- Michael Boisvert -

A CEO's Guide to Sales Lift
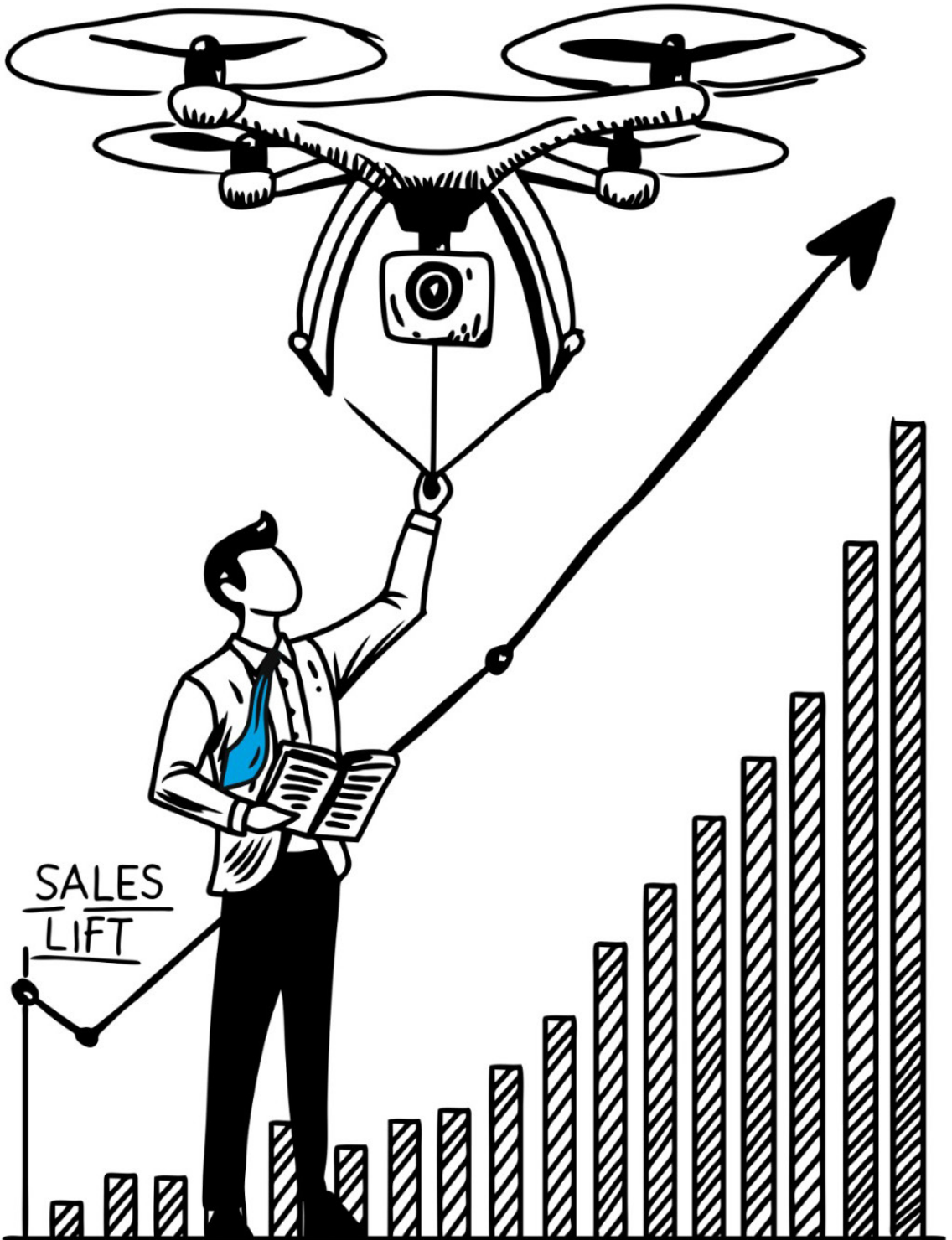
SALES
LIFT

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PREFACE

In today's fast-paced digital landscape, marketing is evolving rapidly. Traditional methods of campaign management—while still effective in certain contexts—are no longer sufficient to meet the demands of increasingly informed and connected consumers. The rise of autonomous marketing signals a profound shift in how businesses approach everything from targeting to execution. With the right data-driven algorithms, companies can optimize their marketing efforts in real-time, automatically adjusting campaigns based on performance metrics like sales lift and customer engagement. This shift not only saves time but allows teams to refine their approach continually, ensuring that marketing efforts are more personalized and impactful.

However, autonomous marketing is not about replacing human creativity; it's about enhancing it. While automation takes care of the technical aspects—timing, delivery, and targeting—marketers can devote their energies to crafting compelling stories and creating innovative strategies. When done right, autonomous marketing removes the guesswork, improves efficiency, and amplifies the effectiveness of campaigns, leaving room for teams to focus on what they do best: delivering value and resonating with their audience. This book offers a concise exploration of autonomous marketing, from the principles behind it to practical applications that any organization can adopt. You'll find insights, case studies, and actionable steps designed to help your business harness the power of technology without sacrificing creativity. The author, a leader with extensive experience in data platforms and marketing strategy, has spent years honing the intersection between automation and creativity. His expertise and passion for empowering organizations to leverage modern tools shine through in every chapter.

WHAT IS SALES LIFT, AND WHY IS IT IMPORTANT ?

An organization that can track sales lift per day, per campaign, has taken the first step towards achieving autonomous marketing. Trusted autonomous marketing should be the goal of every CEO and CMO. Robots and algorithms are faster—and when programmed effectively—can be smarter. In an ideal implementation, every day (or even every hour), your organization's marketing efforts are continuously re-aligning to the optimal "who" and "where" targets.

Autonomous marketing doesn't mean unchecked marketing spend or sloppy images and copy flooding the market. It should never absolve the C-suite of full responsibility, nor should it remove creativity or the human element from your marketing strategy. Instead, autonomous marketing allows leadership to quickly correct course, while freeing up teams to focus on the creative process.

At its core, autonomous marketing eliminates guesswork and optimizes both timing and content placement. If your organization already has a marketing team and active campaigns, the next logical step is clear: start by calculating your sales lift.

So, what is sales lift? Simply put, it's the return on investment (ROI) from your marketing spend. There is a real cost to advertising, with global expenditure estimated to exceed $1 trillion. In my experience, much of this is "shotgun spending"—the idea that you can pump money into advertising and expect some level of return. While this may occasionally yield results, no self-respecting CEO wants to rely on such a haphazard approach. We need real-time insights into marketing effectiveness, and we need to measure the ROI directly.

Knowing what works is non-negotiable.
Consider the common marketing lifecycle. Marketing
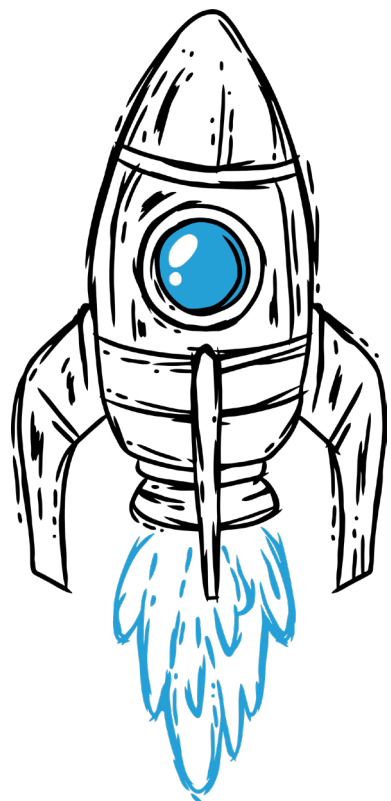
teams launch campaigns—sometimes painstakingly—but often, it's a slow process to determine what's working and what isn't. In many organizations, you don't see the true impact until end-of-month reports. Let's take a typical example: your marketing team has just launched a campaign with sponsored ads targeting a specific age group and location. Everyone agrees that the strategy looks solid. But the reality is, you won't see sales results until next month's report. In the meantime, even if your marketing team has a thousand ideas to improve results, the feedback you get is vague—responses like "it's doing better" or "not as good as the last campaign." How can you confidently adjust strategy with such unclear information?

This is where calculating sales lift changes the game. By understanding your sales lift in real time, you can dynamically trigger targeted sales events or marketing campaigns based on specific customer segments, demographics, or even behavior patterns. Instead of waiting for monthly reports, you can fine-tune your marketing efforts immediately, ensuring that every dollar spent is optimized for maximum impact.

At its simplest, sales lift is A/B testing: you release two campaigns and let them compete in the open market. For instance, which performs better—"Laughing Baby" or "Smiling Baby" for selling baby formula? One A/B test is manageable by a team using just Excel. But imagine running 100 campaigns simultaneously. Now multiply that by the number of platforms you're using and the number of tailored audiences you're trying to reach, and you're suddenly swimming in data. Not only that but it can become a management nightmare. Under these circumstances, vague responses like "doing better" start to feel reasonable. Quantifying results becomes nearly impossible if you want to achieve critical mass in the advertising market.

Maybe "Laughing Baby" does better in male audiences on Facebook but "Smiling Baby" does better with male audiences in Instagram. How will you know if you are not intentionally tracking your customer segmentation and related sales lift with each campaign.

Having access to sales lift numbers opens the door to dynamic insertion. You probably have some sort of fingerprint tracking on your customers and if you are tracking Sales lift you know what each fingerprint responds best to. What if you could push tailored engagement in real time. That could look like dynamic custom pricing based on customer profiles or automated email campaigns with key words that engage those fingerprints best. At some point your data starts to feed itself. You can start by asking questions like "what 6 campaigns will drive the most revenue for my organization based on my typical customer base?".
This is the goal for autonomous marketing.

DATA PLATFORM READINESS

MIRROR YOUR BIZ

A major priority of every tech savvy company should be mirroring their physical business in the digital space. It's unlikely you are still dealing with physical purchase orders or designing your campaign on paper. If you are, stop reading and immediately make it your #1 priority to move every part of your organization to a digital space. If you want lightening fast insights and the ability to leverage AI then the information that defines your organization must be accessible in a digital way. Without a digital organization clone, you cannot be a revenue leader in your industry.

SIMPLE ACCESS POINT TO YOUR DATA

In most organizations, digital clones take the form of ERPs & Accounting software. That's a fantastic start, but only the first step in a true digital copy. Any company with sufficient data (read: "all companies") needs a data warehouse of some kind. Data warehouses could be as simple as an access point with defined views fed out of your ERP but often, they are fully functional data structures that feel like a natural extension of the business.

SIMPLE ACCESS POINT BUILT-IN

For instance, Google Analytics and Google Big Query, combined with an easy-to-use CRM platform, can provide more than enough infrastructure for many small to mid-sized e-commerce companies. Similarly, platforms like Shopify, BigCommerce, and WooCommerce offer built-in analytics features that cover everything from real-time sales tracking to customer segmentation. You can even integrate third-party apps for more advanced insights without a custom-built infrastructure.
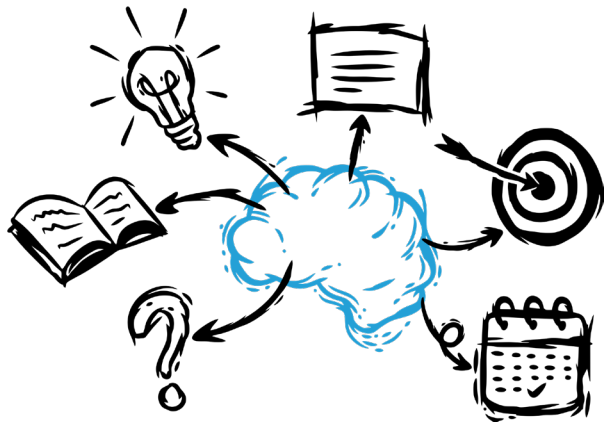
HOW DOES THIS APPLY TO SALES LIFT ?

The important thing is that all your Sales Lift related data is accessible with accuracy and speed. It's not good enough to get monthly sales numbers. You need sales numbers down to the second.

Not only that, but you need to see the cross section of your marketing efforts. How can you have processes that hot swap campaigns based on traffic source if you can't monitor them? By having your data ready for consumption, reporting and prediction become second nature.

Your core component for Sales Lift should be a data warehouse. While "The Data Warehouse™" is nothing new, a well-built warehouse is a powerhouse for your marketing team, excelling at:

1. Capturing data
2. Provide abstraction layers
3. Communicating your organization's digital state

A typical Sales Lift-focused data warehouse uses Medallion architecture, with data flowing from the raw, unfiltered Bronze layer to the ultra-refined Platinum layer.

BRONZE LAYER

Data lands here raw and unfiltered, straight from e-commerce or advertising sources. Reporting is off-limits here since this layer buffers against data changes and platform migrations. For high-volume operations, a Change Data Capture (CDC) engine at this level can streamline data updates.

SILVER LAYER

Here, data begins its transformation into business concepts for downstream layers. The Silver layer standardizes, cleans, and stores data for internal warehouse use but isn't report-ready.

GOLD LAYER

The Gold layer is the first point where business teams can indirectly access data, feeding microservices, accounting integrations, email marketing, and machine learning. Data here is fully abstracted into business concepts, supporting real-time operational needs.

PLATINUM LAYER

The Platinum layer tells the data's story. Tailored for direct reporting, this layer serves data mart views, prepped for tools like Power BI or Tableau. With secure, role-based access, it simplifies data consumption by offering one source of truth for end-users.
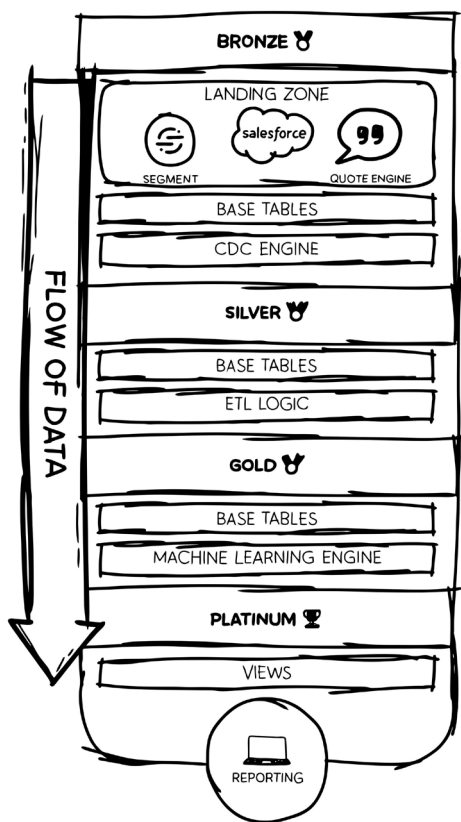
VISUALIZE YOUR SALES LIFT

Visualizing sales lift is complicated, but it doesn't have to be hard. If our data platform is ready to serve us data, then visualizing it is the obvious next step. Visualizing your business comes from having a digital clone of your business, but it's not always immediately clear how to visualize your business.

Translating your data into actionable insights starts with an "Active Purpose". The Active Purpose (or AP) should be the guiding light for any business analysist. Every dashboard, workbook and presentation should have an AP attached to it. APs are not a list of KPIs you plan to showcase but instead speak to a specific business problem or solution.

HOW CAN I TELL WHAT A GOOD CAMPAIGN IS?

○ Have I ever had a good campaign?

○ What is the minimum response required to classify a campaign as effective?

WHICH CUSTOMERS RESPOND TO MY CAMPAIGNS?

○ Who are they?

○ What are their demographics?

○ Do I have different groups of people that respond to my campaigns in different ways?

WHEN SHOULD I CUT OFF ADVERTISING SPEND ?

○ Is there an ideal time to cut off advertising spend for a campaign?

○ Do different types of advertising campaigns have different shelf lives?

Begin with the Business problem you're trying to solve and then ask the questions that solve it. The problems quickly turn in to solutions with an Active Purpose mindset:

The Dashboard for "I don't know what a good campaign for my business is." Now has an associated active purpose of: "Showcase our most effective campaigns across time."
The Dashboard for "My campaigns aren't resonating with my customer base." now has an associated active purpose of: Investigate the ideal campaign for every customer.
The Dashboard for "My business keeps campaigns alive for too long." now has an associated AP of Track sales lift momentum by campaign.

These APs keep us on track. In my mind it is very clear what we are measuring and where the guardrails are. I can't imagine the default experience for any of these Active Purposes is a printed

excel table. Each of these could have rich, engaging visual representations of your business centered around their respective active purposes.

Finding your first few APs can be difficult but once you get the concept, they become second nature. Soon when you see a dashboard, your first question is "what is this dashboard solving?" and "What is it's Active purpose?".

Visualizing abstract concepts is what we do best at FreshBI- the following is a list of suggested implementations for measuring sales lift with a short description detailing why you would want to measure it in that way. This is of-course not an exhaustive list but intended to get your creative juices flowing.

✖ SHOWCASE OUR MOST EXPENSIVE CAMPAIGNS ACCROSS TIME

By viewing all campaigns in a rolling 12 month period we can clearly see what worked, and when. We're going for seasonality and correlation. What kind of campaign performs well, and when. Do video ads on Facebook perform well? What about boosted LinkedIn posts? Most importantly, how do they compare?

Questions and next steps to level up:
- *Display YoY % boosts*
- *Incorporate Media , Platform and Customer segmentation*
- *Calculate Time to Convert & Complete Customer Journey Do targeted ads actually perform as well as video ads, but only if you follow-up with an email?*
- *What are the elements of your effective campaigns?*
- *What if you could "generate" effective campaigns?*
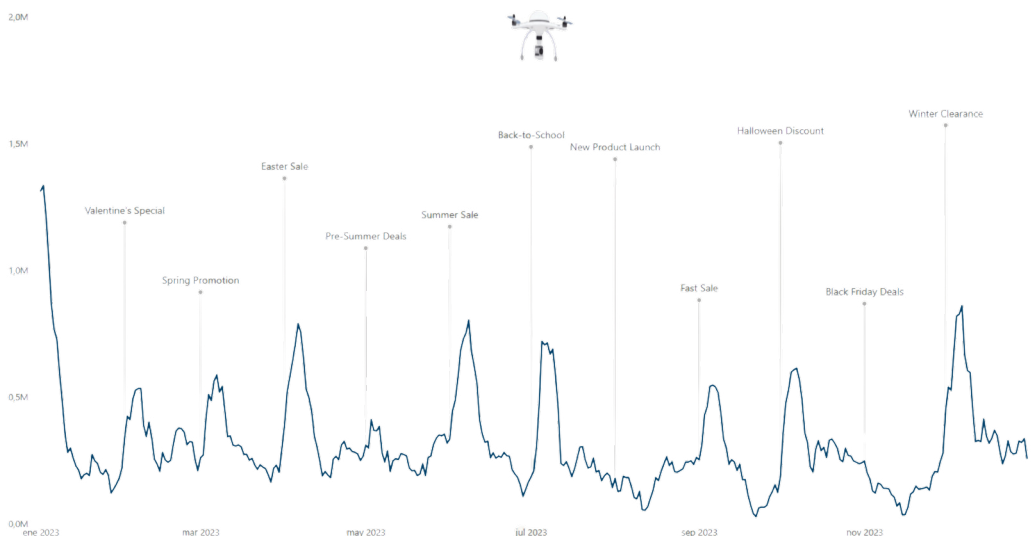
✖ INVESTIGATE THE IDEAL CAMPAIGN FoR EVERY CUSToMER

Breaking up your customer base into clear segments that apply to your business could make or break your ad-spend. Different age segments respond to different media, and on different platforms. The way you market toys to children is different than marketing those same toys to adults who purchase the toys for their children. How does this manifest itself in your business?

Visual

There are endless opportunities here, but let's get started by using some logical groupings (age, sex, geographical location). For each logical grouping, place a Scatter Chart. On the Y axis we have the grouping and on the X axis, show Average ROI. Shade each dot by its campaign.

Questions and next steps to level up:
- ○ *Add auto grouping and clustering*
- ○ *Use 3d graphs to add another dimension to your segmentation view*

✖ TRACK SALES LIFT MoMENTUM BY CAMPAIGN

When do we cut our losses? When have we squeezed all the juice out? This is what tracking momentum is all about. If you can identify when a campaign hits a downtrend, you can start making decisions. Start producing the next one, change the target, whatever it is. This can track clicks, ROI or impressions. A common way to track momentum is to take the current months value less the previous x months (usually 3 or 12) value divided by the previous x months value.

Tracking this value over time demonstrates depreciating or appreciating effectiveness.

CHRYSTAL BALL

If your default approach to data is that for every physical event your company experiences, there is a digital counterpart, predicting future sates of your business becomes easy. Super-fast computing has started a second information arms race and companies that adopt high digital parity today will be ready to take full advantage of this compute as it becomes generally available.

Today we can talk to a generalized LLM (Chat GPT) trained on the open internet and various closed sources. These models provide great general knowledge and conversation, but are incapable of knowing anything about your business. My prediction is that over the next 10 years we will see LLMs trained on university grade business content that have the ability to interface directly with your data platform. Is your business ready?

The result of these highly specific Business LLMs is twofold:

1. The physical language (English, Spanish) used to train the model becomes a 'universal query language'. SQL is no longer required.
2. Every role has a digital "second opinion" built into the model. This second opinion is faster at recalling data related to their role and can communicate effectively.

BLLMs that do these things aren't here yet, but we can begin integrating our business with generally available LLMs today. There are plugins to Chat GPT that can consume your data, and give you feedback, classification engines for user feedback (read: sentient analysis) and we can use CoPilot to accelerate our daily work.

The " AI " acronym: AI- what even is it? If we're being cynical, it's just a super optimized algorithm. That's all. Literally, "AI" isn't even here yet. What we call AI today, is really just good Machine Learning models that have great UIs wrapped around them. They are awesome.

Can we have real AI today? Not. Can we have pseudo AI? You sure can! Machine Learning is not out of reach, especially if you have big ecommerce and marketing datasets. Machine Learning can be used to do so much more than just train LLMs. What can ML models do?

- *Determine what type of user likes what type of campaign*
- *Optimize current campaigns for specific segments*
- *Automatically trigger marketing events*
- *Output customized marketing plans for our customers*

It's important to understand that ML models don't use traditional statistics to determine outputs. It's not looking at the average and smoothing the curve. ML uses Regression models to determine likely outcomes. For the average person this is all just magic; you don't have to know what regression is, or exactly how the model works. Just know that it's not an 'averaging machine'.

HOW CAN AI BOOST OUR SALES LIFT ?

Below are some practical examples of how AI and ML can be used to boost and monitor your sales lift.

REALTIME DATA PROCESSING

Today, you can download a plugin for PowerBI that takes your data and sends it to the LLM for processing. This is a great way to get: feedback on trends, summaries on big datasets and look for anomalies.

IDEA SPARKING & THIRD EDIT MARKETING EFFORTS

LLMs should never be used as the backbone of your marketing efforts, but instead should be leveraged to polish the human efforts produced by your team. LLMs are only ever the sum of their parts; in their current state LLMs will never produce a work greater than what it has been given. This 'disadvangage' is actually a good thing when it comes to the opening of the creative process. Humans love to pre-classicfy ideas as good or bad. As pattern seeking personalities, our creative judgment can be clouded at the starting line. LLMs start out with equal weights applied to all outcomes. This allows for a greater variety of 'inspiration' to surface.

LLMs write in the style they were trained on, and over time I expect that we will be able to subconsciously recognize "trained" text. This means that for now, first drafts are not often acceptable in their raw form straight out of Chat GPT. However, pushing your draft marketing copy through an LLM will give heaps of insights.

CLASSIFICATION ENGINES

Today you can manually classify your customers via a single segment. Over 65. Male. Drives a Porche. But are there natural groupings hidden in the collection of segments? How do they respond to different Campaigns. This is you classification engine.

It's always running, always searching, always being trained on new and existing data. The second you pick up a new click, we're pushing that clicks source through classification engine. Maybe Clicks that happen earlier local time on mobile devices always convert with a specific type of landing page on your website. Maybe you can fin that females under 25 always click buy when you follow-up with a welcome discount. If you could know these things, you can be extremely efficient.

INFRASTRUCTURE

What does it take to run an engine like this? Classification engines like this probably run on the gold layer of your datawarehouse where all the curated data lives. This is a natural place for cleaned data to be consumed, and new evaluated data to be deposited. The actual infrastructure contains many 'microservices' working together to deliver a cohesive platform.

The platform is only worth spinning up if it's robust enough to automatically serve the entire sales funnel on it's own. You could just have a machine learning model that you manually test prospects against but the insights you'll get back aren't worth the cost of the electricity. The end result should be a multi faceted interface for on the fly classification and storage. At the very least a good Classification Engine contains the following parts:

· Batch Machine Learning Model
This is the actual training function of your model. You already have outcomes from hundreds of datapoints, use it to train your custom model. The BML is ALWAYS being trained on new outcomes.

· Classification model
This is a direct interface to your BML. It receives inputs from some source (an API in this case) and pushes the input through the model, delivering a 'classification'.
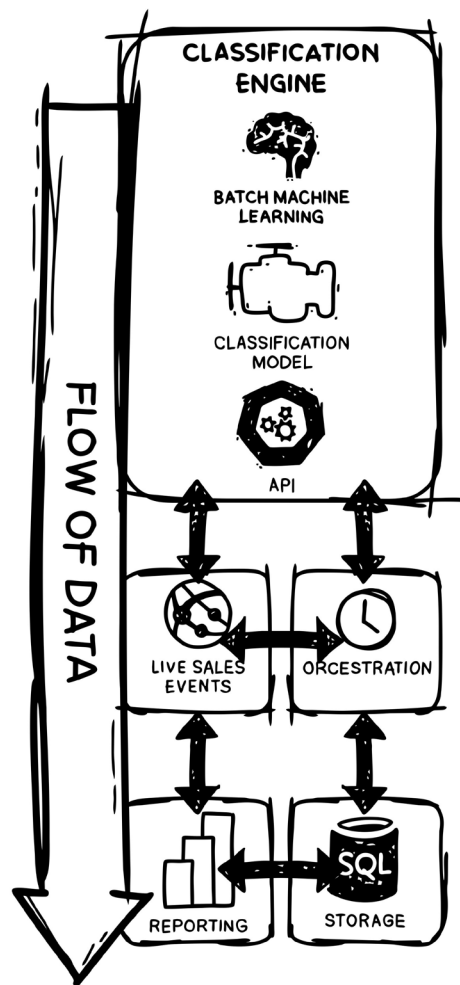
· Live Sales Events
LSEs are always happening- we need to classify them in real time.

· Orchestration
This takes any new outcomes and updates the BML.

· Reporting & Storage
We need a place to store classifications and outcomes then report on the outcomes.

RHYTHM

The actual rhythm you find yourself in might be a little complex than the infrastructure would have you believe. It's not a set and forget system. It constantly needs tending to.
This rhythm will be more familiar to your marketing team, and should probably be something they manage.

1. Release
a. Release the campaign out to some set of users.

2. Monitor
a. Listen to the traffic and track the response. You should also be collecting as much data on this traffic as possible.

3. Train
a. Using what you've learned, train a model to optimize your desired outcome.
b. We also might start adding slight variations and initiation another cycle starting from the Release step. This feedback compounds with ever iteration.

4. Intercept
a. At this point your model (or you, leveraging your model) can use the trained algorithm to start calling the shots.

5. Create
a. Now that we've got a model that is trained out our data, we can start asking questions like "What are some similar campaigns?
b. We can also get the model to do some work for us. "Generate a campaign like the last one, but optimize it for Latin cultures."

DYNAMIC DISCOUNTS

Using our model we can start auto-magically triggering smart discounts based on the classification we receive for a given user. This can happen in real-time. Maybe we've been training our model to look out for price sensitive customers. Based on browsing history/cookies we 've determined that the user that just laned on our site is always motivated by a 20% discount code. We can't offer that to all our customers, but if it's either a 20% sale or no sale, wen are now equipped to pull that trigger when appropriate.
Sales 'come-along'

You've had your AI assistant taking notes during the last two Sales calls with a prospect. Everything your model knows about this customer is pointing to the fact that they would respond well to weekly email check-ins. Without consulting you, the AI starts trying to engage the prospect with relevant "top of mind".