

Website Retargeting Guide

Everything You Need to Know

OVERVIEW

- Client sends their URL for pixel placement.
- Sabal Strategy sends a unique pixel to the client and instructions on how to implement it.
- Client confirms pixel placement.
- Sabal Strategy sends an invitation to a dashboard for the client to view website traffic.
- Client is ready to start.
- Sabal Strategy provides a Google form in order to assess the scope of work (SOW) and sets up a call with the client (if needed).
- The info from the Google form is used to create the SOW document; the SOW is sent to the client for approval.
- Client starts receiving daily files within 3-5 business days of approval.
- Client requests the account to pause/end; daily files will stop within 24-48hrs of request.

PROCESS

It takes 1 week to set up a retargeting snippet on your website and to create a profile so we can identify and remarket to your engaged prospects. To begin, we need the URL of the site where the tag will be placed.

For each account, a unique tag will be provided with the following implementation instructions:

- ❖ Copy the code below and paste it in the <head> tag of your website; this will allow the snippet to load on each page of your site. There is no need to individually install it on each page. The <head> is a static element in your HTML that is loaded on every page by default. Please confirm once the tag has been placed on the site.

Once the client confirms that the tag is in place, we will provide access to a dashboard so you can view daily counts. Please note, this dashboard only shows counts prior to business rules. Please also

inform us of any applicable business rules if you know them. A business rule is any action that a site visitor takes that qualifies them or excludes them from the daily file. Here are examples of business rules (these can be and/or statements):

- Include anyone who lands on a specific page such as a get quote page
- Only include records that start a form but do not complete the form
- Only include records that spend at least 120 seconds on the site
- Exclude records that land on the privacy page or careers page
- Exclude records that complete the application form
- Only include records that land on 3 separate subpages

If not already defined in the SOW, specify directives for the data:

- Daily files
- Direct mail
- Email
- Display
- Social
- Connected TV
- Programmatic radio

Once we have approval for the account to go live and start sending daily files, please allow 3-5 business days for setup. However, this time may vary depending on the complexity of the business rules requested. The daily files can be sent to a shared folder created by Sabal Strategy or by the client.

DAILY WEBSITE VISITOR DATA

We will provide a daily file in the following format:

First Name - Last Name - Address1 - Address2 - State - City - Zip - Zip+4 - Client ID - Email (if specified).

The following statistics demonstrate the effectiveness of website retargeting data:

- We can usually identify approximately **50-65% of the anonymous website visitors** on your website.
- Approximately **60-65% of unique visitors will have both a name and an address** tied to the device they used to access your website.

- o If it is a mobile device, we can usually tie that device to a specific person.
- o If it is a non-mobile device (such as a family laptop) we can still tie it to a postal address. With a postal address, we may not know which exact person at that address was on your site. So, we will append the “last known” name at that postal address in that case.
- o From the identified visitors, we can append emails to about **85% of the records**.
- We run a rolling 30-day deduplication process so you do not retarget the same person multiple times within a 30-day window.
- We can apply active suppression files sent by the client. A sample suppression file will be sent to the client with your specified formatting.

PAUSE/END CAMPAIGN

We need 24-48 hours to pause or end a website retargeting campaign. Please be mindful of the time required to end the campaign as you plan for the final file received for the account.

