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Optimizer Guide

METADATA AI
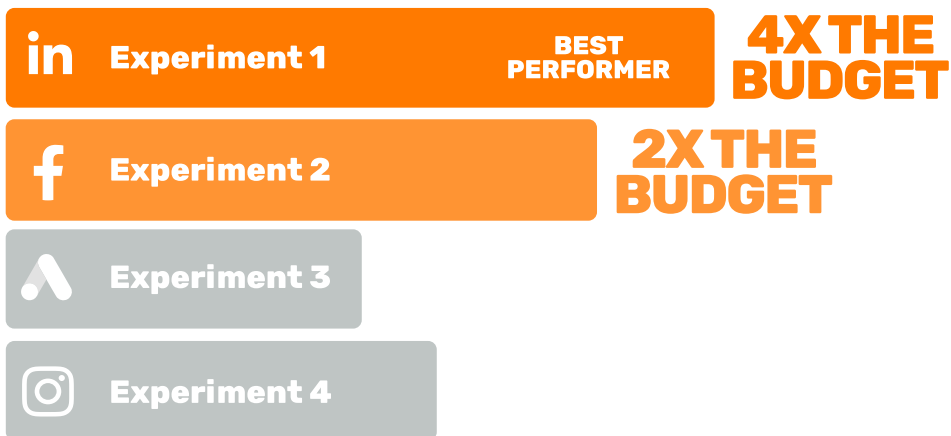Monitors the experiments

$ INCREASES BUDGET
to the highest performing experiements

RUNS 24/7

Experiment Performance

| in Experiment 1 | BEST PERFORMER | **4X THE BUDGET** |

| f Experiment 2 | **2X THE BUDGET** |

Experiment 3

Experiment 4

LOW   AVERAGE   HIGH

What is the optimizer?

Optimizer Goal is to redistribute the group budget between active experiments based on their performance in the most efficient way in order to gain the best outcome. On top of that, the goal is to spend the whole assigned group budget during the specified time period. Avoid manual optimization and save time for marketers.

Input: budget group and experiments performance.

Output: new daily budget pair experiment.

Group Success depends on the group goal, there are main basic measurements:

- ✅ Brand Awareness: the highest number of clicks with the lowest cost per click (CPC);

- ✅ Lead Generation: the highest number of leads leads, MQLs, opportunities and more with the lowest cost per lead (CPL).

Where does it work?

Optimizer works inside the **Optimization Group (aka Budget Group)** which includes the list of campaigns (which have experiments). Optimization groups can have only one goal: Lead Generation or Brand Awareness.

Budget group can contain experiments from any **Channel:** Linkedin, Facebook, Google Ads, or Display.

Experiments **Performance Data** includes the next basic characteristics (see page 4 and 5)

Optimizer algorithm (high-level)

1 Calculate Suggested Daily Budget per optimization group, which is the Remaining Group Budget divided by the number of remaining days.

2 Select all ACTIVE experiments inside the optimization group.

3 Calculate experiment characteristics based on the group goal.

4 Calculate Score per experiment.

5 Calculate **New Suggested Daily Budget** per experiment.

6 Assign the calculated budget to the experiment.

Optimizer Strategy

Budget Optimization ⓘ

○ Pacing Only

◉ Performance & Pacing

PACING ONLY	PERFORMANCE & PACING
Redistributes budget between experiments equally	Redistributes budget between experiments based on experiments performance according to selected formula
Takes control of Budget Group Pacing	Takes control of Budget Group Pacing and Performance

Optimization formula options

Lead generation goal

Lead
Optimizes towards driving the most leads for the lowest cost.

MQL
Optimizes towards driving the most MQLs for the lowest cost.

Triggered Opportunity
Optimizes towards driving the most sourced pipeline for the lowest cost.

Influenced Opportunity
Optimizes towards driving the most influenced pipeline for the lowest cost.

SQL *
Optimizes towards driving the most SQL for the lowest cost.

*Custom KPI (individual per each client)

Brand awareness goal

Optimization Formula

CPC ▲

CPC
Optimizes towards driving the most Clicks for the lowest CPC.

CTR
Optimizes towards driving the most Clicks for the highest CTR.

Parameters per each algorithm

Lead generation

ALGORITHM	PARAMETERS
Lead	Number Of Leads, CPL, Pacing, Duration
MQL	Number Of Leads, CPL, Number Of MQLs, CpMQL, Pacing, Duration
Influenced Opportunity	Number Of Leads, CPL, Number Of MQLs, CpMQL, Influenced Opp Amount, Number Of Influenced Opps, Cp Influenced Opp, Pacing, Duration
Triggered Opportunity	Number Of Leads, CPL, Number Of MQLs, CpMQL, Triggered Opp Amount, Number Of Triggered Opps, Cp Triggered Opp, Pacing, Duration
Custom KPI (SQL, Meeting Booked, etc.)	Number Of Leads, CPL, Number Of Custom KPI, Cp Custom KPI, Pacing, Duration

Score Calculation

Opportunities

Experiment Score

- Leads volume, CPL

- MQLs volume, cpMQL

- Opps amount, Opps number, cpOpps

Lower funnel stage -
higher parameter weight

✕ Last 7 days pacing

- ☑ Calculated based on last 7 active days (spent > 0)
- ☑ More deep funnel parameters - higher score

✕ Duration

- ☑ The latest 30 days is taken into account
- ☑ The same result for the shorter duration - higher score

The main performance characteristics:

- ☑ Higher volume of Leads, MQLs, Opps - higher score;
- ☑ More deep funnel parameters - higher score

Parameters per each algorithm

Brand awareness

ALGORITHM	PARAMETERS
CPC	Number of Clicks, CPC, Pacing, Duration
CTR	Number of Clicks, CTR, Pacing, Duration

Budget Redistribution

Examples by each formula

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Lead

Optimization Formula: Lead

Suggested Daily Budget per experiment (as of Sep 6, 23, 2:28 PM)

EXPERIMENT NAME	LEADS	DURATION	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_NA-ICP-Sale..	107	30	$30	64%	0.35	$187
MD_LI_NA-ICP-Sales.	116	30	$28	58%	0.32	$175
MD_LI_Drift for Cust..	77	30	$37	58%	0.20	$120
MD_LI_Drift for Cust..	53	30	$40	66%	0.13	$180
MD_LI_SFDC Enterp..	66	30	$114	74%	0.00	$25

🟧 Experiments have almost the same performance

🟩 Pacing is slightly higher for the top scored experiment

⬜ Experiments is not actively generating leads for the last 30 days —> lowest score

MQL

Optimization Formula: MQL

Suggested Daily Budget per experiment (as of Sep 6, 23, 4:28 PM)

EXPERIMENT	LEADS	DURATION	MQLS	CPMQLS	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_FY24_Q1..	24	30	23	$164	$157	70%	0.25	$222
MD_LI_FY24_Q1..	19	29	17	$215	$192	68%	0.22	$195
MD_LI_FY24_Q1..	16	30	14	$240	$210	75%	0.17	$160
MD_LI_FY24_AM..	19	30	15	$257	$203	65%	0.15	$140
MD_LI_FY24_AM..	13	30	12	$234	$216	75%	0.14	$130

🟧 Leads and MQLs volume are higher for the 4th experiment, however cpMQL is lower and pacing is higher for the 3rd experiment

⬜ cpMQL for the 4th experiment is lower than for 5th experiment, and pacing is higher. However leads and MQLs volume is lower. Suggested budget is slightly lower.

Custom KPI

Optimization Formula: Demand Conference Leads

Suggested Daily Budget per experiment (as of Sep 7, 23, 6:35 AM)

EXPERIMENT	LEADS	DURATION	DEMAND CONFERENCE LEADS	CP DEMAND CONFERENCE LEADS	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_LIN_MKTG..	184	30	174	$34	$32	73%	0.69	$417
MD_LI_DEMAND2..	120	30	118	$41	$40	69%	0.24	$160
MD_IG_BA_GRPD..	32	15	28	$43	$38	71%	0.07	$60

- Custom KPI volume is high to better calculate the score
- Custom KPI volume overweights cost per action

Triggered Opps

Optimization Formula: Triggered Opportunity

Suggested Daily Budget per experiment (as of Sep 7, 23, 12:31 PM)

EXPERIMENT	LEADS	DURATION	MQLS	CPMQLS	TRIGGERED OPPS	TRIGGERED OPPS AMOUNT	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_LNKD_CS	25	18	20	$68	3	$147,000	$55	79%	0.19	$45
MD_LI_LNKD_CS	29	18	23	$63	1	$200,000	$50	81%	0.18	$40
MD_LI_LNKD_CS	40	18	35	$41	1		$36	36%	0.15	$40
MD_LI_LNKD_CS	19	18	12	$76	1		$48	48%	0.14	$35
MD_LI_LNKD_CS	12	18	11	$68	1		$63	63%	0.11	$30

- First experiment has higher number of Opps
- 2nd experiment has higher Opp Amount -> higher score

Triggered Opps

Optimization Formula: Triggered Opportunity

Suggested Daily Budget per experiment (as of Sep 7, 23, 6:28 AM)

EXPERIMENT	LEADS	DURATION	MQLS	CPMQLS	TRIGGERED OPPS	TRIGGERED OPPS AMOUNT	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_RT...	13	30	13	$320	3	$120,000	$320	59%	0.25	$249
MD_LI_RT...	14	30	14	$206	1		$206	66%	0.24	$235
MD_LI_RT...	13	30	13	$190			$190	62%	0.18	$175
MD_LI_RT...	12	30	11	$226			$207	67%	0.16	$165
MD_LI_RT...	9	30	9	$323	1		$323	67%	0.14	$140

■ The lowest number of leads/MQLs and highest costs with one Opp only -> lowest scored

Influenced Opps

Optimization Formula: Influenced Opportunity

Suggested Daily Budget per experiment (as of Sep 7, 23, 12:28 PM)

EXPERIMENT	LEADS	DURATION	MQLS	CPMQLS	INFLUENCED OPPS	INFLUENCED OPPS AMOUNT	CPL	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LI_AMER/U	37	17			25	$547,794	$124	66%	0.22	$309
MD_LI_AMER/U	101	12			17	$526,083	$126	62%	0.18	$255
MD_LI_AMER/U	150	30			27	$845,417	$88	63%	0.18	$255
MD_LI_USA/CA	111	30			44	$399,868	$109	64%	0.17	$240
MD_LI_AMER/U	19	18			42	$44,306	$246	63%	0.13	$190

■ There is no MQL mapping, score is calculated based on Leads and Opps

▪ Duration, overall cost and opps play the major role in score calculation

CTR

Optimization Formula: CTR

Suggested Daily Budget per experiment (as of Sep 7, 23, 10:29 PM)

EXPERIMENT	IMPRESSIONS	CLICKS	CPC	CTR	DURATION	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_FB_AMER-META	137,718	1,047	$1.34	0.77%	27	72%	0.31	$48
MD_FB_AMER-META	87,727	554	$1.91	0.63%	27	79%	0.22	$35
MD_FB_AMER-META	80,422	524	$1.83	0.65%	27	77%	0.21	$30
MD_FB_AMER-META	49,134	284	$1,78	0.58%	22	87%	0.17	$25
MD_FB_AMER-META	23,392	114	$1.90	0.49%	10	37%	0.06	$15

■ Score for the 3rd experiment is higher that 4th due to higher CTR, even though CPC is higher as well.

CPC

Optimization Formula: CPC

Suggested Daily Budget per experiment (as of Sep 7, 23, 6:30 PM)

EXPERIMENT	IMPRESSIONS	CLICKS	CPC	CTR	DURATION	LAST 7 DAYS	SCORE	BUDGET SUGGESTION
MD_LL_LI_NATIVE		4,886	55	$5.88	0.01%	11	85%	0.26	$39
MD_LL_LI_NATIVE		3,221	35	$5.71	0.01%	11	81%	0.18	$30
MD_LL_LI_NATIVE		4,399	43	$6.08	0.01%	10	87%	0.16	$20
MD_LL_LI_NATIVE		3,548	29	$5.69	0.01%	10	70%	0.15	$20
MD_LL_LI_NATIVE		3,587	41	$6.11	0.01%	10	80%	0.13	$20

■ Clicks volume overweights CPC

FAQ

✅ **Can I enable Opportunity formula when there is no Opps?**

Yes, Optimizer will take into account Leads and MLQs data only then.

✅ **Will newly launched experiments get enough budget with Opportunity formula?**

Newly launched experiments always get average score and budget inside budget group.

✅ **If there is no Custom KPIs, how the score will be calculated?**

Score will be calculated based on Leads volume and CPL.

✅ **If I have different ad types, how are experiments scored?**

Optimizer is ad type/channel/offer agnostic, it takes into account performance only

✅ **What time period does the optimizer look at?**

Even though it says 30 days but priority is given to last 7 days in the diagram, it's definitely not super clear.

✅ **Does the optimizer optimize across channels?**

Yes, it's recommended to group both Facebook and LinkedIn in the same group. As both of the channels are very similar in nature, it's easy for us to optimize across both of them in real-time. However, it's not recommended to add Google Search and Social in the same group, as they are very different in nature.

✅ **How much data do I need, to start optimizing to a deeper funnel metric like opps?**

Our algorithm takes into account statistical significance, and doesn't "over optimize" until it has enough data. Because of that, you don't have to wait to get lots of MQLs, before you switch to the MQLs formula. Same for opportunities and Custom KPIs. If you select to optimize for opportunities, but you don't have many yet, we will simply use leads and MQLs as the main indicator to allocate your budget.