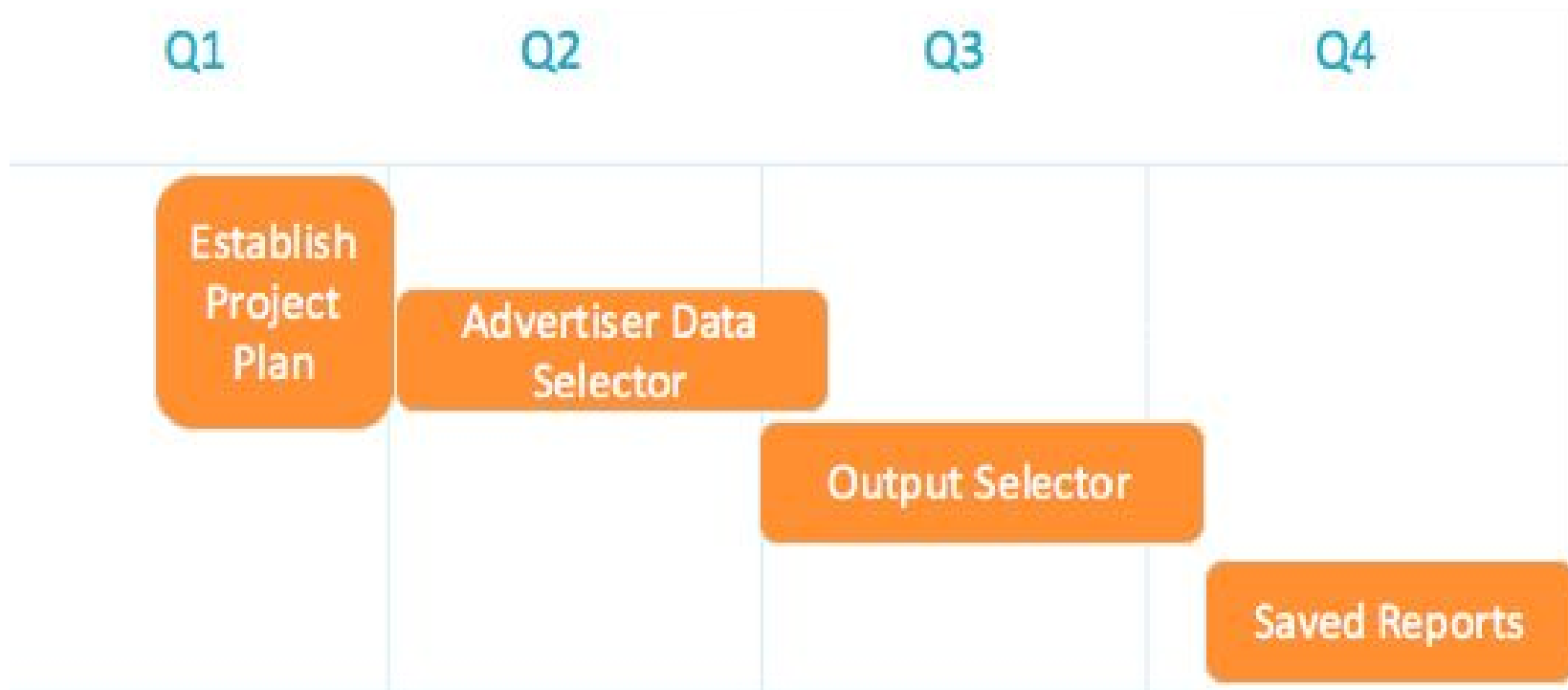
Incremental Revenue Per Month

Time Savings Per Month

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Initial Design Mock

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Roadmap

Q1	Q2	Q3	Q4
Establish Project Plan	Advertiser Data Selector	Output Selector	Saved Reports

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Product RACI

Tasks	PM	Engineering	Ad Operations	Marketing	Execs
Product green-light	R	C	C	I	A
Project kick-off	R	A	I	I	I
Design and determine product Requirements	R/A	C	C	I	I
Product developments	A/C	R	I	I	I

Questions?

Appendix

Product Features

Feature	Description	MVP (Y/N)
Advertiser Data Selector	Users will be able to submit inputs in order to have the queries run the correct data for custom outputs. Pick Advertiser, then pixels	Y
Report Output Selector	User will be able to pick what output they need (PDF, PPT slide, Image,etc.)	Y
Custom Visualization Tool	Users will be able to customize the color scheme and overall visual feel of their data)	N
Unique User Dashboards	The portal should be able to service several different kinds of users and present unique options depending on the user that is logged in	N

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Product Features Cont.

Feature	Description	MVP (Y/N)
Canned Report Analysis Selection	Users can select canned analysis notes/takeaways to be added to the insights that they pull (we want to "break down" the data that they are getting back)	N
Upsell Opportunity Analysis	Section that outlines opportunity for a particular campaign - is there room for an upsell? Is there a product the client should be exploring? The product should map this out clearly and give clear points as to what these are so that the AM/AE can entice the user to take action but with a clear reason	N
Saved Reports	Once a report is run - all data used to generate the report should be able to be saved for quicker pulls in the future	Y

Product Features Cont.

Feature	Description	MVP (Y/N)
Automated Report Generation	If a report is one that will be run over and over again - there should be settings that allow the user to generate this report in an automated fashion with a delivery selection and frequency selection available	N
Customer facing data	Data that a customer can log in to see and interact with in a way that the AM is able to see the notes and can respond in the portal	N
Custom Templates	Users could submit to insights/eng for extra custom reports that are not preloaded into the system	N