

# Using Omeda's ABM Tool to Enhance Your Location-Based Marketing Efforts

OMEDA WEBINAR



# Your Hosts



**Robin Heneghan**

DIRECTOR, CLIENT SUPPORT, OMEDA

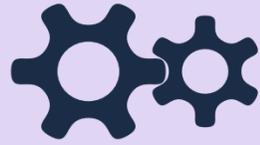


**Whitney Carrier**

CLIENT SUCCESS MANAGER, OMEDA



# What is the ABM Tool?



An add-on utility in the Omeda portal which creates an enhanced, location-based (or "unitized") view of your data.



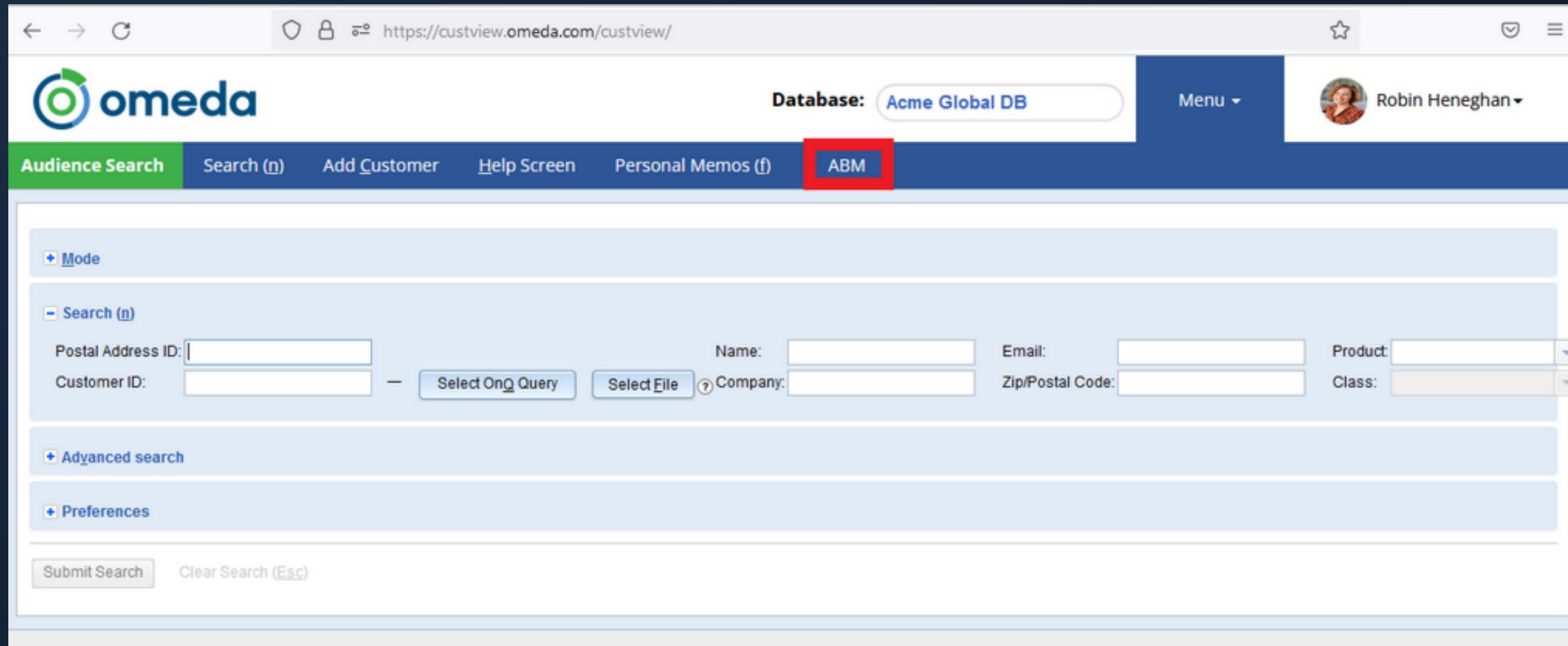
Allows you to focus audience targeting and marketing to a smaller number of people at a specific location.



Shows you how many customers are associated with an individual location or "unit."

# Where is the ABM Tool?

The ABM Tool is in the Audience Search section of the Omeda portal (once access to the tool is enabled).



# ABM Overview Page

## Navigation Options



Manage your **ABM Types**



Membership Search



Run an existing **ABM Assignment job**

← → ↻ https://custview.omedacom/custview/units/

**omedacom** Database: Acme Global DB Menu ▾

ABM Overview ABM Types Membership Search Upload Custom Units Run Assignment

### ABM OVERVIEW

**ABM TYPES** Manage your ABM Types

- Create ABM Assignment Types
- View/Modify Existing ABM Assignment Types
- Setup Keyman Rules
- Setup Nightly Assignment Job

[Go to ABM Types →](#)

**MEMBERSHIP SEARCH** Manage ABM Memberships

- Review ABM and their Members in any of the following environments:
  - Live
  - Modeling
  - History
- Review ABM Demographics

[Go to Membership Search →](#)

**RUN ABM ASSIGNMENT** Run an existing ABM Assignment Job

- Choose a ABM Type
- Choose an environment (Live, Modeling, History)
- Automatically Assign New Memberships

[Go to Run ABM Assignment →](#)

# New ABM Type Setup

The screenshot shows the Omeda web application interface for setting up a new ABM Type. The browser address bar shows the URL: <https://custview.omedac.com/custview/units/unitsetup/edit/>. The page header includes the Omeda logo, the database name "Acme Global DB", and the user profile "Robin Heneghan". The navigation menu includes "ABM", "Overview", "ABM Types", "Membership Search", "Upload Custom Units", and "Run Assignment".

The main content area is divided into several sections:

- ABM Type Details:** This section includes a "Status" toggle switch (currently turned on), "Created By", "Created Date", "Changed By", "Changed Date", "Last Ran Date" (displaying "Has Not Ran Yet"), and "Email Addresses to Notify" with a link to "Add more users to notify".
- ABM Aggregation Setup:** This section includes "ABM Type's Product" (Optional), "ABM Type Methodology" (set to "Company Only"), "Company Match Max Score" (set to "92 (Default)"), and an "Exclude addresses with Blank Company Names" toggle switch.
- ABM Type Demographics (Optional):** This section includes a "Help for this Section" link and an "Add a Demographic" button.
- Keyman Rules (Optional):** This section includes a "Help for this Section" link and an "Add Keyman Rule" button.

Three callout boxes are overlaid on the right side of the page:

- A purple box with a white arrow pointing left, labeled "ABM Type Details", pointing to the ABM Type Details section.
- A purple box with a white arrow pointing left, labeled "ABM Aggregation Setup", pointing to the ABM Aggregation Setup section.
- A purple box with a white arrow pointing left, labeled "Optional: ABM Type Demos Keyman Rules", pointing to the Optional sections.

# ABM Type Demographics Help

## ABM Type Demographics Help

This optional section is for dictating which Demographics will be unitized and how they will be chosen from the members of the ABM.

**Demographic** - The Demographic to be unitized.

**Aggregation Type** - This is used to determine how Demographics will be chosen for the ABM from its Members. The same Demographic cannot be used multiple times.

- **Preassigned** - Rarely used. Leaves the ABM's Demographics in their current state. No aggregation is performed at all.
- **Consensus** - Used mostly for Single Response or Yes/No Demographics. This method finds the most common value for the chosen Demographic among the Members and uses that value as the ABM's Demographic Value. Ties are broken by picking one of them.
- **Census** - Used mostly for Multi-Response Demographics. This picks each occurrence of a value for the chosen Demographic from among the Members and uses those values as the ABM's Demographic Values.
- **From Keyman** - Only functional if this ABM Type uses Keyman Rules. The ABM's Demographic Value(s) are that of the Keyman's.
- **Choose Only Yes** - This is a special variant of Consensus designed for Yes/No Demographics. It will only provide a ABM Demographic Value if a Yes is found via Consensus. Otherwise, the ABM will have no value for that ABM Demographic.
- **Copy Count** - Used exclusively for Whole Number Demographics. The provided Demographic is where the value will be stored. This calculates the Copy Count for the members in the group and then stores that value in the ABM Demographic.

**Class Priority** - This is an optional field. When Consensus, Census, or a similar variant are used, if this will prioritize answers based on class. This is a comma separated list of the numerical representations of the Subscription Classes. Most desired class is on the left, least desired on the right.

Example: **1,3,2,20,25** would prioritize (1) Active Qualified as the highest priority and (25) Kill/Refunds as the lowest priority.

This is not available for "From Keyman" aggregated demographics.

## ABM Type Demographics Setup (Optional)

You have the option to create **Unitized Demographics** as part of this ABM type setup.

# Keyman Rules Help

## Keyman Rules Help

This section is for setting up Keyman Rules. A Keyman is effectively the leading Member of the ABM. These rules act in priority order, with Rule #1 being the highest priority, to determine which customer should be considered Keyman. There can/only should be a single Keyman per ABM. All Units will receive a Keyman, even if no customer meets any of the rules.

There is a final, default rule of "Pick one based on name", where the last name and first name are combined and are sorted in ascending order. This default rule applies for the cases where no Member matches any of the rules and is the tie breaker between multiple Keyman candidates.

There may not be duplicate rules. Keyman is "turned on" by creating at least one Keyman Rule in this section.

**Priority** - These are the controls to move rules around modify the priority.

**Rule #** - A quick reference of where the rule is in the priority.

**Field** - This is the starting point for determining the rule.

**Product** - For the fields Class, Source, and Verification Date, a Product is required. This tells the rule which subscription on the Member to look at when searching for a particular value.

**Demographic** - The actual Demographic that will be used in the rule.

**Value** - Depending on which Field was chosen, this will be filled with relevant values to complete the rule. These are the values that the customer will have to satisfy the rule.

- **Class** - This will be a list of classes relevant to the Product selected.
- **Source** - This will be a list of sources.
- **Demographic** - This will be a list of Demographic Values relevant to the Demographic selected.

Verification Date does not use this field.

**Remove** - Removes a Keyman Rule from this ABM Type. A save is required to make these changes.

## Keyman Rules Setup (Optional)

You have the option to **identify the "keyman" customer** at a location.

As an optional ABM Tool criteria, you can assign additional "unitized" demographics to customers at a location based on the demo responses of the "keyman."

# Where can I access this ABM/Unitized data?



## Audience Builder

Once the ABM tool is activated, you can use Audience Builder to:

- Query & output your enhanced, location-based (unitized) data.
- Run demographic reports on Unitized demographics.
- See more granular ABM data on individual customers via Audience Search or the ABM search tool.

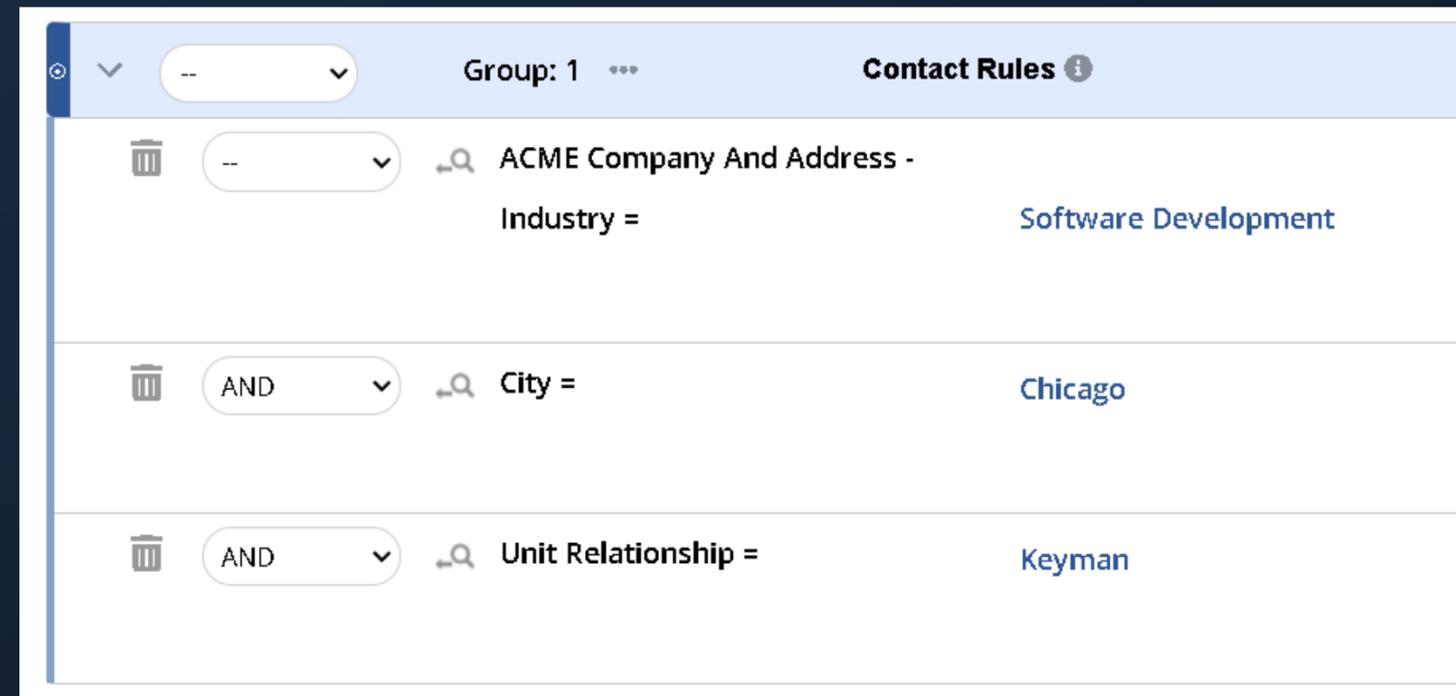
The screenshot displays the Omeda Audience Builder interface. The top navigation bar includes the Omeda logo, database name 'Acme Global DB', profile 'Acme Global DB Master', and a user profile for Robin Heneghan. The main interface is divided into several sections:

- Counts:** Shows metrics for Total Audience (2,083,753), Known (+Behaviors) (321,864), Known (Limited) (1,761,738), Unknown (151), and Total Unit Audience (1,137,711). It also displays 'Net Selected' (0) and 'Net Units Selected' (0).
- New Query:** A dropdown menu is open, showing 'ACME Comp' selected and 'Customer & Unit Counts' as the active query.
- Unit Location information:** A list of fields is highlighted with a red box, including: Alternate Unit Id, Unit Name, SIC Code, Company Name, Street 1, Street 2, City, Region, Postal Code, Country, ACME Company And Address - Industry, and ACME Company And Address - Interests.
- Group 1:** A summary bar for the current group, showing 'Group Unit Total: 0' and 'Group Customer Total: 0'.
- Net Selected:** A summary bar showing 'Net Selected: 0' and 'Copy Count: Select'.

# ABM Tool Use Case 1: ABM Campaigns

**Goal:** Identify the number of unique locations in your audience (based on type of business, for example).

**Query:** Unit Relationship = Keyman, then layer in additional demographics.



**Example:** How many software development company locations do you serve in Chicago?

# ABM Tool Use Case 2: Fill in Demographic Gaps (1 of 2)

**Goal:** Fill in the demographic gaps on individual customers, based on unit demos.

**How:** Create unitized demographics based on keyman demos, consensus (most common demo value in unit), product class priority, etc.

## ABM Type Demographics Help

This optional section is for dictating which Demographics will be unitized and how they will be chosen from the members of the ABM.

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**Class Priority** - This is an optional field. When Consensus, Census, or a similar variant are used, if this will prioritize answers based on class. This is a comma separated list of the numerical representations of the Subscription Classes. Most desired class is on the left, least desired on the right.

Example: **1,3,2,20,25** would prioritize (1) Active Qualified as the highest priority and (25) Kill/Refunds as the lowest priority.

This is not available for "From Keyman" aggregated demographics.

# ABM Tool Use Case 2: Fill in Demographic Gaps (2 of 2)

**ABM Type Demographics (Optional)**  
(Help for this Section)

Demographic	Aggregation Type	Class Priority (Optional)	Remove
Technology Vertical Top 50	From Keyman		✖

Add a Demographic

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**Keyman Rules (Optional)**  
(Help for this Section)

Priority	Rule #	Field	Demographic	Value	Remove
↓	1	Demographic	TinyTech Top 50 Rank (Sing	{1} 1	✖
↑ ↓	2	Demographic	TinyTech Top 50 Rank (Sing	{002} 2	✖
↑	3	Demographic	TinyTech Top 50 Rank (Sing	{003} 3	✖

Add Keyman Rule

**Example:** Set a rule to assign a unit member as the keyman if they have a Top 50 demo value of 1, and prioritize the demo values.\* Then select that Top 50 demographic to be unitized and taken from the keyman so all members of a unit will have the Top 50 unitized demo from the keyman of their unit.

In **Audience Builder**, select customers with a Top 50 ranking based on their unit demo:

**Unit Demographics**

[Unitized] TinyTech Top 50 Rank

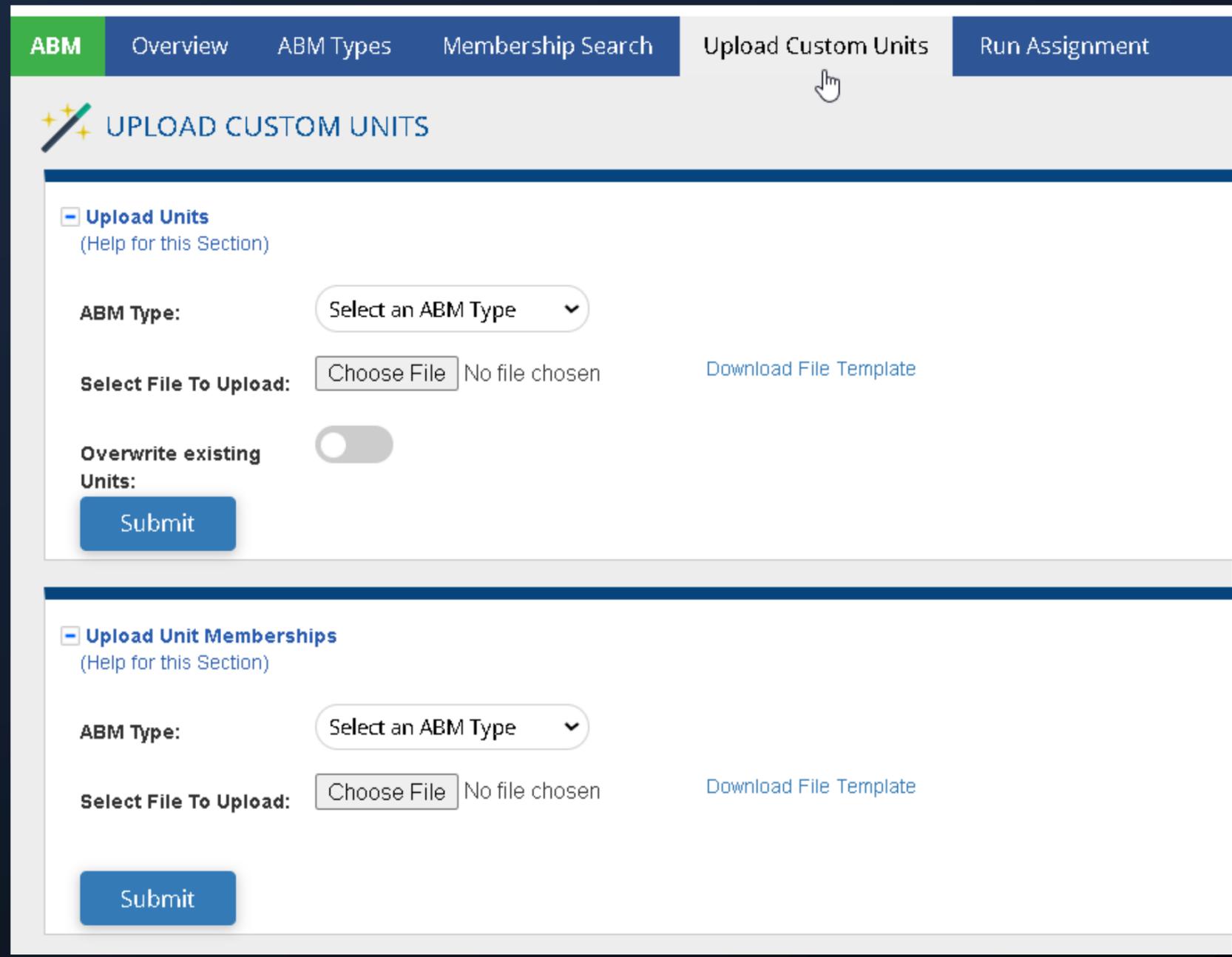
- ✓ 1
- ✓ 2
- ✓ 3

\* Prioritizing: demo values: If they have a 1 but not a 2, they will be selected as keyman, if not a 2 then a 3, etc.

# ABM Tool Use Case 3: Get Insights & Segment (1 of 2)

**Goal:** Gain insights on engagement and be able to segment by a select list of companies/locations.

**How:** Create custom units on your Omeda database by uploading selected companies/addresses in the ABM Tool.



# ABM Tool Use Case 3: Get Insights & Segment (2 of 2)

Assign custom ABM IDs or a pre-assigned demographic to identify these units in Audience Builder:

**T Alternate Unit Id**

12345\*

Search Clear

**5 Matches Found**

- ✓ 123451 (1)
- ✓ 123452 (1)
- ✓ 123454 (1)
- ✓ 123455 (1)
- ✓ 123456 (1)

Accept

Layer in Lead Scoring or Data Science to see engagement:

**M Lead Scoring**

Acme web site visits

Score

Score Description Acme most €

Search Clear

**Data Science**

**Email Engagement**

Email Frequency Score:

Email Recency Score:

Email Intensity Score:

Email Momentum Score:

Email Cluster:

Select All

At Risk

Consistently engaged with high frequency

Recently engaged with high momentum

Unscored User

**Please Note:** Creating custom units from an external file will not create new customers in your Omeda database – it will just match to and group existing customers.

For example, say you upload a list of VIP companies you want to be able to easily track, segment and target from your Omeda database. As new customers come on to your database, they will automatically be added to the custom units if they match by the company or location criteria.

# Common Questions



**Q:** Will having many customer records with blank company names in our database impact unitization?



**A:** You can select to exclude records with blank company names from the ABM aggregation. We'd also recommend cleaning up and standardizing company and address data as much as possible before running the ABM Tool.

**ABM Aggregation Setup**  
(Help for this Section)

**ABM Type's Product:** (Optional) [Dropdown]

**ABM Type Methodology:** Company and Address [Dropdown]

**Company Match Max Score:** 92 (Default) [Dropdown]

**Exclude addresses with Blank Company Names:**



# Common Questions



**Q:** If we merge multiple units to clean up duplicates, which unit's data will be retained?



**A:** If units are merged, the oldest unit will be the winner.

# Common Questions



**Q:** Can we use the ABM Tool to create units for our audited unitized brands?



**A:** Yes, you can set the ABM Aggregation to run by product and select the reported unitized demos.

**ABM Aggregation Setup**  
(Help for this Section)

**ABM Type's Product:** (Optional) Brand B Magazine

**ABM Type Methodology:** Company and Address

**Company Match Max Score:** 92 (Default)

**Address Match Max Score:** 99 (Default)

**Exclude addresses with Blank Company Names:**

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**ABM Type Demographics (Optional)**  
(Help for this Section)

Demographic	Aggregation Type	Class Priority (Optional)
ACME - Design Involvement	From Keyman	
Acme Business (Single) - 50	From Keyman	



**Thank you!**  
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