



AGENCY CHEAT SHEET: **Pre-Optimization Checklist**

WHY THIS IS IMPORTANT

Before acting on data, you need to have some foundational marketing intelligence mined from your CRM and Customer data - this gives you insight into your current reality.

We use this data to give you models of conversion time and the impact of Customer LTV.

Expert use of attribution models gives you a strategic edge on competition relying on outdated last click models.

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WHEN TO USE THIS

Run this cheat sheet a few times to ingrain the concepts and measurements.

You will use the assessments whenever making scale/kill/chill ad budget decisions.

THE CHECKLIST

- **Set your Forecasted Campaign Evaluation Time Period**
- **Determine the Impact Level of Customer LTV**
- **Map Campaign Intention to the Correct Attribution Model**



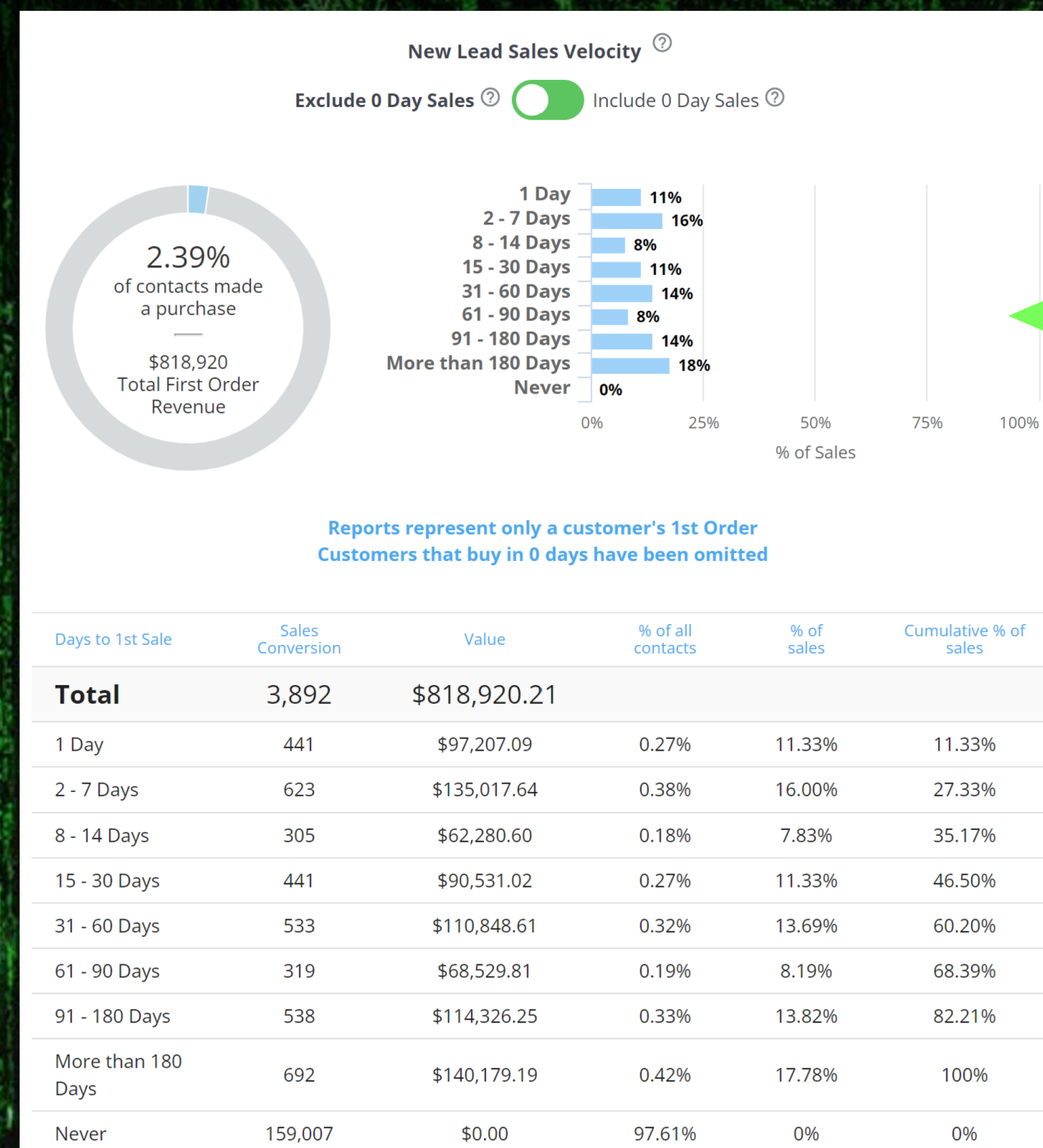
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ATTRIBUTION MODEL MATCHES CAMPAIGN'S INTENTION

CAMPAIGN GOAL	ATTRIBUTION MODEL
Cold Traffic, Brand Awareness, Build Audiences for Retargeting	First Click - unique first click cold traffic New Lead - Leads generated by optin capture verified as new using Wicked's CRM integration
Driving Sales	Last Click with MOF Conversions
Targeting CRM list	Last Click with MOF conversions ReEngaged Lead
Full Funnel Visibility	Full Impact Linear

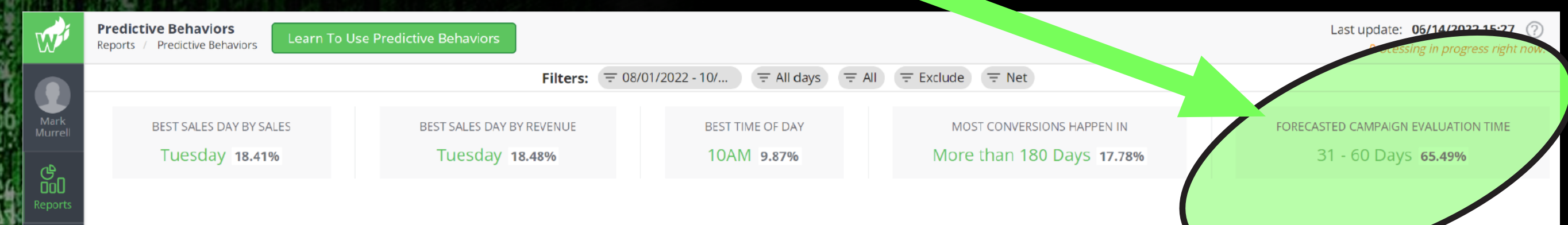


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CONVERSION TIME ANALYSIS

Make note of your Forecasted Evaluation Time. We will use the Customer LTV Impact score with the Scale/Kill/Chill framework.



← Your Forecasted Campaign Evaluation Time is based on the conversion time lag between new CRM conversions and 1st time purchases.

When making Scale/Kill/Chill ad budget decisions, Wicked wants you to ensure the campaign has been running long enough to account for the impact of these delayed sales conversions.

Your Forecasted Campaign Evaluation Time Period is calculated using the time bucket where delayed conversions are predicted to cross the 50% threshold.



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FUTURE CUSTOMER LTV IMPACT - MOF AND BOF

New Customer Cohort informs you on the future LTV of your new customers acquired. When the lift is considerable, it means 2 things:

1. You can use a higher CAC for customers
2. You can chill or scale when ROAS is only average, because the future LTV impact is going to lift the ROAS higher

This is especially true if you have a strong subscription customer base, or frequent repeat purchasers.



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FUTURE CUSTOMER LTV IMPACT - MOF AND BOF

New Customer Cohorts - Analyze lift from Month 1 to Month 3. We will use the Customer LTV Impact score with the Scale/Kill/Chill framework.

Compare month 1 to month 3

New Customer Cohort							TIME SINCE NEW CUSTOMER						
Reports / New Customer Cohort													
Learn To Use This Report													
First Purchase Month	New Customers	Spend	Revenue	CAC	Days Until Breakeven	LTV	Customer Value Day 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
October 2022	2,642	\$97,374	\$576,377	\$36.86	5	\$218.16	\$210	\$218					
September 2022	2,561	\$109,526	\$581,415	\$42.77	8	\$227.03	\$203	\$220	\$227				
August 2022	2,818	\$103,848	\$687,161	\$36.85	7	\$243.85	\$197	\$225	\$239	\$244			
July 2022	1,825	\$104,572	\$570,105	\$57.30	8	\$312.39	\$238	\$264	\$287	\$305	\$312		
June 2022	1,953	\$115,718	\$588,467	\$59.25	9	\$301.31	\$239	\$251	\$266	\$285	\$297	\$301	
May 2022	1,868	\$124,067	\$616,776	\$66.42	5	\$330.18	\$238	\$256	\$272	\$290	\$308	\$324	\$330
April 2022	1,513	\$84,048	\$503,282	\$55.55	5	\$332.64	\$235	\$250	\$267	\$281	\$296	\$310	\$326
March 2022	1,391	\$92,216	\$492,856	\$66.30	9	\$354.32	\$225	\$242	\$260	\$275	\$293	\$310	\$329
February 2022	2,092	\$143,626	\$732,196	\$68.65	6	\$350.00	\$223	\$235	\$251	\$265	\$280	\$295	\$309

LIFT	IMPACT
0-50%	Low
50%-100%	Moderate
Over 100%	High

When the Impact is Moderate or High, it can affect your ad buying optimizations in the Scale/Kill/Chill framework. I will call this out when it's a factor, for now, note the impact.



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FUTURE CUSTOMER LTV IMPACT - TOF

New Lead Cohort informs you on the future LTV of your new leads acquired. When the lift is considerable, it means 2 things:

- 1: You can use a higher CPL for leads
- 2: You can chill or scale when ROAS is only average, because the future LTV impact is going to lift the ROAS higher - on TOF campaigns.

This is especially true if you have a strong subscription customer base, or frequent repeat purchasers, or great email marketing campaigns that just take time to convert the leads.



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FUTURE CUSTOMER LTV IMPACT - TOF

New Lead Cohorts - Analyze lift from Month 1 to Month 3. We will use the Lead LTV Impact score with the Scale/Kill/Chill framework on TOF campaigns.

Compare month 1 to month 3

New Lead Cohort											TIME SINCE LEAD GENERATED						
Reports / New Lead Cohort																	
Filters: Monthly 10/31/2021 - 10/...																	
Lead Acquisition Month	New Leads	Total Customers	Spend	Revenue	CPL	Days Until Breakeven	CAC	LTV	Conversion Rate	Lead Value Day 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	
October 2022	6,939	911	\$97,374	\$199,529	\$14.03	15	\$106.89	\$219.02	13%	\$23	\$29						
September 2022	13,179	1,088	\$109,526	\$245,054	\$8.31	17	\$100.67	\$225.23	8%	\$12	\$18	\$19					
August 2022	6,842	1,441	\$103,848	\$341,765	\$15.18	14	\$72.07	\$237.17	21%	\$29	\$44	\$49	\$50				
July 2022	6,571	959	\$104,572	\$275,555	\$15.91	18	\$109.04	\$287.34	15%	\$24	\$34	\$38	\$41	\$42			
June 2022	5,736	1,057	\$115,718	\$266,798	\$20.17	18	\$109.48	\$252.41	18%	\$30	\$39	\$42	\$44	\$46	\$47		
May 2022	7,133	969	\$124,067	\$254,032	\$17.39	21	\$128.04	\$262.16	14%	\$23	\$29	\$31	\$33	\$34	\$35	\$36	
April 2022	7,127	694	\$84,048	\$212,167	\$11.79	17	\$121.11	\$305.72	10%	\$16	\$22	\$24	\$26	\$27	\$28	\$29	
March 2022	5,418	553	\$92,216	\$152,618	\$17.02	25	\$166.76	\$275.98	10%	\$16	\$22	\$23	\$24	\$25	\$25	\$26	
February 2022	7,446	942	\$143,626	\$259,490	\$19.29	20	\$152.47	\$275.47	13%	\$20	\$25	\$27	\$28	\$29	\$31	\$32	

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CLIENT TALK TRACKS AND PROOF OF YOUR VALUE

Talk track “Scaling ad budget on Higher ROAS”

Conversion Time Analysis...

“We’ve analyzed the conversions between your CRM and Shopping cart. This gives us the time lag between the 2 events. We can use this as a model to predict how future marketing is going to perform. When the conversion time lag is accounted for in our ad buying strategies, we can get an edge on the competitors bidding without this data. The campaigns won’t look as profitable in the ad platforms because they can’t attribute the delayed conversions like we can.”



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CLIENT TALK TRACKS AND PROOF OF YOUR VALUE

Talk track “Scaling ad budget on Higher ROAS”

Customer LTV Impact...

“We’ve analyzed your customer lifetime value to measure the delayed revenue expected from new customers acquired. This helps us decide on a target CAC, and make ad buying decisions based on future customer value not yet realized. This data gives us an edge on Middle and Bottom funnel campaigns.”



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CLIENT TALK TRACKS AND PROOF OF YOUR VALUE

Talk track “Scaling ad budget on Higher ROAS”

Lead LTV Impact...

“We’ve analyzed your new lead lifetime value to measure the delayed revenue expected from new leads acquired. This helps us decide on a target CPL, and make ad buying decisions based on future lead value not yet realized. This data gives us an edge on TOF funnel campaigns.”

