

Blend + LinkedIn 2025 Owned Media RFI

Scaling Global Marketing and
Delivery Excellence

Presented by Blend

October 20th, 2025



Meet the Team

Our Advisory team brings proven expertise in customer experience, managed services, data-driven operations, applied AI and scaling global operations teams.



Maggie Melnick
Chief Client Officer

As Chief Client Officer at Blend, Maggie drives client-centric growth and long-term partnerships. She has led national teams across Talent Solutions and regional P&L, serving Fortune 1000 brands. Her background spans leadership roles at C2G Partners, AT&T, and Concert, bringing 25+ years of experience in analytics-led marketing and sales.



Sara Roberts
SVP, Client Leadership

Sara Roberts is Senior Vice President, Global Client Leadership at Blend, partnering with enterprise brands to scale CX and Mar-Tech outcomes. Since 2023, she has served as the Client Lead for LinkedIn, overseeing global delivery across the U.S., LATAM, and India. Previously Global Account Leader at Blend and a Senior Manager at Deloitte Digital, she spent 12+ years at Merkle leading large-scale CX implementations and global operations. She has led 130+ person global teams and \$24M+ delivery portfolios.



Scott Nuernberger
SVP, Measurement Practice Leader

Scott Nuernberger is the SVP of Measurement Practice at Blend, with over 20 years of experience bridging advanced analytics, data science, and marketing strategy. He helps global brands turn data into action through AI-driven agents, advanced audience segmentation, and unified measurement frameworks. Scott leads teams that connect strategy to execution, enabling precision targeting, personalization, and performance across owned and paid media.



Dan Wardrop
A.D. – Program Management

Dan Wardrop is an execution-first program leader at Blend, directing cross-functional teams across 12+ client departments and 5 agencies to run 10M+ member loyalty programs and global NBA campaigns. His prior work at Updater/Bridgevine, American Express, and Hertz spans \$16M+ portfolios, contract and platform growth, and data-driven wins including 99.6% SLA adherence, +11% matching accuracy, and +20% revenue.



Ryan Serpan
Head of AiEX Group

Ryan Serpan is a customer experience and data strategy leader with 22+ years of experience driving analytics and AI transformation across industries such as consumer tech, financial services, and healthcare. He specializes in designing customer-centric AI solutions—blending data governance, generative AI, and insight activation to enable personalized, scalable business outcomes.



Your Trusted Partner for AI-driven Success

Blend drives meaningful impact with the world's largest brands through the integration of AI, data, data science, technology and "best of world" people.

 **1200+** Employees

 **\$175M** Revenue

 **850+**
AI Researchers, Data
Scientists & Engineers

 **Leader**
AIM Research "Top Generative
AI Service Providers 2024"

 **75%+**
Revenue
Fortune 1000 Clients

 **Inc. 5000**
Fastest Growing every year in
business (6 years)

 **77% NPS**
(4yr Average (2X Industry))

 **Global**
US, Canada, India, UK,
Uruguay, Colombia

Our Services

 Strategy & Consulting

 Data Science & Measurement

 Business Intelligence

 Data Engineering

 Intelligent Applications

 Project Management

Our Team

45+
Team Members

20+
Stakeholders



2021	 Paid Media BI Reporting
2022	 Multiple BI Engagements & Marketing Data Foundation Strategy
2023	 Marketing Data Foundation Build & Expansion across BU's.
2024	 Data Science & Measurement, Data Engineering & BI Engagements.
2025	 Multi Year Partnerships across multiple groups at LinkedIn

Our Journey with LinkedIn

Datawatch | Modern & comprehensive Marketing Analytics Data Foundation

Datavision | Actionable Insights & Reporting Automation.

Oyster | Modelled Attribution Testing, Strategy & Measurement

Elixir | Audience Targeting & Roadmap Strategy.

Analytics & Data Engagements | Across Paid Media, Marketing Foundation, Sales & Operations (GTM), CGI/Non-Profit, LTS & many more.

NOAH | Unified targeting engine for delivering personalized marketing

Bluezone | Enhancing the Customer Marketing lifecycle

AI Search | AI-Assisted Search and Projects

AI Platform Trust | Platform safety & security

AAMER | revolutionizing the sales process.

NAPA | Reliable data foundations

PULSE | Expand the foundational MMM model to enhance marketing capabilities.

Data Canvas | integrating Buyer Journey metrics from Modeled Attribution

What's New(s) with Blend



- Customer Analytics Wave Top 10 (2x)
- AI Service Provider Landscape Top 40 (2x)
- Customer Analytics Landscape (2x)



Blend has been recognized as leaders in AIM Research's "Top Data Engineering Service Providers 2025" and "Top Agentic AI Service Providers 2025" report!



Blend has been recognized in Everest Group's PEAK Matrix® 2025 as a Specialist in Data and AI Services for North America, highlighting its growing impact and expertise in the field.



Blend has been recognized as "Data and AI Leader of the Year" and "Best Place to Work in Data and AI" at the DataIQ Awards!

dataIQ™ 100
THE MOST INFLUENTIAL PEOPLE IN DATA



Oz Dogan
(USA)



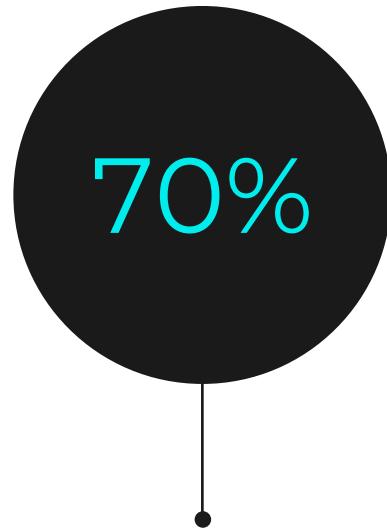
Neil Carden
(EMEA)



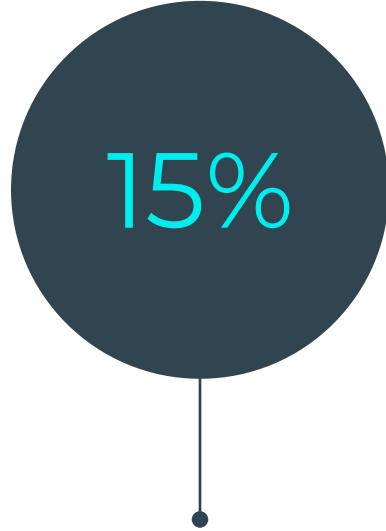
Blend has earned the AWS Financial Services Competency, recognizing its proven expertise in delivering innovative cloud solutions for the financial sector.

Our Footprint In Marketing Operations

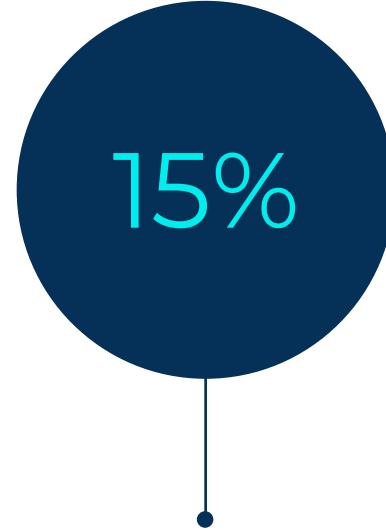
Blend has **over 300 team members** that perform marketing strategy, campaign operations, performance optimization, sales enablement, and program management for our clients.



of those consultants support our clients in day-to-day campaign operations and execution



of those consultants lead programs through strategy and program leadership



of those consultants lead other functions like analytics, optimization, and sales enablement

Blend360 – Customized Solutions

Solutions - Projects	Managed Services	Hybrid – Extend The Team	In Sourcing – Blend360 Hiring Solutions
Managed By Blend360	Managed By Blend360	Collaboratively Managed By Client & Blend360	Day-To-Day Managed By Client, Blend Manages Resourcing
Solutions driven by Blend360 capability leaders and SME's	Managed services engagement driven by Blend360 teams onshore/offshore	Partner with clients to deliver best-in-class support for key projects, short term or long-term engagements to full team installations	Provide flexible hiring solutions of individuals and teams



We Offer Best of World Talent

We have **9 international hubs** enabling us to provide best of world delivery models for our clients 24/7... just follow the sun.

Onshore, NA/EMEA - Strategic planning, client management, and executive alignment

Nearshore - Analytics, business intelligence, and campaign operations with time zone alignment

Offshore – IDC Engineering, Quality Assurance, Experimentation, and Scaled Innovation – Currently expanding in Bangalore too



Locations where we have legal entities and delivery operations for Managed Service Partnerships



We've deployed custom delivery locations for clients based on need and operational design

Campaign Operations Support

Financial Services
Modernize Marketing Data Foundations Develop and implement a comprehensive strategy for data management and governance

Global Media Strategy and Operations Designed and deployed an owned media operations capability With regional specialization across global hub

Marketing Operations & Managed Services PODs and Squads operating key components of marketing, strategy, and campaign operations

Process and Operations Design Redesigned end-to-end campaign operations and Organizational design


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Campaign Operations Support

Technology, Media, & Telecommunications

Email Campaign Operations

Daily campaign operations and strategy for member Benefits, cross-sell and communications



Loyalty Campaign Operations

Customer escalation, error free campaign operations Loyalty communications operations and deployment



Digital Campaign Center of Excellence

Designed a personalization focused DCOE, deployed New journey campaign operations procedures, strategy, And CDP enablement



AI-Decisioning Campaign Operations

30+ person campaign operations PODs for decisioning Integration with email, sms and notification across AI-decisions and next best actions



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Campaign Operations Support

Global Programs Operated Through EMEA

B2B and ABM Campaign Operations

Fully automated lifecycle programs, digital transformation
Consulting, content marketing strategy and deployment



Activation and Journey Enablement Squad

End-user journeys for SME, P&C, and LA ecosystems
With Adobe Campaign technology at the core



Global Marketing Automation & B2B Campaign Operations

Campaigns and Content, lead generation campaigns
Persona research, content mapping, always on campaign
Design and deployment



Buyer Persona Strategy and Journey Operations

Oracle Markie award finalist for best lead management
Campaign, theme-based content strategy & design,
Nurture campaign design and operations



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Examples of How We Leverage Agents to Get from Strategy to Execution -

BlendX – Is our proprietary agentic framework that allows us to blend both traditional deterministic AI tools (decisioning, segmentation, propensity, adaptive models etc) and agentic workflows which connect LLMs and conversational interfaces to these tools.

The screenshot shows a Streamlit application titled "DEMAND_FORECASTING_DEVELOPMENT". The main page is titled "OnDemand Forecasting Platform" and describes it as a "Demand Forecasting App augmented by AI agentic capabilities". It includes sections for "About the Project", "Key Features" (listing AI-Driven Insights, Agent-Based Architecture, Efficient Management, and Customizable Interaction), and "How It Works". A sidebar on the left contains navigation links for Blend, Home, Demand Forecasting, and Report Visualization.

The dashboard is titled "Executive Sales & Tour Performance Dashboard" and displays "Key Performance Insights: May 2025". It includes sections for "Tour Insights", "Sales Performance", and "Business Deep Dive". The "Sales Center Performance" chart shows volume per guest (VPG) and tour-to-owner ratio (TOR) for various cities like Manhattan, Miami Beach, Las Vegas, and Orlando. The "Sales Reps Performance" chart shows close-to-tour ratios (CTOR) for sales representatives like John Perez, Frank Smith, and Tina Price. A "Conversational Assistant" panel on the right provides insights and answers generated by AI, such as "Generating SQL and loading data..." and "Additional Insights".

BlendX & Use-Case Accelerators...

embedding Blend's experience across verticals, domains and technical capabilities



BlendX Use-Case Accelerators

Blend created demo's, user interfaces, business rules, data science models, and associated documentation to make a use-case a full fledge enterprise scale application

Demand
Forecasting

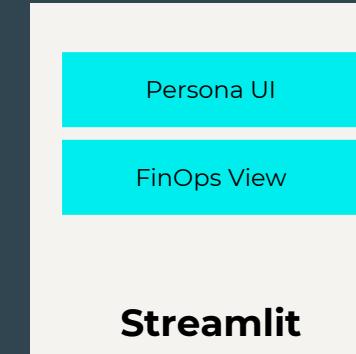
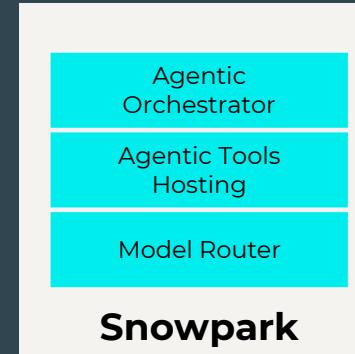
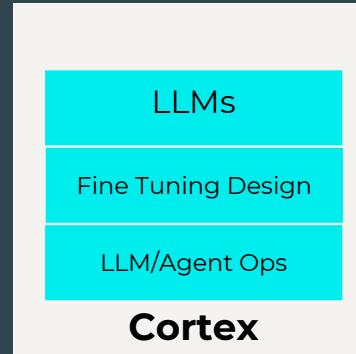
Marketing Mix
Optimization

Supply Chain
Optimization

Customer Journey
Optimization

BlendX

Open Source and Blend Proprietary assets enabled on Snowflake Platform to accelerate deployment of Blend best practices on Agentic Applications



Structured Data

Unstructured Data

3rd Party Data



Examples of Advanced Audience Segmentation and Personalization, Audience Analytics Capabilities

• Targeting

- Propensity/CLV models
- Look a like models
- Uplift models
- Segmentation

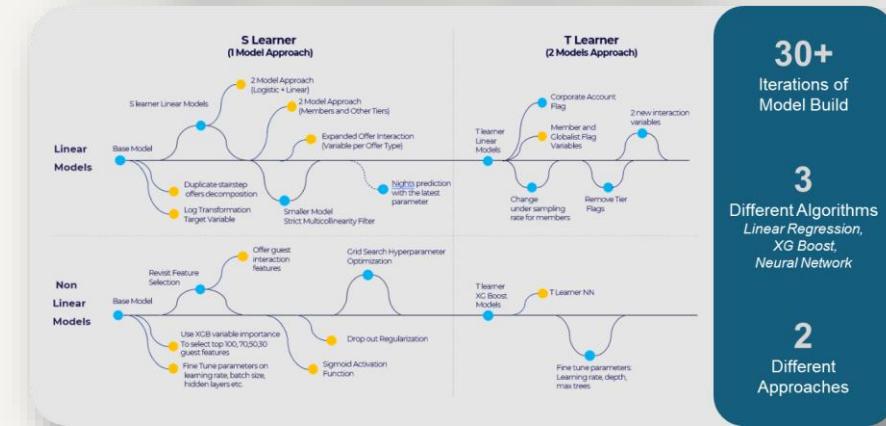
• Decisioning

- Product/offer/message arbitration
- Decisioning + targeting optimization

• Measurement

- Testing
- Synthetic controls
- MMM/Attribution
- Causal insights

Uplift Prediction Model Build



Synthetic control overview

What?

Synthetic control is like finding a "look-alike" group to see how a change affected one group compared to another by taking statistical measures.



When?

- Conducting randomized controlled trials (RCTs) are not feasible or ethical
- Intervention has already occurred and there is only observational data available.



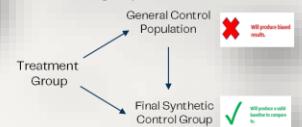
Why?

- **Effective Counterfactual:** Creates a plausible counterfactual scenario, enabling a comparison between the treated actual outcome and what would have happened without the intervention
- **Minimize Selection Bias:** By matching treated and control on pre-intervention characteristics, synthetic control helps mitigate selection bias and provides more reliable causal estimates



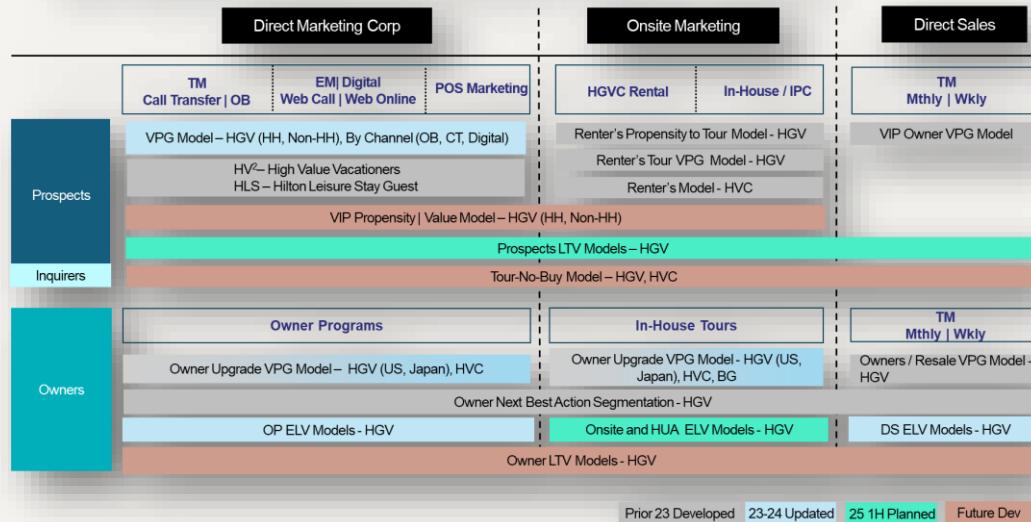
How?

- Construct synthetic control group of customers that is statistically identical to treatment group of customers



Customer Acquisition: Client Cases

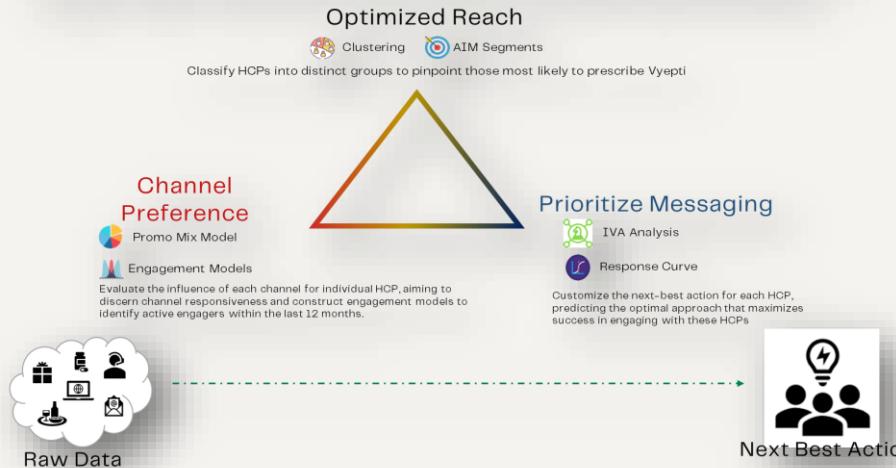
HGV: Models by Marketing Channels, Programs, Audience



CVS Enterprise Segmentation & Enterprise Customer Value



The Artificial Intelligence Marketing (AIM) system identifies and targets high-expected-value HCPs to enhance performance



Accelerator: Vyper 3.0

Vyper 3.0 value

Standardization

Establish and implement uniform guidelines across blend for commonly used models



Efficiency

The learning curve associated with data analysis is reduced, empowering individuals to navigate and make sense of data more effectively



Ease of use

Streamline operations, allowing all-stars to quickly grasp methods. Faster onboarding and increased productivity in the organization.

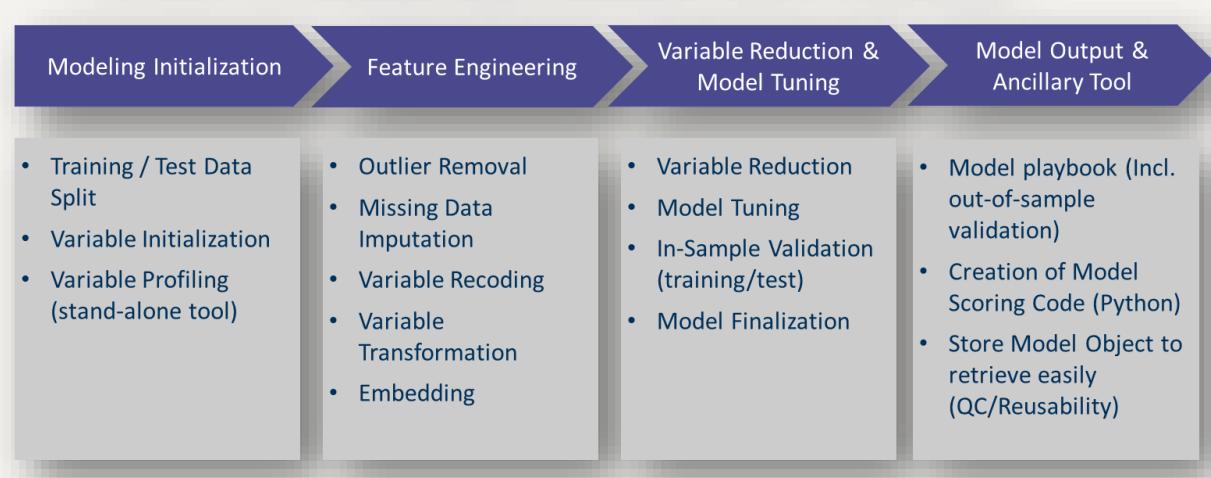


Scalability and Flexibility

Scale to accommodate for growth, and adjust workstreams to meet evolving requirements



VYPER 3.0 Modeling Modules and Processes



Thousands of Models Deployed



LinkedIn Partnership: Driving Personalized Engagement

Blend360 spearheads advanced audience segmentation and personalization for LinkedIn across key business units: Sales Solutions (LSS), Talent Solutions (LTS), and Flagship Marketing. We design and optimize data-driven targeting strategies, lifecycle campaigns, and analytics frameworks to ensure seamless channel orchestration across email, paid media, and LinkedIn Ads.

LinkedIn Sales & Talent Solutions (LSS/LTS)

Targeting & Segmentation

Defined Acquisition & Lifecycle stages (Onboarding, Nurture, Renewal, Health Checks) using NCRM data and custom SQL logic in Darwin.

Campaign Execution

Launched LinkedIn On LinkedIn (LoL) ads via CMT & Trex for A/B testing; managed campaign requirements in Wrike.

Platform Transitions

Ensured continuity during migration from SFDC to Dynamics 365 and Responsys to Adobe Campaign.

Flagship Marketing Initiatives

Campaign & Analytics Projects

Supported Email & LoL initiatives including High Value Action (HVA), Networking, Graduation Series, Pages, Video, and LTS campaigns.

Strategic Ad-Hoc Analyses

Provided insights on college student/recent graduate usage and content strategy effectiveness (ref. go/sdalmanac).

Integrated Measurement

Assisted marketers in measuring Program Health Check performance with Responsys data.

Our core role centers on connecting data, targeting logic, and measurement frameworks, empowering LinkedIn to deliver precise, personalized, and performance-driven audience experiences across all channels.



Approach to Experimentation and Learning Agendas

- Subject Matter Expertise**

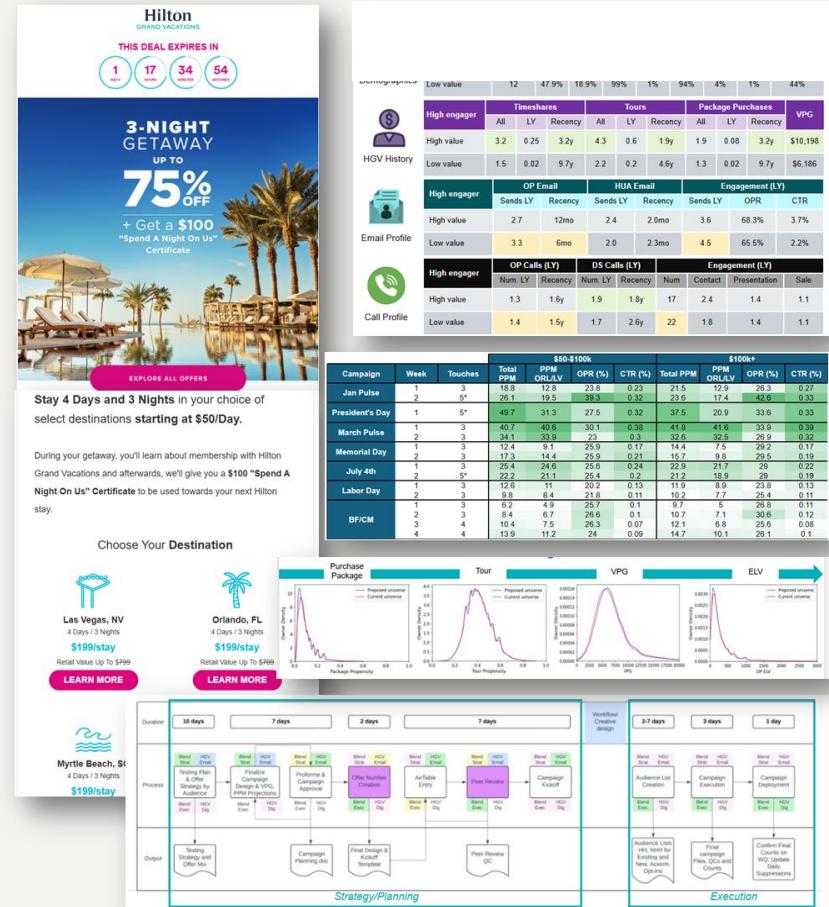
- There will always be a need to have industry subject matter experts as well as CX experts that align with data science teams to interpret and execute strategy based on insights
- Blend designs our teams in a way that align industry and strategy experts with real world experience putting insights into activation through strategy and support to our clients
- HGV – Entire sales qualification, prioritization and lead funnel operation is run from Blend insights, impacting \$1.4B of revenue, where sales centers are located, how they are staffed, and how all performance incentives work

- Automation and Leverage of AI**

- Where possible, it's critical to apply AI through automated operational environments to take real time customer interactions and utilize the performance exhaust to fuel models that automate the next action

- Intersection of Experience and Automation**

- This critical junction of applied experience to help our clients navigate the insights from a strategic level, combined with building platforms to automate insights optimization loops through automated machine learning is key
- When we apply generative AI capabilities, we can expand the CX content library to allow that performance exhaust to automate even more scale



Embedded Analytics & Performance Intelligence

Blend360 supports LinkedIn's experimentation agenda, applying a rigorous data-scientific approach to evaluate campaign effectiveness and optimize strategies.

Experimentation & Learning Agenda

1

Rigorous Design & Methodology

We employ geo-based lift tests, matched-market designs, and A/B/multivariate tests with validated guardrails and statistical power.

2

Centralized Knowledge Management

Key insights and methodological notes are documented in a learning library, informing future testing priorities across LinkedIn.

3

Strategic Measurement Integration

Experimental learnings extend to Media Mix Model validation, attribution refinement, and budget allocation frameworks.

Through this disciplined model, Blend360 enables LinkedIn to move to a continuous learning system, driving measurable performance improvements and strengthening decision-making confidence.



Analytics Capabilities and Examples of Proactive Reporting & Structure

• People First Mindset

- Our approach to insights delivery is rooted in a people first mindset, meaning user interface and experience is key to creating the delivery of relevant information that can create action
- This “productization” approach centralizes business operations around a tool that can constantly evolve
- EG – 44 business users transitioned from legacy systems and processes to MGE
- 10/10 NPS score from executive stakeholders rating value

• Enable Technology

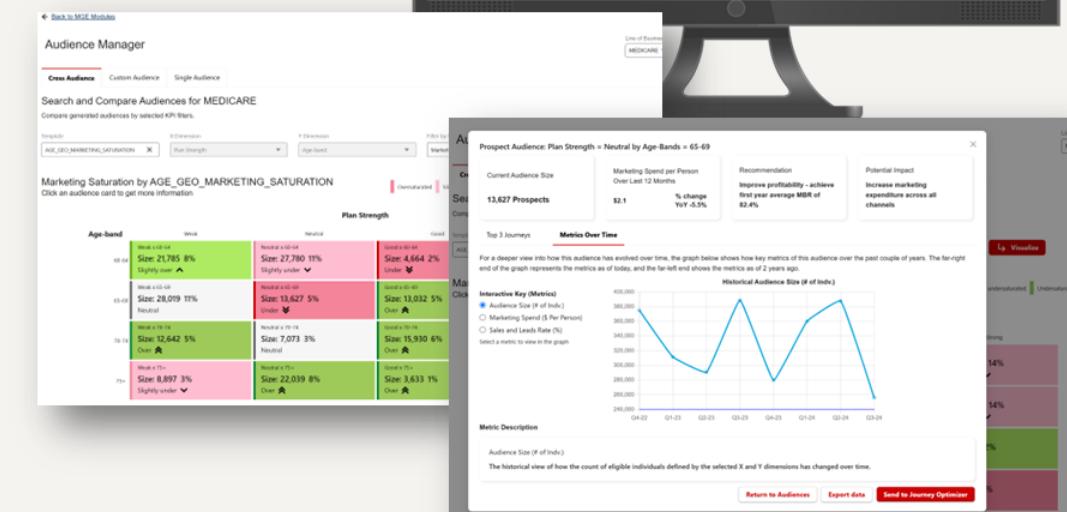
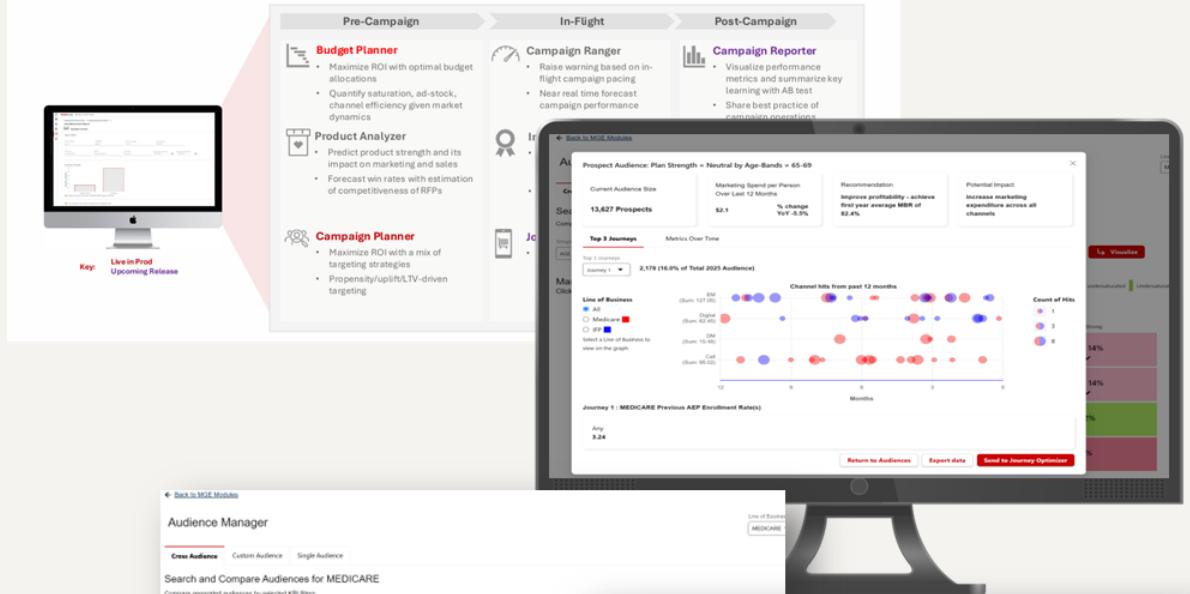
- Our PMAI framework is an accelerator framework that centralizes data around various vertical or industry cases (we have a PMAI foundation for healthcare, financial services, retail, telco etc)
- The framework rapidly drives adoption of the core principles and allows us to architect user front ends in a bespoke manner for any client
- \$75M in media budget optimized

• Optimize with AI

- Utilizing conversational AI, chat interface, and insights generating tools, we can optimize with AI at the core of the insights delivery principles
- 90% campaign coverage and 100% validation of insights quality from stakeholders
- 120 hours per 10 campaigns in operational efficiency

Member Growth Engine (MGE)

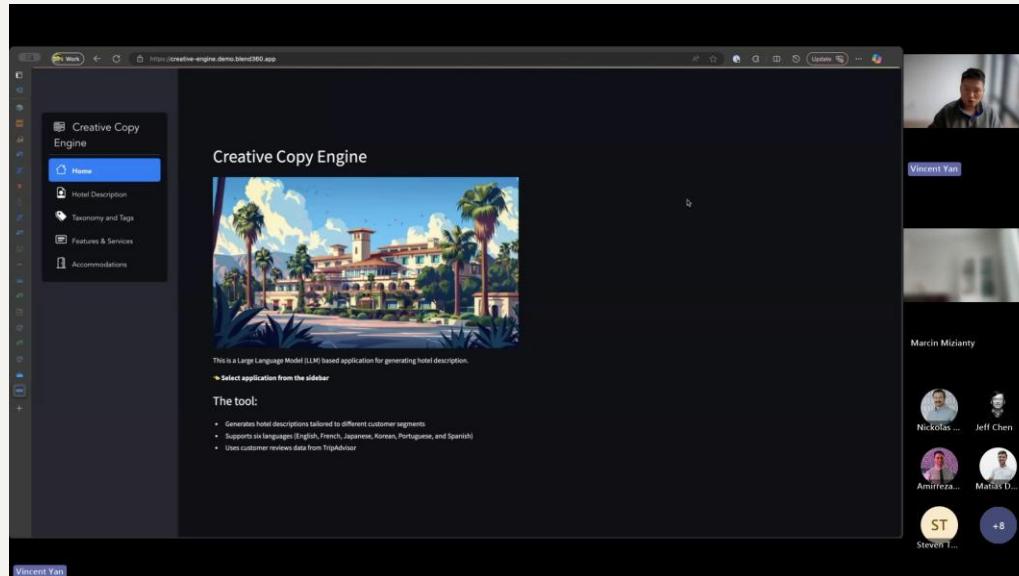
A web application to serve as one stop shop for CVSH Marketing Analytics toolsets and intelligence to provide real time Marketing Analytics as a service to accelerate member and margin growth.



Influencer Marketing – Measurable Performance and Trend Patterns

Blend360 does not run influencer marketing programs directly but supports **measurement and strategy** around creator-led campaigns when integrated into broader marketing efforts.

HGV NLP UGC Content Tool



Chewy's UGC Content Engine

A screenshot of the Chewy's UGC Content Engine. The top part shows a "Filter" section with a "Keyword Search" input, "Review Status" (set to "Fully Reviewed"), "Category" (set to "Cat->Bowls and Feeders->Bowls and I..."), and "Group ID" dropdown. Below the filter is a "Products" section showing three pet bowls. The main content area is for a product titled "Loving Pets Bella Bowls Pet Bowl, Metallic Artichoke (54481)". It includes a note about expression status (G, Y, R), pros (e.g., "High quality", "Easy to clean"), cons (e.g., "Warning the sticker is sticky", "The rubber ring will not stay on"), and a summary table with "# of Reviews" (149.0), "Avg. Rating" (4.268), "Avg. Sentiment" (4.378), and "Recommendation" (0.846). There are "Save" and "Cancel" buttons at the bottom right. A "Link to Product Page" button is also present.

LinkedIn's Creator & Influencer Strategy

Blend360 provides data-driven insights that guide content, creators, and campaigns to drive both brand equity and measurable performance for LinkedIn.



Video Behavior Analysis

We conducted extensive analysis on video creation and consumption trends, identifying key demographics and professional segments. This informed actionable recommendations, such as encouraging senior leaders to post and expanding regional content.



Content Series Performance

Our analysis of "Conversations that Matter" for Social Impact demonstrated that long-form content from senior leaders with strong followings outperformed newsletter posts, shaping future creative and distribution strategies for brand equity.



Proactive Trend Analysis

Ongoing analysis tracks evolving creator behaviors, platform formats, and engagement shifts. Forecasting models and dashboards ensure LinkedIn proactively adapts content and influencer programs as the creator landscape evolves.

This comprehensive approach ensures LinkedIn can effectively focus on enabling high-impact voices and fostering diverse content creation at scale, while staying ahead of emerging market trends.

Answer to Hilary's Question from 10/20: Which teams are we working with on influencer insights?



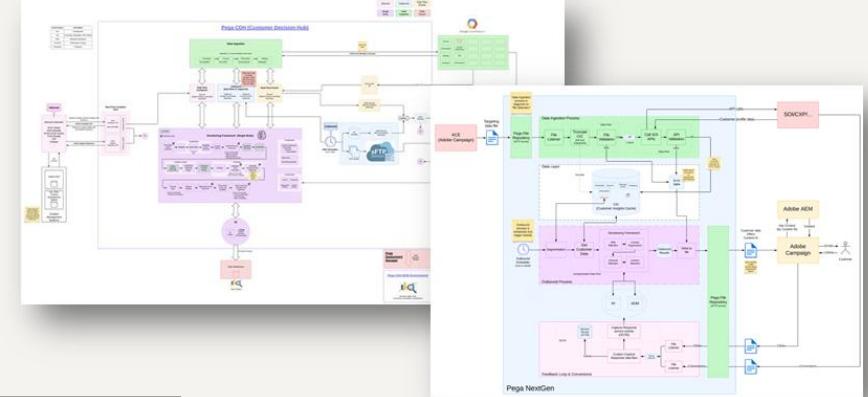
Blend partnered with Laura Wen, Carolyn Crimi (Senior Product Marketing Manager, Flagship) and Adam Young (Social Impact) on LinkedIn's broader initiative to support the platform's transition to becoming video-first. Our work focused on audience and influencer analytics within the Flagship & Social Impact BU, supporting the Creator and Video Analytics programs.



Channel Orchestration Methodology & Owned Channel

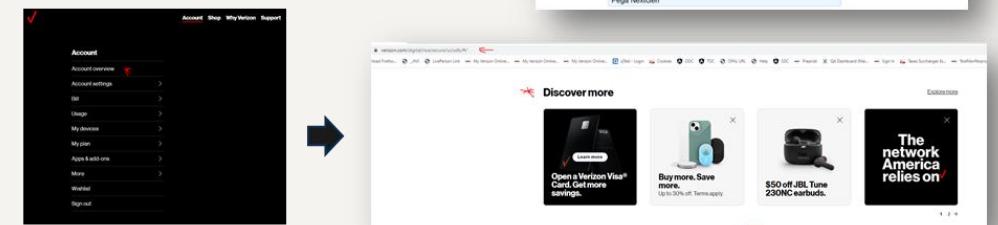
- **Omni Channel At the Heart Of the Strategy**

- Personalization is rarely omni-channel, most organizations have nailed siloed channel or multi channel experiences, but rarely do all channels align to delivery a consistent personalization
- VZ – integrated inbound, outbound, and 9 channels



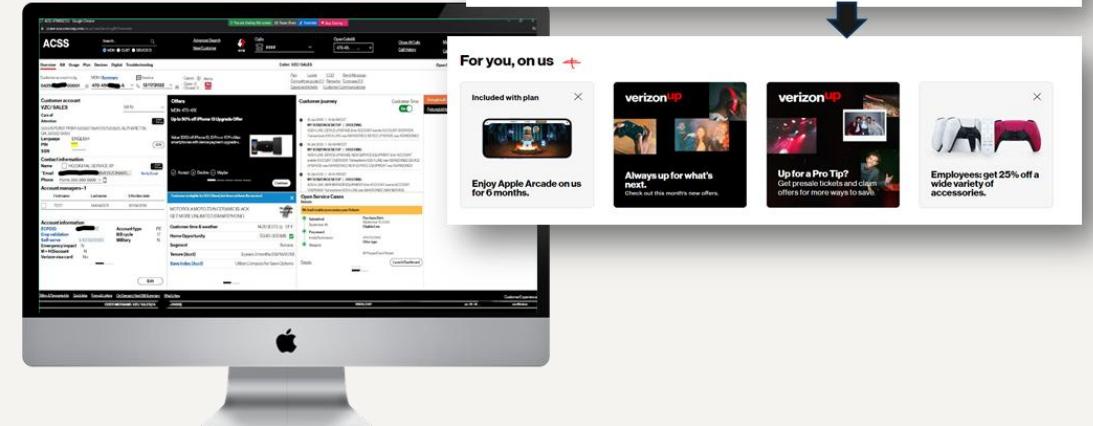
- **One Brain (Or a Central Orchestrator of the Brains)**

- All decisions around content choices, shared interaction history, and performance optimization must be driven by a single Automated ML decisioning brain
- VZ – 4 decisioning engines combined to a single central engine



- **Enable with Generative AI**

- Personalization is irrelevant if the content isn't personal, integrating Generative Ai capabilities scales version and content mass to enable hyper-personalized experiences
- VZ – 5X content mass with no operational changes



- **Change Ways of Working (VRO)**

- Organizations can't change to omni personalized delivery if teams still work in product or channel silos, redesigning the operating model is key to driving hyper-personalization
- VZ – over 100 stakeholders attended our opening sessions representing 4 business groups!

- **Measure CX, Not Campaigns (PMAI)**

- Break away from measuring channel, product, or campaign outcomes, and unify the entirety of experiences to understand if personalization works

Orchestrating Audiences Across Channels

01

Platform Mastery

Adobe, Salesforce MC, Eloqua, Responsys, Unica, Pega, Hightouch, Segment, LinkedIn Campaign Manager (100+ consultants with LI Ads experience), Meta Business Manager, Google

02

Intelligent Automation

Automated audience builds via SQL, Airflow, Alteryx for precision targeting, deploying agentic workflows, synthetic customer personas

03

Scale & Velocity

1,000+ campaigns annually; 10M+ records monthly, with LinkedIn Matched Audiences

04

Continuous Optimization

Real-time performance tracking and audience refinement across all channels



LinkedIn Integration: Seamless audience sync with Campaign Manager for unified B2B targeting

Maintaining Strategic Relevancy Amid Changing Platforms, Priorities, Audiences

Data Literacy and Analytics Training

Blend Academy (BA) provides extensive training in data literacy and analytics for both internal and external teams.

Executive: AI industry trends and insights

- Cornerstone Building Brands, Rockwell Automation, etc
- Cross clients: CD&R (CIO summit)



Academic: University Roles

- Customer experience advisory board
- Director of Data Science program
- AI For Good Initiative



Data Science & Insights: Training & workshops

- CVS: Quarterly workshops
- LinkedIn: Designed and run BI onboarding program
- Topics include GenAI, RL, causal analysis, computer vision, Bayesian testing, synthetic controls, etc



Data Engineering: Training & workshops

- Jefferies: Full day federated MLOps workshop
- Franklin Templeton: Workshop on AI microservices



Thank You for the Opportunity

Excited to
Continue
Growing
Together

We are ready to expand our global delivery footprint to support your owned media marketing execution, bringing world-class operations, AI-enabled efficiency, and proven governance.

Let's scale the future of marketing excellence together.



Partnership First

Building long-term success through collaboration and trust



Innovation Always

Continuously advancing capabilities to meet evolving needs



Results Driven

Delivering measurable impact at every stage of growth



Thank



you

Case Studies

Global Media Optimization Hub

A leading global payments company sought to improve control, transparency, and efficiency across its global media operations. Historically reliant on agency-led execution, the company faced challenges with cost inefficiencies, limited visibility, and slower decision cycles.

Together with Blend, the organization embarked on a transformation journey—**testing, building, and scaling** an in-house media capability anchored in AI-driven tools, agile processes, and specialized talent.

The engagement progressed through three stages:

- **Test:** Validate new workflows and proof of concept (POC) through pilot programs.
- **Build Product:** Develop and integrate proprietary optimization tools (MMO, MIO) into media planning.
- **Build Capability:** Establish a global operating model and team structure to scale operations enterprise-wide.

Solutions

Phase 1: Pilot and Proof of Concept

Objective: Validate the effectiveness of an in-house media planning framework and data-driven optimization process.

Approach:

Launched pilot teams in selected regions focusing on one key market.

Designed sprint-based workflows for campaign setup, optimization, and reporting.

Introduced the Media Optimization Tool (MMO) prototype for early scenario planning and ROI forecasting.

Phase 2: Build Measurement Products

Objective: Build and deploy proprietary tools and data products to enable automation, speed, and accuracy.

Key Initiatives:

Media Mix Optimizer (MMO): AI-based engine that automates budget allocation and scenario modeling.

Media Intelligence Optimizer (MIO): Real-time system for audience segmentation, budget pacing, and creative optimization. Introduced ML-driven forecasting, daily signal ingestion, and ROI reallocation loops.

Phase 3: Scale to Global Media Hub

Objective: Evolve from a regional pilot into a global, product-led media operations capability.

Actions:

Established the **Global Media Hub**, uniting product (tools), process (operating model), and people (capability).

Designed a **hub-and-spoke** structure: centralized governance with regional execution pods.

Created a **Media and Data POD** model integrating strategists, planners, engineers, and data scientists.

Implemented a comprehensive onboarding program enabling new hires to deliver within 4–5 weeks.

Embedded 3-tier QA and governance frameworks for operational excellence.

Impacts

10–15% Incremental ROI Lift: AI-driven optimization engines (MMO/MIO) delivered measurable performance improvement.

35% Cost Savings: Transition to in-house operations reduced agency dependency and operational costs.

40% Faster Speed-to-Market: Agile workflows cut time from media brief to plan approval by nearly half.

80%+ Tool Adoption: Internal teams now originate most plans from in-house AI platforms.

<2% QA Defect Rate: Standardized quality processes improved accuracy and delivery reliability.

Full Transparency & Control: End-to-end visibility into campaign performance and spend allocation.

Financial Services–Center of Excellence: Campaign Execution

Blend Took On End To End Management Of Complex Review And Approval Process For A Fortune 100 Financial Services Company



Challenges

- As a result of rigorous regulatory changes, Client struggled to keep up with a complex review and approval process
- Process included a large number of stakeholders across different functional areas. Channels: Digital, Paid Media, Direct Mail, Email and Phone
- Client required the ability to scale up/down based on budget and campaign volume
- Resources needed to culturally fit into a dynamic, highly matrixed group and act as partners to their constituents
- The right outcome would relieve marketing managers of executional burden, and enable accurate reporting to regulatory agencies



Solutions

- Blend crafted a solution, where junior Blend consultants assumed the management of end-to-end review and approval process
- Solution was designed to be flexible, affordable, and enable client to scale resources as needed to align with changing business needs and objective
- The operations began with a pilot
- Ultimately the marketing operations team was a hybrid of Client FTEs and Blend consultants, becoming a Center of Excellence across multiple programs
- Resources flex based on need, with a current Blend team of 80-90 resources



Impacts

- 1 Solution has facilitated Client's ability to meet regulatory commitments, improved employee satisfaction, and increased efficiencies
- 2 Program has grown steadily since 2013 , from a pilot team of 6 to nearly 100
- 3 Blend has become an integral part of the process, and has taken on responsibilities that enabled Client to focus on other priorities

MediaCo Loyalty Operations

Operations team deployment to support MediaCo's loyalty program

"We never had the ability to schedule future Reward launches before Blend took over."

—Sr. Marketing Manager at MediaCo



Challenges

- Assume campaign launch operations from outgoing agency with limited overlap (2 weeks) and no downtime.
- Streamline and improve campaign operations process to allow greater flexibility and volume.
- Scale customer escalation handling to account for greater and more complex campaigns.
- As this is a loyalty program, error free campaign launches, and customer satisfaction are the two main performance benchmarks.

Solutions

- Deployed three-person team to run campaign operations and escalations
 - Continuous process evaluation and overhaul to advance operational efficiencies.
- Created escalation resolution SOPs for repeat and novel campaigns that are used by offshore customer service groups.
- Added Blend resources to expand campaign ops capabilities and support
 - Product owner to support iterative improvements to the platforms used to run loyalty campaigns
 - Program manager to champion the Xfinity Mobile program and increase connects
 - Business intelligence resources to support program strategy and decisions with timely insights

Impacts

- Capability to support twice the inherited launch volume.
- Stakeholders can now schedule and time launches, as opposed to "launch when built" methodology.
- Blend leads testing and deployment of new campaign types.
- Scaled escalation management practice to handle 20x volume increase
 - Support for new escalation management software rollout
 - Story creation and testing for development enhancements
 - Automated resolution for 40% of tickets
 - Management and guidance for offshore customer service agency
 - Resolved unprecedented number of escalations due to Peacock campaign

1

Campaign launch growth over past 24 months:
20 per month to 40 per month

2

Customer escalations resolved:
87,530 in 2023

3

Reduction in campaign launch errors from
20% to 7% with new checks and procedures.

Telecom Case Study: Journey Orchestration

Helped major telecommunications company implement multi-touch customer journeys. Provided the organization with a well-defined and detailed Journey Orchestration playbook enhancing the campaign planning and orchestration process.



Challenge

Telecommunications was experiencing challenges with operational efficiencies within the campaign deployment and orchestration process.

Organization was lacking a process that provided transparency and centralized all campaign components (from strategy to reporting) into a streamlined documented process that promoted collaboration amongst siloed teams.

Solution

- After discovery and team interviews, Blend implemented a Journey Orchestration Playbook that included all critical campaign components and requirements, from targeting, creatives, messaging, goals, KPIs to journey maps.
 - Playbook enabled transparency into the overall vision and goals for the campaign, which enhanced the collaboration amongst core teams.
 - Blend actively participated and collaborated with the core stakeholders to identify potential gaps and areas of underutilization within their marketing automation platform and implemented net new capabilities that would help unlock new A/B testing opportunities within the customer journey.



Impacts



Growth Driver – Successfully strategized and deployed an multi-touch customer journey for a movie package promotion that increased the conversion rate by over 100% and had a positive financial impact on the business.



Loyalty & Retention – Through journey duplication and messaging tweaks, we successfully deployed a second campaign that targeted current movie package holders to increase viewership and prevent package churn.



Operational Efficiency – The Journey Orchestration Playbook allowed core campaign teams to efficiently collaborate on the campaign requirements while having transparency into the overall campaign goals and vision.

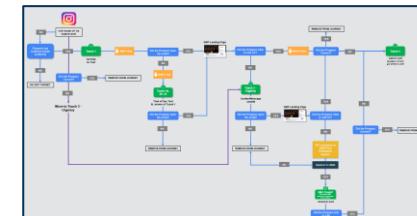
Documented playbooks can be referenced to review previous performance and help direct testing and optimization efforts.

Journey Orchestration Playbook

KPI Framework to Support Reporting

KPI Framework: ARPU DMP Upcell Multi-Touch Journey							
Awareness		Consideration		Conversion		N/A for this journey	
Metric	Description	Target	Actual	Target	Actual	Notes	Notes
ARPU	ARPU (Average Revenue Per User)	\$100	\$105	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
CPA	Cost Per Acquisition	\$100	\$95	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
ROI	Return On Investment	100%	110%	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
Engagement Rate	Engagement Rate	5%	6%	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
Conversion Rate	Conversion Rate	1%	1.2%	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
Retention Rate	Retention Rate	50%	55%	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.
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Retention Rate	Retention Rate	50%	55%	10%	12%	Upcelling strategy effective.	Upcelling strategy effective.

Multi-Touch Journey Mapping



Multi Touch Journey - TouchPoints

The diagram illustrates a multi-touch journey across four touchpoints:

- Create finding tool** (Desktop): A screenshot of a desktop application interface titled "Create finding tool". It shows fields for "Title", "Description", "Category", and "Tags", along with a "Search" button and a "Save" button.
- Find photos** (Mobile): A screenshot of a mobile application interface titled "Find photos". It shows a search bar with the placeholder "Search photos" and a "Find" button.
- Search photos** (Mobile): A screenshot of a mobile application interface titled "Search photos". It shows a search bar with the placeholder "Search photos" and a "Find" button.
- Edit photo** (Mobile): A screenshot of a mobile application interface titled "Edit photo". It shows a photo thumbnail and a "Edit" button.

Annotations indicate the flow from the desktop application to the mobile search screens, and from there to the mobile edit screen.

Pharma Case Study: CRM Activation

Helped a pharmaceutical company launch a CRM stream to raise awareness for a newly launched prostate cancer drug



Challenge

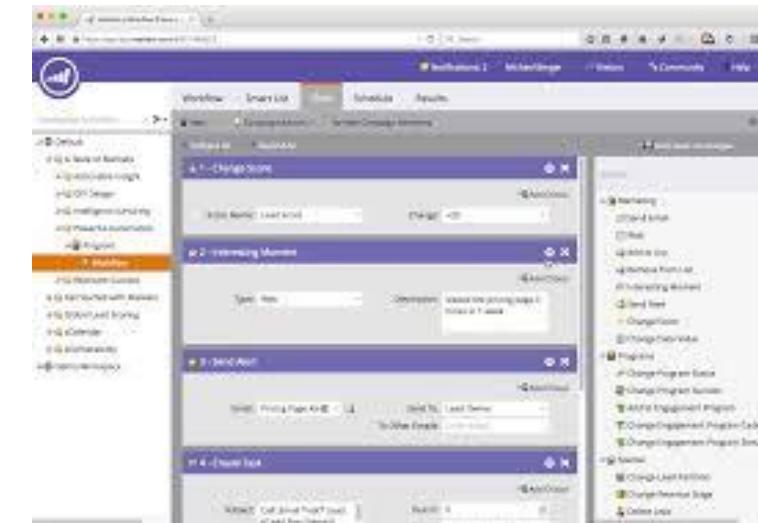
Pharma company was ready to launch an innovative drug for treatment of advanced prostate cancer. Needed a trusted partner to run all direct-to-customer CRM activities, including managing the data hub of online registrants and partnering with creative agency to develop and activate a comprehensive CRM stream.

Solution

- Blend implemented Marketo to be the data hub and email activation platform
- In partnership with the creative agency, Blend programmed 35+ emails within Marketo. Emails were personalized and contained dynamic content, add-to-calendar functionality, survey triggered user journeys, and subject line testing
- Blend developed audience selection logic which activated triggered and batch emails to prospects and patients who register on the company's website

Impacts

- Blend became a trusted partner and facilitator between agency partners (media, creative, and webinar teams) to define campaign strategy, coordinate activities and review results.
- All email programming, audience selection, and email activation was delivered error free, ensuring prospects and patients were provided with relevant information at the right time.



Nonprofit Case Study: Campaign Execution

Helped a non-profit handle an increasing workload of marketing requests from various stakeholders



Challenge

Client did not have the resources in-house to handle the volume of marketing campaigns they were being asked to execute. They needed an experienced team to manage the campaign execution process with minimal oversight.



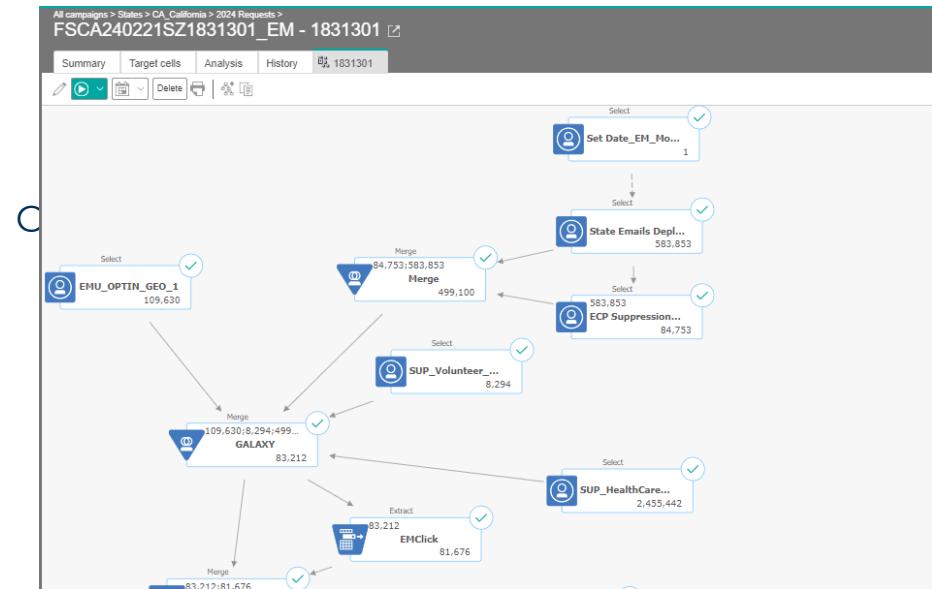
Solution

- Blend built a team of skilled Unica Marketing campaign managers and campaign analysts who quickly ramped up to support production needs
- Blend resources were fully integrated into the client's States and Programs campaign teams, functioning as full-time 'employees' of the client
- The Blend campaign team has supported the client for 5+ years and delivers over 1,600 State and 200 Programs campaigns annually



Impacts

- Blend is a trusted partner of the client and is regularly praised for the accuracy of their work and the volumes of campaigns they complete
- The client was able to free up their employees to do consultative work with the states to help improve their programs and outreach, rather than spend their time operationally working on campaign selection



Digital Center of Excellence Design

Large entertainment and content company needed to transform their digital capabilities across activations, measurement, targeting, and operations.

A heavily siloed set of organizations brought together through acquisitions and mergers had created a significantly fragmented digital media, marketing, analytics and operations group. Client needed to rethink and transform their capabilities through the CDO.

Challenges

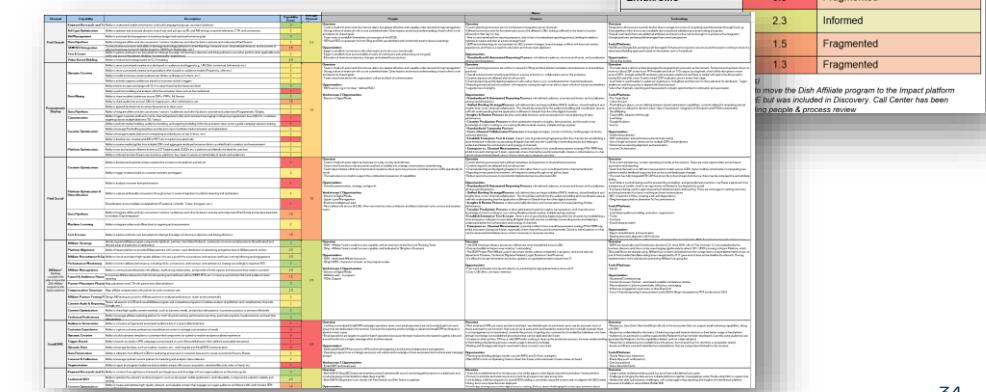
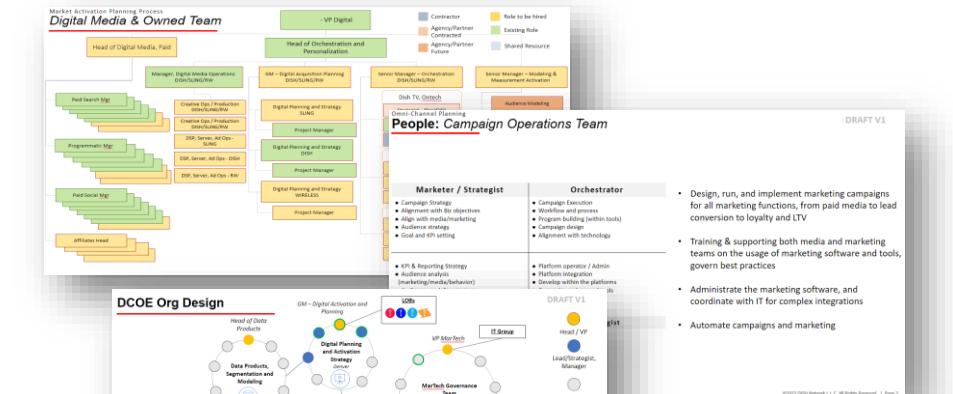
- Siloed campaign operations, long planning SLAs, limited ability to adapt and optimize in real time
 - Low maturity in basics of media operations and optimization capabilities
 - Processes across marketing, media and analytics were fragmented and not enabling the desired capabilities

Solutions

- Blend co-designed the Digital CoE in collaboration with COO, CDO and CMO offices
 - Created a framework and operating model for the digital center of excellence
 - Designed team structures, operations methods, playbooks, process structures and ways of working definitions
 - Supported campaign operations, deployed challenge campaign methods with significant lift against current capabilities
 - Led the evaluation of technology for martech, adtech and identity solutions and leading implementations of new technology

Impacts

CoE Design, Process Design, New Strategic Planning Playbooks, Activation Team Placement:



Hyper-Personalization, Generative AI, Omni-Decision Program

Large Telco Client - is deploying a new instance of Pega CDH, and integrating their in-house generative AI capabilities and campaign operations technology and teams to unlock Hyper-Personalization

Previously, several instances of Pega, siloed by channels, and operated by separate teams personalized treatments for different CX use cases. We're designing a new centralized decision solution, and integrating the gen AI and activation capabilities

Challenges

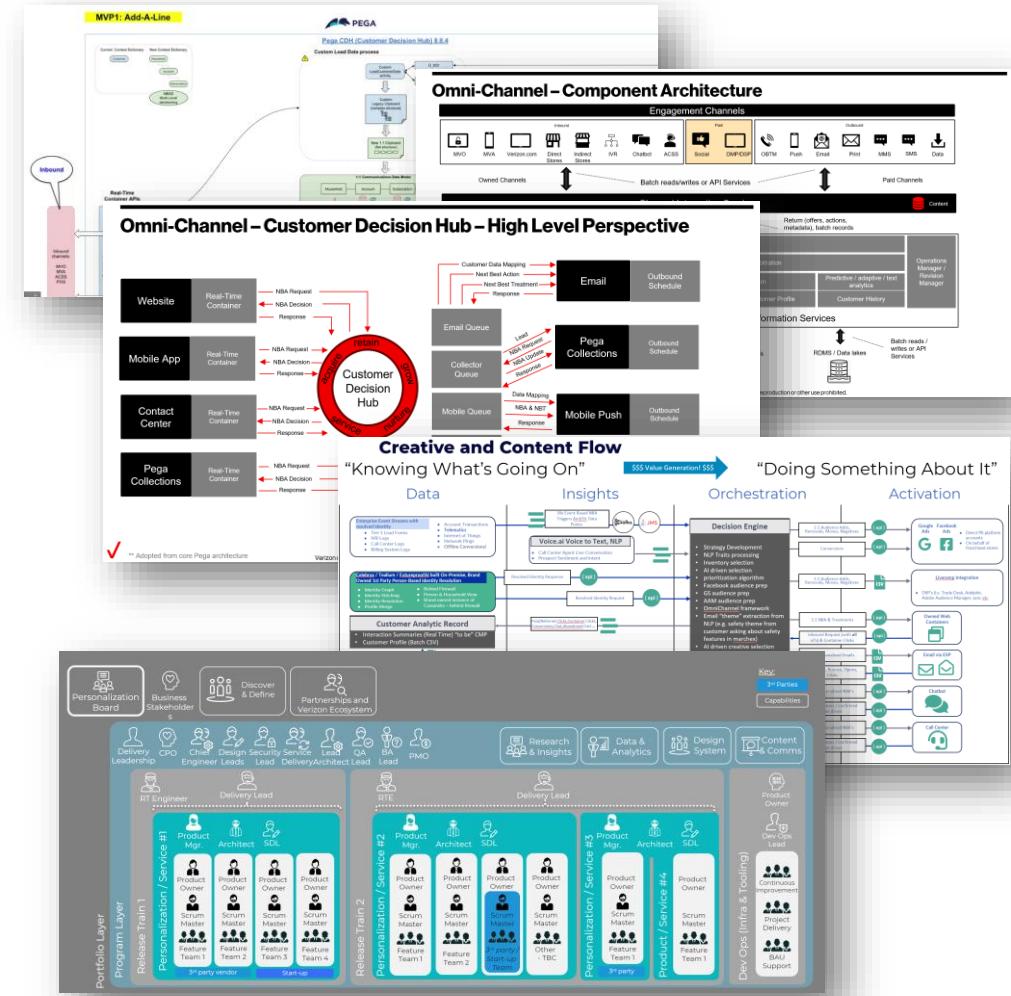
- Multiple decision NBX instances, multiple management teams, multiple development teams – large operating costs
- Siloed channel planning, siloed decision capabilities – poor customer experiences and mis-aligned targeting solutions
- Traditional creative production limitations, content scale impossible

Solutions

- Blend implemented a new Pega CDH omni-channel decision engine
- Blend is defining and designing new operating model to incorporate generative AI into day-to-day campaign production
- Blend is designing the full technology solution architecture in co-collaboration with Client teams to support the new framework
- Blend is designing a new unified measurement and unified dashboard solution to measure omni-channel decisioning

Impacts

Pega Architectures, Component Architecture Design, Process Mapping, Data Infrastructures:



Martech, Adtech, Identity and Digital Transformation

Client assessed a need to adapt to cookieless future, while also transforming their personalization and targeting capabilities across the martech stack

Decommissioning of a legacy DMP, continuous loss of closed loop reporting, and lacking omni-channel capabilities needed to be addressed with a new martech/adtech strategy, roadmap and technology implementation

Challenges

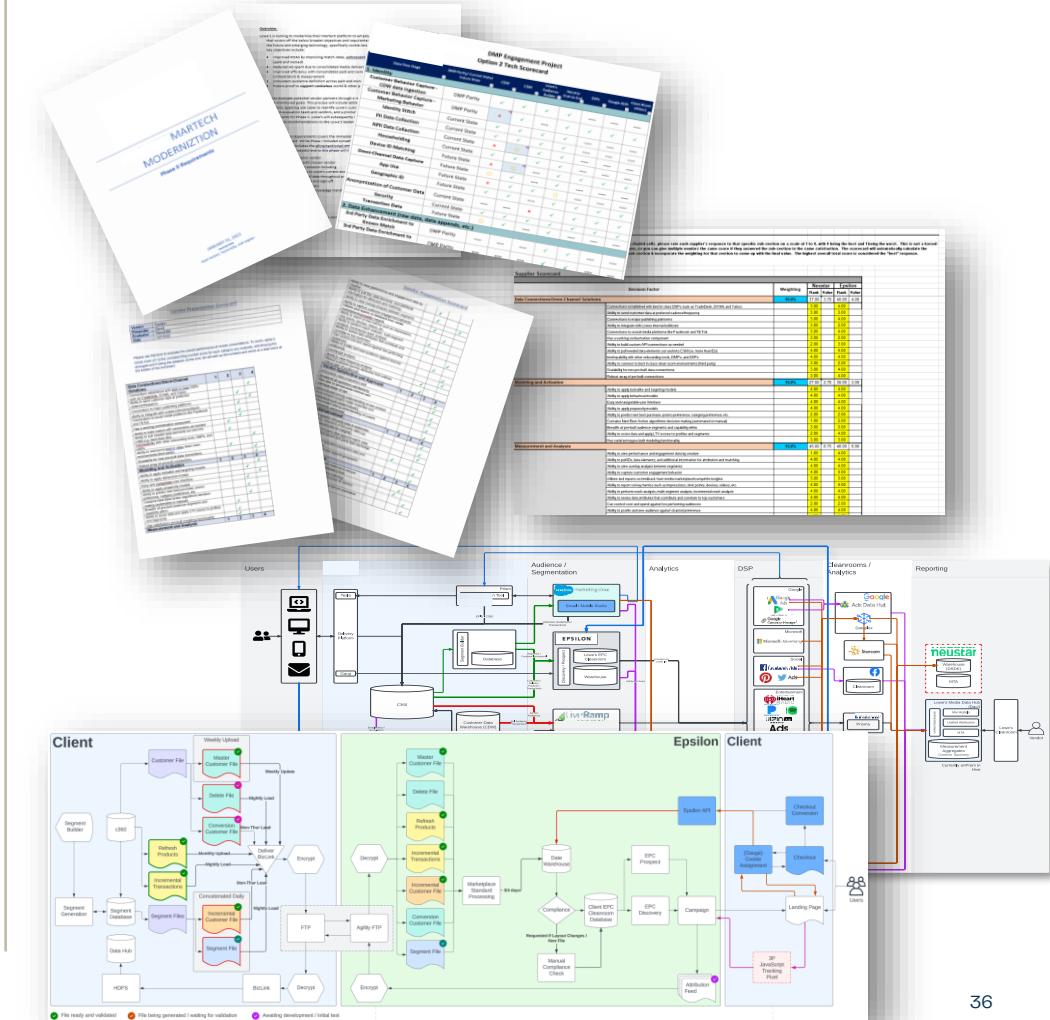
- Decommissioning of the legacy DMP was imminent, and ability to target and track closed loop media measurement was dwindling in quality
- Martech architecture was not omni-channel, did not utilize the CDP investment, and adoption was low
- Durable identity and target modeling capabilities didn't exist

Solutions

- Blend led an evaluation of the martech stack and the adtech ecosystem, and led the business requirements gathering, prioritization and roadmap creation
- Drove vendor evaluations and selections, helped drive the vendor process
- Designed the system architecture, data architecture, CDP/martech/adtech integration architecture and led the implementation
- Created a performance measurement, aggregated attribution and unified view of the customer media analytics hub

Impacts

Defined program requirements, roadmap, selection criteria, system design, and data architecture and implemented with tech:



Thank



you