**My Motivation**

As I have grown with the company, I see myself becoming increasingly focused on improving the value of our brand by giving our audience a good experience through content. The motivation for this is two fold: brand equity is valuable when evaluating the worth of our business and establishing relationships with our audience, miscommunication of our message is an opportunity cost which is highly costly given the volume we have yet to convert. Engineering and Analyst Team invest time targeting this cost by evaluating: site performance, UX/UI, user selection, product targeting, and data analysis to name a few. My focus will be on the last three items. I started building a project plan by taking a tier based approach, starting high level with Equate’s goals and whittling down to how I can influence them. Questions considered:

**Questions to Ask**

1. Equate’s goals for 2016:

* Think about goals in terms of traffic sources. Which ones could have best margins?
  1. Equate Mail (3rd party, remarketing)
  2. Paid campaigns (affiliates, clickouts, click feeds (Taboola))
  3. Paid campaigns (SEM, social, GDN)
* Think about how we can improve our brand equity across each of these sources:
  1. What goes into building reputation?
  2. What is the final product we want to create? Do we want to morph?
  3. Do not appear spammy. Have a well designed website
  4. Provide relevant content to our users (for mail operations)
  5. Offer all our products on one site to provide complementary goods
* Equate mail smaller percentage of revenue (diversify traffic to reduce risk)
  1. Need monetization improvement across all sources
  2. Use remarketing as the base for revenue cultivation toward paid initiatives

1. Factors to consider in meeting goals stated above:

* Who do we hire so that we meet our goals and become profitable?
* What are key areas to focus on so that we meet our goals and maximize profit?
* What are our key risk areas and what do we do to mitigate those risks?
* What are our competitors doing?
* What should priority of efforts be so that we reduce our opportunity cost at stages throughout the year (assign projects based on loss in value per send at any time)?
* What do we want our product to be (lead generation vs. portal for people to shop and explore in a kayak style)?
* Plan goals around key events throughout the year (e.g. health insurance is very seasonal - focus on it leading up to and during OE).
* Are there times when we put effort on one property over another?
* When do we start shifting reliance on traffic sources?
* How do we keep people motivated to enjoy their work and stay focused on goals?
* How much do we believe in the quality of our product?

**My Initiatives**

Based on questions and considerations above, the following are a list of initiatives for next year:

* OE only lasts for so long. A big focus will be on having strong revenue during off months when we rely on home and life. The suggestions below will be in the spirit of augmenting performance on these offers.
* Our mailing infrastructure still has limitations from a content perspective.
  + *Have flexibility to turn on/off bandit for A/B testing on its effectiveness, as well as testing different banditing algorithm types on similar audiences.*
  + *Create a cohort infrastructure which will be referenced below.*
  + *This will allow us to test if targeting works.*
* Think from the audience’s perspective (user psychology). What do competitors do that we are not doing? What messages do they put out there that we are lacking? Are there blogs/articles worthwhile for incorporation? Can we place that in our creative?
  + *Start creating a corpus of health content by date. Use an A/B testing framework and bandit to record what works and implement at certain times (trending topics).*
  + *Have a sizeable portion of time invested in research, now that CMS can handle it.*
  + *The current process to use copy (subject lines, body copy, clickout advertising, SEM) does not factor in current events/trends that would pique a user’s interest.*
  + *Currently the bandit suggests mailing to multiple brands. Other companies don’t have multiple brands representing them. Strategize a way to move toward 1 brand approach.*
* Know what is going on in health/life/home markets. Kaiser Family Foundation had a survey, which said that 8 in 10 people are looking for information.
  + *Create tests that incorporate Healthcare.gov, syndicated content, current events informationals with guidance on shopping for health insurance.*
  + *Measure long term value on our users – time before engagement metric based on different campaigns that cohorts were exposed to and our ability to avoid eroding user base.*
* Understand users by placing them into categories. If we don’t have information on users, how can we efficiently test them in a systematic way to infer certain things about them. What additional knowledge do we have that can be leveraged targeted experiences?
  + *Create content tests that expose traffic sources to base categories, and a methodology which can assess their likelihood to belong to a group. This is highly relevant when delving into AOL (untapped market for us).*
  + *Survey our audience, see what they are interested in and cultivating a user base in third party.*
  + *Work with Cogo to find data sources which can provide information about users (AIQ for Yahoo, None for AOL).*
  + *Identify sleeping engagers who may not have gotten a targeted experience.*
  + *Determine which user groups prefer funnel, clickouts, click to call*
* Setup a robust A/B testing framework that is user friendly. Hypotheses on the content side can only be tested with a controlled environment.
  + *Merlin got us there, but it needs to be user friendly (design a front end for CMS).*
  + *Have a verification system that makes sure that all decision making algorithms for content selection make sense.*
  + *As we generate increasing amount of traffic to our site and are aiming for better pricing with partnerships, the opportunity costs may be greater. Need to create a methodology that values a test in terms of dollars and cents and indicates if it is worthwhile to pursue.*
  + *Continue to learn what makes for effective creative, and increase transparency on performance amongst design team. In this case, CMS front end having a graphical component for performance visualization.*

**General Projects**

Here are some additional projects for next year:

* Optimization on equate-email (3rd party, remarketing), paid campaigns.
* Having partnerships that are direct with agents. Better monetization (dependent on good quality lead attributes) on traffic we generate. Start developing an agent portal using Everquote as a model. How to improve quality of traffic?
* Think about strategies to cultivate interest in different offers amongst our first party records. Think about fluent customer interest.
* Think about Ad-Marketplaces.
* How do we mitigate deliverability/complaint rate/deferral/IBR risks?
* Natural language processing to know what content is trending - worth sending (staying relevant)
* Understanding our AOL/Yahoo audience and giving them a relevant experience (options that make sense for them - correct click out feed, should we click to call, should we send them in a funnel).
* Dynamic content on our website. Could we use articles from healthcare.gov for SEO purposes?