



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



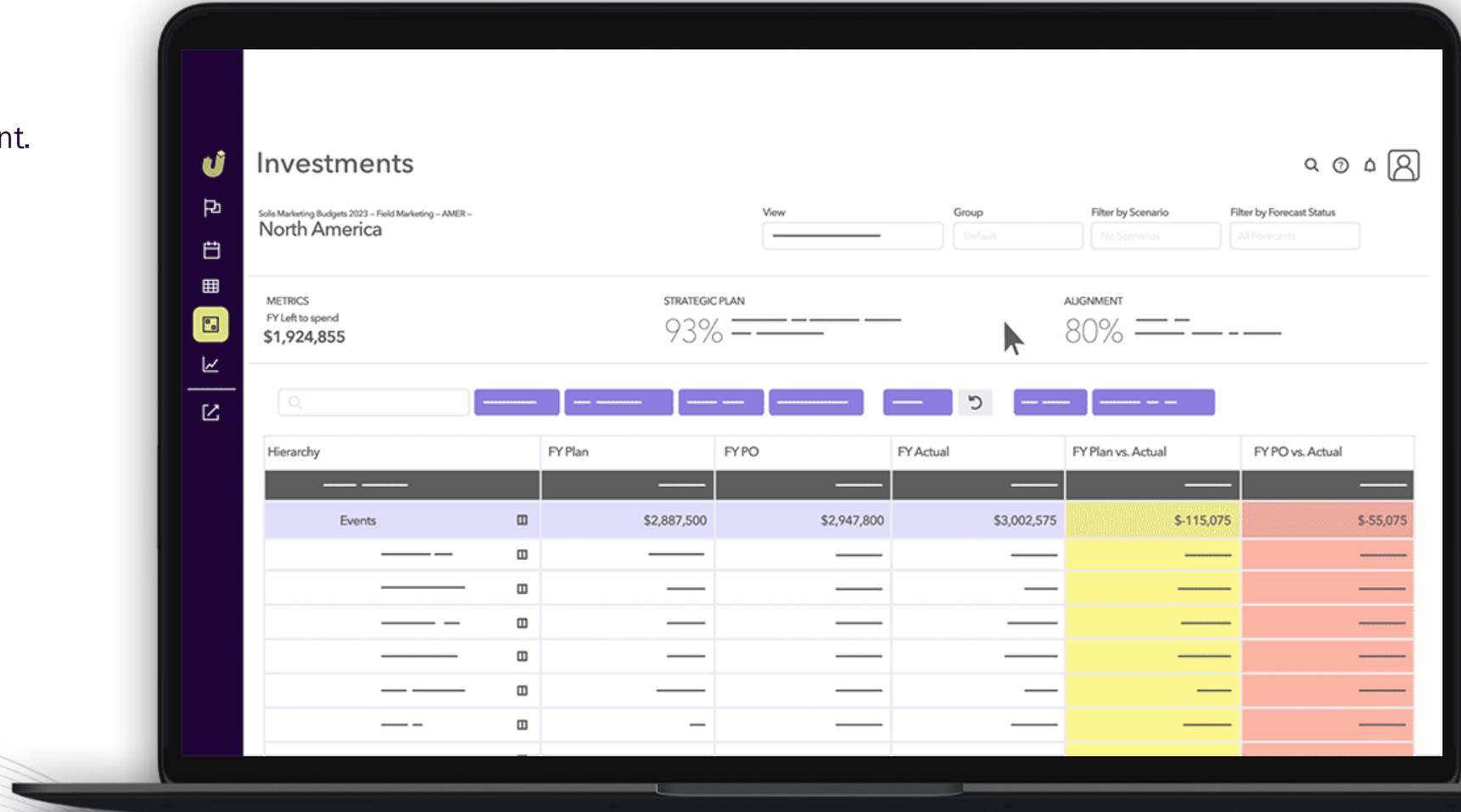
Jan Kublikowski
Regional Director,
Solutions Engineering

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

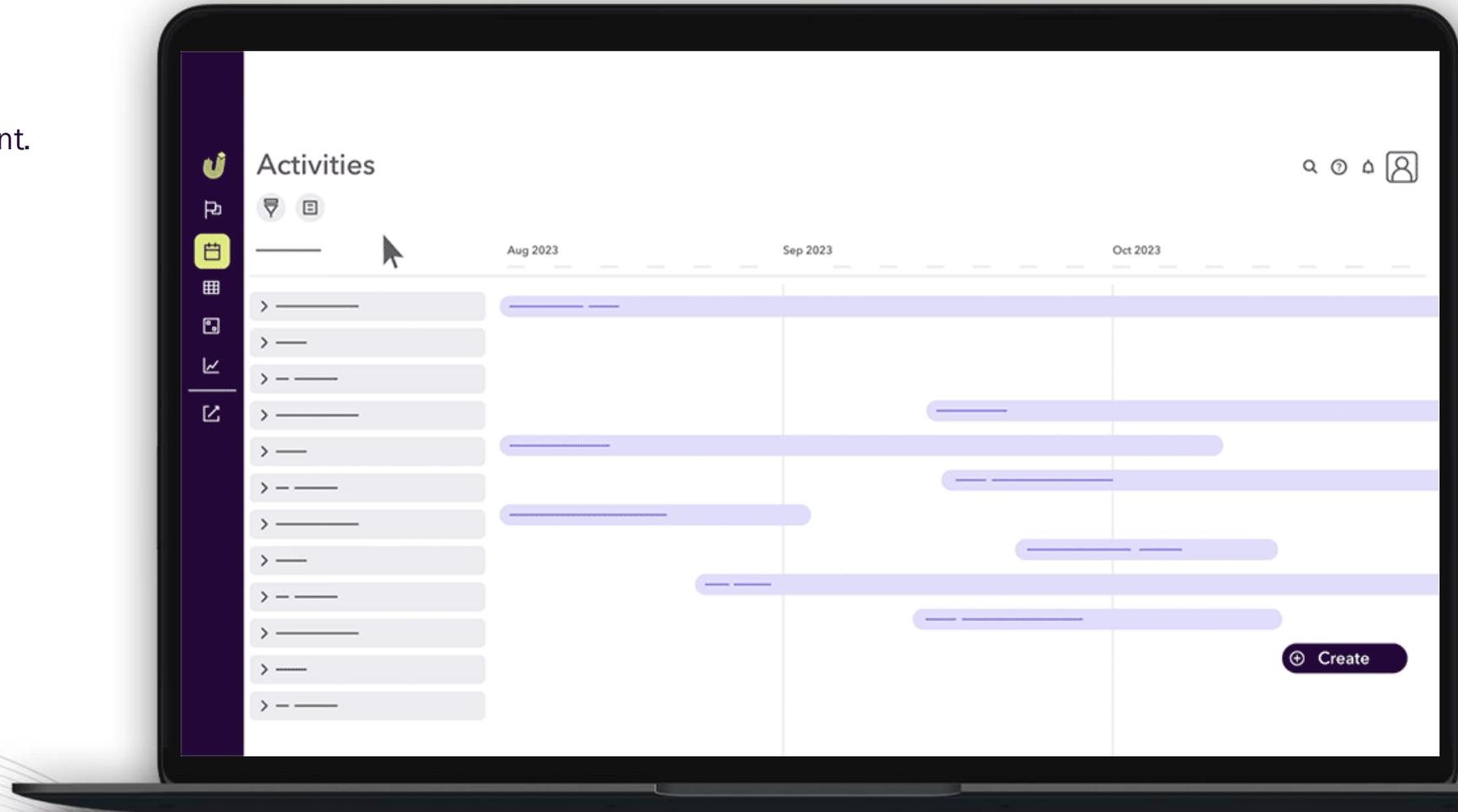
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Campaign Planning

Organizes activities at various levels, with customized attributes and briefs



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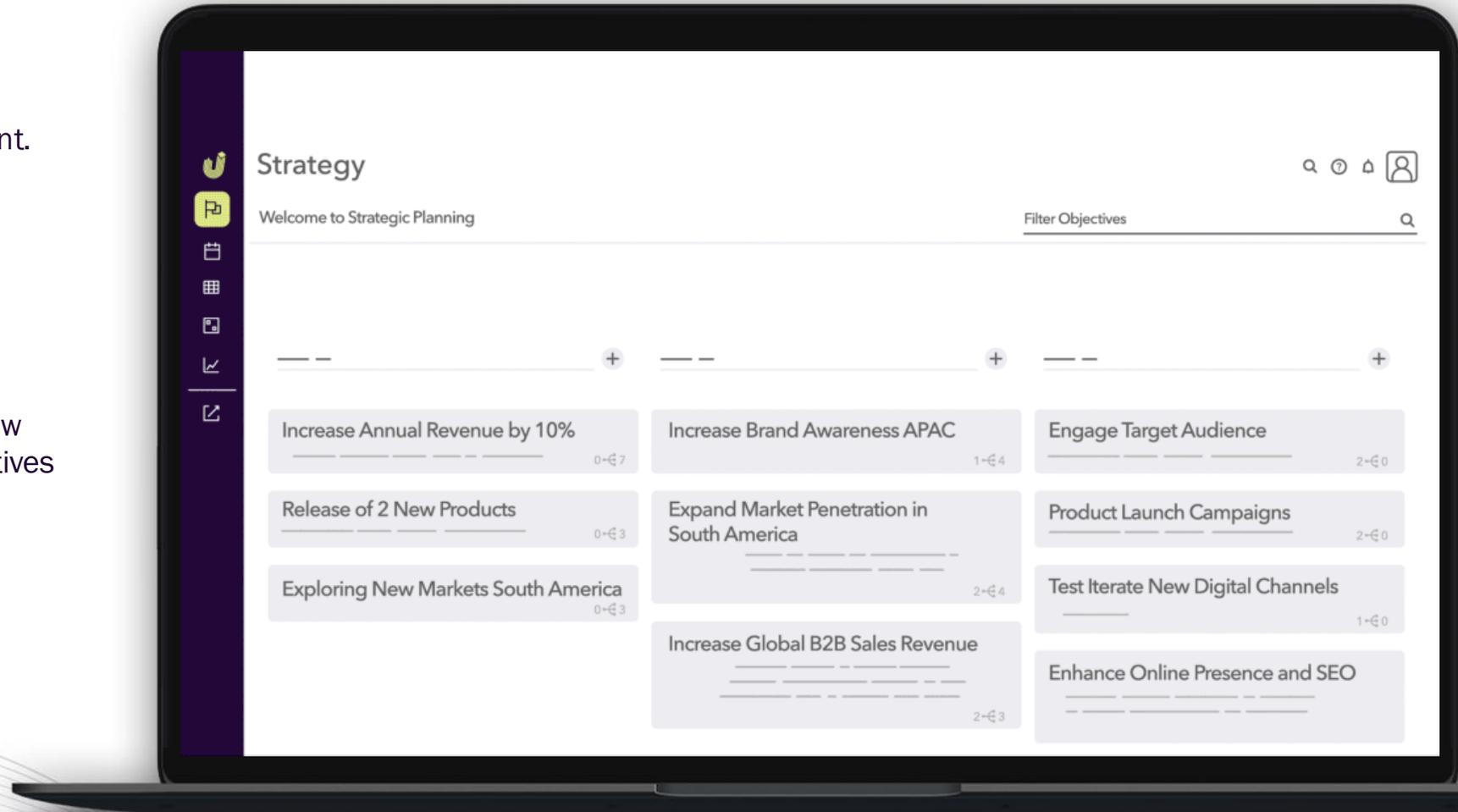
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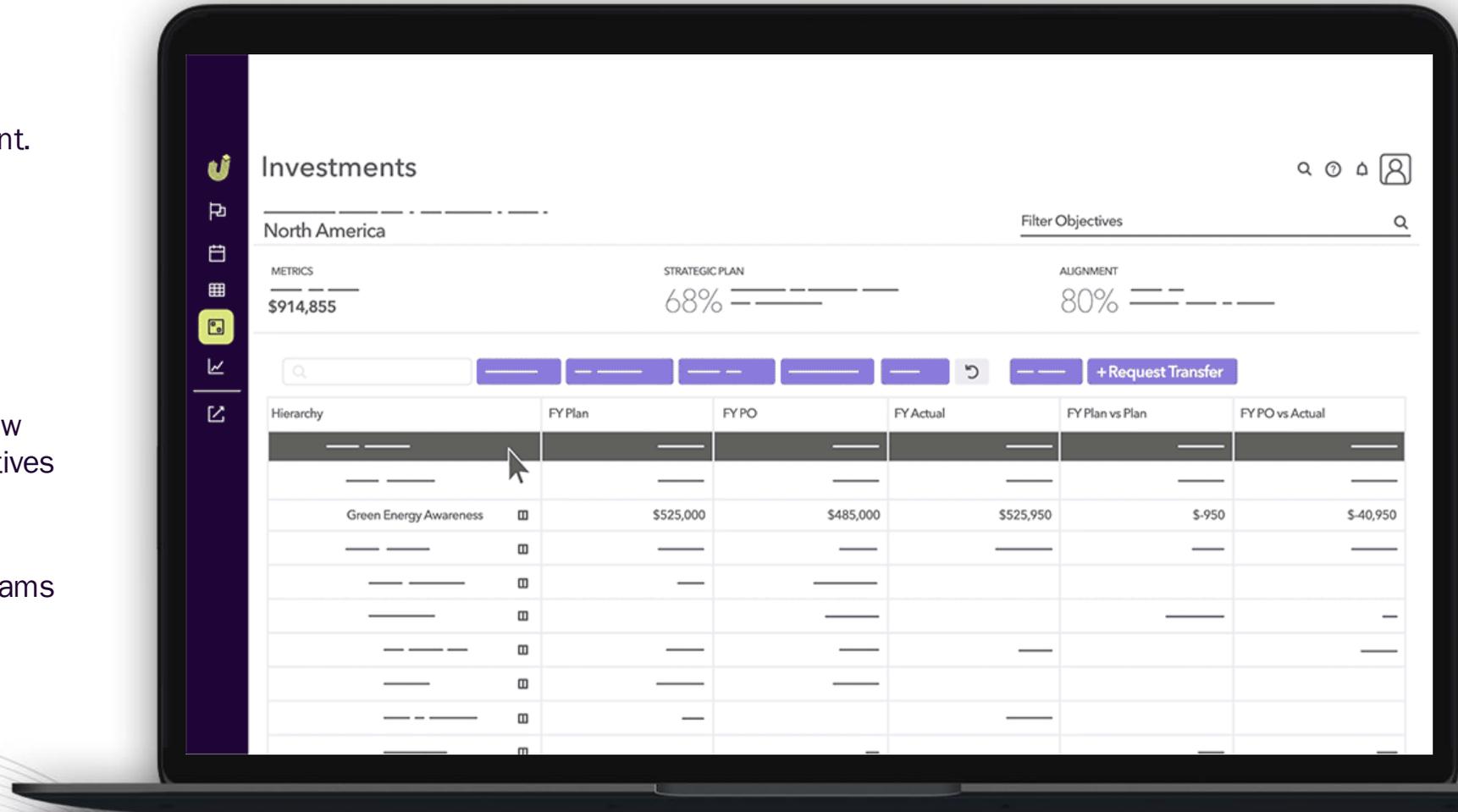
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Plan & Spend Analytics

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



BrandMaker 8.0 has 50 new features and enhancements

Improved Job Manager & Review Manager UX

Enhanced Marketing Planner Sort & Filter

Continuous updates available on BrandMaker 8.0



Accessibility for ADA compliance

Manage campaign plan & spend at granular level by connecting your financial plan to Uptempo



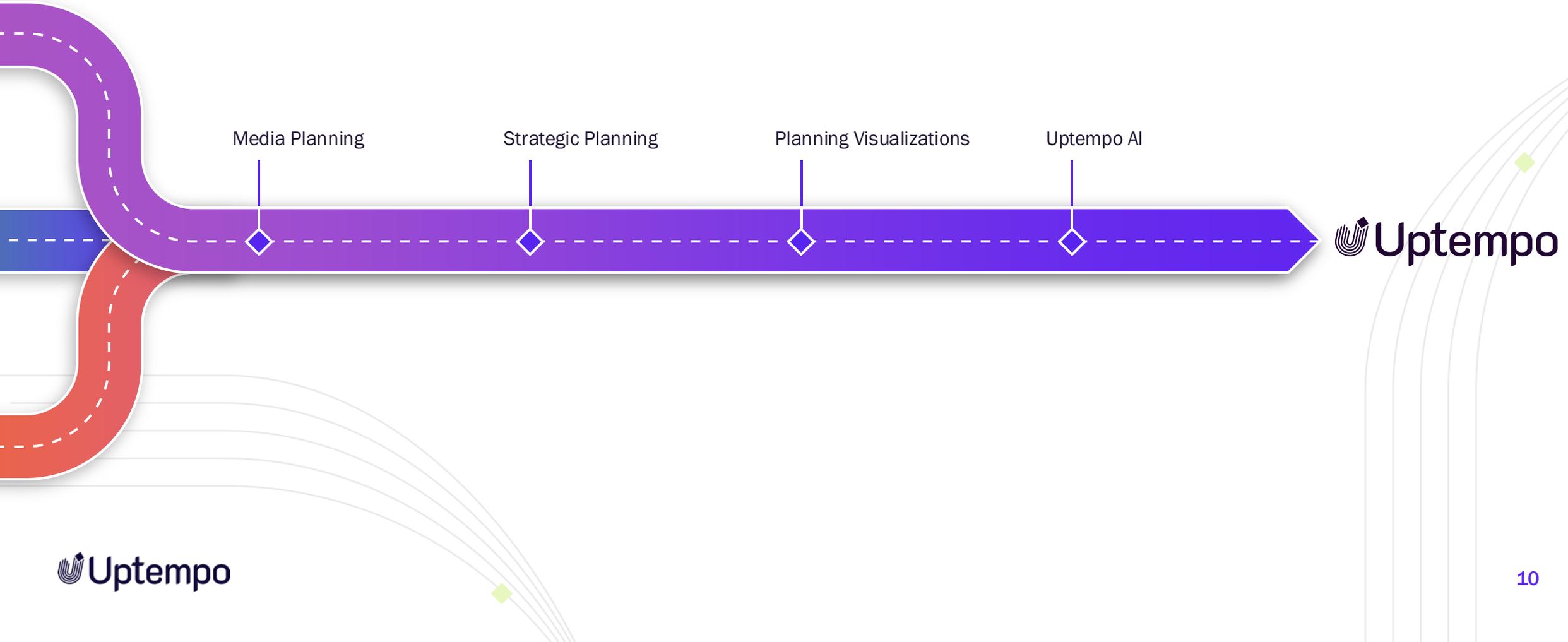
Accrual request enhancements

Significant performance improvements

25+ product features & enhancements



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

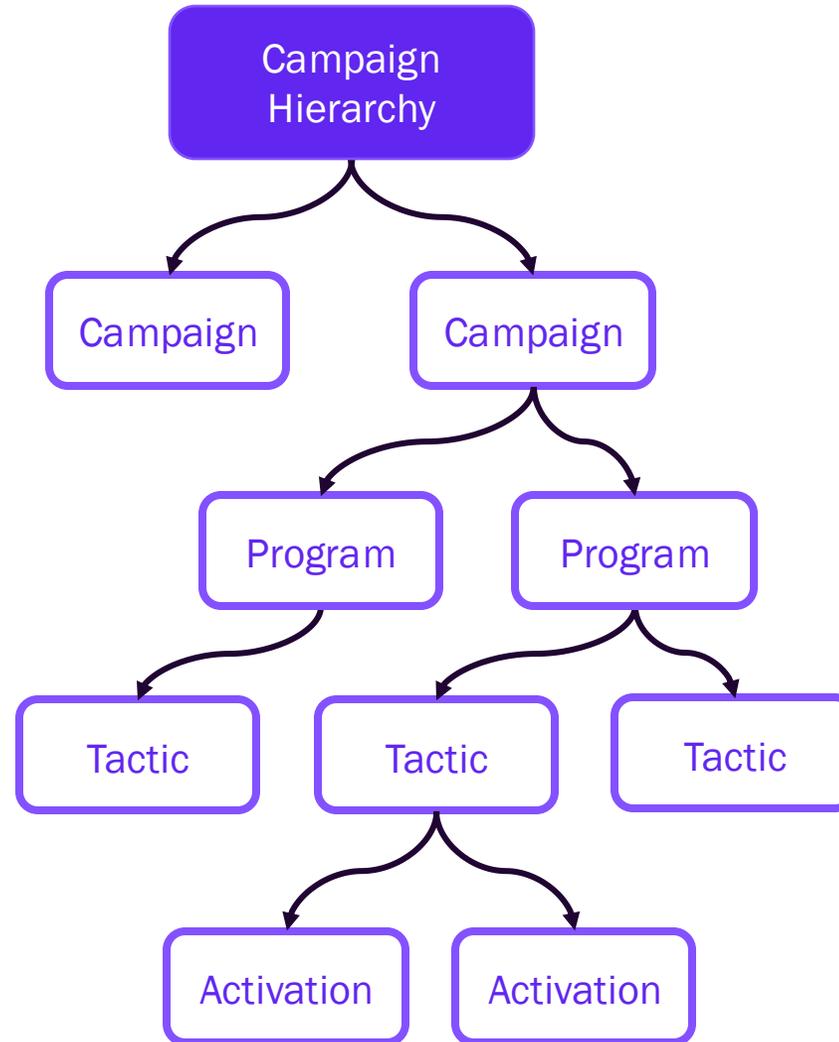
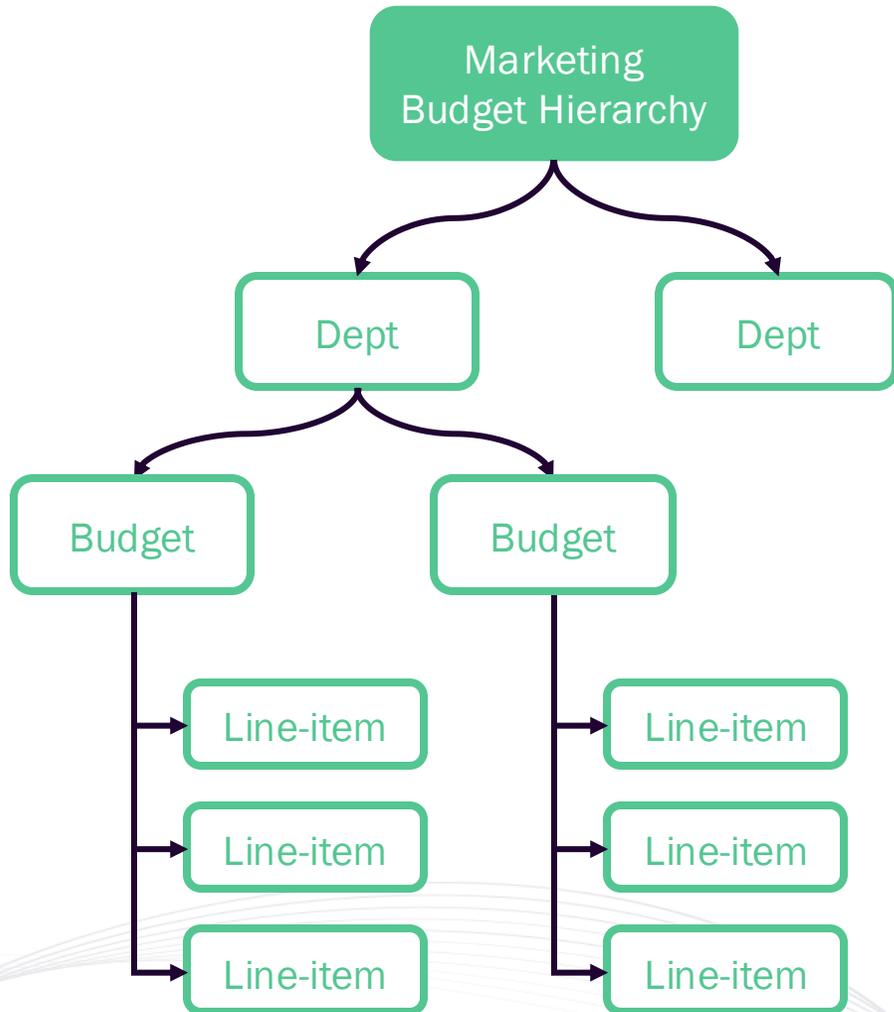


Timeframes: Complex to match campaign timelines to budget cycles since campaign execution timelines can extend across fiscal years, while budget timeframes are annual



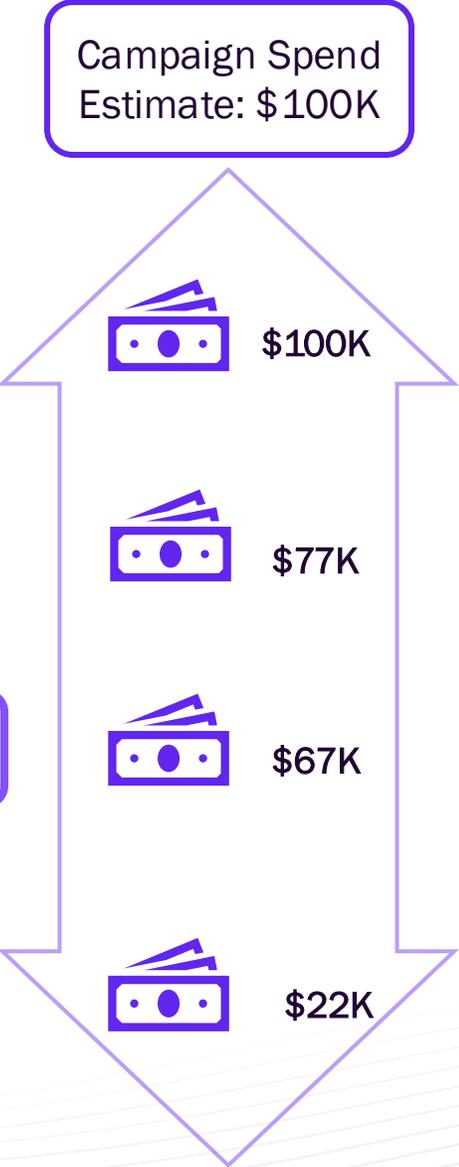
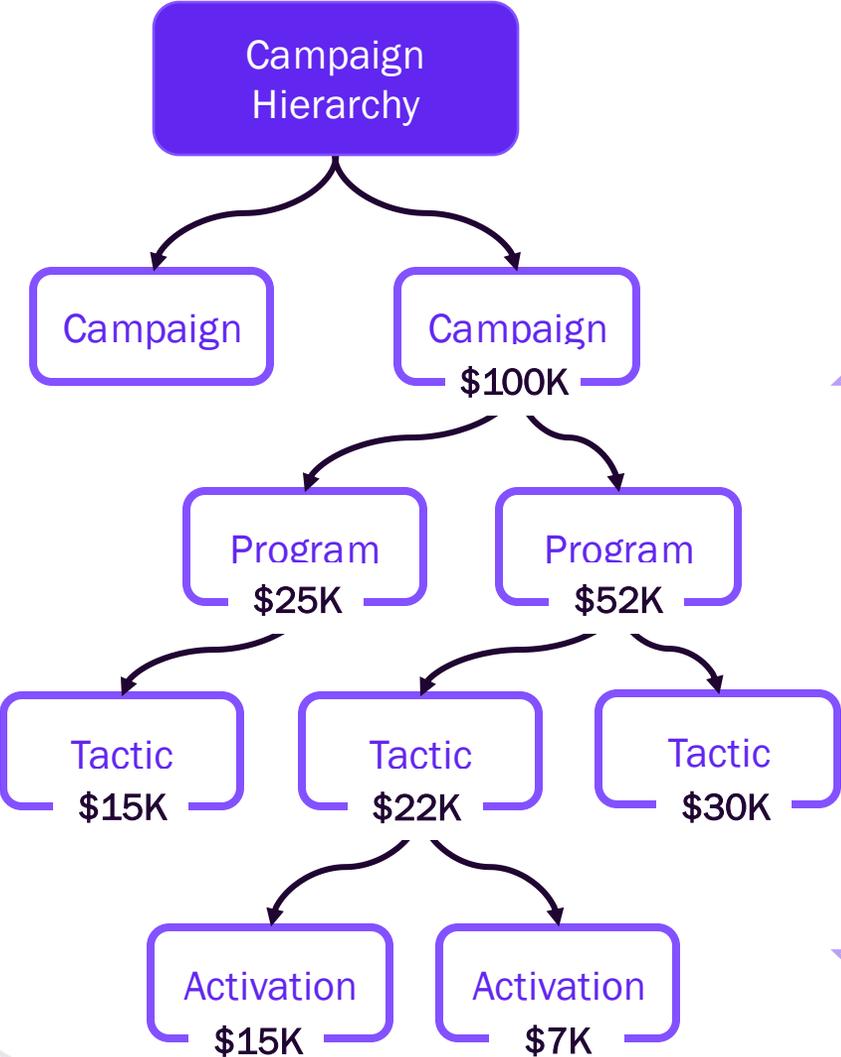
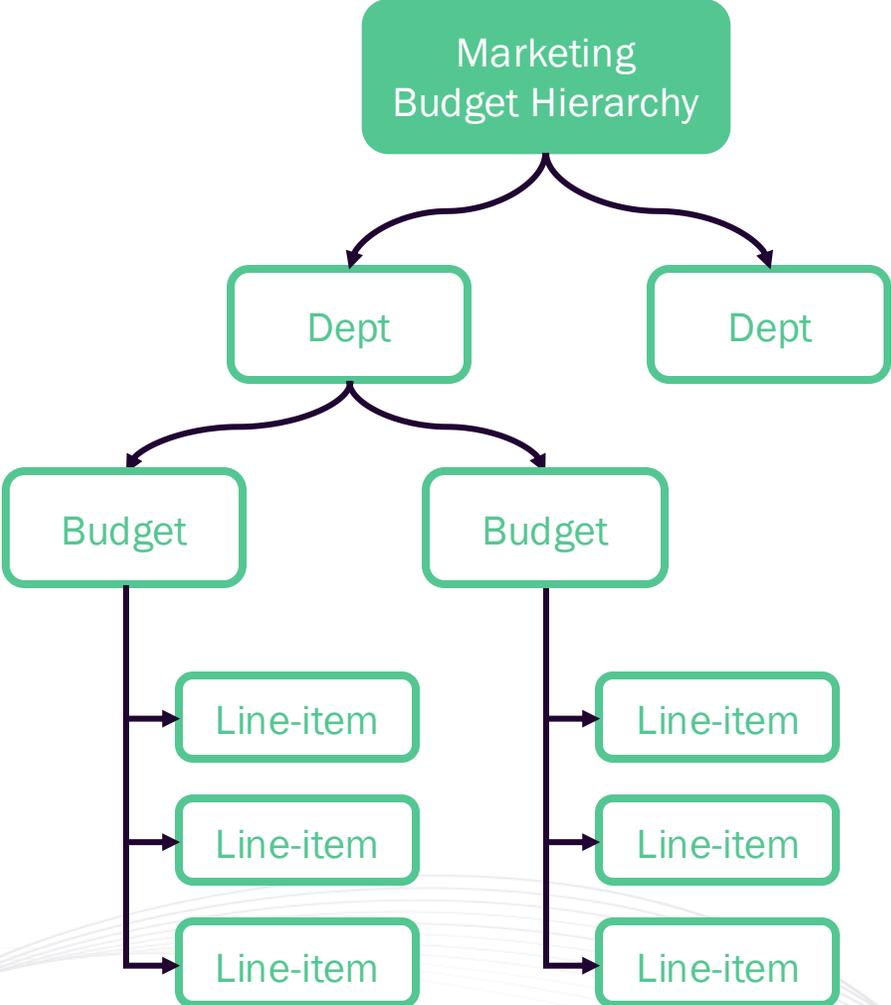
Strategic Alignment: Challenging to show how budgets support strategic objectives due to difficulty to roll up investments across marketing plan

The Benefit of Separating Plan and Spend

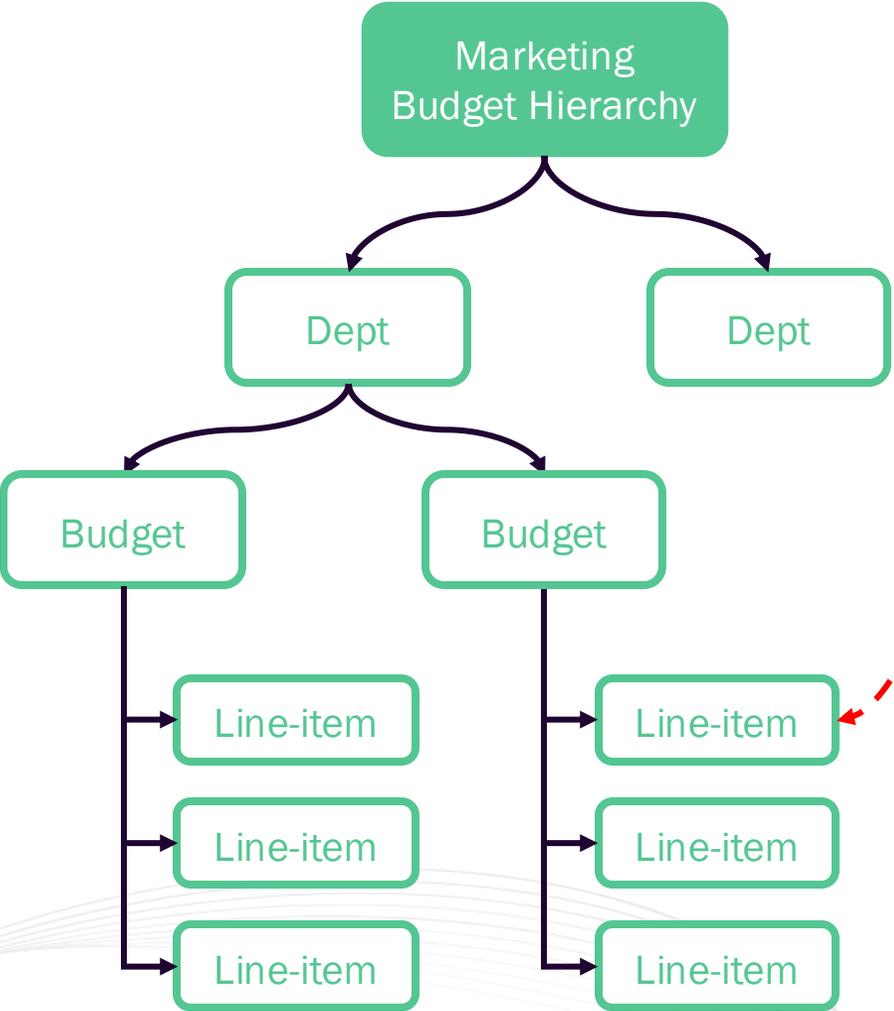


- ✓ Linked hierarchies for plan and spend ties investments to campaigns.
- ✓ A single calendar unifies the team, with accurate budgets.
- ✓ Marketing activities are tied to corporate objectives.
- ✓ Deeper analysis of working vs non-working spend to get to accurate ROI.
- ✓ More accountability for planning,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

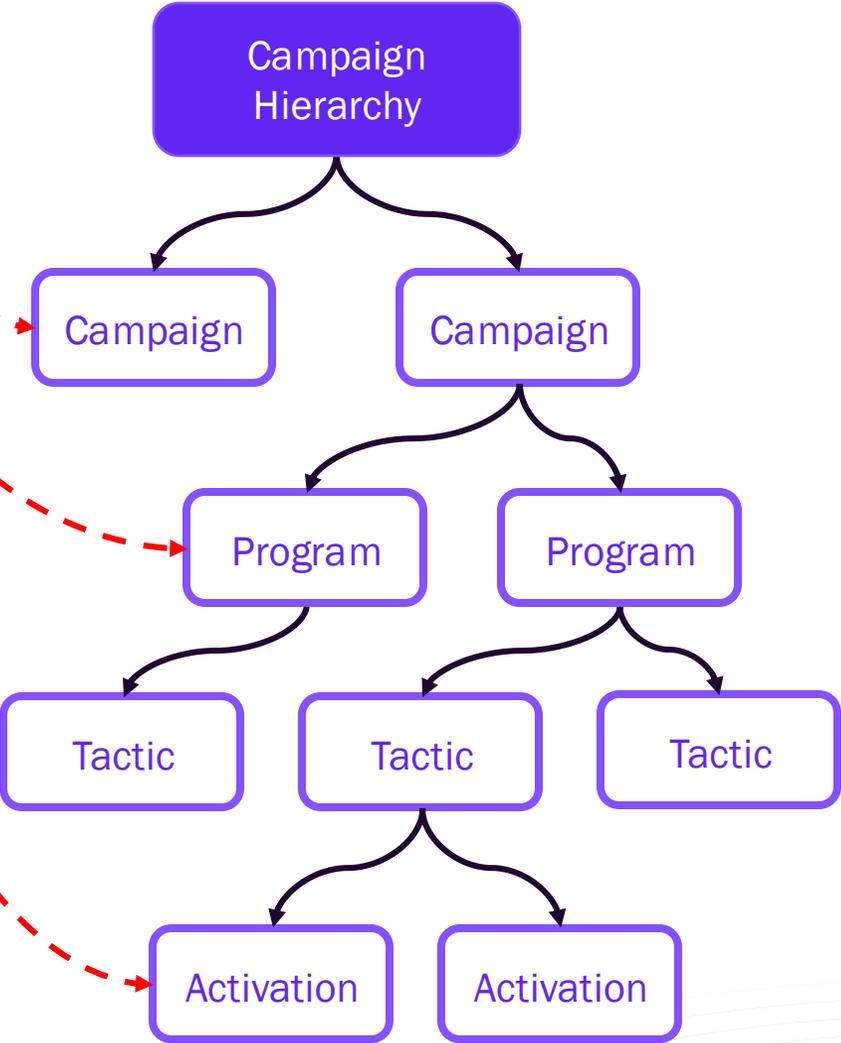
Campaign Estimated Cost Example



Multi-Activity Funding Example

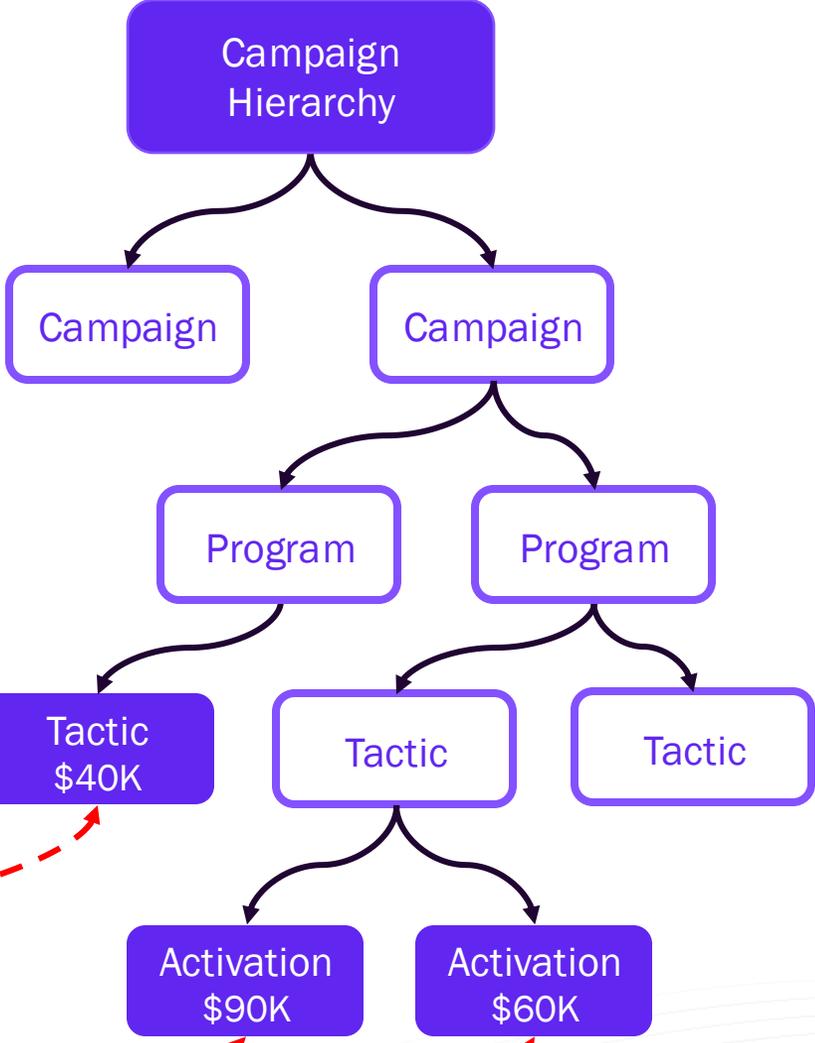
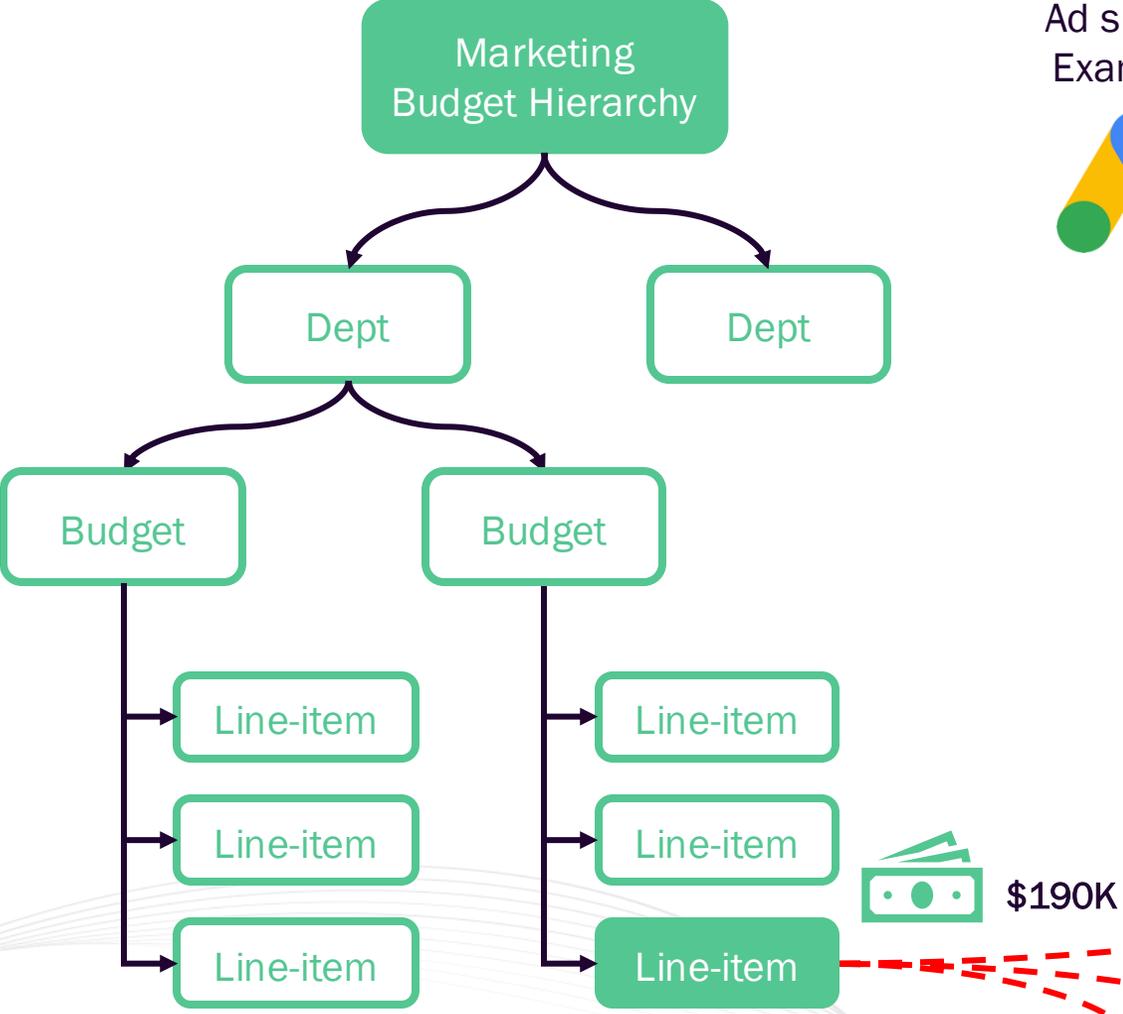


Agency Spend



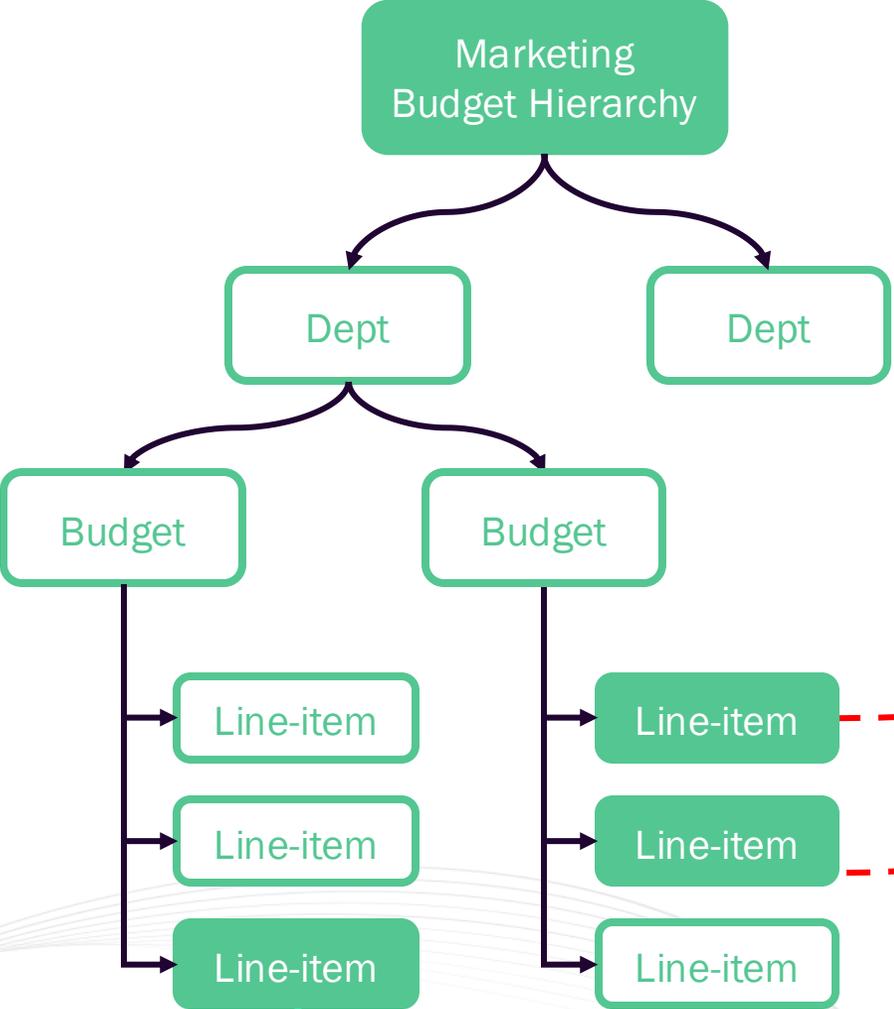
Multi-Activity Funding Example

Ad spend Example



\$190K

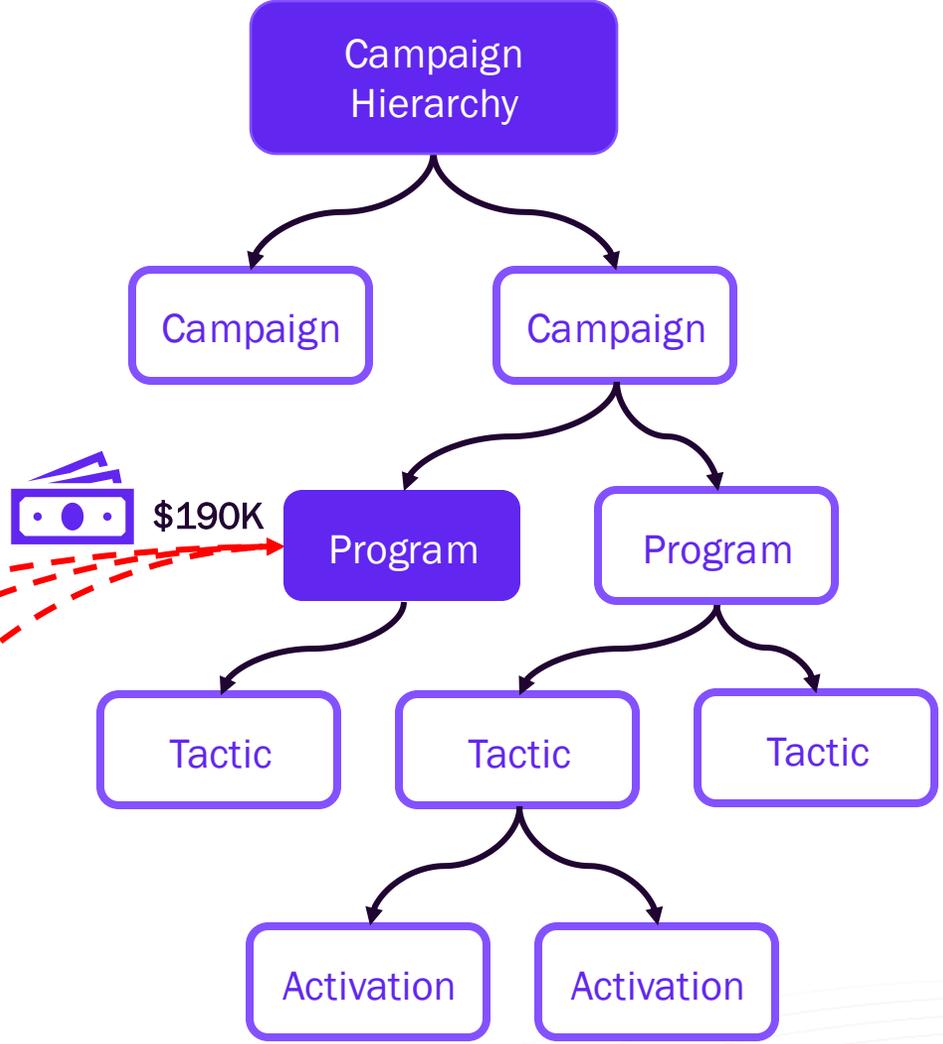
Multi-Activity Funding Example



Tradeshow Example

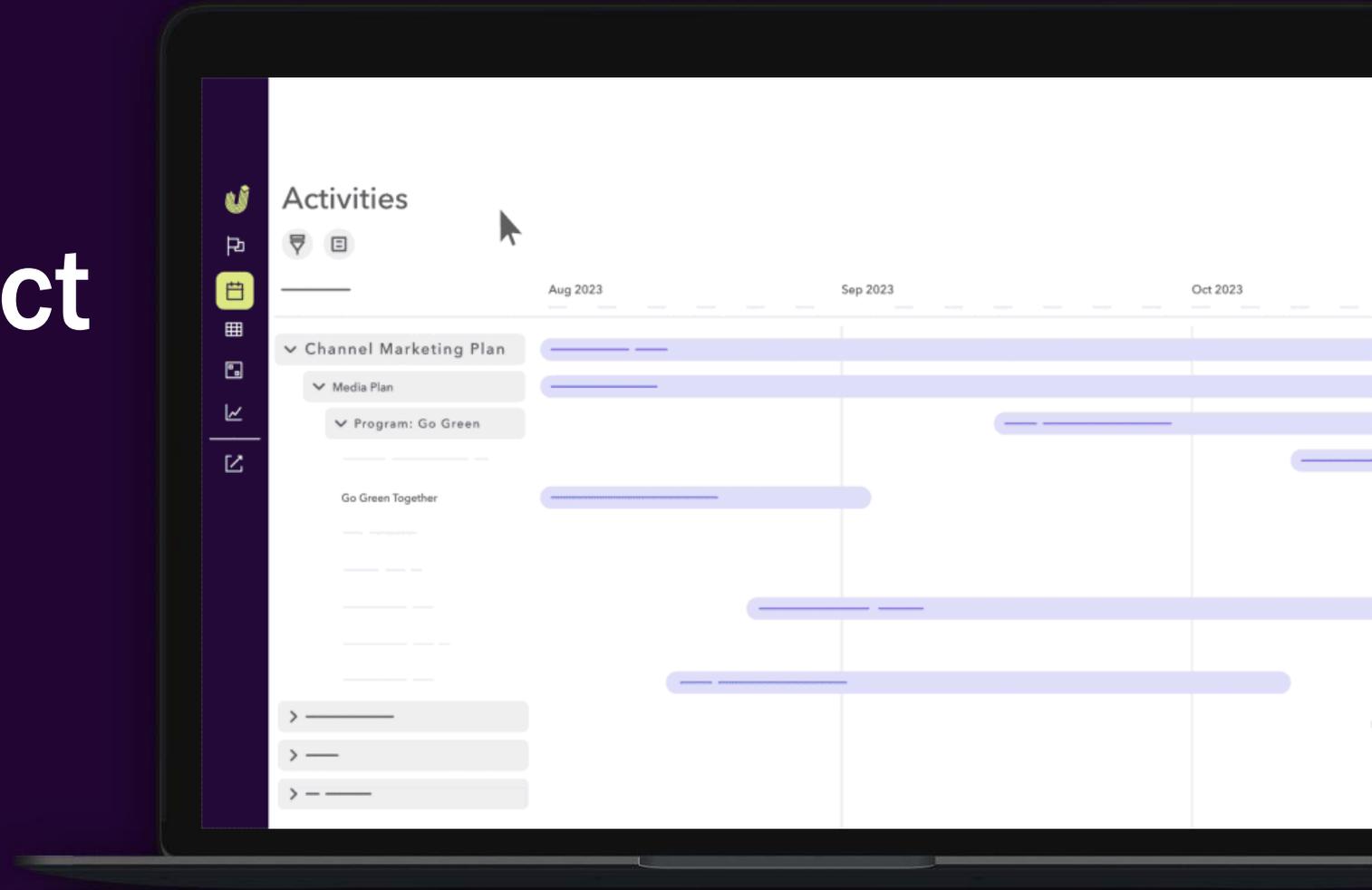


\$40K
\$60K
\$90K

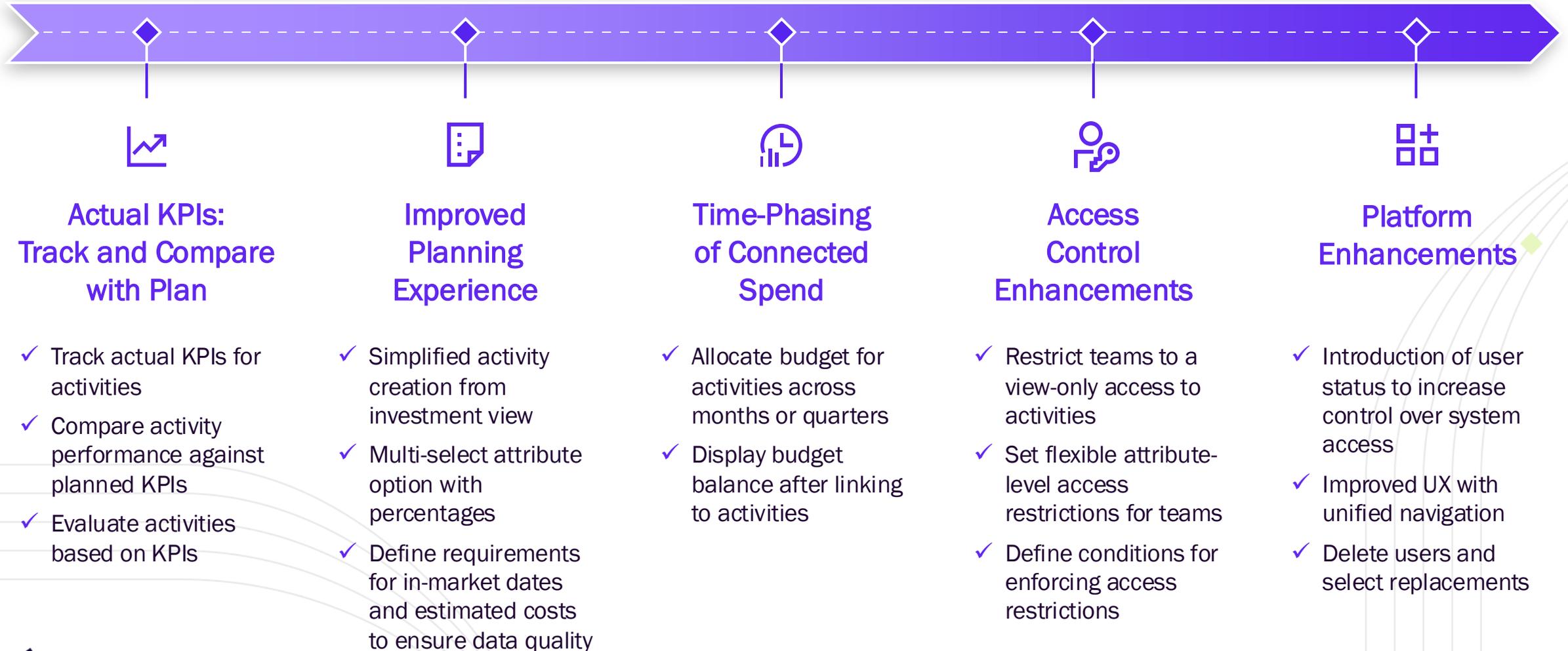


Uptempo Product Roadmap

What's lined up next



Short-Term Roadmap for Next Three Months



Mid-Term Roadmap for 2025



Improved Visual Organization

- ✓ Colored timeline bars
- ✓ Activity statuses
- ✓ Activity icons



Increased Control Over Your Data

- ✓ Improved data quality and user experience by adding multiple levels of attribute dependencies
- ✓ Streamlined data using hierarchical graph structure
- ✓ Manual reorder of activities



Activity States

- ✓ Improved clarity with activity states e.g., draft
- ✓ Activity state aligned with the corresponding business process



Improved Workflow Experience

- ✓ Revamped workflow UI for better data entry, collaboration, and approvals
- ✓ Improved workflow listing with activity mapping



Connecting Plan & Spend Enhancements

- ✓ Enhanced usability with more filter options for connected activities
- ✓ Improved transparency in marketing plan funding with custom spend data categories

AI-Powered Marketing Planning

Our Vision

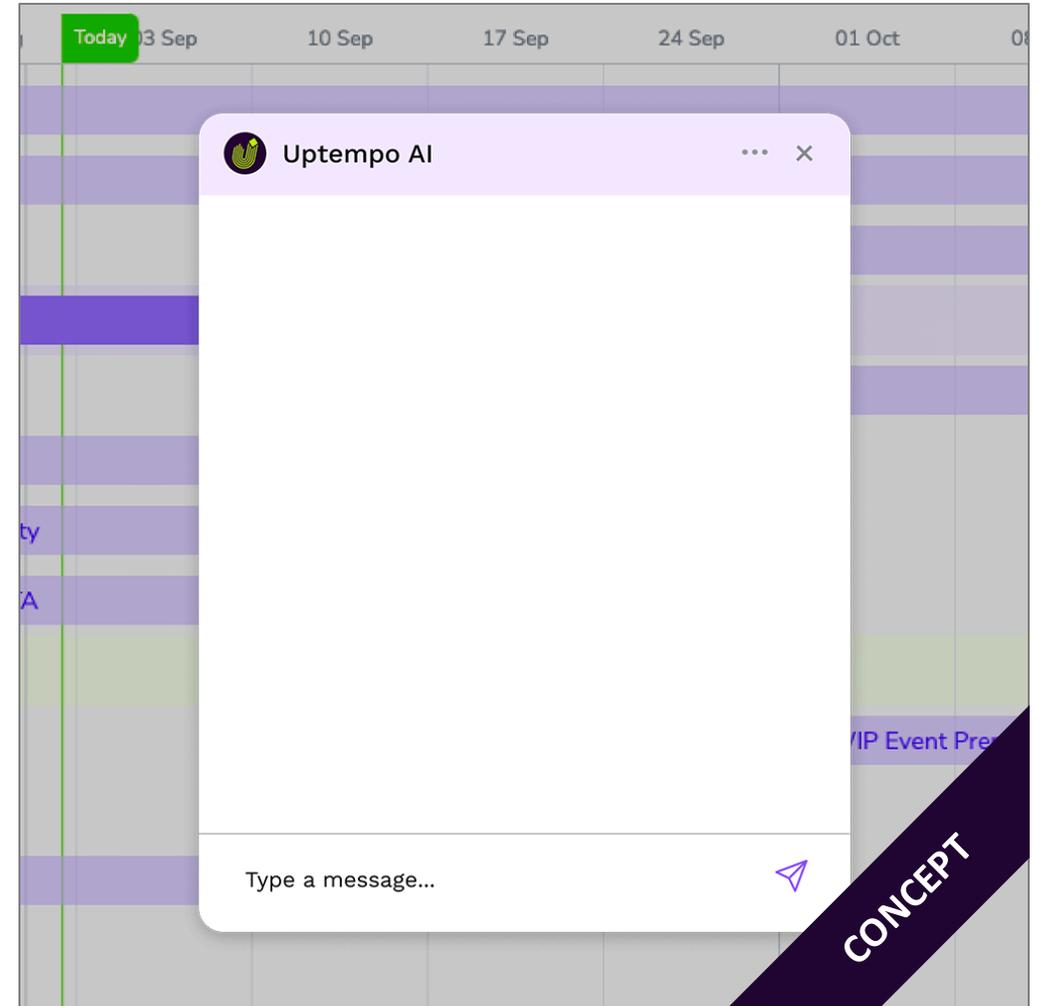
Deliver a co-pilot for marketing planning to enhance decision-making and boost marketer productivity:

- **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.