



Virtual User Group

October 2024



Agenda

- Product Vision
- Recent Releases
- Product Deep Dive
- Roadmap
- Vision for AI
- Q&A



Jim Williams
Chief Marketing Officer



Payod Deshpande
Chief Product Officer



Dan Jacobsen
Senior Product Manager



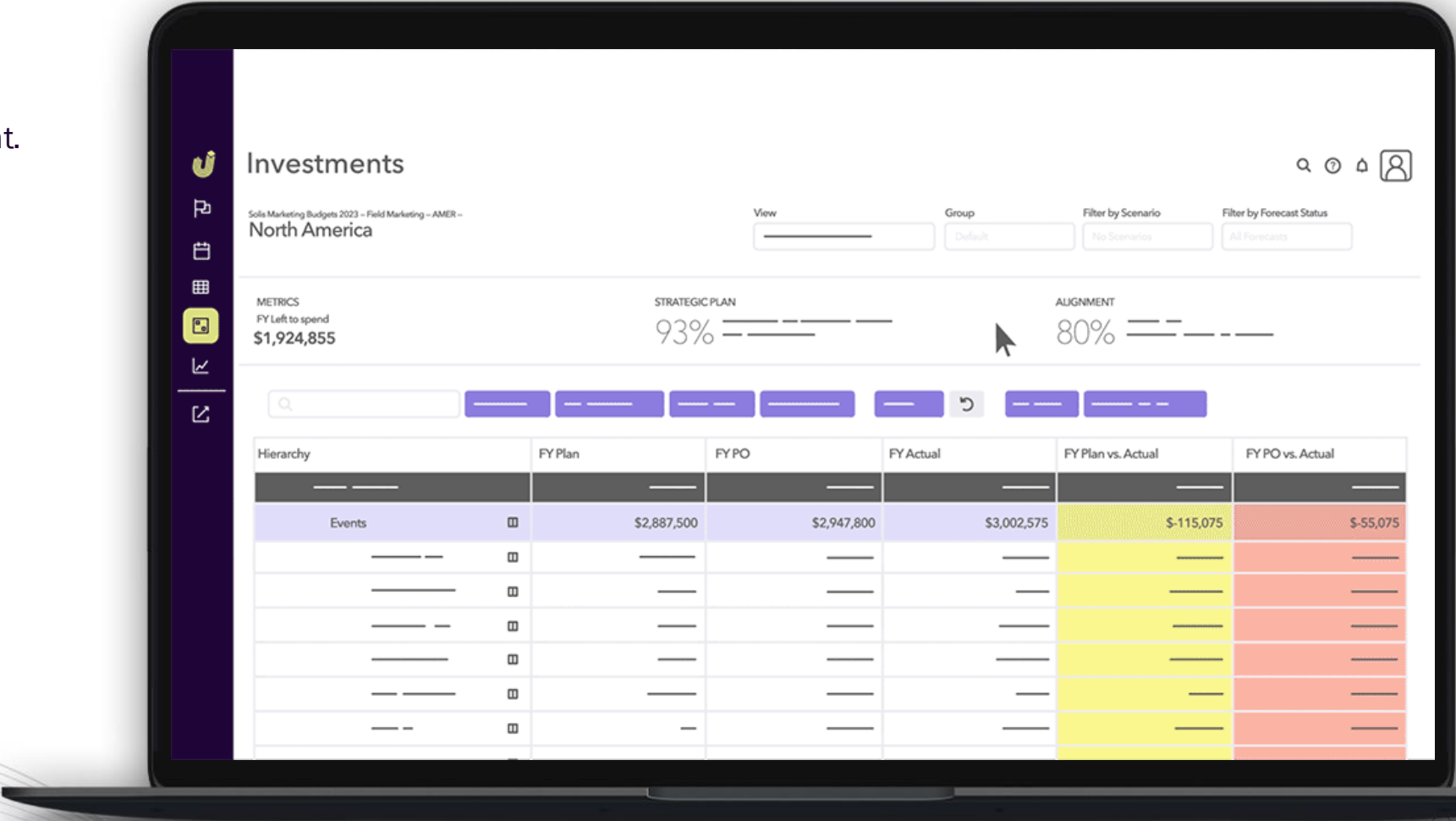
Jan Kublikowski
Regional Director,
Solutions Engineering

Uptempo's System of Record Unifies Marketing Planning

Bridging the gap between strategy, execution and ROI

Financial Planning

Automates reconciliation with ERP for more accurate forecasting and spend management.



Uptempo's System of Record Unifies Marketing Planning

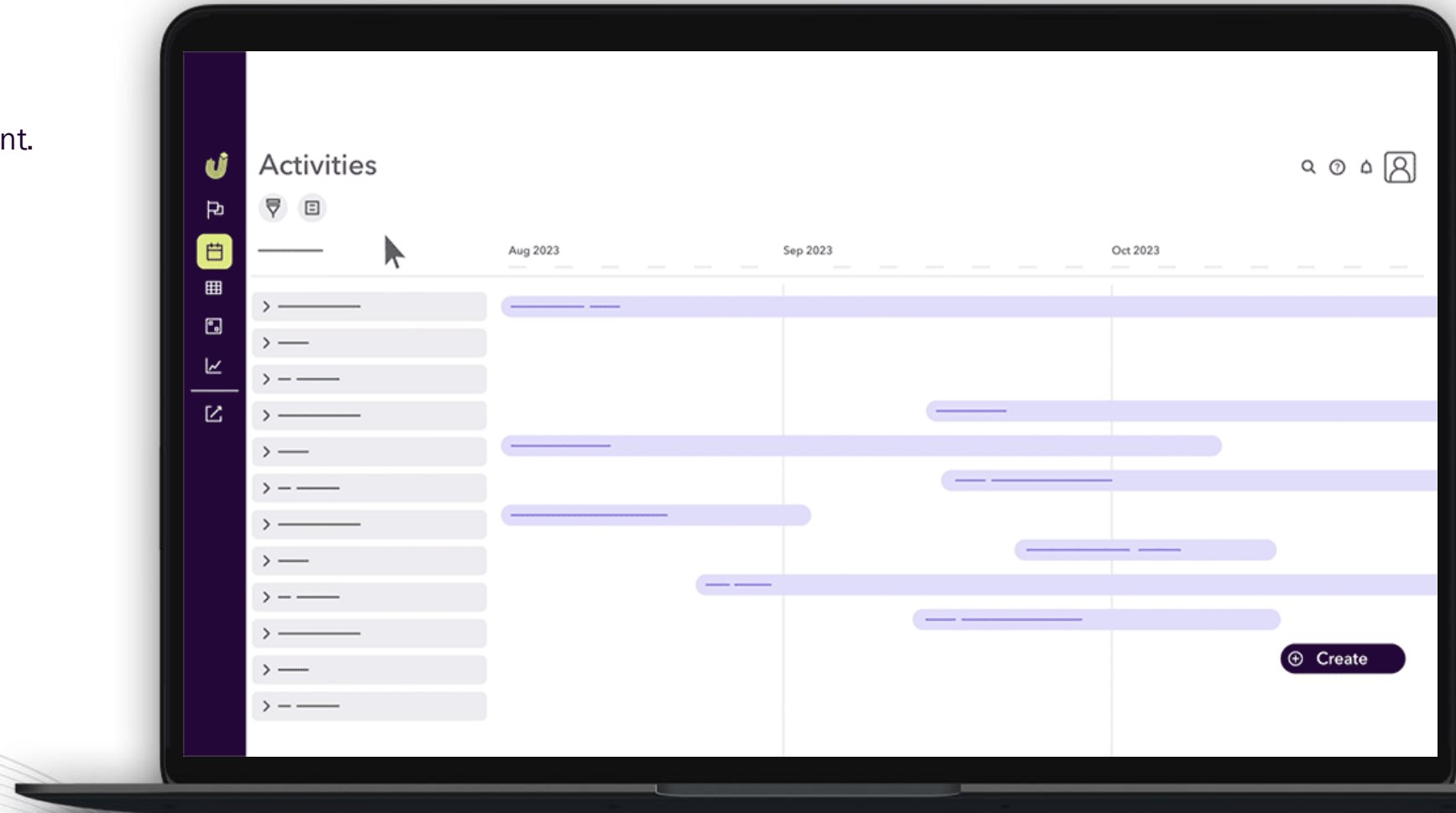
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Campaign Planning

Organizes activities at various levels, with customized attributes and briefs



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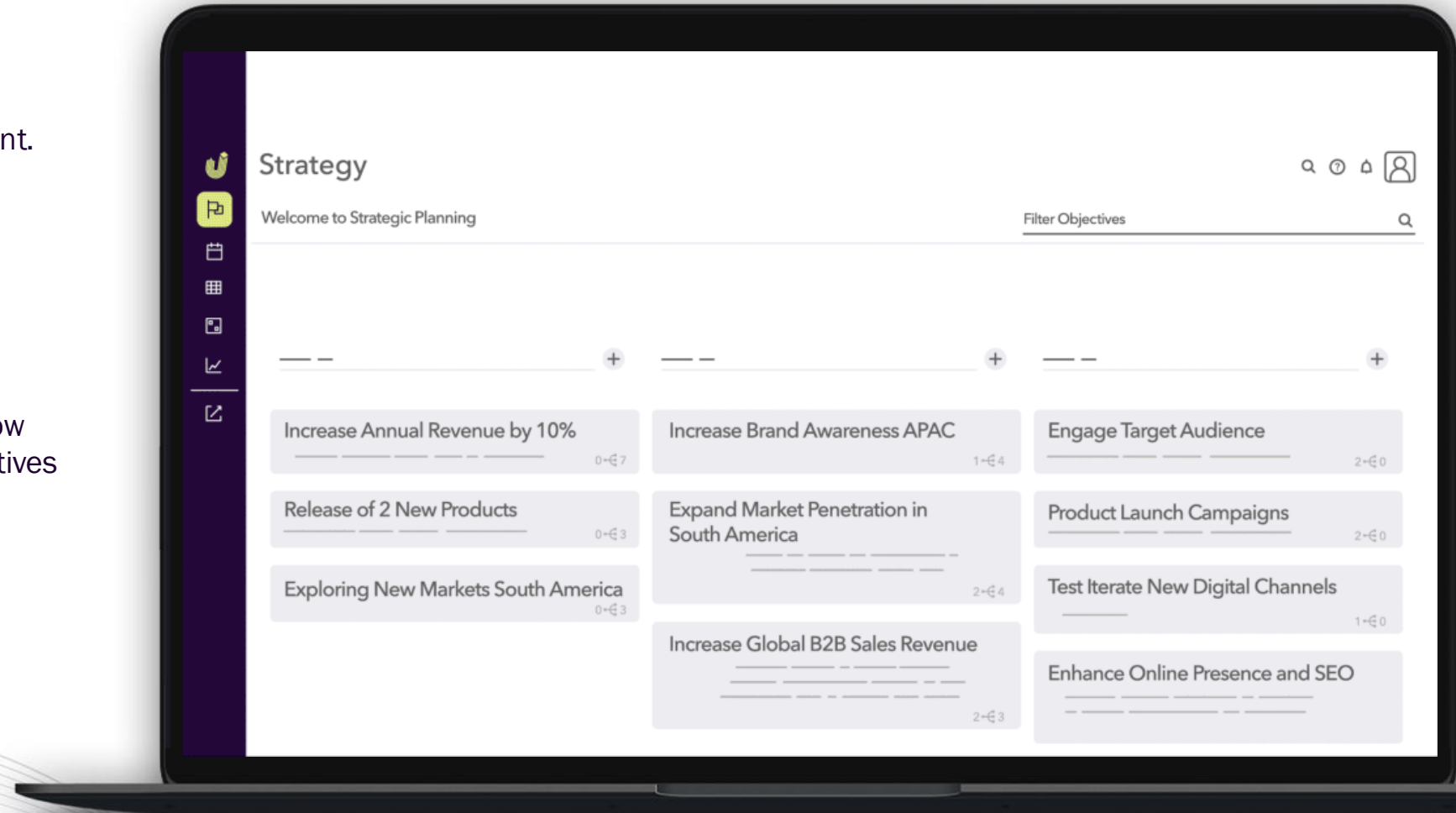
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Strategic Planning

Gives stakeholders full transparency into how marketing strategy aligns to company objectives



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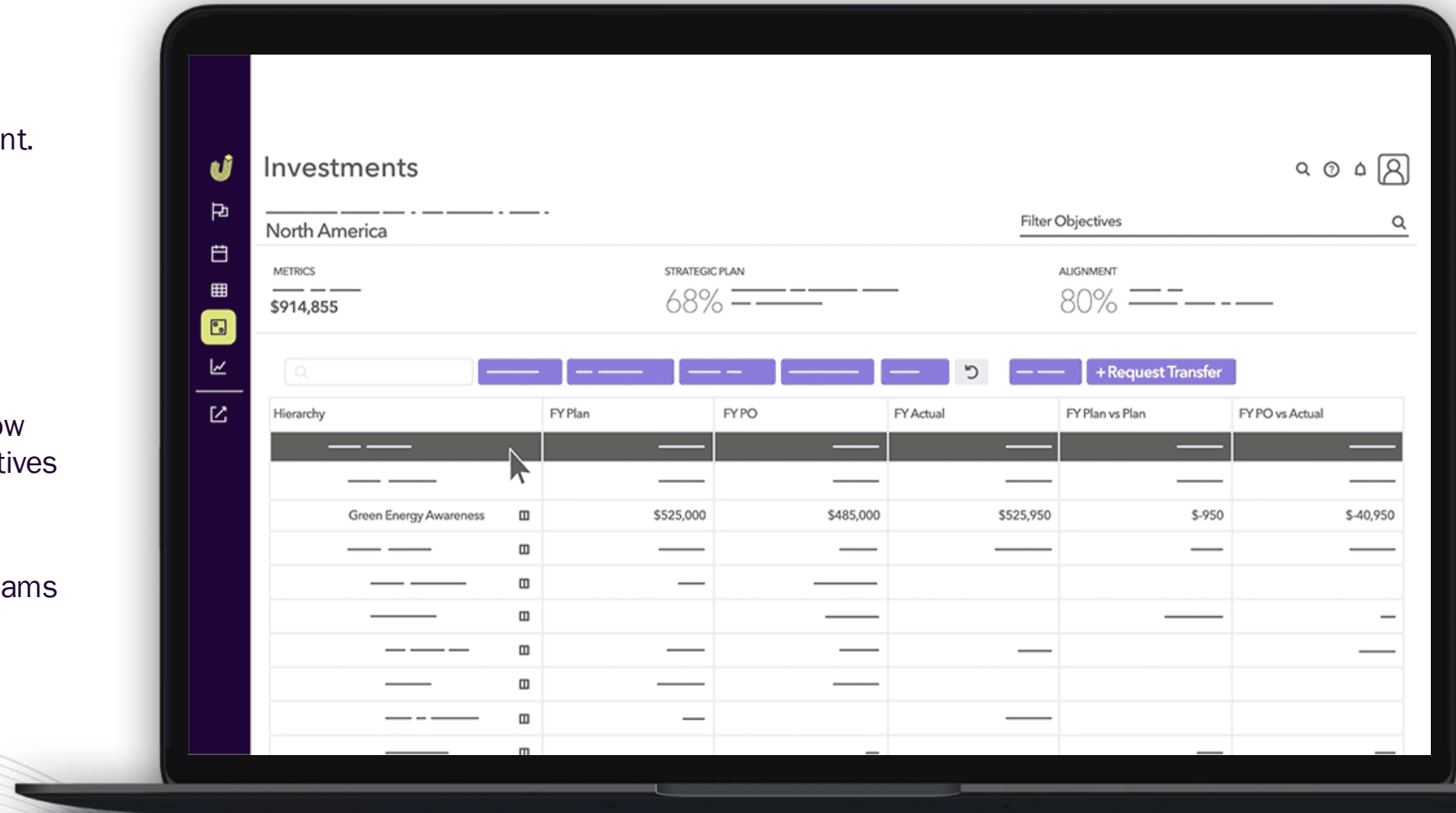
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Orchestrates workflows across marketing teams for planning and approval



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Plan & Spend Analytics

Provides insights into spend, plans, performance and actual ROI



Uptempo Recent Releases


Over 70 features & enhancements released on Uptempo Platform this year

H1


Enhanced Activity Management  **Delivered**

Campaign budget planning with estimated costs  **Delivered**

Budget Tab Enhancements  **Delivered**

Improved experience when connecting activities and investment plans  **Delivered**


H2

Multi-Activity Funding  **Delivered**

Improved metadata management  **Partially delivered, on track for 2024**

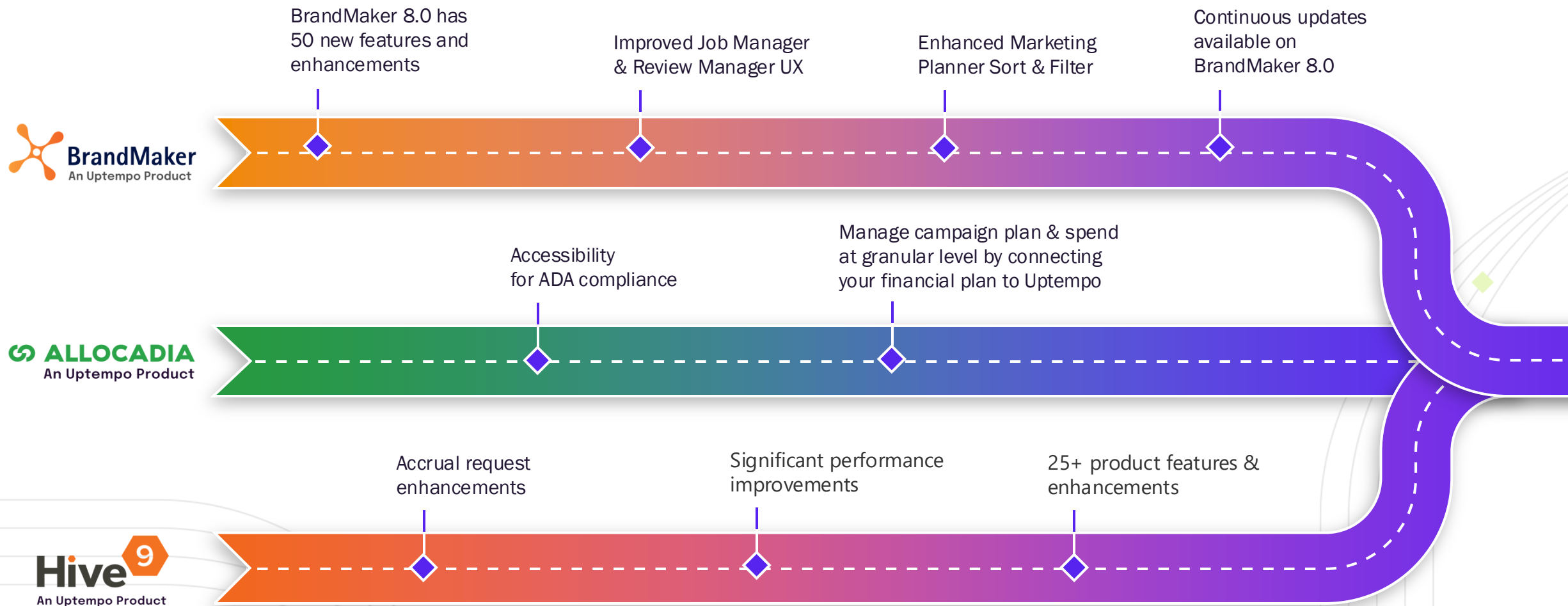
Performance KPI tracking  **Partially delivered, on track for 2024**

Improved activity information sharing tools  **Partially delivered, on track for 2025**

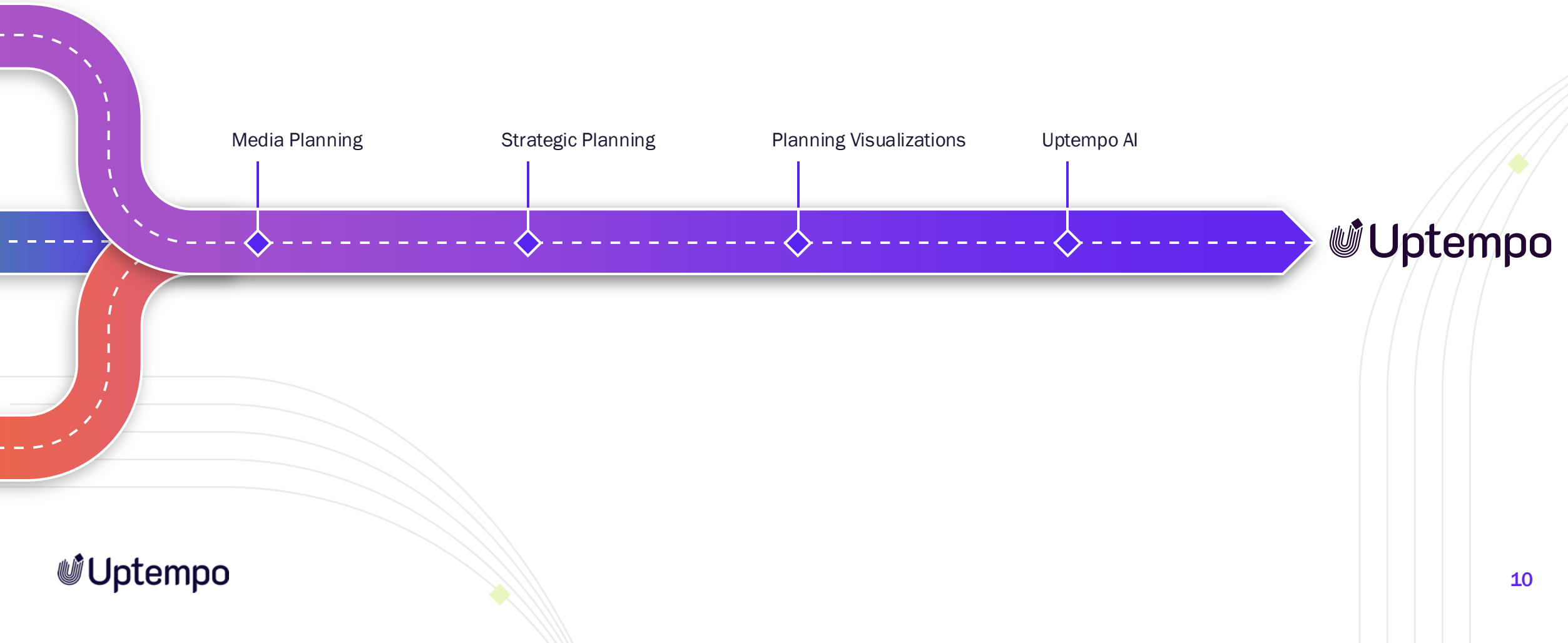
Improved visual organization for large teams  **On roadmap**

Improved workflow experience  **On roadmap**

Continued Improvements Across all Products



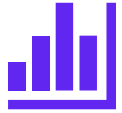
Uptempo is Our Platform for Strategic Innovation



Product Deep Dive

Why Uptempo Separates Plan & Spend

When marketers use one tool for planning and budgeting, it creates significant downstream challenges



Spend Analytics: Difficult to categorize spend into working and non-working dollars or demand vs. content



Inflexible Budgeting: Hard to track investments across different departmental budgets and do budget reconciliation



ROI Measurement: Unable to accurately measure ROI for specific marketing tactics due to inability to tie granular spend totals to marketing tactics

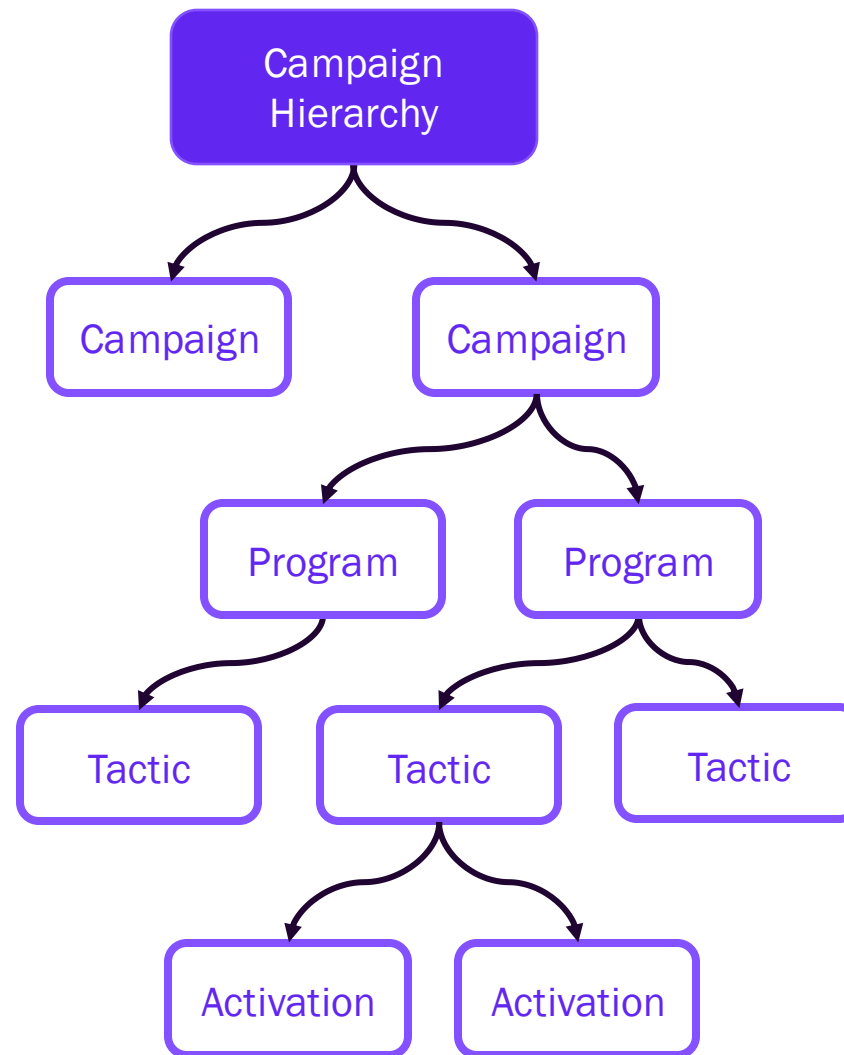
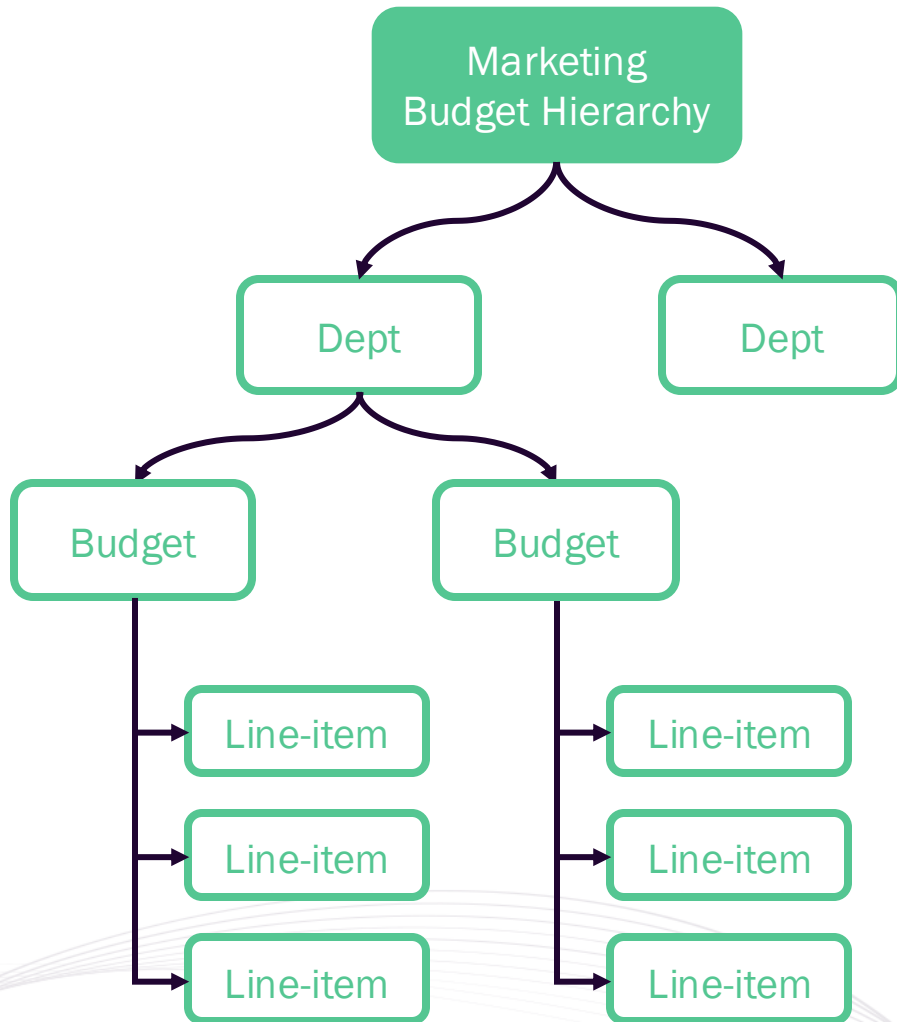


Timeframes: Complex to match campaign timelines to budget cycles since campaign execution timelines can extend across fiscal years, while budget timeframes are annual



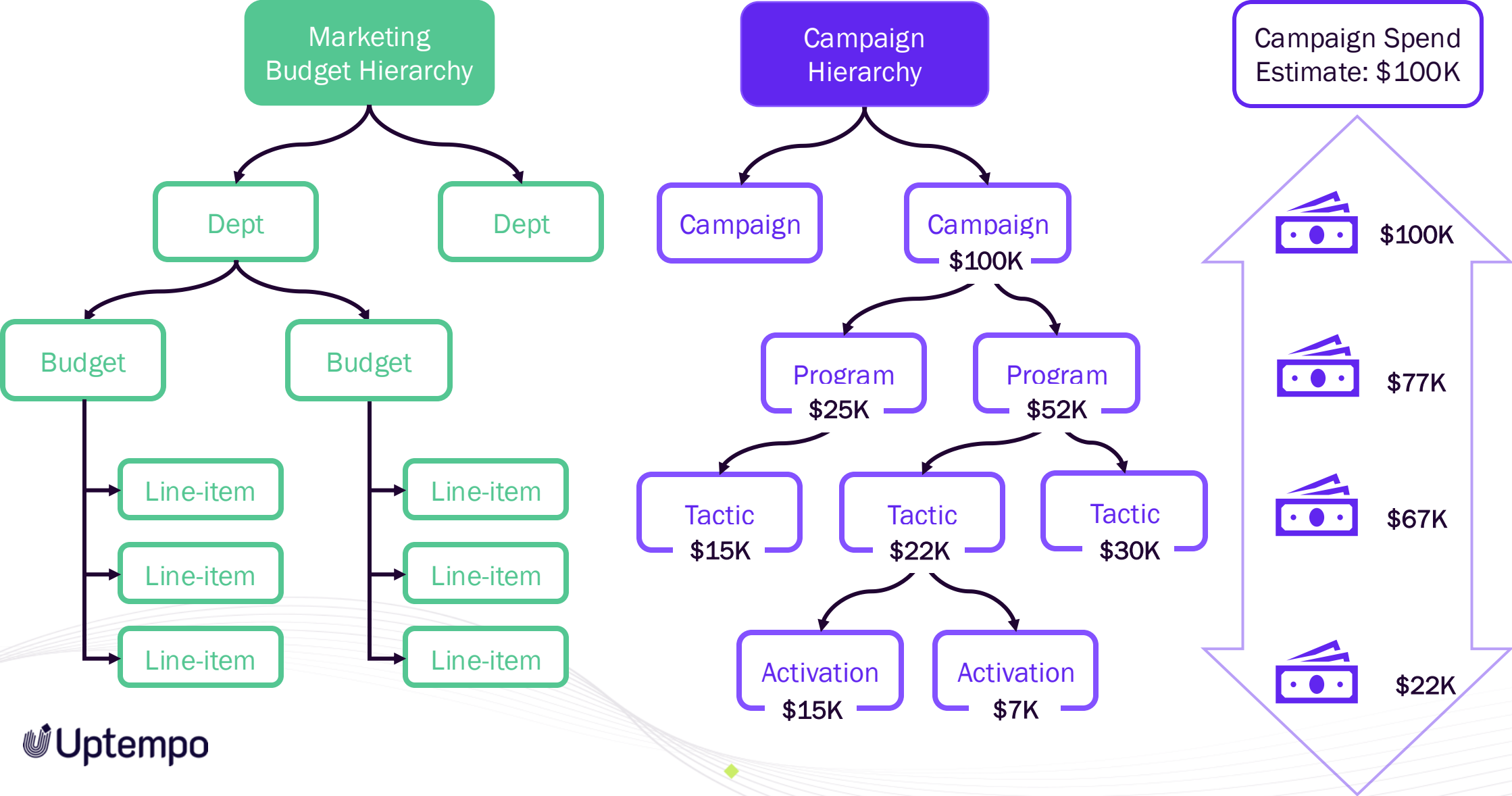
Strategic Alignment: Challenging to show how budgets support strategic objectives due to difficulty to roll up investments across marketing plan

The Benefit of Separating Plan and Spend

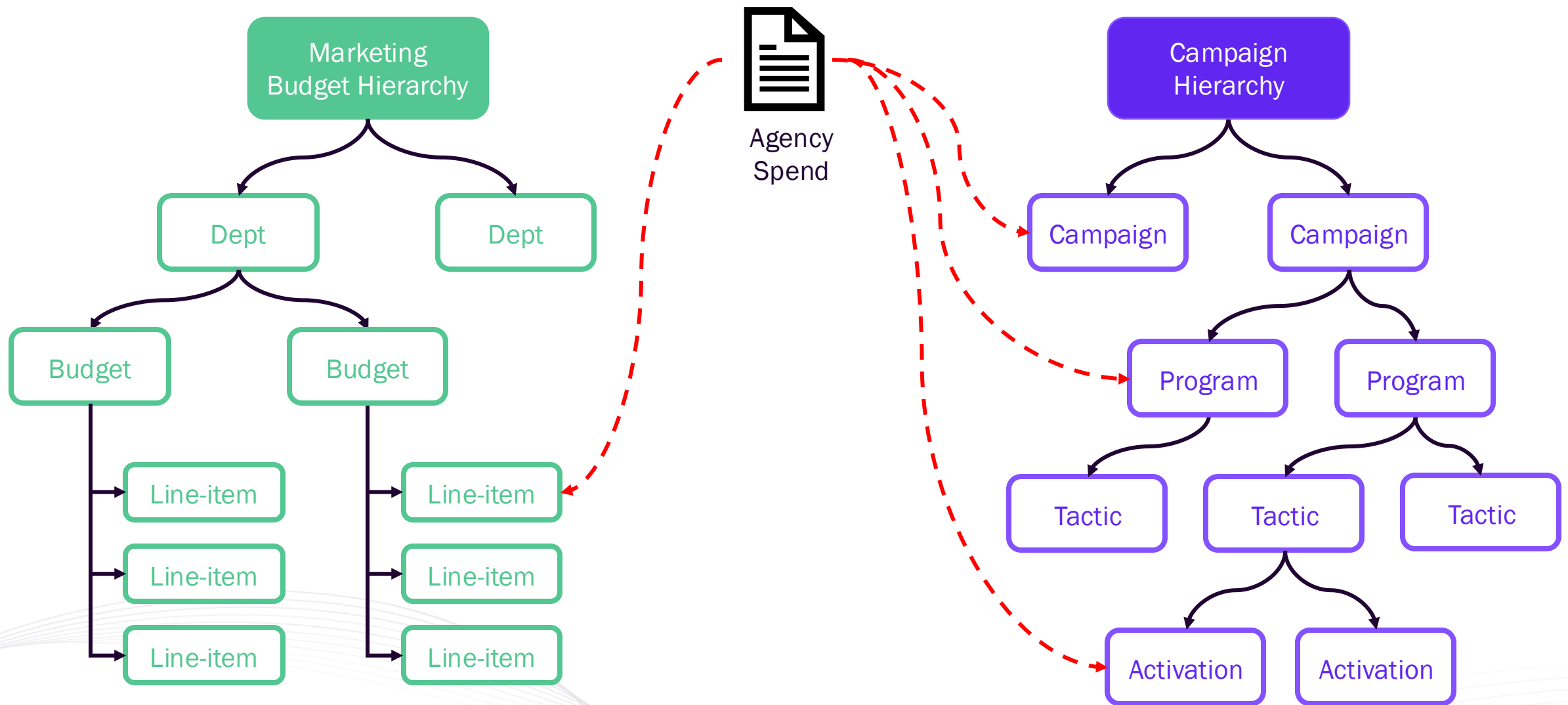


- ✓ Linked hierarchies for plan and spend ties investments to campaigns.
- ✓ A single calendar unifies the team, with accurate budgets.
- ✓ Marketing activities are tied to corporate objectives.
- ✓ Deeper analysis of working vs non-working spend to get to accurate ROI.
- ✓ More accountability for planning, but maintain tight financial controls.
- ✓ Predictive impact modeling to optimize plans before any dollars are spent

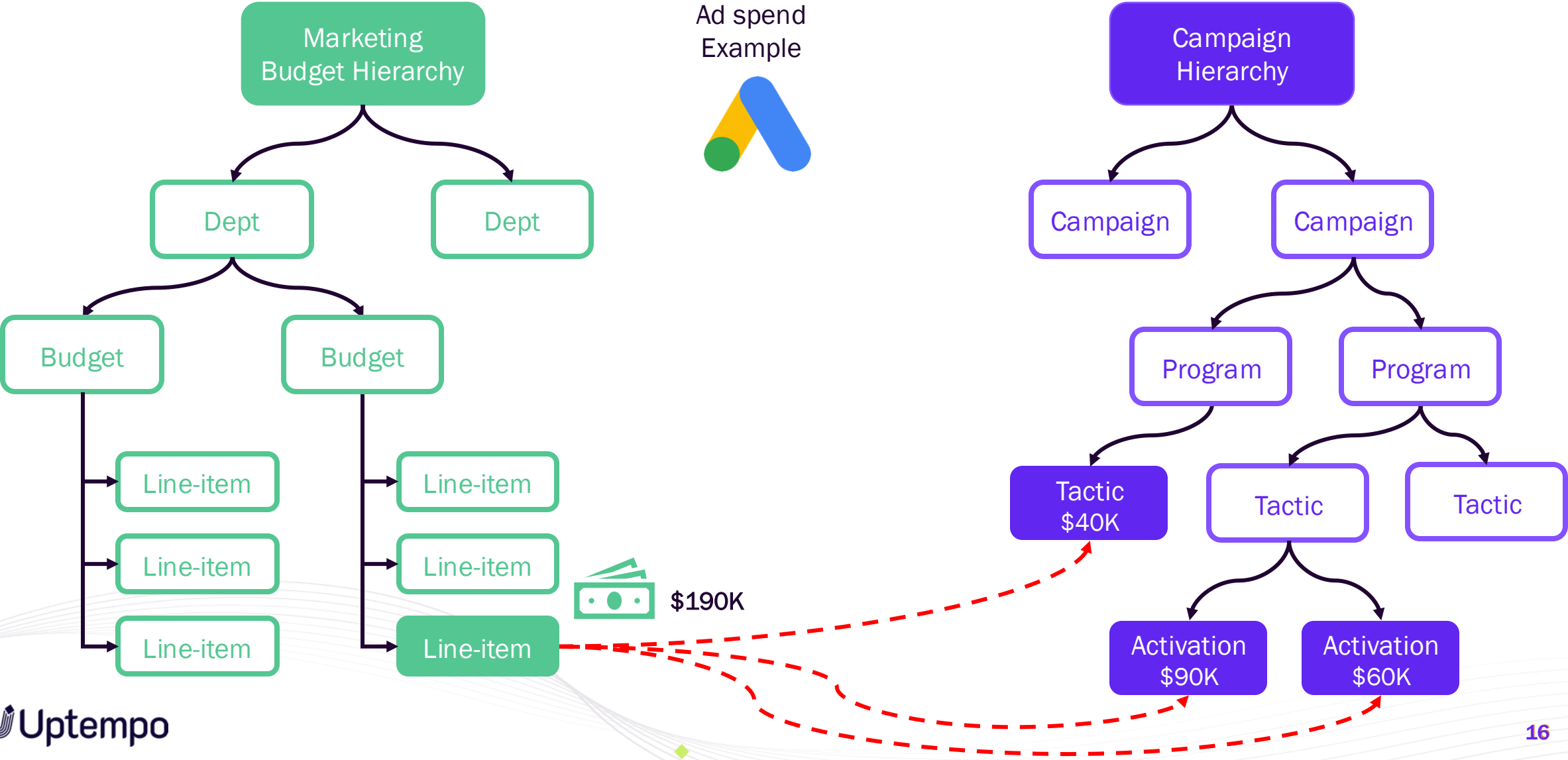
Campaign Estimated Cost Example



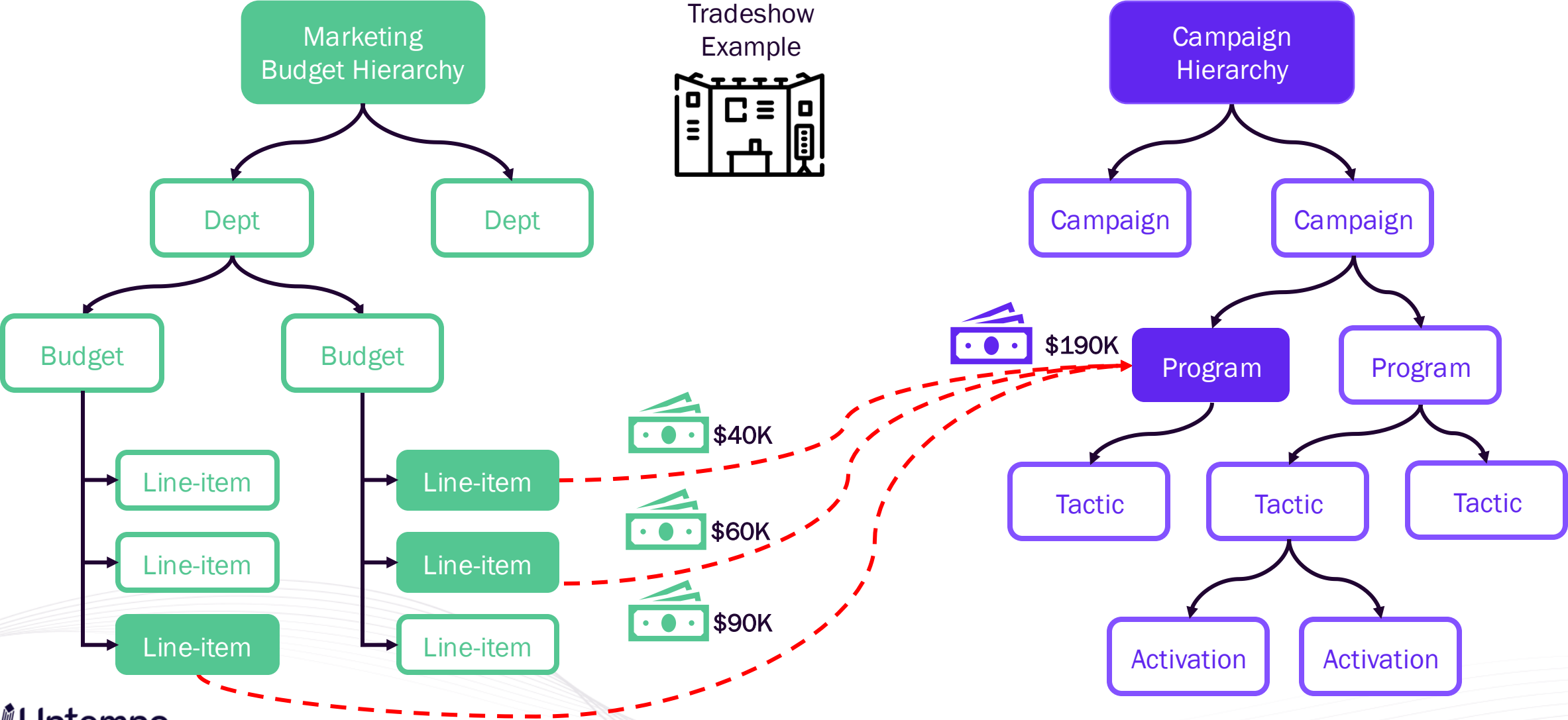
Multi-Activity Funding Example



Multi-Activity Funding Example

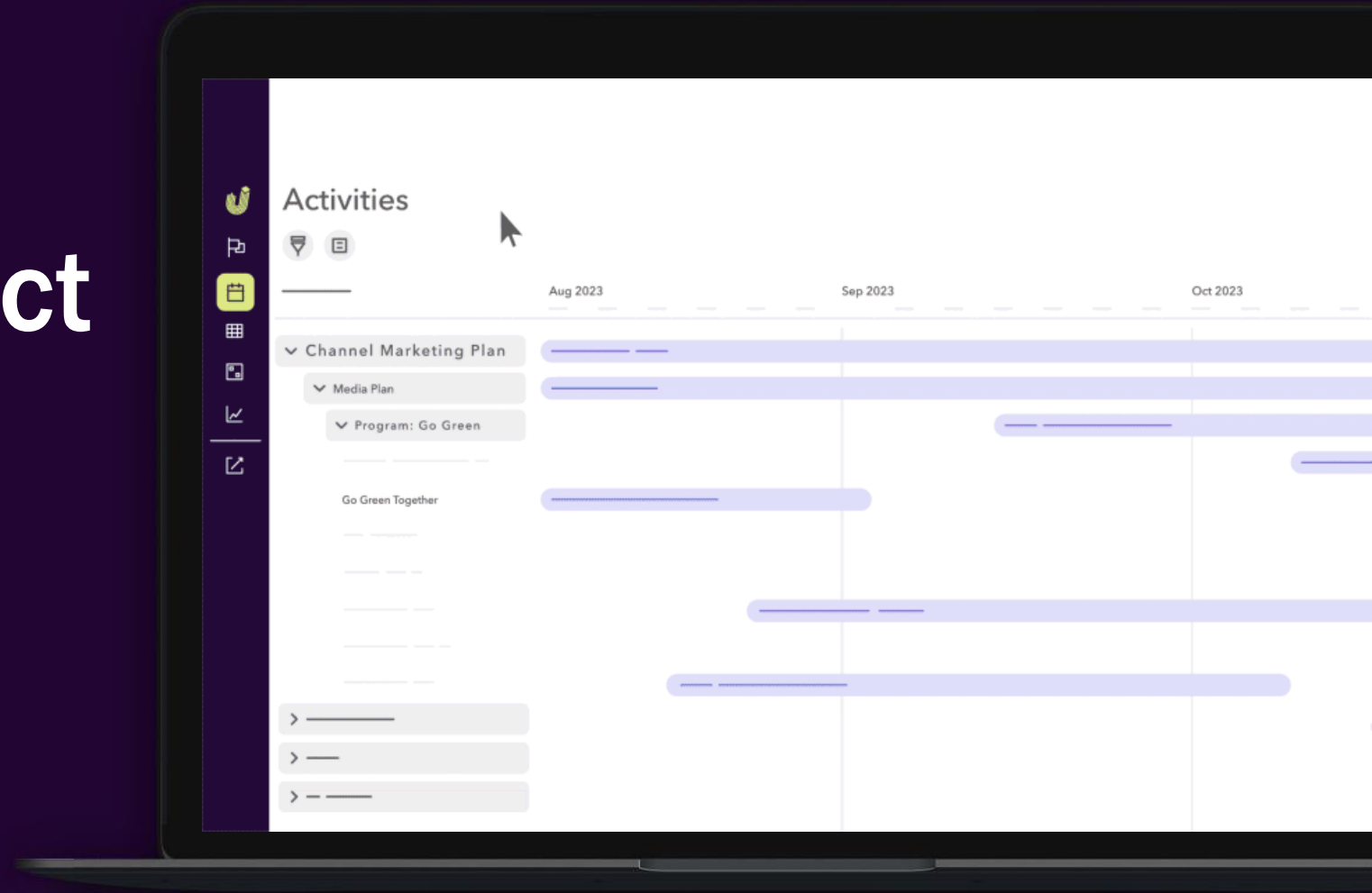


Multi-Activity Funding Example

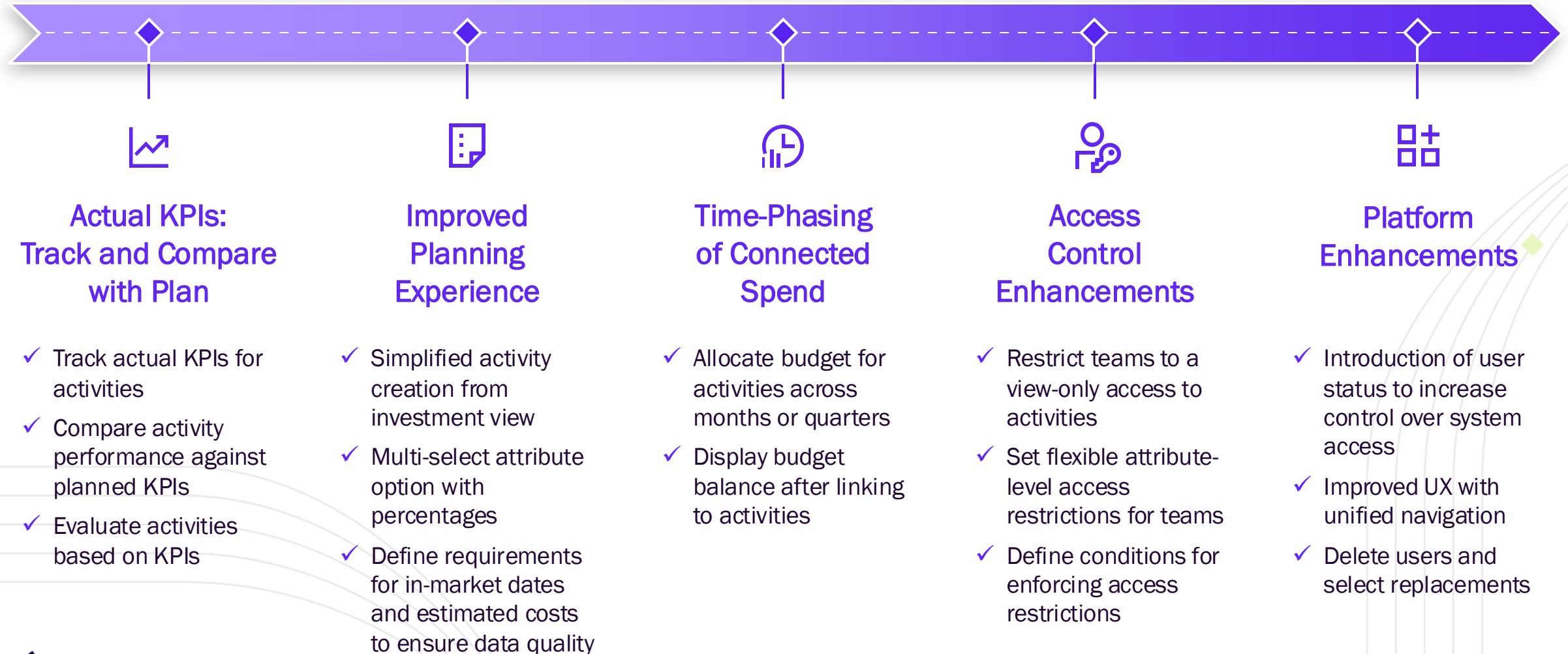


Uptempo Product Roadmap

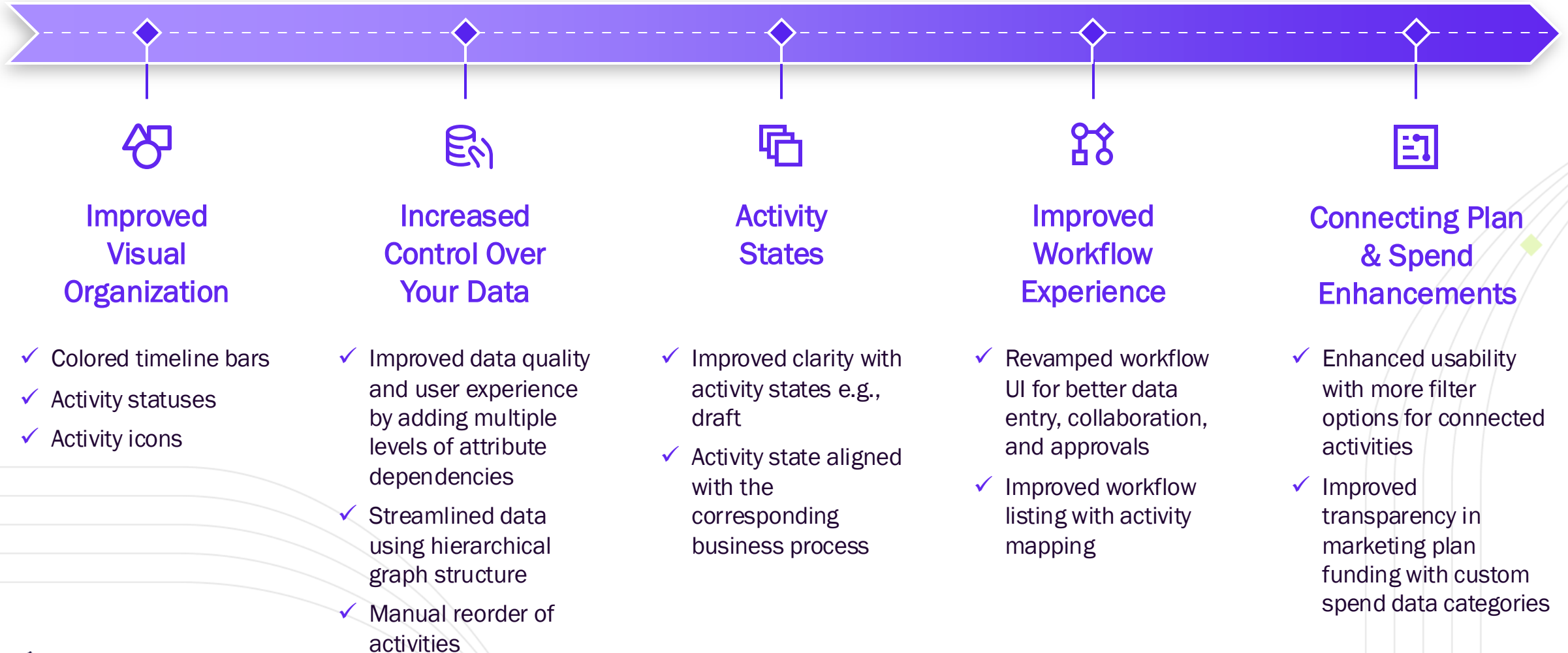
What's lined up next



Short-Term Roadmap for Next Three Months



Mid-Term Roadmap for 2025



AI-Powered Marketing Planning

Our Vision

Deliver a co-pilot for marketing planning to enhance decision-making and boost marketer productivity:

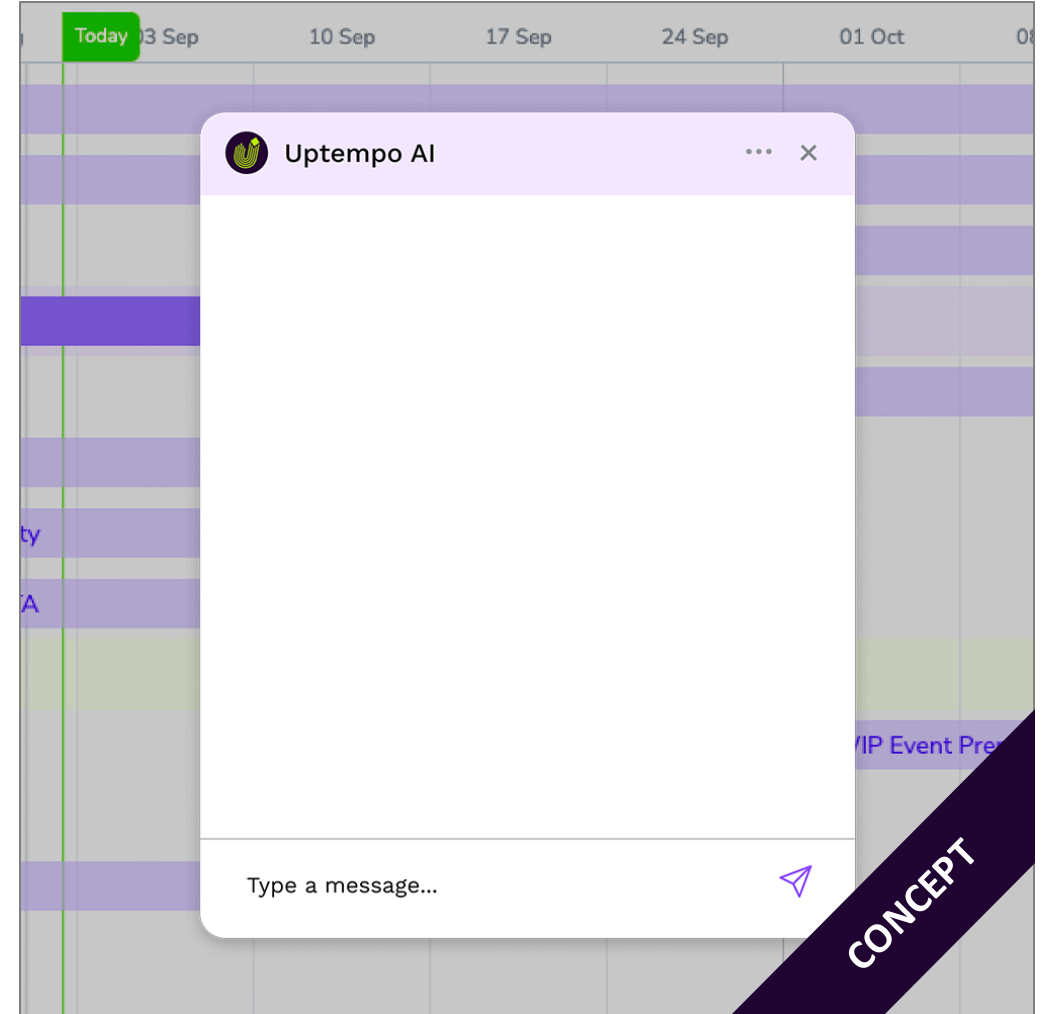
- **Smarter Decision-Making:** Provide unparalleled insights, enabling marketers to make faster, more strategic decisions that drive efficient growth.
- **Enhanced Productivity:** Automate routine planning tasks, allowing marketers to focus on higher-value strategic initiatives, maximizing impact and creativity.



Uptempo AI: Your Marketing Planning Co-pilot

Conversational data insights on

- **Budget & Spend:** budget allocation, spending progress, and open POs/invoices.
- **Campaign Plan & Performance:** campaign performance, optimization opportunities, and strategic alignment.



Uptempo AI: Your Marketing Planning Co-pilot

Auto-Complete Campaigns



AI assists in auto-filling campaign and tactic attributes as marketers build their plans, saving time and reducing manual errors.

Seamless Plan Import



Easily import plans from Excel and PowerPoint with AI, automatically structuring and optimizing them within the platform.

Spend & KPI Recommendation



Leverage AI-driven suggestions for optimal spend and KPI targets for marketing activities, based on historical data and benchmarks.

Plan Optimization



AI recommends adding or removing tactics from campaigns based on real-time performance data and historical insights.

Thank you!



- ✓ Download the **Blueprint for Marketing Planning**, our 7-step guide to producing a plan with impact.
- ✓ Sign up for tomorrow's **Campaign planning workshop** to get hands-on planning advice and templates.