

RelayOps GTM Launch: Paid Media Plan



Paid Media Plan

RelayOps GTM Launch · RelayOps · B2B · Generated 2026-07-26

Gate launch until tracking, routing, proof, and diagnostic destinations pass QA, then use high-intent Google Search, persona-specific LinkedIn, and controlled account retargeting to generate sales-accepted workflow diagnostic and demo requests.



Overview

Assumptions & Dependencies

The inherited \$14,166.67 monthly amount is treated exclusively as paid-media spend. The plan assumes controlled activation during days 61–90 after the diagnostic conversion path, proof content, tracking, CRM routing, and sales follow-up pass end-to-end QA.

Acquisition Thesis

A diagnostic-led acquisition motion should outperform broad category promotion because qualified buyers must first recognize a consequential cross-system handoff problem, then validate technical fit and establish a credible proof plan. Search captures explicit problem and solution intent; LinkedIn reaches the three selected buying roles and qualified accounts; retargeting helps align operations, IT, and executive stakeholders.

Primary Wedge

Bring one high-impact cross-system workflow to RelayOps for a tailored diagnostic that clarifies handoff risk, ownership gaps, and an evidence-based improvement path.

Final Recommendation

Use the \$14,166.67 monthly media budget to establish disciplined learning on Google Search and LinkedIn rather than spreading spend across many platforms. Launch only after conversion, proof, tracking, routing, and sales follow-up pass QA; then scale the intent, persona, and offer combinations that produce sales-accepted requests and qualified account progression.

Key Dependencies

- Approve the production or staging URL and canonical destinations before campaign construction.
- Complete the tailored workflow diagnostic and product-demo conversion path, including qualification, scheduling, thank-you, and follow-up states.
- Implement analytics, advertising pixels, consent handling, CRM campaign capture, offline sales-stage imports, and sales-disposition reporting.
- Validate problem language, persona hooks, objections, and proof requirements through the planned virtual focus group.
- Produce or adapt connector, architecture, data-access, governance, explainability, and audit-evidence content for technical evaluation.
- Approve the claims and proof register before ads or landing pages are published.
- Define sales acceptance, disqualification, and opportunity-stage criteria for weekly media optimization.
- Build qualified Tier 1 and Tier 2 account lists with employee count, supported-system evidence, operational triggers, and selected-persona contacts.

Positioning Do

- Lead with broken handoffs, unclear ownership, recurring bottlenecks, and operational risk across existing tools.
- Position RelayOps as connected workflow intelligence that complements Slack, Jira, Salesforce, and HubSpot.
- Use operational, technical, and executive messages matched to the selected persona and buying role.
- Frame the diagnostic as a bounded evaluation around one representative workflow and a shared proof plan.
- Explain connector scope, data flow, governance approach, mapping logic, alert explainability, and outcome-measurement methodology.

Positioning Don't

- Do not use generic AI-transformation messaging.
- Do not position RelayOps as another standalone dashboard or employee-productivity monitor.
- Do not promise guaranteed financial, speed, accuracy, privacy, or customer outcomes.
- Do not imply replacement of systems of record, BI, automation, or broad ERP-centered process mining.
- Do not optimize acquisition toward unrelated roles or unqualified lead volume.

Secondary Conversion Goals

- Qualified diagnostic form start
- Completed diagnostic request
- Scheduled product or technical demo
- Technical workflow-review request
- Operational ROI assessment completion using transparent assumptions
- Workflow-risk webinar registration and attendance
- Multi-stakeholder engagement from a qualified account
- Qualified opportunity creation

Secondary Tests

- Meta retargeting after qualified site and CRM audience thresholds are met.
- Microsoft Search after Google query quality and conversion handling are validated.
- YouTube product-demo retargeting after approved video assets and audience volume exist.
- Selective programmatic ABM only after Tier 1 account density, verified intent, and incremental budget justify it.
- Adjacent personas only after selected-persona campaigns validate the relevant use case and sales confirms buying participation.

Plan Summary	
MARKET	PLAN TYPE
US mid-market B2B SaaS organizations with 200–2,000 employees, fragmented workflows across at least three supported systems, and visible cross-functional handoff or process-risk problems	launch_plan
GEOGRAPHY	SPEND STATUS
United States	budget_specified
BUDGET MODE	PRIMARY OPTIMIZATION GOAL
specified_budget	Minimize cost per sales-accepted qualified workflow diagnostic or technical-review request while increasing selected-persona, ICP, supported-system, operational-trigger, and multi-stakeholder account quality.
MONTHLY BUDGET	
\$14,167	

Proof Policy

PROOF STATUS

proof_placeholders_only

ALLOWED CLAIMS

- RelayOps is designed to connect signals from Slack, Jira, Salesforce, and HubSpot.
- RelayOps is positioned as a neutral workflow-intelligence layer rather than a replacement for systems of record.
- RelayOps analyzes workflow signals to map handoffs, identify potential bottlenecks and ownership gaps, and support practical recommendations.
- The tailored diagnostic can focus evaluation on one representative cross-system workflow.
- Annual plans are stated to start at \$18,000 when commercial review confirms that the figure remains current.
- Illustrative workflow maps, diagnostic structures, and architecture diagrams clearly labeled as representative or conceptual.

PROHIBITED CLAIMS

- Guaranteed ROI, savings, revenue impact, or payback period.
- Unvalidated cycle-time, productivity, accuracy, precision, recall, or speed improvements.
- Unvalidated connector setup time or time-to-first-insight claims.
- Unsubstantiated privacy, security, compliance, or surveillance-prevention outcomes.
- Customer adoption, customer results, category leadership, or market-leadership claims without evidence.
- Claims that RelayOps replaces systems of record, BI platforms, automation platforms, or full enterprise process-mining systems.

NOTES

Use capability descriptions, transparent methodology, and representative examples until customer evidence and validated performance results are available. All ROI tools must expose assumptions and allow buyers to change inputs.

Minimum Launch Prerequisites

Category	Requirement	Status	Priority
landing_page	Publish and QA the workflow diagnostic page, persona-relevant landing paths, qualification form, scheduling flow, diagnostic expectations, and privacy or governance links.	in_progress	critical
tracking	Validate source, medium, campaign, content, term, form-start, form-submit, scheduling, CRM routing, and offline sales-stage capture across all paid destinations.	in_progress	critical
analytics	Create a weekly reporting view joining platform spend with account fit, persona match, supported-system qualification, sales acceptance, and opportunity progression.	not_started	critical
proof	Produce and review the canonical claims register, connector evidence, data-flow explanation, governance documentation, alert explainability examples, and illustrative diagnostic output.	in_progress	critical
creative	Produce persona-specific Search and LinkedIn variants using validated hooks, approved capability language, and non-customer illustrative workflow examples.	not_started	high
retargeting	Create consent-compliant audiences for qualified site visitors, content engagers, video viewers, form starters, CRM contacts, and named accounts.	not_started	high
lifecycle_email	Prepare role-specific diagnostic confirmation, preparation, sales follow-up, technical review, and committee-alignment sequences.	not_started	high
website	Approve canonical URLs for the category answer page, operations solution page, IT and systems solution page, integrations evidence, trust content, ROI methodology, and workflow diagnostic.	blocked	critical

Recommended Initial Structure

Channel / Campaign	Core Message	Role
Google Search: broken handoffs and workflow bottlenecks	See where work stalls, clarify ownership, and identify practical next steps.	Highest-priority capture of explicit operational problem intent
Google Search: cross-system workflow and process intelligence	Connect supported workflow signals without replacing systems of record.	Capture technical and solution-evaluation intent
LinkedIn: executive operations	See operational risk before customer impact and prioritize one high-impact workflow.	Reach the executive sponsor and business-value approver
LinkedIn: IT and systems operations	Review connector scope, data flow, governance, and alert explainability.	Reach the technical evaluator and implementation gatekeeper
LinkedIn: administrative and business operations	Expose missed handoffs and ownership gaps, then turn evidence into practical action.	Reach the day-to-day workflow owner and operational champion
LinkedIn and Google qualified retargeting	Align operations, IT, and executives around one workflow and one proof plan.	Convert proof-seeking stakeholders and support committee progression

Audience

Mid-Market Administrative Operations Leader

Operational champion and day-to-day cross-functional workflow owner

BUYING ROLE

- operational_champion
- workflow_owner
- influencer

Manager or senior manager at a qualified US mid-market organization experiencing missed handoffs, recurring bottlenecks, unclear ownership, manual status chasing, or coordination risk across multiple systems.

Paid Subsegments

High-intent broken-handoff and workflow-bottleneck searchers

DESCRIPTION

US searchers expressing direct intent around missed handoffs, workflow bottlenecks, unclear ownership, or cross-team workflow tracking.

PAIN STATE

Recurring process failures require manual investigation and create delays, rework, and unclear accountability.

MESSAGE HOOK

See where work stalls before the next handoff fails.

RECOMMENDED OFFER

Tailored workflow diagnostic

BEST CHANNELS

Google Search

PRIORITY

primary

Missed-handoff workflow owners

DESCRIPTION

Administrative services, business operations, and operations managers responsible for recurring cross-team workflows and service delivery.

PAIN STATE

Ownership becomes unclear as work crosses teams and systems, leading to status chasing and escalations.

MESSAGE HOOK

Turn scattered workflow signals into clear ownership and practical next steps.

RECOMMENDED OFFER

Workflow-risk assessment

BEST CHANNELS

LinkedIn Ads

Google Search

PRIORITY

primary

Executive operational-risk sponsors

DESCRIPTION
COO, VP Operations, Head of Operations, General Manager, and senior operations leaders at qualified 200–2,000 employee accounts.

PAIN STATE
Operational risk becomes visible only after it affects commitments, customers, or executive confidence.

MESSAGE HOOK
See where operational risk is building before it becomes a customer or financial problem.

RECOMMENDED OFFER
Executive process-risk diagnostic

BEST CHANNELS
LinkedIn Ads Google Search

PRIORITY
primary

Executive improvement-prioritization leaders

DESCRIPTION
Senior operations decision-makers researching operational excellence, workflow analytics, process improvement, and measurable performance improvement.

PAIN STATE
Multiple operational problems compete for attention without a connected evidence base for prioritization.

MESSAGE HOOK
Move from operational noise to a clear, evidence-based improvement plan.

RECOMMENDED OFFER
Priority-workflow assessment and executive demo

BEST CHANNELS
LinkedIn Ads Google Search

PRIORITY
primary

Connector and systems-fragmentation evaluators

DESCRIPTION

IT operations, business systems, enterprise applications, and information systems managers at accounts using at least three supported systems.

PAIN STATE

Business teams need connected insight, but integration burden, data access, governance, and system replacement risk must be controlled.

MESSAGE HOOK

Connect workflow signals across supported systems without replacing the tools teams already use.

RECOMMENDED OFFER

Connector and data-flow demonstration

BEST CHANNELS

LinkedIn Ads

Google Search

PRIORITY

primary

Governance and explainability gatekeepers

DESCRIPTION

Technical evaluators engaging with connector, architecture, governance, data-handling, explainability, or product-detail content.

PAIN STATE

Unexplained alerts, unclear data handling, and uncertain implementation requirements can stop evaluation.

MESSAGE HOOK

Review the data flow, governance approach, and evidence behind workflow alerts.

RECOMMENDED OFFER

Technical workflow review and governance FAQ

BEST CHANNELS

LinkedIn Retargeting

Google Retargeting

PRIORITY

secondary

Multi-stakeholder Tier 1 account committee

DESCRIPTION

Named accounts with an executive operations sponsor, selected IT or systems evaluator, selected administrative or business operations stakeholder, and a verified operational trigger.

PAIN STATE

Evaluation stalls when operations, IT, and executives use different problem definitions, proof requirements, and success criteria.

MESSAGE HOOK

Align operations, IT, and executive stakeholders around one workflow and one proof plan.

RECOMMENDED OFFER

Cross-functional workflow diagnostic and committee demo

BEST CHANNELS

LinkedIn Ads

Sales outreach

PRIORITY

primary

Executive business-case retargeting pool

DESCRIPTION

Qualified executives and named-account stakeholders who engaged with pricing, ROI, buying-guide, diagnostic, or executive-demo content.

PAIN STATE

The committee needs a transparent baseline, outcome model, and evaluation plan before approving a new entrant.

MESSAGE HOOK

Build a credible investment case around one measurable workflow problem.

RECOMMENDED OFFER

Tailored evaluation and proof plan

BEST CHANNELS

LinkedIn Retargeting

Google Retargeting

Meta Retargeting

PRIORITY

secondary



Experimental / Excluded Audiences

Audience	Reason	Recommendation
Customer Success and Service Operations leaders	Potential owners of onboarding and escalation handoffs, but outside the three selected personas.	defer
Revenue Operations leaders	Potential fit for forecast leakage and sales-to-service handoffs, but could shift positioning toward CRM analytics.	defer
Finance and procurement stakeholders	Relevant to opportunity-stage ROI and commercial evaluation but not a primary acquisition audience.	secondary
Process excellence and transformation leaders	Relevant to process improvement but outside the selected persona scope and may introduce enterprise-transformation expectations.	defer
Organizations below 200 employees or above 2,000 employees	Outside the primary company-size ICP unless an approved named-account exception is documented.	exclude
Companies primarily operating in one system	Insufficient cross-system workflow complexity for the primary RelayOps use case.	exclude
Employee-monitoring and workforce-surveillance buyers	Misaligned use case and positioning risk.	exclude
ERP-replacement or broad ERP-centered process-mining buyers	RelayOps is not positioned as an ERP replacement or broad enterprise process-mining implementation.	exclude
Students, job seekers, educators, individual contributors without systems or operations responsibility	Low buying relevance and poor traffic quality.	exclude

Channels

Channel Roles

Channel	Role	Priority	Funnel Roles
Google Search	Capture explicit broken-handoff, workflow-bottleneck, workflow-integration, process-intelligence, and operational-risk intent.	primary	MOFU BOFU
LinkedIn Ads	Reach selected personas at qualified companies, activate named accounts, validate role-specific messages, and retarget proof-seeking stakeholders.	primary	TOFU MOFU BOFU
Google and LinkedIn Retargeting	Re-engage qualified visitors, content engagers, form starters, and multiple stakeholders from priority accounts with persona-specific proof.	secondary	MOFU BOFU
Meta and Instagram	Low-budget retargeting of known qualified visitors and consented CRM audiences only.	retargeting_only	MOFU BOFU
Microsoft Advertising	Incremental high-intent search coverage after Google query quality and conversion tracking are validated.	secondary	MOFU BOFU
YouTube	Retarget qualified site visitors and product-demo viewers with short workflow-map or technical explanation videos after audience thresholds are met.	deferred	MOFU
Programmatic ABM	Selective named-account committee coverage when an approved account list, verified intent, and sufficient account density exist.	deferred	MOFU BOFU

Highest-Priority Tests

1

TEST

Broken-handoff versus workflow-bottleneck Search intent

MESSAGE

See where work stalls, clarify ownership, and identify practical next steps.

AUDIENCE

High-intent broken-handoff and workflow-bottleneck searchers

CHANNEL

Google Search

EXPECTED LEARNING

Determine which problem language produces qualified diagnostic requests rather than generic workflow traffic.

2

TEST

Executive operational risk versus improvement prioritization

MESSAGE

See risk before customer impact versus move from operational noise to an evidence-based improvement plan.

AUDIENCE

Executive operational-risk sponsors and executive improvement-prioritization leaders

CHANNEL

LinkedIn Ads

EXPECTED LEARNING

Identify the executive hook and offer that produce qualified account engagement and sales-accepted requests.

3

TEST

Connector scope versus technical governance

MESSAGE

Connect supported workflow signals without replacing systems versus review data flow, governance, and alert logic.

AUDIENCE

Connector and systems-fragmentation evaluators

CHANNEL

LinkedIn Ads

EXPECTED LEARNING

Determine whether technical evaluators respond first to interoperability or risk-control proof.

4

TEST

Problem-intent versus category-intent Search

MESSAGE

Broken handoffs and bottlenecks versus workflow intelligence and process-intelligence alternatives.

AUDIENCE

Selected operations and IT personas showing active search intent

CHANNEL

Google Search

EXPECTED LEARNING

Measure whether direct problem intent is more qualified than emerging category and alternative-comparison intent.

5

TEST

Single-persona versus committee retargeting

MESSAGE

Role-specific proof versus one workflow and one shared proof plan.

AUDIENCE

Qualified site visitors and Tier 1 accounts with multiple engaged selected-persona stakeholders

CHANNEL

LinkedIn Retargeting

EXPECTED LEARNING

Assess whether committee-alignment creative improves diagnostic completion and opportunity progression.

Platform Prioritization

Platform	Recommendation	Rationale
Google Ads	primary	Best source of explicit problem and solution intent. Start with exact and phrase Search; keep Search Partners, broad match, Display expansion, and optimized targeting off.
LinkedIn Ads	primary	Best fit for selected-persona targeting, company-size controls, account lists, role-specific proof, and multi-stakeholder coverage.
Meta and Instagram	retargeting_only	Use only for known qualified visitors, engagers, or consented CRM audiences; do not use broad cold-interest acquisition.
Microsoft Advertising	secondary_after_validation	Can add incremental Search coverage, but the monthly budget should first establish stable Google and LinkedIn learning.
YouTube	deferred_until_pool_size	Useful for product and workflow-map retargeting, but not before qualified audience pools and approved video proof exist.
Programmatic ABM	deferred_selective	Potential committee-coverage value, but the current budget cannot support broad programmatic activity without diluting Search and LinkedIn learning.
X	deferred_experimental	Narrow operations or systems tests are possible only after primary channels validate audience-message fit.
Reddit	deferred	No source-supported community strategy or evidence that it should displace higher-intent Search and persona-targeted LinkedIn.
Quora	deferred	Likely lower intent and weaker account qualification than the approved primary channels.

Budget Tiers

Monthly Spend Tiers

Specified controlled-launch budget

TIER

Specified controlled-launch budget

MIN

\$14,167

MAX

\$14,167

BEST FOR

A gated US B2B launch using two primary acquisition platforms, one small retargeting layer, and a limited reserve for validated incremental tests.

SUPPORTS

- Two primary channels: Google Search and LinkedIn Ads.
- Approximately 5–7 active campaigns without over-fragmentation.
- Approximately 8–12 initial message, audience, keyword, or offer test cells.
- Three selected personas, with most cold spend concentrated on four high-priority persona-derived segments.
- Small qualified retargeting pools once audience thresholds are met.
- A 4–6 week paid learning period after launch, with sales-quality evaluation extending across the 30–90 day buying cycle.
- Sufficient learning only if micro-conversions and offline sales stages are captured; the plan does not assume a specific minimum number of qualified demos because no baseline conversion data exists.

AVOID

- Launching Google, LinkedIn, Microsoft, Meta, YouTube, X, Reddit, Quora, and programmatic simultaneously.
- Broad Display, broad-match Search, Search Partners, audience expansion, or optimized targeting before qualified-conversion evidence exists.
- Separate campaigns for every title, company-size band, creative format, and keyword variation.
- Cold Meta acquisition or broad programmatic awareness.
- Optimizing to clicks, page views, all leads, or webinar registrations without account and sales-quality controls.
- Scaling before a complete 4–6 week learning window and initial sales disposition data.

MINIMUM VIABLE STRUCTURE

- Three Google Search campaigns: operations problem intent, IT solution intent, and brand or high-intent retargeting when volume supports it.
- Two LinkedIn prospecting campaigns: executive operations and combined operations-manager or IT evaluator campaigns with separate ad groups or audiences.
- One LinkedIn retargeting and Tier 1 committee campaign.
- One Meta retargeting campaign only after qualified audience thresholds are reached.
- Two to three ads per audience cell and one primary landing destination per intent cluster.

PRIMARY LEARNING GOAL

Identify the persona, operational trigger, intent cluster, message, and offer combination that generates sales-accepted diagnostic requests and qualified opportunity progression.

Allocation by Funnel Stage

Scenario	Funnel Stage	Min %	Max %
Initial controlled launch	TOFU	8%	12%
Initial controlled launch	MOFU	48%	52%
Initial controlled launch	BOFU	38%	42%

Allocation by Platform

Scenario	Platform / Bucket	%
Specified controlled-launch budget	Google Ads Search and qualified retargeting	50%
Specified controlled-launch budget	LinkedIn prospecting, named accounts, and retargeting	43%
Specified controlled-launch budget	Meta qualified retargeting	4%
Specified controlled-launch budget	Controlled test reserve	3%

Allocation by Test Priority

Priority	Test	Budget Weight
1	Google broken-handoff and workflow-bottleneck Search	Approximately \$3,541.67 per month, or 25% of total spend
2	LinkedIn executive operational-risk and improvement-prioritization	Approximately \$2,833.33 per month, or 20% of total spend
3	LinkedIn connector and systems-fragmentation evaluators	Approximately \$1,983.33 per month, or 14% of total spend
4	Google process-intelligence, cross-system workflow, and integration Search	Approximately \$2,833.33 per month, or 20% of total spend
5	LinkedIn missed-handoff workflow owners	Approximately \$1,275.00 per month, or 9% of total spend
6	LinkedIn, Google, and Meta qualified committee retargeting	Approximately \$1,275.00 per month, or 9% of total spend
7	Controlled reserve for Microsoft Search or winning-cell expansion	Approximately \$425.00 per month, or 3% of total spend

Campaign Architecture

Campaign Architecture

Google Ads

PLATFORM

Google Ads

FUNNEL STAGE

BOFU

CAMPAIGN

US_GADS_BOFU_MMAOL_BrokenHandoffs_Diagnostic_Search

AUDIENCE

High-intent broken-handoff and workflow-bottleneck searchers

OBJECTIVE

Generate qualified diagnostic requests from operational champions with explicit problem intent.

OFFER

Tailored workflow diagnostic

LANDING PAGE

/workflow-diagnostic/ or approved problem-intent diagnostic variant

PRIMARY EVENT

sales_accepted_diagnostic_request

PRIORITY

primary

BUDGET WEIGHT

high

Google Ads

PLATFORM

Google Ads

FUNNEL STAGE

MOFU

CAMPAIGN

US_GADS_MOFU_ITSO_CrossSystemAnalytics_TechReview_Search

AUDIENCE

Process-intelligence, cross-system workflow, and integration searchers

OBJECTIVE

Capture technical solution evaluation and differentiate RelayOps from heavier process-mining, isolated reporting, and manual data projects.

OFFER

Technical workflow review and connector demonstration

LANDING PAGE

/solutions/it-systems/ or approved integrations and technical-review destination

PRIMARY EVENT

qualified_technical_review_request

PRIORITY

primary

BUDGET WEIGHT

high

LinkedIn Ads

PLATFORM

LinkedIn Ads

FUNNEL STAGE

MOFU

CAMPAIGN

US_LI_MOFU_GOL_OperationalRisk_ExecDiagnostic_Titles

AUDIENCE

Executive operational-risk sponsors and improvement-prioritization leaders

OBJECTIVE

Create qualified executive demand around operational risk, accountability, and improvement prioritization.

OFFER

Executive process-risk diagnostic

LANDING PAGE

/solutions/operations-leaders/ or approved executive diagnostic variant

PRIMARY EVENT

sales_accepted_diagnostic_request

PRIORITY

primary

BUDGET WEIGHT

high

LinkedIn Ads

PLATFORM

LinkedIn Ads

FUNNEL STAGE

MOFU

CAMPAIGN

US_LI_MOFU_ITSO_ConnectorScope_TechReview_Titles

AUDIENCE

Connector and systems-fragmentation evaluators

OBJECTIVE

Generate technical evaluation from IT and systems gatekeepers at qualified mid-market accounts.

OFFER

Connector and data-flow demonstration

LANDING PAGE

/solutions/it-systems/ or approved integrations evidence page

PRIMARY EVENT

qualified_technical_review_request

PRIORITY

primary

BUDGET WEIGHT

medium

LinkedIn Ads

PLATFORM

LinkedIn Ads

FUNNEL STAGE

TOFU

CAMPAIGN

US_LI_TOFU_MMAOL_BrokenHandoffs_Assessment_Titles

AUDIENCE

Missed-handoff workflow owners and manual-coordination managers

OBJECTIVE

Validate operational problem language and move qualified workflow owners into assessment or diagnostic consideration.

OFFER

Missed-handoff checklist or workflow-risk assessment

LANDING PAGE

/solutions/operations-leaders/ or approved workflow bottleneck resource

PRIMARY EVENT

qualified_assessment_completion

PRIORITY

secondary

BUDGET WEIGHT

low

LinkedIn Ads

PLATFORM

LinkedIn Ads

FUNNEL STAGE

BOFU

CAMPAIGN

US_LI_BOFU_GOL_Tier1Committee_CommitteeDemo_Accounts

AUDIENCE

Tier 1 named accounts and qualified site-engaged stakeholders across the three selected personas

OBJECTIVE

Create multi-threaded account engagement and convert proof-seeking committees into a shared diagnostic or demo.

OFFER

Cross-functional workflow diagnostic and committee demo

LANDING PAGE

/workflow-diagnostic/ or approved committee-evaluation variant

PRIMARY EVENT

multi_stakeholder_sales_accepted_request

PRIORITY

primary

BUDGET WEIGHT

medium

Meta and Instagram

PLATFORM

Meta and Instagram

FUNNEL STAGE

BOFU

CAMPAIGN

US_META_BOFU_GOL_SiteRTG_EvaluationPlan_SiteRTG

AUDIENCE

Qualified executive, technical, and operations visitors or consented CRM contacts

OBJECTIVE

Re-engage qualified visitors and form abandoners with role-specific proof and a clear evaluation next step.

OFFER

Tailored evaluation plan or workflow diagnostic

LANDING PAGE

/workflow-diagnostic/

PRIMARY EVENT

sales_accepted_diagnostic_request

PRIORITY

secondary

BUDGET WEIGHT

low

Microsoft Advertising

PLATFORM

Microsoft Advertising

FUNNEL STAGE

MOFU

CAMPAIGN

US_MS_MOFU_ITSO_WorkflowIntegration_TechDemo_Search

AUDIENCE

Validated workflow-integration and operational-intelligence searchers

OBJECTIVE

Add incremental high-intent coverage after Google query quality and conversion handling are validated.

OFFER

Technical workflow review

LANDING PAGE

/solutions/it-systems/

PRIMARY EVENT

qualified_technical_review_request

PRIORITY

deferred

BUDGET WEIGHT

low

Targeting

Platform Setups

Google Ads

ROLE

Primary high-intent demand capture

RECOMMENDATION

Launch exact and phrase Search only; add qualified retargeting after pool thresholds and consent requirements are satisfied.

EXCLUSIONS

- Search Partners at launch
- Broad match at launch
- Display expansion and optimized targeting
- Mobile applications and low-quality placements
- Existing customers, employees, submitted leads, disqualified leads, and recent converters
- Countries outside the United States

NOTES

- Separate problem-intent and solution-intent campaigns to protect budget and query interpretation.
- Review search terms at least twice weekly during the first month.
- Do not activate automated bidding toward shallow events; use qualified submission or imported sales-stage events when volume supports it.
- Use ad-group-level landing-page alignment rather than sending all traffic to a generic homepage.

LinkedIn Ads

ROLE

Primary persona, account, and committee targeting

RECOMMENDATION

Launch title-based prospecting for the three selected personas, matched-account activation for Tier 1 accounts, and retargeting after audience thresholds are met.

EXCLUSIONS

- Entry, training, unpaid, student, and intern seniorities
- Companies below 200 employees
- Companies above 2,000 employees unless approved as named-account exceptions
- Current customers, employees, submitted leads, disqualified leads, and recent converters
- Recruiting, human resources, marketing-only, sales-development, account-executive, educator, and job-seeker roles
- Individual-contributor engineering roles without systems or operations responsibility
- Audience expansion at launch

NOTES

- Keep executive, IT, and administrative operations audiences separate for message and quality reporting.
- Use the 1,001–5,000 platform band only with account-list controls that isolate verified 1,001–2,000 employee companies.
- Avoid excessive segmentation; use two to three creative variants per persona campaign.
- Measure account engagement and multi-stakeholder penetration in addition to platform conversions.

Meta and Instagram

ROLE

Qualified retargeting only

RECOMMENDATION

Activate only after sufficient qualified site or CRM audience volume exists; do not use broad cold-interest targeting.

EXCLUSIONS

- Broad cold-interest targeting
- Current customers
- Employees
- Submitted leads
- Disqualified leads
- Recent converters
- Audience Network until placement quality is validated

NOTES

- Keep monthly spend near \$566.67 unless qualified pool size and sales quality justify expansion.
- Do not build lookalikes until sufficient sales-accepted or qualified-opportunity source data exists.
- Use qualified diagnostic or sales-accepted leads as future seed audiences, not all form submissions.

Platform Targeting

Google Ads

LOCATIONS

United States using presence-based location targeting

KEYWORDS

workflow handoff management

workflow bottleneck software

missed handoff process

workflow ownership software

cross team workflow tracking

operational intelligence software

workflow analytics platform

operational risk software

cross functional workflow visibility

process improvement analytics

workflow integration software

cross system workflow analytics

process intelligence platform

workflow analytics Salesforce Jira

operational analytics integration

process mining alternative

CUSTOM SEGMENTS

- Search retargeting audience - Executive and diagnostic-page visitors
- Connector and technical-content visitors
- Workflow bottleneck resource visitors
- Diagnostic form starters - Observation and bid analysis in Search; separate retargeting only after audience thresholds are met.
- Customer Match - Qualified Tier 1 account contacts
- Qualified technical contacts
- Qualified operations contacts - Use only where consent, eligibility, and data-quality requirements are satisfied.

LinkedIn Ads

LOCATIONS

United States

JOB TITLES

Chief Operating Officer Vice President of Operations Head of Operations Director of Operations

Senior Director of Operations General Manager Business Operations Director IT Manager

Senior IT Manager Director of Information Technology IT Operations Manager

Systems Operations Manager Business Systems Manager Director of Business Systems

Enterprise Applications Manager Business Applications Manager Information Systems Manager

Administrative Services Manager Senior Administrative Services Manager Director of Administrative Services

Business Operations Manager Senior Business Operations Manager Operations Manager

Operations Program Manager Administrative Operations Manager Director of Business Operations

INDUSTRIES

- Cross-industry when account fit and workflow complexity are verified
- Software and IT services test cohort
- Professional and business services test cohort

SKILLS / INTERESTS

Operations Management Operational Excellence Process Improvement Business Operations

Workflow Management Program Management IT Operations Systems Integration

Business Systems Enterprise Applications Data Governance Salesforce Jira Slack

HubSpot

CUSTOM SEGMENTS

- Matched account list - Tier 1 accounts with three or more supported systems and a verified operational trigger
- Tier 2 ICP-fit accounts
- Open-opportunity accounts for coordinated acceleration - Separate Tier 1 committee campaigns from broader title-based prospecting.
- Website and engagement retargeting - Diagnostic visitors and form starters
- Connector and governance visitors
- 75% product-video viewers
- Document-ad engagers
- Workflow-risk webinar registrants and attendees - Use role-specific proof and suppress completed or disqualified leads.

Meta and Instagram

LOCATIONS

United States

CUSTOM SEGMENTS

- Website custom audience - Qualified diagnostic visitors
- Connector and governance visitors
- Workflow bottleneck resource visitors
- Diagnostic form abandoners - Retargeting only with persona-relevant creative.
- CRM audience - Qualified selected-persona contacts
- Sales-engaged account stakeholders - Use only where consent and platform requirements are satisfied.

Retargeting Pools

Google Ads

PLATFORM

Google Ads

POOL

Qualified diagnostic intent

SOURCE

Website analytics and advertising tag

WINDOW DAYS

30

CONDITIONS

Visited workflow diagnostic, pricing, ROI, buying-guide, or executive-demo content

US location and no completed qualified conversion

EXCLUSIONS

Customers Employees Submitted leads Disqualified leads

Google Ads

PLATFORM

Google Ads

POOL

Technical evaluation

SOURCE

Website analytics and advertising tag

WINDOW DAYS

60

CONDITIONS

Visited connector, architecture, governance, trust, FAQ, or technical-demo content

EXCLUSIONS

Customers Employees Recent technical-review submitters

LinkedIn Ads

PLATFORM

LinkedIn Ads

POOL

Executive business-case pool

SOURCE

LinkedIn Insight Tag and approved CRM audience

WINDOW DAYS

90

CONDITIONS

Engaged with pricing, ROI, buying-guide, diagnostic, or executive-demo content

Selected-persona or qualified named-account match

EXCLUSIONS

Customers Employees Disqualified leads Recent converters

LinkedIn Ads

PLATFORM

LinkedIn Ads

POOL

Governance and explainability pool

SOURCE

LinkedIn Insight Tag and engagement audiences

WINDOW DAYS

90

CONDITIONS

Visited connector, data-flow, governance, FAQ, trust, or technical-demo content

EXCLUSIONS

Customers Employees Recent technical-review submitters

Meta and Instagram

PLATFORM

Meta and Instagram

POOL

Qualified site retargeting

SOURCE

Meta Pixel or server-side event source

WINDOW DAYS

30

CONDITIONS

Visited a diagnostic, persona, integrations, governance, ROI, or demo destination

EXCLUSIONS

Completed leads Customers Employees Disqualified leads

Proof Needs

NEEDED ASSETS

- Canonical messaging, claims, and proof register.
- Connector scope and implementation-requirements documentation for Slack, Jira, Salesforce, and HubSpot.
- Architecture, data-access, governance, privacy, access-control, and audit-evidence explanations.
- Representative handoff-mapping methodology and illustrative workflow map.
- Documented alert definitions, evidence path, explainability logic, and recommendation review process.
- Workflow diagnostic output preview using non-customer illustrative structure.
- Product demo narrative organized around one cross-system handoff.
- Transparent workflow-intelligence ROI methodology, finance review checklist, and editable assumptions.
- Executive reporting example and operational baseline checklist.
- Role-specific IT evaluation, objection-handling, business-case, and committee-alignment sales enablement.

PROHIBITED CLAIMS UNTIL VALIDATED

- Guaranteed ROI, cost savings, revenue gains, or payback.
- Specific cycle-time, productivity, accuracy, speed, alert-quality, or integration-time outcomes.
- Validated privacy, security, or compliance outcomes.
- Customer proof, adoption, or leadership claims without supporting evidence.
- Claims that findings prevent customer impact or guarantee earlier detection.

PROOF PLACEHOLDERS ALLOWED

True

Core Offers

Tailored workflow diagnostic and product demo

FUNNEL FIT

- MOFU
- BOFU

BEST CHANNELS

- Google Search
- LinkedIn Ads
- Qualified retargeting

LANDING PAGE

/workflow-diagnostic/

PRIMARY CTA

Request a tailored workflow diagnostic and product demo

Executive process-risk diagnostic

FUNNEL FIT

- MOFU
- BOFU

BEST CHANNELS

- LinkedIn Ads
- Google Search

LANDING PAGE

/solutions/operations-leaders/

PRIMARY CTA

Assess your workflow risk

Connector and data-flow demonstration

FUNNEL FIT

- MOFU
- BOFU

BEST CHANNELS

- LinkedIn Ads
- Google Search

LANDING PAGE

/solutions/it-systems/

PRIMARY CTA

Request a technical product demo

Missed-handoff checklist and workflow-risk assessment

FUNNEL FIT

- TOFU
- MOFU

BEST CHANNELS

- LinkedIn Ads
- Webinar promotion
- Qualified retargeting

LANDING PAGE

/solutions/operations-leaders/

PRIMARY CTA

Assess one recurring workflow bottleneck

Operational improvement ROI assessment with transparent assumptions

FUNNEL FIT

- MOFU
- BOFU

BEST CHANNELS

- LinkedIn Retargeting
- Google Retargeting
- Sales follow-up

LANDING PAGE

/resources/workflow-intelligence-roi/

PRIMARY CTA

Complete an operational improvement ROI assessment

Message Map by Subsegment

High-intent broken-handoff and workflow-bottleneck searchers

PAIN
Work repeatedly stalls between teams, and manual follow-up does not reveal the recurring cause.

HOOK
Find the bottleneck. Clarify ownership. Keep work moving.

OFFER
Tailored workflow diagnostic

BEST FORMAT
Responsive Search ad Workflow-map landing-page visual

BEST CHANNELS
Google Search

Executive operational-risk sponsors

PAIN
Recurring escalations and missed commitments become visible too late.

HOOK
Catch stalled work before delays compound into customer or financial impact.

OFFER
Executive process-risk diagnostic

BEST FORMAT
Executive single-image ad Short risk-path animation Search ad

BEST CHANNELS
LinkedIn Ads Google Search

Connector and systems-fragmentation evaluators

PAIN
Operational data is disconnected, but another integration burden or replacement project is unacceptable.

HOOK
Connect the workflow signals Slack, Jira, Salesforce, and HubSpot leave apart.

OFFER
Connector and data-flow demonstration

BEST FORMAT
Connector diagram Technical document ad Product-demo video Search ad

BEST CHANNELS
LinkedIn Ads Google Search

Governance and explainability gatekeepers

PAIN

Unclear data handling and unexplained alerts create implementation and governance risk.

HOOK

Review how workflow signals become explainable alerts and recommendations.

OFFER

Technical workflow review and governance FAQ

BEST FORMAT

Architecture diagram

FAQ carousel

Technical webinar

BEST CHANNELS

LinkedIn Retargeting

Google Retargeting

Missed-handoff workflow owners

PAIN

Unclear ownership and recurring bottlenecks force status chasing and manual coordination.

HOOK

See exactly where ownership becomes unclear as work crosses teams.

OFFER

Workflow-risk assessment

BEST FORMAT

Before-and-after workflow map

Checklist document ad

Use-case carousel

BEST CHANNELS

LinkedIn Ads

Google Search

Multi-stakeholder Tier 1 account committee

PAIN

Operations, IT, and executives need different evidence and may not agree on success criteria.

HOOK

Align every stakeholder around one workflow, one baseline, and one proof plan.

OFFER

Cross-functional workflow diagnostic and committee demo

BEST FORMAT

Committee evaluation guide

Role-based proof carousel

Account-specific single-image ad

BEST CHANNELS

LinkedIn Ads

Qualified retargeting

Creative Concepts

The Broken Handoff Map

CONCEPT

The Broken Handoff Map

FORMAT

LinkedIn document ad

Single-image ad

Responsive Search ad

Short animation

VISUAL DIRECTION

Use a representative cross-system workflow showing a stalled transition, unclear owner, and diagnostic path. Label the structure as illustrative rather than customer evidence.

COPY DIRECTION

See where work stalls before the next handoff fails. Turn scattered signals into clear accountability.

CTA

Request a tailored workflow diagnostic

LANDING PAGE

/workflow-diagnostic/

TARGET SUBSEGMENTS

High-intent broken-handoff and workflow-bottleneck searchers

Missed-handoff workflow owners

Manual-coordination and bottleneck managers

FUNNEL STAGE

MOFU

Risk Before Impact

CONCEPT

Risk Before Impact

FORMAT

Executive single-image ad

LinkedIn document ad

Responsive Search ad

VISUAL DIRECTION

Show a concise risk path from stalled handoff to escalation, with no quantified outcome claims.

COPY DIRECTION

See process risk before it becomes a customer problem. Start with one high-impact workflow.

CTA

Assess your workflow risk

LANDING PAGE

/solutions/operations-leaders/

TARGET SUBSEGMENTS

Executive operational-risk sponsors

Executive improvement-prioritization leaders

FUNNEL STAGE

MOFU

Connected Signals, Existing Systems

CONCEPT

Connected Signals, Existing Systems

FORMAT

Connector diagram

Technical document ad

Short product video

Responsive Search ad

VISUAL DIRECTION

Illustrate supported signals flowing from Slack, Jira, Salesforce, and HubSpot into a neutral workflow-intelligence layer without depicting system replacement.

COPY DIRECTION

Connect supported workflow signals without replacing systems of record. Review connector scope and data flow.

CTA

Request a technical workflow review

LANDING PAGE

/solutions/it-systems/

TARGET SUBSEGMENTS

Connector and systems-fragmentation evaluators

FUNNEL STAGE

MOFU

Explain the Alert

CONCEPT

Explain the Alert

FORMAT

FAQ carousel

Architecture document ad

Technical webinar promotion

VISUAL DIRECTION

Use an illustrative signal-to-alert sequence showing evidence, logic, owner validation, and recommendation review.

COPY DIRECTION

Review the evidence behind workflow alerts and recommendations before evaluation.

CTA

Book a connector and data-flow demonstration

LANDING PAGE

/trust/ or approved governance and explainability destination

TARGET SUBSEGMENTS

Governance and explainability gatekeepers

FUNNEL STAGE

BOFU

One Workflow, One Proof Plan

CONCEPT

One Workflow, One Proof Plan

FORMAT

Committee evaluation guide Role-based carousel Account retargeting image Executive demo clip

VISUAL DIRECTION

Show operations, IT, and executive proof requirements converging around one workflow, baseline, intervention, and measurement plan.

COPY DIRECTION

Give operations, IT, and executives the evidence each needs to evaluate one shared workflow problem.

CTA

Schedule a cross-functional workflow diagnostic

LANDING PAGE

/workflow-diagnostic/

TARGET SUBSEGMENTS

Multi-stakeholder Tier 1 account committee Executive business-case retargeting pool

FUNNEL STAGE

BOFU

Tracking & KPIs

Reporting Cuts

- Platform, campaign, audience, ad group, ad, keyword, search term, and landing page
- Persona and persona-derived subsegment
- Funnel stage and offer
- Tier 1 versus Tier 2 account
- Company employee band
- Industry test cohort
- Supported-system count and specific supported systems
- Operational trigger or use case
- New visitor versus retargeting audience
- Single-stakeholder versus multi-stakeholder account engagement
- Form submission, sales acceptance, opportunity creation, and disqualification reason

Optimization Hierarchy

- Qualified opportunity created
- Sales-accepted diagnostic or technical-review request
- Scheduled diagnostic, product demo, or committee demo
- Qualified diagnostic form submission
- Qualified form start and high-value proof engagement
- Clicks and landing-page views for diagnostics only

Decision Threshold Context

No baseline analytics or validated conversion rates exist. Use directional thresholds tied to spend, click volume, account quality, and sales disposition rather than invented CPA targets. Require enough volume to distinguish message or targeting failure from normal B2B variance, and evaluate downstream quality across the 30–90 day buying cycle.

Pause or Fix If

- A campaign launches before critical landing-page, tracking, routing, privacy, proof, or claims QA is complete.
- Search terms are predominantly employment, education, templates, free tools, automation implementation, surveillance, or unrelated workflow traffic.
- An audience repeatedly produces companies outside 200–2,000 employees or roles outside the three selected personas.
- A campaign spends approximately two to three times its provisional qualified-lead cost guardrail without a qualified form start, sales-accepted request, or credible account-level engagement signal.
- A test cell reaches approximately 75–100 qualified clicks without a meaningful conversion-path event; inspect query, audience, message, destination, and form friction before continuing.
- Sales acceptance is materially weaker than the account-wide baseline after enough dispositions are available.
- Frequency rises without incremental qualified engagement, indicating audience saturation.
- CRM source capture, offline conversion imports, or sales dispositions become incomplete enough to invalidate optimization.

Scale If

- A campaign produces repeated sales-accepted requests from ICP-fit companies and selected personas.
- Search-term reviews show sustained concentration in approved problem, category, integration, and evaluation intent.
- The landing page converts qualified traffic without elevated spam, duplicate, or poor-fit submissions.
- Two or more selected-persona stakeholders engage from the same qualified account.
- A message and offer combination performs consistently across at least two review cycles and sales confirms problem relevance.
- Additional budget can be added without materially increasing low-quality queries, audience overlap, or frequency.

Do Not Optimize To

- Impressions
- Reach alone
- Click-through rate alone
- Low-cost clicks
- All form submissions
- Raw webinar registrations
- Document opens
- Unqualified page views
- Platform-reported leads without CRM verification

Preferred Optimization Hierarchy

- Qualified opportunity
- Sales-accepted diagnostic request
- Scheduled demo or technical review
- Qualified diagnostic submission
- Qualified account and multi-stakeholder engagement
- Form start or proof-content engagement
- Traffic metrics

Conversion Events

Event	Purpose	Type	Priority	Platforms
sales_accepted_diagnostic_request	Primary optimization and business outcome for paid acquisition.	offline_qualified_conversion	primary	Google Ads LinkedIn Ads Microsoft Advertising Meta
qualified_opportunity_created	Measure downstream commercial progression and channel quality.	offline_pipeline_conversion	primary	Google Ads LinkedIn Ads Microsoft Advertising Meta
diagnostic_form_submit	Capture completed diagnostic or demo requests before sales acceptance.	website_conversion	secondary	Google Ads LinkedIn Ads Microsoft Advertising Meta
demo_scheduled	Measure successful movement from request to a scheduled sales interaction.	lifecycle_conversion	secondary	Google Ads LinkedIn Ads Microsoft Advertising Meta
qualified_technical_review_request	Measure high-intent technical evaluation from the IT persona.	website_and_offline_qualified_conversion	secondary	Google Ads LinkedIn Ads Microsoft Advertising
multi_stakeholder_account_engaged	Identify two or more selected-persona stakeholders from the same qualified account.	account_quality_event	secondary	LinkedIn Ads Google Ads
diagnostic_form_start	Diagnose landing-page and form friction without treating the event as the final outcome.	website_micro_conversion	diagnostic	Google Ads LinkedIn Ads Microsoft Advertising Meta

Event	Purpose	Type	Priority	Platforms
qualified_content_engagement	Track meaningful engagement with connector, governance, workflow-map, ROI, or diagnostic content from a qualified account.	engagement_quality_event	diagnostic	Google Ads LinkedIn Ads Meta



KPI Groups

Group	KPIs
Primary demand and pipeline	- Sales-accepted qualified diagnostic requests - Cost per sales-accepted qualified diagnostic request - Qualified opportunity creation - Demo-to-opportunity progression - Qualified pipeline by campaign when CRM data becomes available
Lead and account quality	- Sales acceptance rate - ICP company-size match rate - Supported-system qualification rate - Selected-persona match rate - Workflow-complexity qualification rate - Operational-trigger qualification rate - Multi-stakeholder account engagement rate - Disqualification reason distribution
Conversion-path performance	- Diagnostic form-start rate - Diagnostic form-completion rate - Demo scheduling rate - Landing-page conversion rate by intent and persona - Qualified technical-review conversion rate
Media efficiency and learning	- Cost per qualified diagnostic submission - Cost per sales-accepted request - Search-term qualification rate - Qualified account engagement by LinkedIn persona - Spend concentration on validated queries and audiences - Frequency and audience saturation
Measurement quality	- Tracking completeness - CRM source and campaign capture rate - Offline conversion import success rate - Sales-disposition completeness - Duplicate and spam rate

Optimization Cadence

Activity	Cadence
Budget pacing and tracking-health check	Daily during the first two weeks, then at least three times weekly
Search-term and negative-keyword review	Twice weekly during the first month, then weekly
Creative, audience, and landing-page review	Weekly
Sales disposition and lead-quality review	Weekly with sales and revenue operations
Account-level and multi-stakeholder review	Weekly for Tier 1 accounts
Budget reallocation and scale decisions	Every two weeks unless a critical quality issue requires immediate action
Claims and proof review	Before each new creative flight and monthly thereafter

30/60/90 Rollout

30/60/90 Rollout

Validate positioning and measurement

PHASE

Validate positioning and measurement

DATE RANGE

Days 1–30

START DAY

1

END DAY

30

PRIMARY GOAL

Validate ICP language, persona messages, objections, proof requirements, account criteria, and the measurement specification before paid activation.

PAID MEDIA ACTIONS

- Do not activate broad paid demand.
- Use virtual focus-group findings to finalize Search themes, LinkedIn hooks, offers, and disqualification logic.
- Build the campaign taxonomy, account lists, conversion-event dictionary, CRM fields, and reporting requirements.
- Draft Google Search and LinkedIn creative for the three selected personas.
- Consolidate the problem-language validation guide, ICP and Positioning-Anchor Validation Pack, and canonical messaging, claims, and proof register into the launch approval system.

SCALE CRITERIA

- Approved ICP criteria and selected-persona title map
- Approved message hierarchy and claims register
- Tracking specification approved by marketing, sales, and analytics owners

PAUSE CRITERIA

- Persona findings materially contradict the planned problem language or offer
- Sales acceptance and disqualification criteria remain undefined
- No owner is accountable for analytics and CRM implementation

Build and QA the launch system

PHASE

Build and QA the launch system

DATE RANGE

Days 31–60

START DAY

31

END DAY

60

PRIMARY GOAL

Complete conversion destinations, proof content, creative production, sales enablement, and end-to-end measurement QA.

PAID MEDIA ACTIONS

- Produce the workflow diagnostic conversion page, qualification form, scheduling flow, preparation content, privacy links, and role-specific follow-up.
- Consolidate and publish the category answer page, category FAQ, homepage or platform positioning, category-intent Search content, and category-positioning sales narrative after canonical URL approval.
- Consolidate and publish the operations leader page, workflow bottleneck analysis resource, cross-functional handoff management content, automated handoff-mapping explainer, and persona-specific LinkedIn problem content.
- Consolidate and publish the IT and systems page, integrations evidence, architecture and data-access explainer, trust page, governance and explainability content, and IT evaluation enablement.
- Consolidate and produce the ROI methodology, operational baseline checklist, finance review checklist, executive reporting explainer, diagnostic output preview, and business-case enablement.
- Produce the one-handoff product demo narrative, tailored committee demo narrative, and multi-stakeholder sales narrative.
- Build campaigns in draft status and complete URL, event, routing, audience, claims, consent, and offline-conversion tests.

SCALE CRITERIA

- All critical prerequisites are ready
- End-to-end test leads preserve source and campaign data through CRM and scheduling
- Sales receives and dispositions test leads correctly
- Approved proof and role-specific landing content are live

PAUSE CRITERIA

- Diagnostic destination or routing fails QA
- Connector, governance, or claims content has not passed product and legal or privacy review
- Offline sales-stage reporting cannot be connected to campaign data

Activate controlled qualified demand

PHASE

Activate controlled qualified demand

DATE RANGE

Days 61–75

START DAY

61

END DAY

75

PRIMARY GOAL

Launch the minimum viable Google and LinkedIn structure and establish initial query, audience, account, and conversion-path quality.

PAID MEDIA ACTIONS

- Launch broken-handoff and workflow-bottleneck Google Search.
- Launch cross-system workflow and process-intelligence Google Search.
- Launch executive operations, IT evaluator, and operational workflow-owner LinkedIn audiences.
- Promote the workflow-risk webinar only to selected personas and qualified accounts.
- Activate LinkedIn retargeting when pool thresholds are met.
- Review search terms, account fit, sales feedback, and tracking daily or near-daily.

SCALE CRITERIA

- Approved search terms dominate traffic
- Qualified account and persona match rates are acceptable relative to the emerging baseline
- At least one credible qualified conversion-path signal appears without routing defects
- Sales feedback confirms message-to-problem relevance

PAUSE CRITERIA

- Traffic is dominated by poor-fit intent or company sizes
- Tracking or CRM attribution fails
- Creative introduces unsupported claims
- Audience overlap or frequency prevents interpretable learning



Optimize proof and committee conversion

PHASE

Optimize proof and committee conversion

DATE RANGE

Days 76–90

START DAY

76

END DAY

90

PRIMARY GOAL

Shift spend toward qualified intent and role-specific proof while creating multi-stakeholder account engagement.

PAID MEDIA ACTIONS

- Reallocate budget toward validated Search themes, persona hooks, and offers.
- Launch governance and explainability retargeting for qualified technical visitors.
- Launch executive business-case and diagnostic form-start retargeting.
- Activate Meta retargeting only if qualified audience volume supports delivery.
- Use the controlled reserve for Microsoft Search only if Google query quality is validated and sufficient budget remains.
- Complete the 90-day performance, claim-review, and next-cycle optimization playbook.

SCALE CRITERIA

- Repeated sales-accepted requests or credible qualified-account progression
- Consistent selected-persona and ICP fit
- Multi-stakeholder engagement within priority accounts
- Stable tracking and sales-disposition completeness

PAUSE CRITERIA

- No meaningful qualified event after sufficient spend or click volume
- Sales rejects the dominant lead type
- Retargeting frequency rises without progression
- Programmatic or additional-channel testing would dilute primary-channel learning

Controls

Geo Controls

- Use United States presence-based targeting rather than interest-in-location targeting.
- Exclude all countries outside the United States.
- Exclude US territories if sales coverage or contracting does not support them.
- Review location reports for out-of-market traffic weekly.

Role Exclusions

- Entry, training, unpaid, student, and intern seniorities
- Recruiting and human resources roles
- Marketing roles without operations ownership
- Sales development representatives and account executives
- Students, educators, job seekers, and certification seekers
- Individual-contributor software engineering roles without systems or operations responsibility
- Employee-monitoring and workforce-surveillance buyers

Company Exclusions

- Companies below 200 employees
- Companies above 2,000 employees unless approved as a named-account exception
- Existing customers
- RelayOps employees and contractors
- Accounts operating primarily in one system
- Duplicate, disqualified, or unsupported accounts

Industry Exclusions

- Consumer-only audiences without B2B operational workflows
- Accounts seeking broad ERP replacement or ERP-centered process mining as the primary requirement
- Organizations seeking employee-surveillance products
- Industries or accounts unsupported by sales, contracting, data-governance, or integration requirements

Display / Programmatic Controls

- Keep Google Display expansion and optimized targeting off.
- Exclude mobile applications, parked domains, made-for-advertising inventory, and low-quality placements.
- Do not activate broad firmographic programmatic audiences without approved account lists and intent criteria.
- Require 200–2,000 employee fit, supported-system evidence, and a selected-persona or department overlay for programmatic ABM.
- Use allowlists or verified contextual inventory where possible.
- Exclude customers, employees, submitted leads, disqualified leads, and recent converters.
- Do not use sensitive personal targeting or employee-level surveillance themes.

Audience Separation Rules

- Keep the three selected personas in separate reporting and creative groups.
- Separate cold title-based prospecting from matched-account, website-retargeting, CRM, and open-opportunity audiences.
- Exclude retargeting and CRM audiences from cold prospecting where platform controls permit.
- Separate problem-intent Search from category, integration, and alternative-comparison Search.
- Suppress completed leads, customers, employees, recent converters, and disqualified accounts from acquisition campaigns.
- Treat Tier 1 accounts separately from Tier 2 prospecting to measure committee penetration and prevent budget leakage.
- Do not combine adjacent personas with approved primary personas in the initial learning structure.
- Avoid duplicate bidding across Google and Microsoft by monitoring query and account quality rather than assuming incremental reach.

Google Search Negative Keywords

Keyword	Match Type	Applies To	Caution
jobs	phrase	All non-brand Search	Review queries before adding broader employment-related negatives.
career	phrase	All non-brand Search	
salary	phrase	All non-brand Search	
course	phrase	All non-brand Search	
training	phrase	All non-brand Search	Check that legitimate implementation-training intent is not required by sales.
certification	phrase	All non-brand Search	
template	phrase	BOFU Search	Do not apply to a dedicated checklist or educational campaign without query review.
free	phrase	All acquisition Search	
open source	phrase	All acquisition Search	
employee monitoring	phrase	All Search	
employee surveillance	phrase	All Search	
time tracking	phrase	All Search	
keystroke monitoring	phrase	All Search	
ERP replacement	phrase	All Search	
workflow automation free	phrase	All Search	
definition	exact	BOFU Search	Allow in a separately budgeted category-education campaign only after conversion intent is validated.

Frequency Caps

Campaign Type	Recommended Frequency
LinkedIn cold persona prospecting	Monitor weekly; refresh or reduce delivery when frequency exceeds approximately 3–4 impressions per person per week without qualified engagement.
LinkedIn and Meta retargeting	Target approximately 2–4 impressions per person per week and avoid sustained delivery above 8–10 impressions per 30 days without progression.
Display or programmatic ABM if later approved	Cap near 2 impressions per person per day and 8–12 per month, then adjust based on account engagement.

Handoff Checklist

Naming Pattern

{GEO}_{PLATFORM}_{FUNNEL}_{PERSONA}_{SEGMENT}_{OFFER}_{AUDIENCE_TYPE}

Naming Dimensions

Dimension	Allowed Values
GEO	US
PLATFORM	GADS LI META MS YT ABM
FUNNEL	TOFU MOFU BOFU ACT EXP
PERSONA	GOL ITSO MMAOL
SEGMENT	BrokenHandoffs WorkflowBottlenecks OperationalRisk ImprovementPriority ConnectorScope Governance CrossSystemAnalytics Tier1Committee BusinessCaseRTG
OFFER	Diagnostic ExecDiagnostic Assessment TechReview ConnectorDemo CommitteeDemo EvaluationPlan ROI
AUDIENCE_TYPE	Search Titles Accounts SiteRTG CRM Engagers Intent

Campaign Name Examples

Platform	Example
Google Ads	US_GADS_BOFU_MMAOL_BrokenHandoffs_Diagnostic_Search
LinkedIn Ads	US_LI_MOFU_ITSO_ConnectorScope_TechReview_Titles
LinkedIn Ads	US_LI_BOFU_GOL_Tier1Committee_CommitteeDemo_Accounts
Meta	US_META_BOFU_GOL_BusinessCaseRTG_EvaluationPlan_SiteRTG
Microsoft Advertising	US_MS_MOFU_ITSO_CrossSystemAnalytics_TechReview_Search

Media Buyer Handoff Checklist

Approve the three selected personas, persona-derived subsegments, ICP criteria, exclusions, and Tier 1 account definition.

CATEGORY

Strategy and approvals

STATUS

required_before_build

OWNER

Marketing lead and sales lead

NOTES

Do not add adjacent personas to primary campaigns.

Approve the canonical messaging, claims, proof, and prohibited-claims register.

CATEGORY

Strategy and approvals

STATUS

in_progress

OWNER

Marketing, product, legal or privacy reviewer

NOTES

Required before creative publication.

Complete virtual focus-group validation and document message changes.

CATEGORY

Strategy and approvals

STATUS

planned

OWNER

Marketing strategy owner

NOTES

Use findings to finalize hooks, objections, and offers.

Approve canonical URLs and publish the workflow-intelligence category answer page, category FAQ, homepage or platform positioning, and category-intent Search content.

CATEGORY

Destinations and content consolidation

STATUS

blocked

OWNER

Website and content owner

NOTES

Consolidates duplicate category-page and category-positioning recommendations.

Publish operations-leader and administrative-operations role content, workflow bottleneck analysis, cross-functional handoff management content, and problem-intent Search landing copy.

CATEGORY

Destinations and content consolidation

STATUS

planned

OWNER

Content and website owner

NOTES

Supports operations Search and LinkedIn acquisition.

Publish the IT and systems role page, integrations evidence, architecture and data-access explainer, trust page, governance, explainability, and audit-evidence content.

CATEGORY

Destinations and content consolidation

STATUS

planned

OWNER

Product marketing, security or privacy, and website owner

NOTES

Required for technical acquisition and retargeting.

Publish the ROI methodology, finance review checklist, operational baseline checklist, executive reporting explainer, and illustrative diagnostic output preview.

CATEGORY

Destinations and content consolidation

STATUS

planned

OWNER

Product marketing and finance reviewer

NOTES

All assumptions must remain transparent and editable.

Publish and QA the workflow diagnostic conversion page, qualification form, scheduling flow, privacy links, diagnostic expectations, and role-specific follow-up.

CATEGORY

Destinations and content consolidation

STATUS

in_progress

OWNER

Demand generation, web, marketing operations, and sales operations

NOTES

Critical launch gate.

Produce Google Search problem-intent and category or technical-intent ad variants mapped to approved landing pages.

CATEGORY

Creative and sales enablement

STATUS

planned

OWNER

Paid media buyer and copy owner

NOTES

Use two to three variants per intent cluster.

Produce LinkedIn role-specific problem, capability, proof, and committee-retargeting variants.

CATEGORY

Creative and sales enablement

STATUS

planned

OWNER
Paid social buyer and creative owner

NOTES
Include document, single-image, workflow-map, and technical diagram formats.

Complete the one-handoff product demo narrative and tailored committee demo narrative.

CATEGORY

Creative and sales enablement

STATUS

planned

OWNER
Product marketing and sales engineering

NOTES
Use representative data unless validated customer evidence becomes available.

Complete IT objection handling, category narrative, business-case enablement, multi-stakeholder sales narrative, and persona-specific diagnostic follow-up.

CATEGORY

Creative and sales enablement

STATUS

planned

OWNER
Product marketing and sales enablement

NOTES
Align sales responses with paid-media promises.

Implement analytics, platform pixels, consent controls, cross-domain tracking, and server-side events where appropriate.

CATEGORY

Tracking and CRM

STATUS

in_progress

OWNER

Marketing operations and analytics

NOTES

Validate against privacy requirements.

Capture campaign, ad, audience, keyword, search term, landing page, persona, account tier, and offer in CRM.

CATEGORY

Tracking and CRM

STATUS

planned

OWNER

Marketing operations

NOTES

Preserve original and latest source values.

Configure sales acceptance, disqualification, scheduled-demo, opportunity, and multi-stakeholder account events.

CATEGORY

Tracking and CRM

STATUS

planned

OWNER

Sales operations and marketing operations

NOTES

Import eligible offline events to ad platforms.

Run test submissions from every campaign destination through scheduling and sales disposition.

CATEGORY

Tracking and CRM

STATUS

required_before_launch

OWNER

Paid media buyer, marketing operations, and sales operations

NOTES

Paid activation remains gated until all tests pass.

Build campaigns using the approved taxonomy, budgets, audience separation, location controls, and exclusions.

CATEGORY

Media build and QA

STATUS

planned

OWNER

Paid media buyer

NOTES

Keep all campaigns paused until launch approval.

Apply negative keywords, Search Partner exclusions, audience-expansion controls, customer suppression, and placement controls.

CATEGORY

Media build and QA

STATUS

planned

OWNER

Paid media buyer

NOTES

Verify at account and campaign levels.

Check ad-to-keyword-to-audience-to-landing-page alignment and all final URLs.

CATEGORY

Media build and QA

STATUS

required_before_launch

OWNER

Paid media buyer and website owner

NOTES

Avoid generic homepage routing.

Document daily caps and monthly allocation: Google approximately \$7,083.33, LinkedIn approximately \$6,091.67, Meta retargeting up to \$566.67, and reserve \$425.00.

CATEGORY

Media build and QA

STATUS

planned

OWNER

Paid media lead

NOTES

Reallocate Meta or reserve funds to primary channels when qualified pools are too small.

Schedule weekly paid-media, CRM quality, sales feedback, and claims review.

CATEGORY

Operating cadence

STATUS

planned

OWNER

Performance marketing lead

NOTES

Include product and security or privacy reviewers when proof language changes.

Create the 90-day performance, claim-review, and next-cycle optimization playbook.

CATEGORY

Operating cadence

STATUS

planned

OWNER

Performance marketing lead

NOTES

Close the learning loop by persona, trigger, use case, offer, and channel.