

RelayOps GTM Launch: Target Segment Analysis



Target Segment Analysis RelayOps GTM Launch · RelayOps · B2B · Generated 2026-07-26

Prioritize high-intent search, persona-specific LinkedIn targeting, and multi-stakeholder account-based retargeting to reach US mid-market operations leaders evaluating cross-system workflow risk and handoff improvement.

Overview

Positioning Summary

RelayOps is a cross-system workflow-intelligence layer that connects signals from Slack, Jira, Salesforce, and HubSpot to reveal stalled handoffs, ownership gaps, bottlenecks, and process risk without replacing systems of record.

Final Recommendation

Launch with Google Search for explicit problem and solution demand, LinkedIn for persona and account precision, and tightly controlled retargeting that advances operations, IT, and executive stakeholders toward one tailored workflow diagnostic.

Warning / Constraint

The product URL, external proof, validated integration details, conversion assets, baseline measurement, and final focus-group findings are not yet available; avoid scaling spend or making ROI, implementation-speed, privacy, mapping-accuracy, or customer-outcome claims until these are substantiated.

Strongest Value Propositions

- Expose missed handoffs and ownership gaps across collaboration, project-management, and CRM systems.
- Detect operational risk before delays or escalations create customer or financial impact.
- Prioritize explainable workflow improvements tied to observed operational evidence.
- Give operations, IT, and executive stakeholders a shared view of one high-impact workflow.
- Measure interventions through a diagnostic-led evaluation and documented pre/post outcomes.

Recommended Initial Strategy

- Build separate campaigns for each selected persona rather than combining operations, IT, and executive audiences.
- Start Google Search with broken-handoff, workflow-bottleneck, operational-risk, process-intelligence, and cross-system workflow themes using exact and phrase match.
- Launch LinkedIn title-based and named-account campaigns for the three selected personas, keeping title, function, and skill audiences separate for quality analysis.
- Create a Tier 1 account list requiring 200–2,000 employees, at least three supported systems, cross-functional workflow complexity, and a verified operational trigger.
- Sequence persona-specific retargeting: workflow diagnostic for operational champions, technical review for IT, and ROI or evaluation planning for executives.
- Measure sales-accepted qualified demo requests, account fit, persona match, and opportunity progression rather than optimizing to raw engagement or form volume.

Scale After Validation

- Scale search themes that produce sales-accepted demos from qualified 200–2,000 employee accounts.
- Expand LinkedIn from exact titles into function-plus-seniority audiences only after persona quality is validated.
- Increase ABM coverage when multiple selected-persona stakeholders can be identified within qualified accounts.
- Test qualified-lead lookalikes only after sufficient sales-accepted conversion data exists.
- Expand industry cohorts only when opportunity data demonstrates repeatable fit.
- Test adjacent audiences only after selected-persona campaigns validate the associated use case and buying role.

Targeting Summary

MARKET

US B2B operations intelligence SaaS for sales-led mid-market buying committees

GEOGRAPHY

United States

PRIMARY PAID TARGET

The three selected personas at US companies with 200–2,000 employees, at least three supported systems, meaningful cross-functional handoffs, and active signals such as missed SLAs, escalations, onboarding delays, forecast leakage, automation planning, or cycle-time variance.

PRIMARY CHANNELS

Google Ads

LinkedIn Ads

Account-based sales and media orchestration

SECONDARY CHANNELS

Microsoft Advertising

Programmatic ABM

Google retargeting

Meta retargeting

X experimental tests

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Targeting Approach

Channel / Method	Role	Priority
Google Search	Capture explicit demand around workflow bottlenecks, handoff failures, process visibility, operational risk, and cross-system workflow analytics.	primary
LinkedIn Ads	Reach the three selected personas by title, function, seniority, company size, and named-account fit while delivering role-specific proof.	primary
Account-based advertising and sales orchestration	Concentrate impressions and coordinated outreach on qualified accounts with multiple selected-persona stakeholders.	primary
Google, LinkedIn, and Meta retargeting	Advance engaged visitors from problem education to diagnostic, technical review, committee demo, or business-case content.	secondary
Microsoft Advertising	Extend high-intent search and selectively apply available LinkedIn profile targeting to business search audiences.	secondary
Programmatic contextual and intent activation	Reach qualified accounts consuming operations, workflow, integration, SLA, and process-improvement content.	selective
Facebook and Instagram	Support retargeting and modeled expansion only after sufficient first-party qualified-conversion data exists.	selective
X	Test narrow follower, keyword, website-retargeting, and event-conversation audiences after primary channels establish message-market fit.	experimental

Audience Framework

Audience Families

Family Type	Family	Description
persona_role	Selected-persona buying committee	Structure campaigns around the operational sponsor, technical evaluator, and day-to-day workflow champion represented by the three selected personas.
use_case	Operational problem and use-case clusters	Group audiences by the operational trigger most likely to create demand while mapping each cluster back to the selected personas.
company_size	Mid-market fit bands	Prioritize companies large enough to have cross-functional complexity but small enough to value a faster, diagnostic-led alternative to enterprise transformation programs.
industry_company_type	Workflow-complexity company cohorts	Use industry as a secondary efficiency filter rather than a substitute for persona, company-size, systems, and workflow-fit requirements.
buying_intent	Active research and trigger audiences	Capture accounts and people researching workflow problems, process visibility, SLA risk, operational analytics, or related solution categories.
account_based	Qualified named-account audiences	Build account lists around ICP fit and activate multiple selected-persona stakeholders within each account.
retargeting	Engagement and buying-stage pools	Sequence offers according to the content, persona page, technical material, event, or conversion action already consumed.

Audience Family Segments

Selected-persona buying committee

FAMILY

Selected-persona buying committee

SEGMENT

Executive operational sponsor

DESCRIPTION

General and operations executives accountable for scaling, operational control, customer impact, and investment approval.

BEST FOR PERSONAS

General and Operations Leader for Scaling Business

THEMES

Operational risk Executive accountability Improvement prioritization Business-case development

EXAMPLES

- COO and VP Operations audiences
- General Manager audiences
- Head of Operations audiences

PRIORITY

primary

Selected-persona buying committee

FAMILY

Selected-persona buying committee

SEGMENT

Technical evaluator and implementation gatekeeper

DESCRIPTION

IT and systems operations leaders evaluating connectors, data scope, governance, architecture, and recommendation explainability.

BEST FOR PERSONAS

IT and Systems Operations Intelligence Manager

THEMES

Cross-system visibility Connector feasibility Data governance Explainable analysis

EXAMPLES

- Director of IT audiences
- Business Systems leadership audiences
- Enterprise Applications leadership audiences

PRIORITY

primary

Selected-persona buying committee

FAMILY

Selected-persona buying committee

SEGMENT

Operational workflow champion

DESCRIPTION

Administrative and business operations leaders responsible for reliable execution, coordination, ownership, and process improvement.

BEST FOR PERSONAS

Mid-Market Administrative Operations Leader

THEMES

Missed handoffs

Manual coordination

Ownership gaps

Workflow reliability

EXAMPLES

- Administrative Services Manager audiences
- Business Operations Manager audiences
- Operations Program Manager audiences

PRIORITY

primary

Operational problem and use-case clusters

FAMILY

Operational problem and use-case clusters

SEGMENT

Broken handoffs and unclear ownership

DESCRIPTION

Teams experiencing work that stalls between functions or systems and requires repeated manual follow-up.

BEST FOR PERSONAS

- Mid-Market Administrative Operations Leader
- General and Operations Leader for Scaling Business

THEMES

Missed handoffs

Recurring bottlenecks

Rework

Accountability

EXAMPLES

- Customer onboarding handoffs
- Sales-to-service transitions
- Cross-functional approval workflows

PRIORITY

primary

Operational problem and use-case clusters

FAMILY

Operational problem and use-case clusters

SEGMENT

Operational risk and missed SLA visibility

DESCRIPTION

Leaders looking for earlier warning of delays, escalation risk, service failures, or cycle-time variance.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- Mid-Market Administrative Operations Leader

THEMES

Missed SLAs Escalations Customer impact Early risk detection

EXAMPLES

- Process-risk diagnostic
- Escalation-path demonstration
- Workflow-risk assessment

PRIORITY

primary

Operational problem and use-case clusters

FAMILY

Operational problem and use-case clusters

SEGMENT

Cross-system workflow intelligence

DESCRIPTION

Technical and operational stakeholders seeking connected workflow insight across Slack, Jira, Salesforce, and HubSpot.

BEST FOR PERSONAS

- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Fragmented data Connected signals Workflow reconstruction Systems-of-record compatibility

EXAMPLES

- Connector and data-flow review
- Representative workflow map
- Architecture demonstration

PRIORITY

primary

Operational problem and use-case clusters

FAMILY

Operational problem and use-case clusters

SEGMENT

Improvement prioritization and outcome measurement

DESCRIPTION

Executives and operations leaders choosing which workflow problems to address and how to document progress.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- Mid-Market Administrative Operations Leader

THEMES

Resource prioritization

Operational ROI

Pre/post measurement

Executive reporting

EXAMPLES

- ROI assessment
- Priority-workflow diagnostic
- Executive evaluation guide

PRIORITY

secondary

Mid-market fit bands

FAMILY

Mid-market fit bands

SEGMENT

Core mid-market

DESCRIPTION

US companies with 200–1,000 employees and multi-system, customer-facing workflows.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Scaling complexity

Fragmented ownership

Limited appetite for enterprise transformation

EXAMPLES

- 201–500 employee LinkedIn band
- 501–1,000 employee LinkedIn band

PRIORITY

primary

Mid-market fit bands

FAMILY

Mid-market fit bands

SEGMENT

Upper mid-market

DESCRIPTION

Companies with 1,001–2,000 employees selected through account lists or enrichment because platform employee bands may extend above the ICP ceiling.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Governance

Multi-team handoffs

Committee evaluation

Operational risk

EXAMPLES

- Qualified accounts within the platform 1,001–5,000 band
- CRM or enrichment lists capped at 2,000 employees

PRIORITY

primary

Workflow-complexity company cohorts

FAMILY

Workflow-complexity company cohorts

SEGMENT

Cross-functional customer workflow cohort

DESCRIPTION

Companies with customer-facing work spanning operations, service, sales, implementation, and technical teams.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Customer onboarding

Service delivery

Sales-to-operations handoffs

Escalation management

EXAMPLES

- B2B software and technology services
- Professional and business services
- Other qualified industries with supported-system usage

PRIORITY

test

Active research and trigger audiences

FAMILY

Active research and trigger audiences

SEGMENT

Problem-aware search intent

DESCRIPTION

Searchers explicitly describing handoff failures, bottlenecks, workflow visibility, missed SLAs, or ownership problems.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Workflow bottleneck analysis

Cross-functional handoffs

Operational risk detection

Process visibility

EXAMPLES

- workflow bottleneck software
- cross functional workflow analytics
- missed SLA root cause
- workflow handoff management

PRIORITY

primary

Active research and trigger audiences

FAMILY

Active research and trigger audiences

SEGMENT

Solution and alternative-category intent

DESCRIPTION

Researchers comparing process intelligence, workflow analytics, process mining, BI, work-management reporting, or automation approaches.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager

THEMES

Mid-market deployment

Neutral intelligence layer

Explainable recommendations

No system replacement

EXAMPLES

- process intelligence software
- workflow analytics platform
- process mining alternative
- operational intelligence tools

PRIORITY

primary

Qualified named-account audiences

FAMILY

Qualified named-account audiences

SEGMENT

Tier 1 high-fit accounts

DESCRIPTION

US accounts with 200–2,000 employees, evidence of at least three supported systems, customer-facing handoffs, and a current operational trigger.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

One workflow

One shared proof plan

Committee alignment

Tailored diagnostic

EXAMPLES

- Operations plus IT matched audiences
- Account-specific LinkedIn campaigns
- Programmatic account lists coordinated with sales outreach

PRIORITY

primary

Qualified named-account audiences

FAMILY

Qualified named-account audiences

SEGMENT

Tier 2 fit accounts

DESCRIPTION

Accounts meeting company-size and systems criteria but lacking a verified active trigger.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Problem education

Workflow-risk recognition

Diagnostic introduction

EXAMPLES

- LinkedIn thought-leadership audiences
- Contextual programmatic account targeting

PRIORITY

secondary

Engagement and buying-stage pools

FAMILY

Engagement and buying-stage pools

SEGMENT

Problem-aware site and content engagers

DESCRIPTION

Visitors who consumed handoff, bottleneck, SLA, operational-risk, or workflow-improvement content without converting.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- Mid-Market Administrative Operations Leader

THEMES

Workflow-risk assessment Use-case proof Diagnostic CTA

EXAMPLES

- 30-day high-intent page visitors
- 50% video viewers
- LinkedIn document-ad engagers

PRIORITY

primary

Engagement and buying-stage pools

FAMILY

Engagement and buying-stage pools

SEGMENT

Technical evaluation engagers

DESCRIPTION

Visitors to connector, security, governance, architecture, FAQ, or product demonstration content.

BEST FOR PERSONAS

IT and Systems Operations Intelligence Manager

THEMES

Connector scope Data flow Governance Technical workflow review

EXAMPLES

- Connector-page visitors
- Technical webinar attendees
- Product-demo video viewers

PRIORITY

primary

Engagement and buying-stage pools

FAMILY

Engagement and buying-stage pools

SEGMENT

Decision-stage account engagement

DESCRIPTION

Qualified accounts with repeat visits, multiple engaged stakeholders, diagnostic starts, webinar attendance, or sales activity.

BEST FOR PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

THEMES

Committee demo Evaluation plan Business case Proof requirements

EXAMPLES

- Open opportunities
- Diagnostic form abandoners
- Multiple engaged contacts from one account

PRIORITY

primary

General and Operations Leader for Scaling Business

Targeting Profile

ROLE SUMMARY

Executive operations leader accountable for scalable execution, cross-functional performance, operational risk, and approval of an operations-intelligence investment.

BUYING ROLE

decision_maker executive_sponsor business_value_approver

LIKELY OFFERS

- Executive workflow-risk diagnostic
- Operational ROI assessment with transparent assumptions
- Executive product demo
- Buying guide for workflow intelligence
- Cross-functional evaluation plan

AUDIENCE THEMES

- Operational risk before customer impact
- Scaling without coordination failure
- Cross-functional accountability
- Improvement prioritization
- Measurable executive outcomes

LINKEDIN JOB TITLES

Chief Operating Officer COO Vice President of Operations VP Operations Head of Operations
Director of Operations General Manager Senior Director of Operations Business Operations Director

SENIORITY

CXO VP Director

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

COMPANY SIZES

201–500 employees 501–1,000 employees Verified 1,001–2,000 employee accounts

INTENT TOPICS

Operational intelligence Workflow analytics Process risk Cross-functional workflow
Operational excellence Process improvement Workflow bottlenecks

MESSAGING ANGLES

- Gain an evidence-based view of operational risk and accountability.
- Focus resources on the workflow problems that matter most.
- See risk, set priorities, and measure progress without replacing existing systems.
- Start with one high-impact workflow and a tailored diagnostic.

Pain-Point Subsegments

Escalation and missed-commitment leaders

DESCRIPTION

Executives facing recurring escalations, missed commitments, or customer-impacting delays caused by fragmented workflows.

MESSAGING ANGLES

- See process risk before it becomes a customer problem.
- Identify where recurring escalations begin across systems.
- Turn scattered workflow signals into earlier operational action.

USE CASES

Reduce process risk before impact

Find and fix broken handoffs

OFFER

Executive process-risk diagnostic

Growth and accountability leaders

DESCRIPTION

Executives trying to scale operations while maintaining clear ownership and reliable cross-functional execution.

MESSAGING ANGLES

- Scale operations without scaling coordination failure.
- Create an evidence-based view of ownership and operational risk.
- Prioritize the workflow changes that matter most.

USE CASES

Prioritize operational improvements

Align the buying committee

OFFER

Executive-focused demo and workflow prioritization assessment

Business-case builders

DESCRIPTION

Executives who need credible baselines, measurable outcomes, and committee-ready rationale before approving investment.

MESSAGING ANGLES

- Connect workflow problems to measurable improvement priorities.
- Build the investment case around one high-impact workflow.
- Give every stakeholder a shared proof plan.

USE CASES

Build the investment case

Align the buying committee

OFFER

ROI assessment and tailored evaluation plan

Platform Fit

Platform	Fit	Reason
LinkedIn	strong	Reliable access to executive operations titles, seniority, company size, and named-account targeting.
Google Search	strong	Captures executives or delegated researchers actively investigating workflow risk, operational visibility, and process-intelligence solutions.
Programmatic ABM	moderate	Useful for sustained account coverage when restricted to verified ICP account lists and coordinated with sales.
Facebook and Instagram	retargeting_only	Native professional-role precision is insufficient for primary acquisition, but retargeting can reinforce executive proof and offers.
X	experimental	Follower and keyword audiences can reach operations conversations but offer weaker role and company-fit controls.

IT and Systems Operations Intelligence Manager

Targeting Profile

ROLE SUMMARY

Manager or senior manager responsible for systems operations, business applications, integrations, data access, governance, and technical feasibility.

BUYING ROLE

technical_evaluator implementation_gatekeeper security_and_governance_reviewer

LIKELY OFFERS

- Connector and data-flow demonstration
- Technical workflow review
- Architecture and governance FAQ
- Product demonstration using a representative workflow
- Committee diagnostic including IT and operations

AUDIENCE THEMES

- Connected insight without replacing systems of record
- Connector scope and implementation requirements
- Explainable workflow mapping and alerts
- Data access, privacy, and governance clarity
- Reduced manual data and reporting burden

LINKEDIN JOB TITLES

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
Director of Enterprise Applications

SENIORITY

Manager Senior Director

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

COMPANY SIZES

201–500 employees 501–1,000 employees Verified 1,001–2,000 employee accounts

INTENT TOPICS

Workflow integration Business systems integration Process intelligence Workflow analytics
Data governance Enterprise applications Operational analytics

MESSAGING ANGLES

- Add explainable workflow intelligence without replacing systems of record.
- Review connector scope, data flow, governance, and alert logic.
- Connect supported workflow signals without creating another manual reporting project.
- Include IT in a tailored diagnostic centered on one representative workflow.

Pain-Point Subsegments

Integration-burden evaluators

DESCRIPTION

IT leaders concerned that another platform will create connector maintenance, support burden, or a manual data project.

MESSAGING ANGLES

- Connect workflow signals without replacing core systems.
- Evaluate connector scope and data flow before committing.
- Give operations a connected view without another manual BI build.

USE CASES

Connect workflow signals safely

OFFER

Connector and data-flow demonstration

Governance and explainability evaluators

DESCRIPTION

Technical stakeholders requiring clarity on access controls, data handling, alert logic, and recommendation explainability.

MESSAGING ANGLES

- See the evidence behind workflow alerts and recommendations.
- Review data scope, governance, and analysis before evaluation.
- Align technical requirements with operational outcomes.

USE CASES

Connect workflow signals safely

Align the buying committee

OFFER

Technical workflow review and governance FAQ

Systems-fragmentation managers

DESCRIPTION

Leaders supporting Slack, Jira, Salesforce, HubSpot, or similar environments where operational signals remain disconnected.

MESSAGING ANGLES

- Connect the workflow signals your existing tools leave apart.
- Reconstruct cross-system handoffs without replacing systems of record.
- Create a shared operational view across supported systems.

USE CASES

Connect workflow signals safely

Find and fix broken handoffs

OFFER

Representative cross-system workflow demo

Platform Fit

Platform	Fit	Reason
LinkedIn	strong	Strong title, function, skill, seniority, company-size, and account-list targeting for technical evaluators.
Google Search	strong	Captures active research around workflow integration, process intelligence, operational analytics, and product alternatives.
Microsoft Advertising	moderate	Provides incremental search demand and selective business-profile overlays where available.
Programmatic ABM	moderate	Can reach technical stakeholders at named accounts around relevant contextual and intent topics.
Facebook and Instagram	retargeting_only	Best limited to known technical visitors, video viewers, webinar registrants, and qualified customer-list audiences.
X	experimental	Technical follower and keyword audiences may provide reach but need strict conversion-quality validation.

Mid-Market Administrative Operations Leader

Targeting Profile

ROLE SUMMARY

Manager or senior manager responsible for administrative and business operations, resource coordination, process reliability, ownership, and everyday workflow execution.

BUYING ROLE

operational_champion workflow_owner influencer

LIKELY OFFERS

- Workflow-risk assessment
- Missed-handoff checklist
- Representative workflow map
- Operational use-case webinar
- Tailored workflow diagnostic
- Product demonstration focused on a recurring bottleneck

AUDIENCE THEMES

- Missed handoffs and recurring bottlenecks
- Clear workflow ownership
- Reduced manual follow-up
- Earlier process-risk visibility
- Practical recommendations that teams can implement

LINKEDIN JOB TITLES

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
Head of Business Operations

SENIORITY

Manager Senior Director

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

COMPANY SIZES

201–500 employees 501–1,000 employees Verified 1,001–2,000 employee accounts

INTENT TOPICS

Workflow management Workflow bottlenecks Process improvement Cross-functional operations
SLA management Operational efficiency Workflow analytics

MESSAGING ANGLES

- Expose missed handoffs and unclear ownership.
- Reduce manual coordination by seeing how work moves across systems.
- Turn workflow evidence into practical steps for everyday execution.
- Bring one recurring bottleneck to a tailored diagnostic.

Pain-Point Subsegments

Missed-handoff workflow owners

DESCRIPTION

Operations managers repeatedly chasing updates because work crosses teams and systems without clear ownership.

MESSAGING ANGLES

- See where work stalls before the next handoff fails.
- Turn scattered workflow signals into clear accountability.
- Find the bottleneck, clarify ownership, and keep work moving.

USE CASES

Find and fix broken handoffs

OFFER

Tailored workflow diagnostic

Manual-coordination leaders

DESCRIPTION

Operations leaders spending excessive time on status checks, escalations, and coordination across disconnected tools.

MESSAGING ANGLES

- Replace manual investigation with a connected workflow view.
- Expose recurring bottlenecks across the tools teams already use.
- Focus effort on practical workflow changes.

USE CASES

Find and fix broken handoffs

Prioritize operational improvements

OFFER

Workflow-risk checklist followed by a diagnostic

Change and adoption owners

DESCRIPTION

Managers concerned that new insights will add complexity or fail to translate into operational change.

MESSAGING ANGLES

- Move from identified risk to a practical improvement path.
- Start with one workflow instead of a broad transformation.
- Measure whether the intervention improves execution.

USE CASES

Prioritize operational improvements

Build the investment case

OFFER

Use-case demo and measurable intervention plan

Platform Fit

Platform	Fit	Reason
LinkedIn	strong	Provides the clearest access to administrative and business operations titles, functions, seniority, company size, and named accounts.
Google Search	strong	Captures problem-aware research around handoffs, workflow bottlenecks, process improvement, and SLA issues.
Programmatic ABM	moderate	Useful for building awareness among operations stakeholders within prequalified accounts.
Facebook and Instagram	retargeting_only	Appropriate for retargeting engaged operations visitors with visual use-case and checklist creative, not cold role-based acquisition.
X	experimental	Operations and productivity conversations exist, but persona and company-size precision are limited.



Subsegments

Persona-Derived Subsegments

Executive operational-risk sponsors

SUBSEGMENT

Executive operational-risk sponsors

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGETING SUMMARY

COO, VP Operations, Head of Operations, General Manager, and senior operations titles at qualified US mid-market accounts showing escalation, SLA, customer-impact, or cycle-time risk.

INTENT SIGNALS

- Operational risk research
- Missed SLA content consumption
- Escalation-management research
- Repeat visits to executive or diagnostic pages

OFFER

Executive process-risk diagnostic

MESSAGE

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

PRIORITY

high

CHANNELS

- LinkedIn
- Google Search
- Programmatic ABM
- Sales outreach

FUNNEL FIT

- MOFU
- BOFU



Executive improvement-prioritization leaders

SUBSEGMENT

Executive improvement-prioritization leaders

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGETING SUMMARY

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

INTENT SIGNALS

Operational excellence content engagement

Workflow analytics searches

ROI or business-case page visits

OFFER

Priority-workflow assessment and executive demo

MESSAGE

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

PRIORITY

high

CHANNELS

LinkedIn

Google Search

Microsoft Advertising

FUNNEL FIT

TOFU

MOFU

BOFU

Connector and systems-fragmentation evaluators

SUBSEGMENT

Connector and systems-fragmentation evaluators

PARENT PERSONA

IT and Systems Operations Intelligence Manager

TARGETING SUMMARY

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

INTENT SIGNALS

Workflow integration searches

Connector-page visits

Architecture or product-demo engagement

Planned automation initiative

OFFER

Connector and data-flow demonstration

MESSAGE

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

PRIORITY

high

CHANNELS

LinkedIn

Google Search

Microsoft Advertising

Programmatic ABM

FUNNEL FIT

MOFU

BOFU

Governance and explainability gatekeepers

SUBSEGMENT

Governance and explainability gatekeepers

PARENT PERSONA

IT and Systems Operations Intelligence Manager

TARGETING SUMMARY

Technical evaluators consuming content about data governance, access controls, AI explainability, architecture, and implementation requirements.

INTENT SIGNALS

Governance FAQ visits

Security or data-handling content engagement

Technical webinar attendance

Repeated product-detail visits

OFFER

Technical workflow review and governance FAQ

MESSAGE

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

PRIORITY

high

CHANNELS

LinkedIn

Google retargeting

LinkedIn retargeting

Programmatic ABM

FUNNEL FIT

MOFU

BOFU

Missed-handoff workflow owners

SUBSEGMENT

Missed-handoff workflow owners

PARENT PERSONA

Mid-Market Administrative Operations Leader

TARGETING SUMMARY

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

INTENT SIGNALS

Workflow handoff searches

Bottleneck content engagement

Customer onboarding delay research

Missed SLA research

OFFER

Tailored workflow diagnostic

MESSAGE

See where work stalls, clarify ownership, and identify practical steps to keep it moving.

PRIORITY

high

CHANNELS

LinkedIn

Google Search

Webinars

Sales outreach

FUNNEL FIT

TOFU

MOFU

BOFU

Manual-coordination and bottleneck managers

SUBSEGMENT

Manual-coordination and bottleneck managers

PARENT PERSONA

Mid-Market Administrative Operations Leader

TARGETING SUMMARY

Operations managers experiencing excessive status chasing, spreadsheet tracking, escalation follow-up, or recurring bottlenecks across disconnected tools.

INTENT SIGNALS

Operational efficiency searches

Workflow bottleneck searches

Checklist or webinar engagement

Multiple visits to use-case pages

OFFER

Missed-handoff checklist and workflow-risk assessment

MESSAGE

Replace manual investigation with a connected view of recurring workflow problems.

PRIORITY

high

CHANNELS

LinkedIn

Google Search

LinkedIn retargeting

Meta retargeting

FUNNEL FIT

TOFU

MOFU

Multi-stakeholder Tier 1 account committee

SUBSEGMENT

Multi-stakeholder Tier 1 account committee

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGETING SUMMARY

Named-account segment requiring concurrent coverage of the executive sponsor plus the selected IT and administrative operations personas.

INTENT SIGNALS

Multiple engaged contacts from one account

Account-level search or content intent

Sales activity

Diagnostic or webinar engagement

OFFER

Cross-functional workflow diagnostic and committee demo

MESSAGE

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

PRIORITY

high

CHANNELS

LinkedIn

Programmatic ABM

Google customer-match activation where eligible

Sales outreach

FUNNEL FIT

MOFU

BOFU

Executive business-case retargeting pool

SUBSEGMENT

Executive business-case retargeting pool

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGETING SUMMARY

Qualified executive visitors and named-account stakeholders who consumed pricing, ROI, diagnostic, buying-guide, or executive-demo content.

INTENT SIGNALS

- Pricing-page visit
- ROI content engagement
- Diagnostic form start
- Repeat site visit
- Open sales opportunity

OFFER

Tailored evaluation plan

MESSAGE

Build a credible investment case around one measurable workflow problem.

PRIORITY

medium

CHANNELS

- LinkedIn retargeting
- Google retargeting
- Meta retargeting

FUNNEL FIT

BOFU



Platform Guidance

Google Ads

RECOMMENDATION

primary

ROLE

Capture explicit problem and solution intent through Search, then use YouTube and Display primarily for qualified retargeting and custom-segment reinforcement.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

MOFU BOFU

AUDIENCE TYPES

- Exact- and phrase-match high-intent Search themes
- Search remarketing audiences
- Customer Match where eligibility and consent requirements are met
- Custom segments based on high-intent search terms and relevant URLs
- YouTube video-viewer retargeting
- Display retargeting for high-intent site visitors

EXCLUSIONS

- Exclude Search Partners initially until query quality is validated.
- Keep Display expansion and optimized targeting off until qualified-conversion data supports testing.
- Exclude mobile apps and low-quality placements from Display activity.
- Apply employment, education, template, consumer, free-tool, surveillance, ERP, and unrelated automation negatives.
- Exclude existing customers, employees, vendors, and disqualified leads where first-party lists permit.



LinkedIn Ads

RECOMMENDATION

primary

ROLE

Create persona-specific acquisition and account-based campaigns using job title, function, seniority, company size, skills, matched accounts, retargeting, and engagement audiences.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

TOFU MOFU BOFU

AUDIENCE TYPES

- Job-title audiences
- Job-function plus seniority audiences
- Skill audiences layered with function and company size
- Matched account lists
- Contact lists where consent and platform requirements are met
- Website retargeting
- Video-view and document-ad engagement audiences
- Lead-form openers and submitters
- Event registrants and attendees

EXCLUSIONS

- Exclude entry-level, training, unpaid, and student seniorities.
- Exclude companies below 200 employees unless included on an approved exception list.
- Exclude companies above 2,000 employees through account lists or company exclusions where possible.
- Exclude current employees, customers, vendors, competitors, disqualified leads, and active applicants.
- Avoid enabling audience expansion until baseline persona and account quality are established.
- Separate title-based and function-based audiences to prevent opaque overlap and measure quality.

Microsoft Advertising

RECOMMENDATION

secondary

ROLE

Add incremental high-intent search coverage and selectively test available LinkedIn profile targeting overlays for business audiences.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

MOFU

BOFU

AUDIENCE TYPES

Search keyword targeting

Remarketing lists

Customer Match where eligible

Available LinkedIn company, industry, and job-function profile targeting

In-market audiences tested only as observation or bid modifiers initially

EXCLUSIONS

Mirror the validated Google negative-keyword framework.

Separate syndicated or partner traffic until quality is proven.

Do not rely on broad in-market audiences without search intent or first-party qualification.

Exclude existing customers, employees, and disqualified leads.

Facebook and Instagram

RECOMMENDATION

retargeting_only

ROLE

Re-engage known visitors and content engagers with persona-specific visual proof; test lookalikes only after sufficient high-quality first-party conversion data exists.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

MOFU

BOFU

AUDIENCE TYPES

Website custom audiences

CRM audiences where consent and platform requirements are met

Video-view audiences

Lead-form engagement audiences

Qualified-conversion lookalikes as a later test

EXCLUSIONS

Do not use broad cold-interest targeting as a primary B2B acquisition tactic.

Exclude current customers, employees, submitted leads, disqualified leads, and recent converters.

Use qualified diagnostic or sales-accepted leads rather than all leads as the source for any later lookalike test.

Control placement quality and review lead quality by placement.

X

RECOMMENDATION

experimental

ROLE

Test narrow follower, keyword, conversation, website-retargeting, and first-party audiences around operations and systems topics after primary channels are validated.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

TOFU

MOFU

AUDIENCE TYPES

Follower look-alike targeting

Keyword and conversation targeting

Website retargeting

First-party list targeting where eligible

Event and webinar conversation audiences

EXCLUSIONS

Exclude broad news and entertainment inventory where controls permit.

Exclude irrelevant consumer, employment, student, and cryptocurrency conversations.

Use conversion and lead-quality reporting rather than engagement metrics to judge viability.

Keep spend capped until qualified demo or account-engagement quality is demonstrated.

Programmatic ABM

RECOMMENDATION

selective

ROLE

Build named-account awareness and committee coverage through account lists, verified intent, contextual content, and coordinated sales activation.

BEST PERSONAS

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

FUNNEL STAGES

TOFU

MOFU

BOFU

AUDIENCE TYPES

Named-account targeting

Account-level intent audiences

Contextual page targeting

Site retargeting

Opportunity-stage account suppression or acceleration

Persona and department overlays where available

EXCLUSIONS

Do not activate broad firmographic audiences without approved account lists or intent criteria.

Exclude accounts outside 200–2,000 employees unless separately approved.

Exclude accounts lacking supported-system or meaningful cross-functional workflow evidence.

Apply frequency controls and monitor account-level reach rather than optimizing to low-value clicks.

Suppress customers, competitors, vendors, disqualified accounts, and accounts under contractual restrictions.

Platform Targeting Logic

Google Ads

PERSONA

General and Operations Leader for Scaling Business

KEYWORDS

operational intelligence software workflow analytics platform operational risk software
cross functional workflow visibility process improvement analytics workflow bottleneck analysis
process intelligence software

ACCOUNT LISTS

- Qualified CRM account lists through Customer Match where eligible
- Tier 1 account visitors through analytics audiences

RETARGETING POOLS

Executive-page visitors ROI and buying-guide visitors Diagnostic form starters
Repeat visitors from qualified accounts

CONTEXTUAL TOPICS

Operational excellence Process improvement Business operations Workflow analytics

CAMPAIGN EXAMPLES

- US_Search_BOFU_GOL_OperationalRisk_Diagnostic
- US_Search_MOFU_GOL_ProcessIntelligence_ExecutiveDemo

Google Ads

PERSONA

IT and Systems Operations Intelligence Manager

KEYWORDS

workflow integration software cross system workflow analytics business systems workflow visibility
process intelligence platform workflow analytics Salesforce Jira operational analytics integration
process mining alternative

ACCOUNT LISTS

- Qualified technical contacts through Customer Match where eligible
- Tier 1 accounts with supported-system evidence

RETARGETING POOLS

Connector-page visitors Technical FAQ visitors Product-demo viewers Technical webinar attendees

CONTEXTUAL TOPICS

Systems integration Enterprise applications Data governance IT operations

CAMPAIGN EXAMPLES

- US_Search_BOFU_ITSO_ConnectorReview_TechDemo
- US_Search_MOFU_ITSO_CrossSystemAnalytics_ProductDemo

Google Ads

PERSONA

Mid-Market Administrative Operations Leader

KEYWORDS

- workflow handoff management
- workflow bottleneck software
- missed handoff process
- cross team workflow tracking
- missed SLA root cause
- customer onboarding bottlenecks
- workflow ownership software

ACCOUNT LISTS

- Qualified operations contacts through Customer Match where eligible
- Tier 1 operational accounts

RETARGETING POOLS

- Handoff use-case visitors
- Checklist downloaders
- Workflow-risk webinar registrants
- Diagnostic landing-page visitors

CONTEXTUAL TOPICS

- Workflow management
- Administrative operations
- Process improvement
- Customer operations

CAMPAIGN EXAMPLES

- US_Search_BOFU_MMAOL_BrokenHandoffs_Diagnostic
- US_Search_MOFU_MMAOL_WorkflowBottlenecks_Assessment

LinkedIn Ads

PERSONA

General and Operations Leader for Scaling Business

JOB TITLES

- Chief Operating Officer
- Vice President of Operations
- Head of Operations
- General Manager
- Director of Operations
- Business Operations Director

SENIORITY

- CXO
- VP
- Director

INDUSTRIES

- Use cross-industry targeting when account fit is known
- Test software and IT services
- Test professional and business services

COMPANY SIZES

- 201–500
- 501–1,000
- 1,001–5,000 only with account-list controls

SKILLS / INTERESTS

- Operations Management
- Operational Excellence
- Process Improvement
- Strategic Planning

ACCOUNT LISTS

- Tier 1 qualified accounts
- Tier 2 ICP-fit accounts
- Open-opportunity accounts

RETARGETING POOLS

- Executive content engagers
- ROI assessment visitors
- Diagnostic-page visitors
- 75% video viewers
- Lead-form openers

CAMPAIGN EXAMPLES

- US_LI_MOFU_GOL_OperationalRisk_ExecDiagnostic
- US_LI_BOFU_GOL_Tier1ABM_CommitteeDemo



LinkedIn Ads

PERSONA

IT and Systems Operations Intelligence Manager

JOB TITLES

- IT Operations Manager
- Business Systems Manager
- Director of Business Systems
- Enterprise Applications Manager
- Business Applications Manager
- Information Systems Manager

SENIORITY

- Manager
- Senior
- Director

INDUSTRIES

- Use cross-industry targeting when account fit is known
- Test software and IT services
- Test professional and business services

COMPANY SIZES

- 201–500
- 501–1,000
- 1,001–5,000 only with account-list controls

SKILLS / INTERESTS

- IT Operations
- Systems Integration
- Business Systems
- Enterprise Applications
- Data Governance
- Salesforce
- Jira
- Slack
- HubSpot

ACCOUNT LISTS

- Tier 1 accounts with three or more supported systems
- Accounts with planned automation or integration initiatives
- Open-opportunity accounts

RETARGETING POOLS

- Connector-content visitors
- Governance FAQ visitors
- Technical webinar attendees
- Product-demo viewers

CAMPAIGN EXAMPLES

- US_LI_MOFU_ITSO_ConnectorScope_TechReview
- US_LI_BOFU_ITSO_Tier1ABM_DataFlowDemo

LinkedIn Ads

PERSONA

Mid-Market Administrative Operations Leader

JOB TITLES

- Administrative Services Manager
- Business Operations Manager
- Operations Manager
- Operations Program Manager
- Administrative Operations Manager
- Director of Administrative Services
- Director of Business Operations

SENIORITY

- Manager
- Senior
- Director

INDUSTRIES

- Use cross-industry targeting when account fit is known
- Test software and IT services
- Test professional and business services

COMPANY SIZES

- 201–500
- 501–1,000
- 1,001–5,000 only with account-list controls

SKILLS / INTERESTS

- Administrative Management
- Business Operations
- Workflow Management
- Process Improvement
- Program Management

ACCOUNT LISTS

- Tier 1 qualified accounts
- Accounts with onboarding or SLA triggers
- Open-opportunity accounts

RETARGETING POOLS

- Handoff-content engagers
- Checklist viewers
- Workflow-risk webinar attendees
- Diagnostic-page visitors

CAMPAIGN EXAMPLES

- US_LI_TOFU_MMAOL_BrokenHandoffs_Checklist
- US_LI_MOFU_MMAOL_WorkflowRisk_Diagnostic



Microsoft Advertising

PERSONA

General and Operations Leader for Scaling Business

INDUSTRIES

Qualified workflow-complexity industries

SKILLS / INTERESTS

Operations job-function profile targeting where available

KEYWORDS

operational intelligence software

workflow analytics platform

process improvement analytics

ACCOUNT LISTS

Qualified customer and account lists where eligible

RETARGETING POOLS

Executive and diagnostic visitors

CAMPAIGN EXAMPLES

US_MS_BOFU_GOL_OperationalIntelligence_Diagnostic

Microsoft Advertising

PERSONA

IT and Systems Operations Intelligence Manager

INDUSTRIES

Qualified workflow-complexity industries

SKILLS / INTERESTS

Information Technology job-function profile targeting where available

KEYWORDS

workflow integration software

cross system workflow analytics

process intelligence platform

ACCOUNT LISTS

Qualified accounts with supported-system evidence

RETARGETING POOLS

Connector and technical content visitors

CAMPAIGN EXAMPLES

US_MS_BOFU_ITSO_WorkflowIntegration_TechDemo

Microsoft Advertising

PERSONA

Mid-Market Administrative Operations Leader

INDUSTRIES

Qualified workflow-complexity industries

SKILLS / INTERESTS

Operations job-function profile targeting where available

KEYWORDS

workflow handoff management

workflow bottleneck software

cross team workflow tracking

ACCOUNT LISTS

Qualified operations account lists

RETARGETING POOLS

Handoff and workflow-risk visitors

CAMPAIGN EXAMPLES

US_MS_MOFU_MMAOL_HandoffManagement_Assessment

Facebook and Instagram

PERSONA

General and Operations Leader for Scaling Business

ACCOUNT LISTS

Qualified executive contacts where permitted

RETARGETING POOLS

Executive-page visitors

ROI content engagers

Diagnostic form abandoners

CAMPAIGN EXAMPLES

US_META_BOFU_GOL_SiteRTG_EvaluationPlan

Facebook and Instagram

PERSONA

IT and Systems Operations Intelligence Manager

ACCOUNT LISTS

Qualified technical contacts where permitted

RETARGETING POOLS

Connector visitors

Technical FAQ visitors

Demo viewers

CAMPAIGN EXAMPLES

US_META_MOFU_ITSO_TechRTG_ConnectorDemo

Facebook and Instagram

PERSONA

Mid-Market Administrative Operations Leader

ACCOUNT LISTS

Qualified operations contacts where permitted

RETARGETING POOLS

- Handoff-content visitors
- Checklist engagers
- Webinar registrants
- Diagnostic-page visitors

CAMPAIGN EXAMPLES

US_META_MOFU_MMAOL_SiteRTG_WorkflowDiagnostic

X

PERSONA

General and Operations Leader for Scaling Business

SKILLS / INTERESTS

- Operations leadership
- Operational excellence
- Business transformation

KEYWORDS

- operational excellence
- workflow bottleneck
- process improvement
- operations leadership

ACCOUNT LISTS

Qualified first-party executive contacts where eligible

RETARGETING POOLS

- Executive site visitors

CONTEXTUAL TOPICS

- Operations management
- Process improvement

FOLLOWER TARGETS

- Reputable operations-management publications
- Operational-excellence communities
- Business operations event accounts

CAMPAIGN EXAMPLES

US_X_TOFU_GOL_OperationalRisk_ThoughtLeadership



X

PERSONA

IT and Systems Operations Intelligence Manager

SKILLS / INTERESTS

IT operations

Enterprise applications

Systems integration

KEYWORDS

workflow integration

business systems

enterprise applications

data governance

ACCOUNT LISTS

Qualified first-party technical contacts where eligible

RETARGETING POOLS

Technical content visitors

CONTEXTUAL TOPICS

IT operations

Systems integration

FOLLOWER TARGETS

Reputable enterprise-IT publications

Business-systems communities

Supported-platform ecosystem accounts

CAMPAIGN EXAMPLES

US_X_MOFU_ITSO_CrossSystemSignals_TechReview

X

PERSONA

Mid-Market Administrative Operations Leader

SKILLS / INTERESTS

Business operations

Workflow management

Program management

KEYWORDS

workflow management

missed handoff

operations bottleneck

customer onboarding

ACCOUNT LISTS

Qualified first-party operations contacts where eligible

RETARGETING POOLS

Handoff-content visitors

CONTEXTUAL TOPICS

Workflow management

Business operations

FOLLOWER TARGETS

Reputable business-operations publications

Program-management communities

Operations event accounts

CAMPAIGN EXAMPLES

US_X_TOFU_MMAOL_BrokenHandoffs_Checklist

Programmatic ABM

PERSONA

General and Operations Leader for Scaling Business

JOB TITLES

- COO
- VP Operations
- Head of Operations
- General Manager

SENIORITY

- CXO
- VP
- Director

INDUSTRIES

Only industries represented in approved ICP account lists

COMPANY SIZES

- 200–2,000 employees

ACCOUNT LISTS

- Tier 1 trigger accounts
- Tier 2 fit accounts
- Open opportunities

RETARGETING POOLS

- Account visitors
- Executive-content visitors
- Diagnostic visitors

CONTEXTUAL TOPICS

- Operational intelligence
- Operational excellence
- Process risk
- Workflow analytics

CAMPAIGN EXAMPLES

US_ABM_MOFU_GOL_Tier1_ProcessRisk_Diagnostic

Programmatic ABM

PERSONA

IT and Systems Operations Intelligence Manager

JOB TITLES

- IT Operations Manager
- Business Systems Manager
- Enterprise Applications Manager
- Director of Information Technology

SENIORITY

- Manager
- Director

INDUSTRIES

Only industries represented in approved ICP account lists

COMPANY SIZES

- 200–2,000 employees

ACCOUNT LISTS

- Accounts with supported-system evidence
- Accounts showing integration or automation intent
- Open opportunities

RETARGETING POOLS

- Technical visitors
- Connector-content visitors
- Committee-demo accounts

CONTEXTUAL TOPICS

- Systems integration
- Enterprise applications
- Data governance
- Process intelligence

CAMPAIGN EXAMPLES

US_ABM_MOFU_ITSO_Tier1_ConnectorScope_TechReview



Programmatic ABM

PERSONA

Mid-Market Administrative Operations Leader

JOB TITLES

- Administrative Services Manager
- Business Operations Manager
- Operations Manager
- Director of Business Operations

SENIORITY

- Manager
- Director

INDUSTRIES

Only industries represented in approved ICP account lists

COMPANY SIZES

- 200–2,000 employees

ACCOUNT LISTS

- Accounts with SLA, onboarding, or handoff triggers
- Tier 1 workflow-complexity accounts
- Open opportunities

RETARGETING POOLS

- Use-case visitors
- Webinar attendees
- Diagnostic visitors

CONTEXTUAL TOPICS

- Workflow management
- Process improvement
- Customer operations
- Service delivery

CAMPAIGN EXAMPLES

US_ABM_TOFU_MMAOL_Tier1_BrokenHandoffs_UseCase

Funnel Mapping

Funnel-Stage Audience Mapping

Problem recognition

STAGE

TOFU

OBJECTIVE

Help selected-persona audiences recognize that missed handoffs, ownership gaps, and recurring escalations are cross-system workflow problems rather than isolated team failures.

AUDIENCE TYPES

- LinkedIn persona title and function audiences
- Tier 2 named accounts
- Contextual programmatic audiences
- Problem-oriented custom segments
- Narrow X keyword and follower tests

PLATFORMS

LinkedIn Programmatic ABM Google YouTube selective tests X experimental

CONTENT / OFFERS

- Missed-handoff checklist
- Workflow-risk explainer
- Educational webinar
- Problem-focused document ad
- Representative workflow-map video

Solution and proof evaluation

STAGE

MOFU

OBJECTIVE

Demonstrate how RelayOps maps cross-system handoffs, identifies risk, supports practical interventions, and fits the existing environment.

AUDIENCE TYPES

- Problem-aware Google Search audiences
- LinkedIn named-account persona audiences
- Website and content retargeting
- Video and document-ad engagers
- Intent-qualified account audiences

PLATFORMS

Google Ads LinkedIn Microsoft Advertising Programmatic ABM Meta retargeting

CONTENT / OFFERS

- Tailored workflow diagnostic
- Use-case demonstration
- Connector and governance FAQ
- Workflow-risk webinar
- Buying guide
- Representative workflow map

Diagnostic, committee alignment, and demo

STAGE

BOFU

OBJECTIVE

Convert qualified accounts into sales-accepted diagnostic and demo requests while supplying each selected persona with the proof needed for a 30–90 day committee evaluation.

AUDIENCE TYPES

- High-intent exact and phrase Search audiences
- Tier 1 named accounts
- Open-opportunity and sales-engaged account audiences
- Diagnostic form abandoners
- Pricing, ROI, connector, governance, and demo-page visitors
- Multiple engaged stakeholders from one account

PLATFORMS

- Google Search
- LinkedIn
- Programmatic ABM
- Microsoft Advertising
- Google retargeting
- Meta retargeting

CONTENT / OFFERS

- Tailored workflow diagnostic and demo
- Committee demo with operations and IT
- Technical workflow review
- ROI assessment with transparent assumptions
- Role-specific evaluation plan
- Proof-plan consultation



Persona Audiences — Problem recognition

General and Operations Leader for Scaling Business

RECOMMENDED AUDIENCE

- Executive improvement-prioritization leaders
- Tier 2 executive operations accounts
- Operational-risk content audiences

CHANNELS

LinkedIn Programmatic ABM

OFFER / CTA

Learn how cross-system handoff risk affects operational accountability.

IT and Systems Operations Intelligence Manager

RECOMMENDED AUDIENCE

- Systems-fragmentation managers
- Business systems and enterprise applications title audiences
- Integration and process-intelligence contextual audiences

CHANNELS

LinkedIn Programmatic ABM X experimental

OFFER / CTA

See how workflow signals can be connected without replacing systems of record.

Mid-Market Administrative Operations Leader

RECOMMENDED AUDIENCE

- Missed-handoff workflow owners
- Manual-coordination managers
- Workflow and process-improvement skill audiences

CHANNELS

LinkedIn Programmatic ABM

OFFER / CTA

Use the missed-handoff checklist or register for the workflow-risk webinar.

Persona Audiences — Solution and proof evaluation

General and Operations Leader for Scaling Business

RECOMMENDED AUDIENCE

- Executive operational-risk sponsors
- Operational intelligence and process-risk searchers
- Executive content retargeting pools

CHANNELS

Google Search LinkedIn Programmatic ABM

OFFER / CTA

Request an executive workflow-risk diagnostic.

IT and Systems Operations Intelligence Manager

RECOMMENDED AUDIENCE

- Connector and systems-fragmentation evaluators
- Governance and explainability gatekeepers
- Technical content retargeting pools

CHANNELS

LinkedIn Google Search Microsoft Advertising

Programmatic ABM

OFFER / CTA

Request a connector, data-flow, and technical workflow review.

Mid-Market Administrative Operations Leader

RECOMMENDED AUDIENCE

- Missed-handoff workflow owners
- Manual-coordination and bottleneck managers
- Checklist and webinar engagers

CHANNELS

LinkedIn Google Search Meta retargeting

OFFER / CTA

Assess one recurring workflow bottleneck.

Persona Audiences — Diagnostic, committee alignment, and demo

General and Operations Leader for Scaling Business

RECOMMENDED AUDIENCE

- Executive business-case retargeting pool
- Tier 1 executive sponsors
- High-intent operational intelligence searchers

CHANNELS

Google Search

LinkedIn

Programmatic ABM

Meta retargeting

OFFER / CTA

Book an executive demo and build a measurable evaluation plan.

IT and Systems Operations Intelligence Manager

RECOMMENDED AUDIENCE

- Governance and explainability gatekeepers
- Connector-page visitors
- Tier 1 technical evaluators

CHANNELS

LinkedIn

Google Search

Programmatic ABM

OFFER / CTA

Book a connector and data-flow demonstration.

Mid-Market Administrative Operations Leader

RECOMMENDED AUDIENCE

- Diagnostic-page visitors
- High-intent handoff and bottleneck searchers
- Tier 1 operational workflow owners

CHANNELS

Google Search

LinkedIn

Meta retargeting

OFFER / CTA

Request a tailored diagnostic focused on one high-risk handoff.

Priority Shortlist

Campaign Audience Taxonomy

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

Taxonomy Examples

- US_GADS_BOFU_MMAOL_BrokenHandoffs_Diagnostic_Search
- US_LI_MOFU_ITSO_ConnectorScope_TechReview_Titles
- US_LI_BOFU_GOL_Tier1Committee_CommitteeDemo_Accounts
- US_META_BOFU_GOL_SiteRTG_ROI_SiteRTG
- US_ABM_MOFU_ITSO_Governance_TechReview_Intent

Taxonomy Dimensions

Dimension	Required	Allowed Values
geography	True	US
platform	True	GADS LI MS META X ABM
funnel	True	TOFU MOFU BOFU
persona	True	GOL ITSO MMAOL
segment	True	OperationalRisk ImprovementPriority ConnectorScope Governance BrokenHandoffs ManualCoordination Tier1Committee SiteRTG
offer	True	Checklist Webinar Diagnostic TechReview ExecDemo CommitteeDemo ROI BuyingGuide
audience_type	True	Search Titles Functions Skills Accounts Intent SiteRTG EngagementRTG CustomerList

Priority Audience Shortlist

1

RANK

1

SEGMENT

High-intent broken-handoff and workflow-bottleneck searchers

PLATFORM

Google Ads

PARENT PERSONA

Mid-Market Administrative Operations Leader

TARGET DESCRIPTION

US searchers expressing a direct need to diagnose missed handoffs, workflow bottlenecks, unclear ownership, or cross-team process failures.

KEYWORDS / TARGETING

- workflow handoff management
- workflow bottleneck software
- missed handoff process
- workflow ownership software
- cross team workflow tracking

OFFER

Tailored workflow diagnostic

WHY PRIORITIZE

Combines explicit problem intent with the operational champion most likely to recognize and articulate the day-to-day use case.

2

RANK

2

SEGMENT

Executive operational-risk sponsors

PLATFORM

LinkedIn Ads

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGET DESCRIPTION

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

KEYWORDS / TARGETING

- Executive operations titles
- CXO, VP, and Director seniority
- 201–1,000 employee platform bands
- Verified 1,001–2,000 employee account lists
- Tier 1 operational-risk accounts

OFFER

Executive process-risk diagnostic

WHY PRIORITIZE

Reaches the sponsor and business-value approver with the strongest accountability, risk, and scaling message.

3

RANK

3

SEGMENT

Connector and systems-fragmentation evaluators

PLATFORM

LinkedIn Ads

PARENT PERSONA

IT and Systems Operations Intelligence Manager

TARGET DESCRIPTION

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

KEYWORDS / TARGETING

- IT Operations Manager
- Business Systems Manager
- Enterprise Applications Manager
- Systems Integration skills
- Supported-system account evidence

OFFER

Connector and data-flow demonstration

WHY PRIORITIZE

Directly addresses the technical gatekeeper whose approval is required for connector, governance, and implementation feasibility.

4

RANK

4

SEGMENT

Process-intelligence and cross-system workflow searchers

PLATFORM

Google Ads

PARENT PERSONA

IT and Systems Operations Intelligence Manager

TARGET DESCRIPTION

Searchers evaluating workflow analytics, process intelligence, cross-system operational analytics, or alternatives to heavier process-mining approaches.

KEYWORDS / TARGETING

- cross system workflow analytics
- process intelligence platform
- workflow integration software
- operational analytics integration
- process mining alternative

OFFER

Technical workflow review and product demo

WHY PRIORITIZE

Captures active solution research while allowing RelayOps to differentiate on supported-system compatibility, explainability, and mid-market deployment.

5

RANK

5

SEGMENT

Missed-handoff workflow owners

PLATFORM

LinkedIn Ads

PARENT PERSONA

Mid-Market Administrative Operations Leader

TARGET DESCRIPTION

Administrative services, business operations, and operations managers at qualified mid-market companies with cross-functional customer-facing workflows.

KEYWORDS / TARGETING

- Administrative Services Manager
- Business Operations Manager
- Operations Manager
- Workflow Management skills
- Process Improvement skills

OFFER

Workflow-risk assessment

WHY PRIORITIZE

Targets the operational champion closest to recurring coordination failures and most likely to bring a representative workflow into discovery.

6

RANK

6

SEGMENT

Multi-stakeholder Tier 1 account committee

PLATFORM

LinkedIn Ads and Programmatic ABM

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGET DESCRIPTION

High-fit named accounts with an executive operations sponsor plus selected IT and administrative operations stakeholders and at least one verified operational trigger.

KEYWORDS / TARGETING

- 200–2,000 employees
- Three or more supported systems
- Executive operations contact
- IT or systems contact
- Administrative or business operations contact
- Verified escalation, SLA, onboarding, forecast, automation, or cycle-time trigger

OFFER

Cross-functional workflow diagnostic and committee demo

WHY PRIORITIZE

Matches the multi-stakeholder buying process and reduces the risk that a single-threaded lead stalls during technical or executive review.

7

RANK

7

SEGMENT

Governance and explainability retargeting

PLATFORM

LinkedIn Ads

PARENT PERSONA

IT and Systems Operations Intelligence Manager

TARGET DESCRIPTION

Technical visitors and named-account stakeholders who consumed connector, data-flow, governance, FAQ, or product-demo content.

KEYWORDS / TARGETING

- Connector-page visitors
- Governance FAQ visitors
- Technical webinar attendees
- Product-demo viewers
- Qualified account overlay

OFFER

Technical workflow review

WHY PRIORITIZE

Addresses predictable late-stage objections and converts technical engagement into a concrete evaluation step.

8

RANK

8

SEGMENT

Executive business-case retargeting

PLATFORM

LinkedIn Ads and Google Ads

PARENT PERSONA

General and Operations Leader for Scaling Business

TARGET DESCRIPTION

Qualified executive visitors and account stakeholders engaging with ROI, pricing, buying-guide, diagnostic, or executive-demo content.

KEYWORDS / TARGETING

- ROI content visitors
- Pricing-page visitors
- Diagnostic form starters
- Executive-demo visitors
- Repeat visitors from qualified accounts

OFFER

Tailored evaluation and proof plan

WHY PRIORITIZE

Supports the proof-heavy decision process with a concrete route from operational problem to committee-ready evaluation.

Controls

Geographic Exclusions

- Exclude all countries outside the United States from primary acquisition campaigns.
- Use presence-based location settings rather than interest-in-location settings where the platform permits.
- Exclude US territories if sales coverage or contracting does not support them.

Seniority Exclusions

- Entry
- Training
- Unpaid
- Student
- Intern

Job / Function / Title Exclusions

- Individual-contributor software engineering roles without systems or operations responsibility
- Recruiting and human resources roles
- Marketing roles without operations ownership
- Sales development and account executive roles
- Students, interns, educators, and job seekers
- Employee-monitoring and workforce-surveillance buyers

Industry Exclusions

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

Google Search Negative Keywords

- jobs
- job
- career
- salary
- certification
- course
- training
- degree
- internship
- definition
- template
- worksheet
- free
- open source
- consumer
- personal
- employee monitoring
- employee surveillance
- time tracking
- keystroke monitoring
- ERP implementation
- ERP replacement
- robotic process automation jobs
- workflow automation free
- school workflow
- student workflow

Company-Size Exclusions

Persona / Campaign	Exclude Below	Exclude Above	Exception
All primary persona acquisition campaigns	200 employees	2,000 employees	Allow only approved named accounts with independently verified workflow complexity or strategic expansion value.
LinkedIn campaigns using the 1,001–5,000 employee band	Not applicable	2,000 employees	Use matched account lists or company exclusions to isolate verified 1,001–2,000 employee accounts.

Lead-Quality Controls

ICP company-size validation

DESCRIPTION	SCORING IMPACT
Score 200–2,000 employee companies positively and route smaller or larger companies to manual review or separate tests.	positive

Supported-system validation

DESCRIPTION	SCORING IMPACT
Ask or enrich for Slack, Jira, Salesforce, HubSpot, and total supported-system usage; prioritize accounts with at least three supported systems.	positive

Workflow-complexity qualification

DESCRIPTION	SCORING IMPACT
Require a meaningful cross-functional workflow, customer-facing handoff, or recurring coordination problem.	positive

Operational trigger qualification

DESCRIPTION	SCORING IMPACT
Increase priority for escalations, missed SLAs, onboarding delays, forecast leakage, planned automation, executive accountability concerns, or cycle-time variance.	positive

Persona and buying-role match

DESCRIPTION	SCORING IMPACT
Score the three selected personas and their approved title variants positively while flagging unrelated roles.	positive

Business email and account verification

DESCRIPTION

Require business contact information and validate company domain, geography, employee count, and duplicate status before sales acceptance.

SCORING IMPACT

positive

Multi-stakeholder engagement

DESCRIPTION

Increase priority when two or more selected-persona stakeholders from the same account engage or when operations and IT jointly request evaluation.

SCORING IMPACT

positive

Poor-fit use-case suppression

DESCRIPTION

Reduce or reject leads seeking employee surveillance, single-system reporting, ERP replacement, or a full automation platform.

SCORING IMPACT

negative

Offline conversion feedback

DESCRIPTION

Return sales-accepted demo, qualified opportunity, and disqualification outcomes to ad platforms where technically and contractually permitted.

SCORING IMPACT

positive

Conversion hierarchy

DESCRIPTION

Optimize toward qualified diagnostic and demo requests rather than page views, raw form fills, or unqualified content downloads.

SCORING IMPACT

positive

Creative Hooks

Persona Creative Guidance

Persona	Best Hooks	Best Offers	Best Formats
General and Operations Leader for Scaling Business	See process risk before it becomes a customer problem. Scale operations without scaling coordination failure. Focus resources on the workflow problems that matter most. Build the business case around one measurable workflow.	Executive workflow-risk diagnostic Executive product demo ROI assessment with transparent assumptions Committee evaluation guide	Executive single-image ads Short executive video LinkedIn document ads Search ads ROI assessment landing page Account-specific display creative
IT and Systems Operations Intelligence Manager	Connect workflow signals without replacing systems of record. Review connector scope, data flow, and governance before evaluation. See the evidence behind alerts and recommendations. Give operations a connected view without another manual data project.	Connector and data-flow demonstration Technical workflow review Governance and architecture FAQ Representative cross-system product demo	Architecture diagram Connector matrix Technical product video LinkedIn document ad Search ad Technical webinar
Mid-Market Administrative Operations Leader	See where work stalls before the next handoff fails. Turn scattered workflow signals into clear ownership. Reduce manual status chasing across teams and tools. Find the bottleneck, clarify the process, and keep work moving.	Tailored workflow diagnostic Missed-handoff checklist Workflow-risk webinar Use-case product demo	Before-and-after workflow map Checklist document ad Short product animation Search ad Webinar promotion Use-case carousel

Subsegment Creative Match

General and Operations Leader for Scaling Business

PERSONA

General and Operations Leader for Scaling Business

SUBSEGMENT

Executive operational-risk sponsors

HOOK

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

FORMAT

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

OFFER

Executive process-risk diagnostic

CHANNELS

LinkedIn Google Search Programmatic ABM

General and Operations Leader for Scaling Business

PERSONA

General and Operations Leader for Scaling Business

SUBSEGMENT

Executive improvement-prioritization leaders

HOOK

Move from operational noise to an evidence-based improvement plan.

FORMAT

LinkedIn document ad Executive framework graphic Search ad

OFFER

Priority-workflow assessment

CHANNELS

LinkedIn Google Search

General and Operations Leader for Scaling Business

PERSONA
General and Operations Leader for Scaling Business

SUBSEGMENT

Executive business-case retargeting pool

HOOK
Give the buying committee a shared baseline, outcome model, and proof plan.

FORMAT

Retargeting single-image ad ROI explainer Executive demo clip

OFFER
Tailored evaluation plan

CHANNELS

LinkedIn retargeting Google retargeting Meta retargeting

IT and Systems Operations Intelligence Manager

PERSONA
IT and Systems Operations Intelligence Manager

SUBSEGMENT

Connector and systems-fragmentation evaluators

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

FORMAT

Connector diagram Product-demo video Search ad

OFFER
Connector and data-flow demonstration

CHANNELS

LinkedIn Google Search Microsoft Advertising

IT and Systems Operations Intelligence Manager

PERSONA
IT and Systems Operations Intelligence Manager

SUBSEGMENT
Governance and explainability gatekeepers

HOOK
Review how signals become explainable workflow alerts and recommendations.

FORMAT
Technical document ad FAQ carousel Architecture webinar

OFFER
Technical workflow review and governance FAQ

CHANNELS
LinkedIn Programmatic ABM Google retargeting

Mid-Market Administrative Operations Leader

PERSONA
Mid-Market Administrative Operations Leader

SUBSEGMENT
Missed-handoff workflow owners

HOOK
See exactly where ownership becomes unclear as work crosses teams.

FORMAT
Workflow-map visual Checklist document ad Search ad

OFFER
Tailored workflow diagnostic

CHANNELS
LinkedIn Google Search

Mid-Market Administrative Operations Leader

PERSONA

Mid-Market Administrative Operations Leader

SUBSEGMENT

Manual-coordination and bottleneck managers

HOOK

Stop rebuilding the same workflow story through status checks and spreadsheets.

FORMAT

Use-case carousel Short explainer video Retargeting image ad

OFFER

Workflow-risk assessment

CHANNELS

LinkedIn Meta retargeting Google retargeting

Experimental Audiences

Adjacent / Experimental Audiences

Customer Success and Service Operations leaders

AUDIENCE

Customer Success and Service Operations leaders

WHY RELEVANT

They may own customer onboarding, escalation, and service-delivery handoffs that fit RelayOps use cases.

WHY NOT PRIMARY

They are not one of the selected project personas and therefore should not be included in primary campaign structure or the initial priority shortlist.

LATER USE CASE

Customer onboarding delays and escalation-path visibility

LATER MESSAGE

Reveal where customer-facing handoffs stall across teams and systems.

RECOMMENDED TRIGGER

Test only after selected-persona campaigns validate the onboarding or escalation use case and sales confirms this role participates in qualified opportunities.

Revenue Operations leaders

AUDIENCE

Revenue Operations leaders

WHY RELEVANT

Forecast leakage and sales-to-service handoffs may create a commercially relevant cross-system workflow problem.

WHY NOT PRIMARY

Revenue Operations is outside the selected persona scope and could pull positioning toward CRM analytics rather than cross-system operations intelligence.

LATER USE CASE

Forecast leakage and sales-to-implementation handoffs

LATER MESSAGE

Connect CRM and delivery signals to identify where revenue-critical handoffs break.

RECOMMENDED TRIGGER

Test only after qualified opportunities repeatedly identify forecast leakage or sales-to-delivery transitions as the entry workflow.

Finance and procurement stakeholders

AUDIENCE

Finance and procurement stakeholders

WHY RELEVANT

They may evaluate ROI assumptions, commercial risk, and annual software investment during committee review.

WHY NOT PRIMARY

They are committee participants rather than selected primary users, sponsors, or technical evaluators.

LATER USE CASE

Investment-case validation

LATER MESSAGE

Evaluate workflow-intelligence value through transparent baselines, assumptions, and proof criteria.

RECOMMENDED TRIGGER

Use as deferred opportunity-stage account expansion after an operations sponsor initiates evaluation.

Process excellence and transformation leaders

AUDIENCE

Process excellence and transformation leaders

WHY RELEVANT

Their mandates often include process visibility, bottleneck reduction, and measurable operational improvement.

WHY NOT PRIMARY

They are not selected project personas and may introduce enterprise-transformation expectations outside the mid-market diagnostic-led position.

LATER USE CASE

Prioritizing workflow improvement opportunities

LATER MESSAGE

Identify evidence-based improvement priorities without launching a large transformation program.

RECOMMENDED TRIGGER

Test after proof demonstrates demand from dedicated process-improvement teams inside otherwise qualified mid-market accounts.

