



**LEVEL.AGENCY**  
THE AUTHORITY IN CUSTOMER GENERATION



**Make Marketing Automation and AI  
Work For You**



# Agenda

- Introduce the Level Agency team
- Define marketing automation and AI and provide some examples
- Who needs this technology most today?
- Review and prioritize specific use cases
- Establish a sample implementation roadmap
- Look to the future

# Who Are These Guys?

**Patrick Van Gorder, Senior Vice President**



**Brad Stephenson, Sr. Director of Client Services and Special Projects**



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# Level Agency

**We are experts in digital customer generation.**

We are a full-service agency custom-built for B2B and high-value B2C partners. We invest in people, technology, partnerships, and strategies that deliver measurable ROI for our partners.

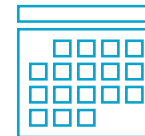
We plan and build vertically-integrated conversion funnels that reach, engage, activate, and nurture highly targeted audiences with messages that resonate.



**70  
Employees**



**Pittsburgh, PA  
Charleston, SC**



**Founded  
2010**



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# We Offer Full-Funnel Marketing & Sales Support Service



## DIGITAL MEDIA

Digital Direct (SEM, Social, Display)  
 Pay Per Lead  
 Rich Digital Media  
 Data Driven TV  
 Direct Mail  
 Email Prospecting



## CREATIVE AND INTERACTIVE

Landing Page Optimization  
 Mobile First Design  
 Ad and Rich Media Production  
 Content and SEO



## CUSTOMER GENERATION STRATEGY

Quantitative Research  
 Success Measurement Strategies  
 Audience Segmentation  
 Marketing Planning



## DATA AND ANALYTICS

ROI Measurement and Forecasting  
 Predictive Modeling  
 Data Integration and 3rd Party Append  
 Media Mix Modeling



## SALES SUPPORT

Marketing Automation Programs  
 Email Nurturing  
 Call Center Sales



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# Our Partners

We plan and execute effective digital marketing strategies for more than 40 clients across a range of industries.

## Industries

- B2B Services & SaaS
- Education
- Insurance
- Healthcare
- Mortgage
- Finance
- Legal
- Technology
- Automotive
- Manufacturing
- Telecommunications
- Travel & Hospitality



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# **Defining Marketing Automation and AI**



# Marketing Automation

**Marketing Automation** is using software to **more effectively communicate** with audiences on multiple online channels (like social, email, search) **and automate repetitive marketing tasks.**

**Marketing Automation Platforms** are either multi-use contact management solutions, OR single-point solutions that address specific opportunities.

# Artificial Intelligence

**Artificial Intelligence** is intelligence demonstrated by machines.

**Marketing Artificial Intelligence** refers to advertising technology systems that **utilize data and machine learning** to automate or optimize key marketing processes.

# Categorizing Marketing Automation & AI

A photograph of a yellow industrial robotic arm in a factory setting, positioned on the left side of the slide. The background shows a complex industrial environment with various pipes and machinery.

## Marketing Automation

- Multi-use tools like Marketo, Hubspot, and Pardot
- Single-point solutions
  - EMAIL: Mailchimp
  - SEARCH: Kenshoo or Marin
  - DISPLAY / VIDEO: DV 360
  - SOCIAL: HootSuite or MeetEdgar

## ARTIFICIAL INTELLIGENCE

- Platform-integrated AI
  - Search and recommendation engines
  - Lead scoring
  - Algorithmic optimization engines
  - Smart assistants
- Analysis and insight tools like IBM Watson



# Marking Automation: 1998

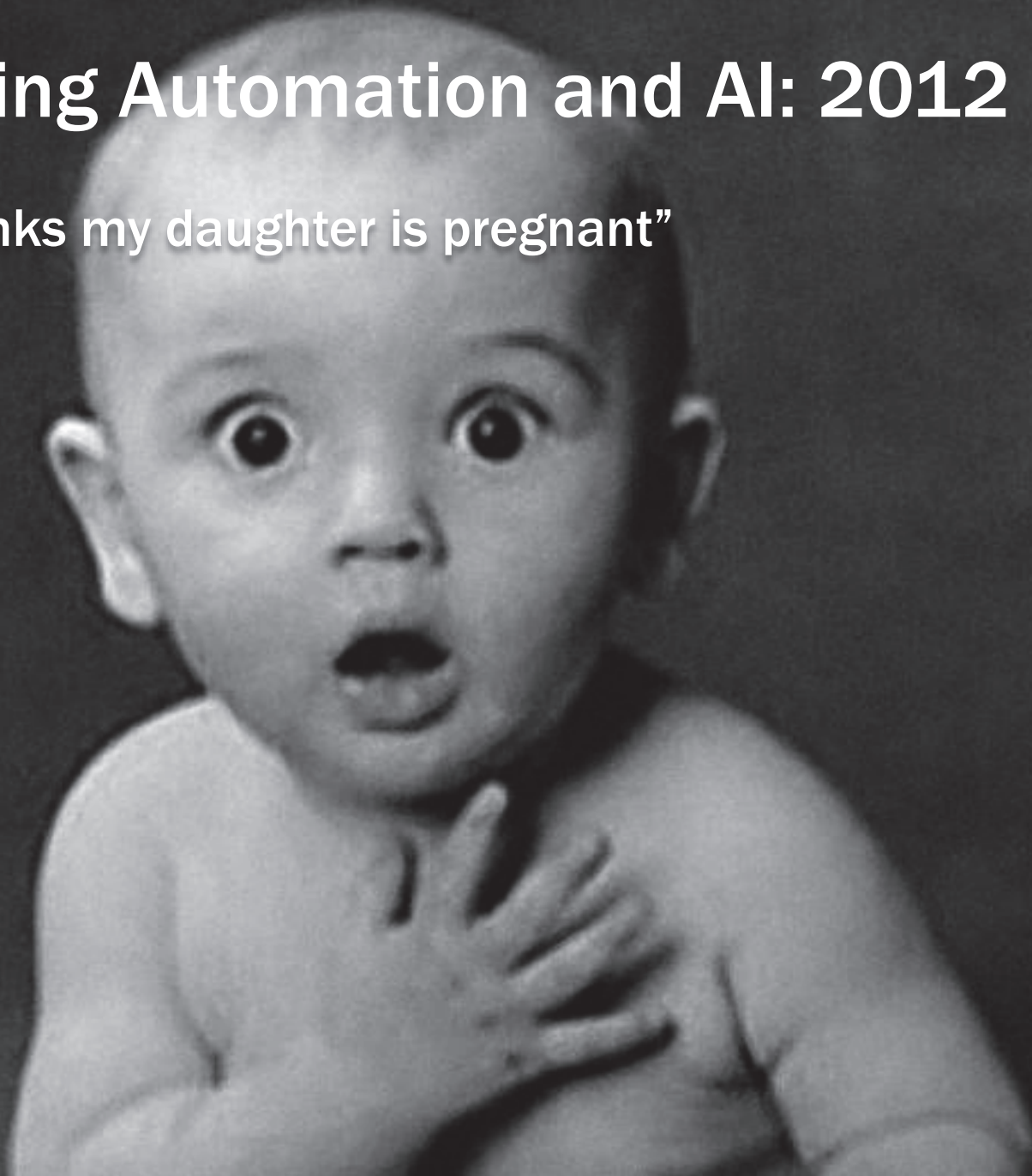
“Press 1 for Sales, Press 2 for Service”





# Marketing Automation and AI: 2012

“Target thinks my daughter is pregnant”



# Marketing Automation and AI: 2018

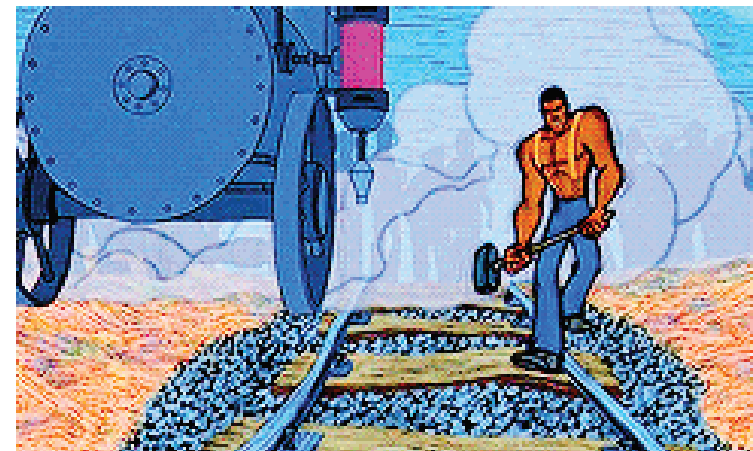
Predictive channel, message, or offer customization



# Will it Help Me Reach My Goals?

The impact of message personalization or other baseline marketing automation functions is well documented.

The value proposition for higher function automation and AI tools isn't always as clear. Each year, Level Agency implements a man vs. machine test to establish the efficacy and ROI of automated optimization tools.

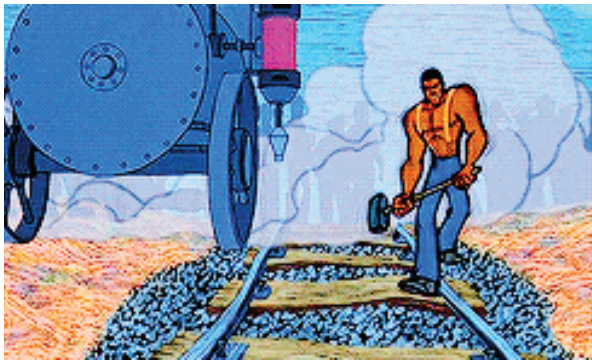


Though some of the technology has existed for more than a decade, it didn't win until 2018.



*3X increase in management efficiency, 58% improvement in conversion performance*

# It's Only a Matter of Time Before the Machine Wins...

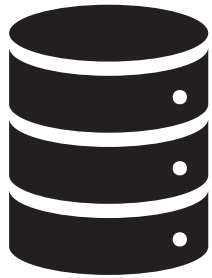




# Who Needs this Technology Most Today?



# Why Does My Data Approach Matter?



- Machine learning doesn't "think" like you or I do
- It requires specific human inputs and objectives
- It then either analyzes a back-log of data (i.e. predictive analytics)
- Or runs water through the pipes to develop a new data set (i.e. automated bid optimization)

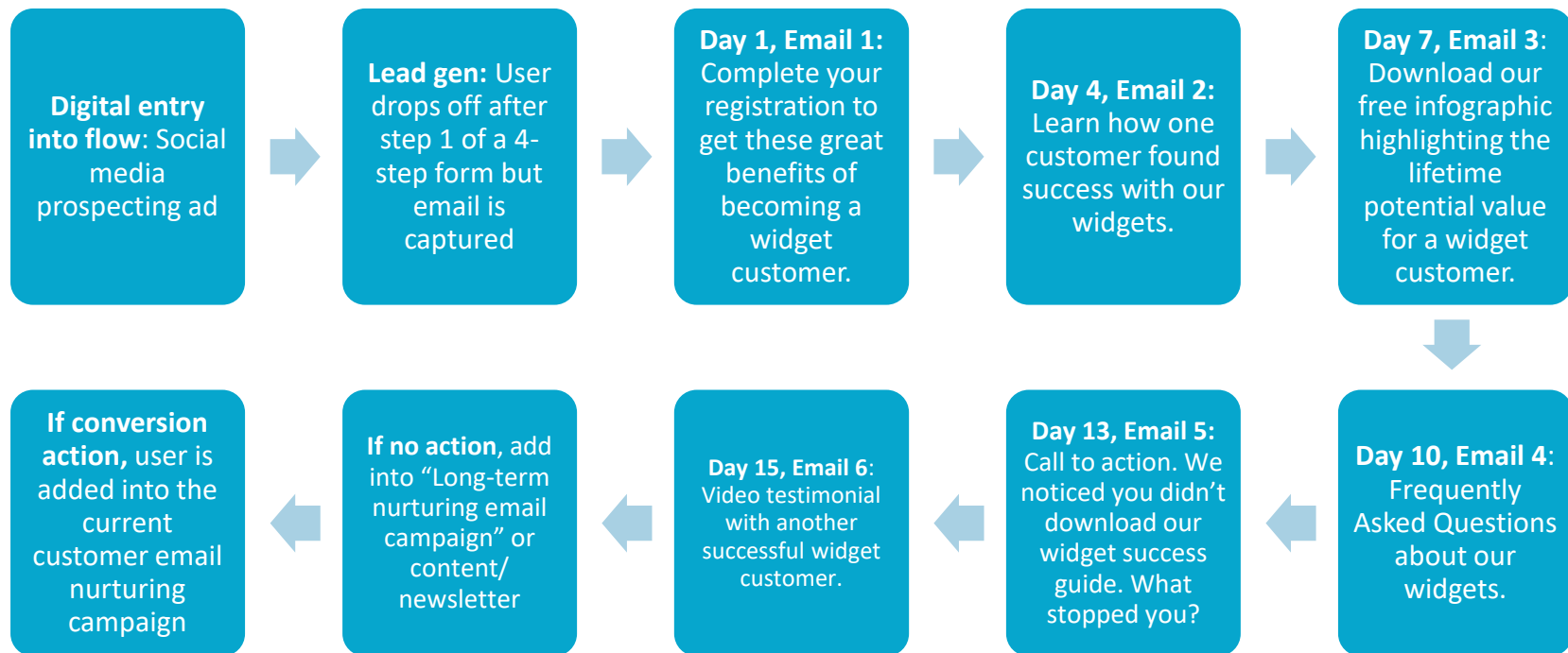
*If the data is inaccurate, inconsistent, or otherwise bad, the tools won't work.*



# Making Automation / AI Work for You

# Email Marketing Automation

Nurture leads by sending emails related to the problem the audience is facing, and the solution you present for that user.

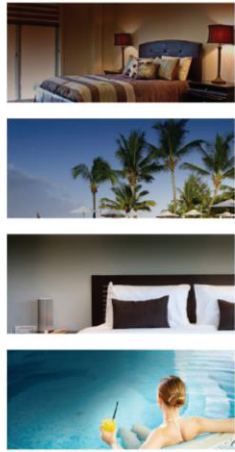


Social and display remarketing campaigns used as subtle reminders throughout



# Predictive Advertising (AI)

## Hero Images



Book by June 11<sup>th</sup> for  
**1,000 Bonus Points**  
 Over 5,000 hotels worldwide.

**BOOK NOW**

## Headlines

**20% Off**  
Your Next Booking

Book 3 nights, get  
**Get 1 Night Free**

Book by June 11<sup>th</sup> for  
**1,000 Bonus Points**

Hurry! There's still time to get  
**Last-Minute Deals**

Thousands of  
Dynamically Assembled Variations

## Secondary Headlines

Get a great deal  
for a great getaway.

Over 5,000  
hotels worldwide.

Reserve early  
and save.

Take advantage of  
instant savings.

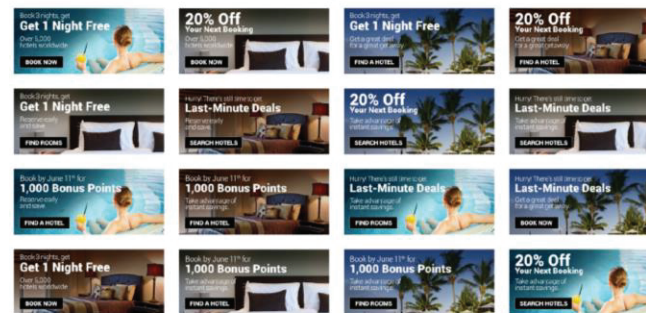
## CTA Buttons

**BOOK NOW**

**FIND ROOMS**

**SEARCH HOTELS**

**FIND A HOTEL**



Source: WYLEI.com

# Predictive Analytics

Use cases:

- Customer buying behaviors
- Customer value
- Product development
- Lead scoring

Example resources:

- MS Azure
- Google Cloud Prediction
- TensorFlow

## The Predictive Analytics Process



### Pull

Extract the data from where it lives.



### Prepare

Clean, refine, and prepare it.



### Pick

Identify what to predict.



### Predict

Create the prediction.



### Plan

Develop a plan of action.

Source: christopherspenn.com

# AI-Powered Call Tracking

Tools like Invoca are doing more than just tracking calls. Now we can understand the source of the calls, the duration, the type of phone, and what was said.

Most importantly, based on the conversation, the lead can be assigned a score.

The days of human call monitoring are nearing an end.



# Google RankBrain

- As many as 90% of B2B buyers use Google search to begin their buying journey (Marketo)
- 90% of searchers haven't made their mind up about a brand before starting their search. (Status Labs, 2018)

## Optimizing for RankBrain



# Implementation Roadmap

1. Identify opportunities for Automation/AI
2. Validate the opportunity
3. Evaluate solutions and features
4. Establish budget
5. Identify a champion or gain buy-in
6. Establish KPIs or success metrics
7. Launch process or system
8. Measure and report
9. Rinse and repeat





**Looking to the Future**

# Minority Report - 2002



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# The Future

1. Consumer expectations of relevant ads will increase
2. Marketing Automation and Marketing AI will become more and more ubiquitous, and will be an expected feature in every major digital platform
3. The effectiveness of Marketing Automation and AI tools will continue to increase, while the cost simultaneously decreases – making the ROI case for businesses more and more compelling
4. Internal teams and marketing agencies will increasingly focus on systems integration and data analysis in addition to traditional strategy, messaging, creative, and media buying roles
5. The emergence of voice search, virtual assistants, and augmented reality represent massive opportunities – and new challenges – for businesses and technology providers
6. Privacy questions and “the creep factor” will grow and importance – and increasingly be evaluated on a consumer value basis