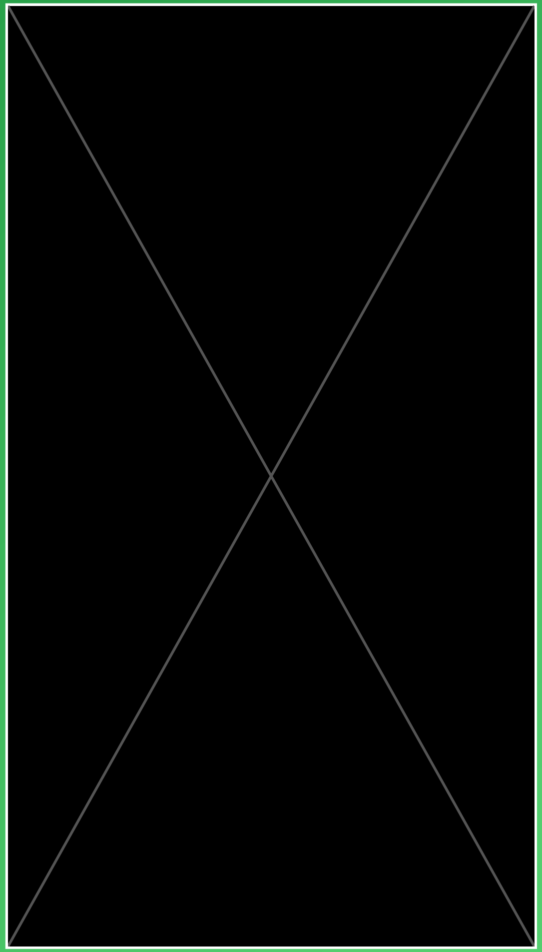
June 2025

Everything you need to know about Case Studies

(& more)

Agenda

1. One-time actions for access
2. **Step 1:** Reviewing the Monday board
3. **Step 2:** Creating the case study
4. **Step 3:** Approval process
5. **Step 4:** Uploading to Highspot
6. Retemplating guide 2025



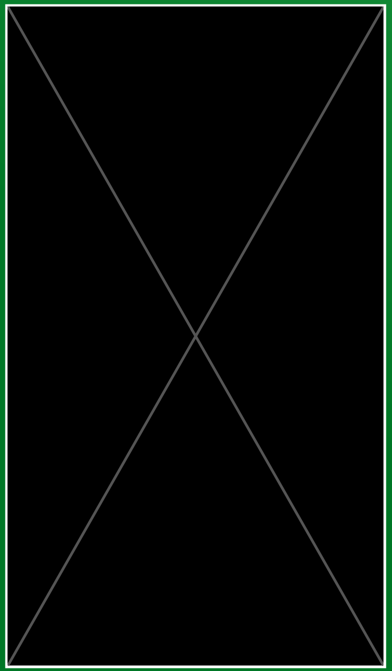
The basics:

Case studies...

1. **Explain how a product/solution helped an advertiser** achieve their goals through storytelling

2. **Demonstrate the effectiveness of NBCU advertising** products and solutions through data-focused evidence.

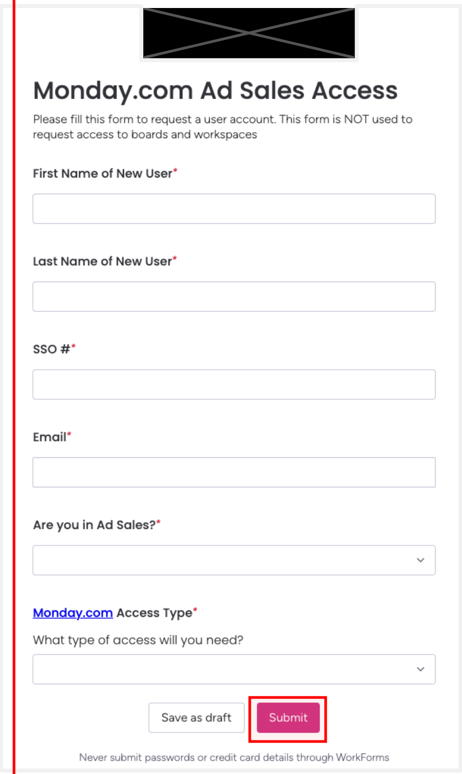
3. **Act as social proof, offer real-world examples**, and help our Sales teams overcome objections from potential advertisers

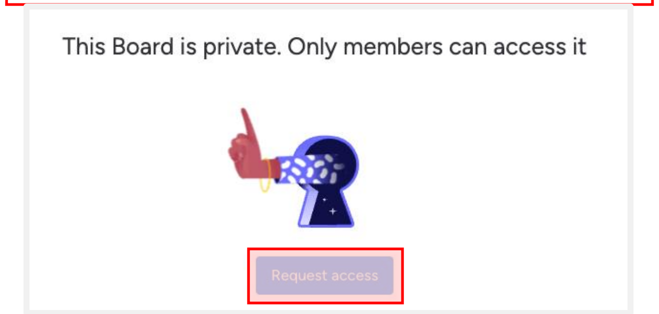


One-time actions for access

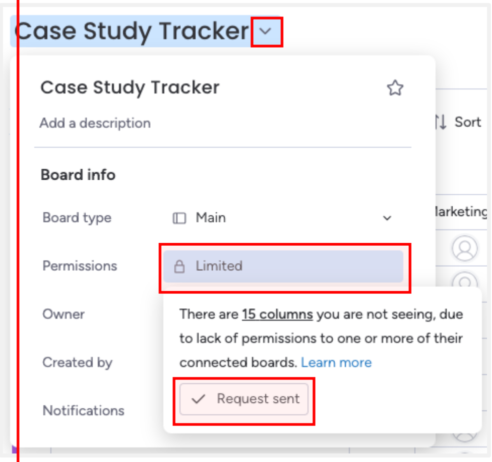
Monday board access

1. Email monday.support[redacted] to request a Monday acc[redacted].
2. Fill out the **Monday.com Ad Sales Access** form and click **Submit**.
3. Select **Request access** to view the Case Study Tracker.



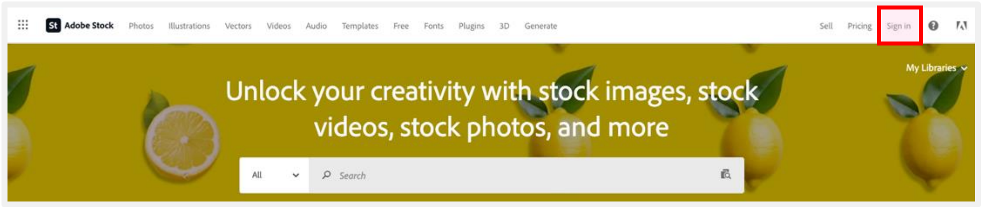


4. Click on the **Case Study Tracker** drop down to request access to the Ad Impact Monday board.



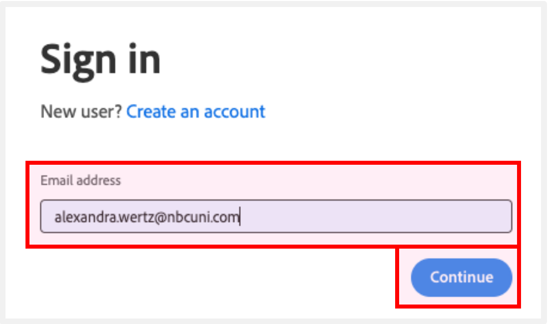
Adobe Stock access

1. Sign in to Adobe Stock for case study imagery.

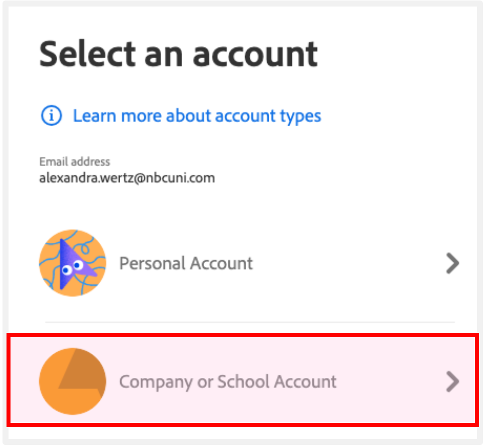


2. Click **Sign in**.

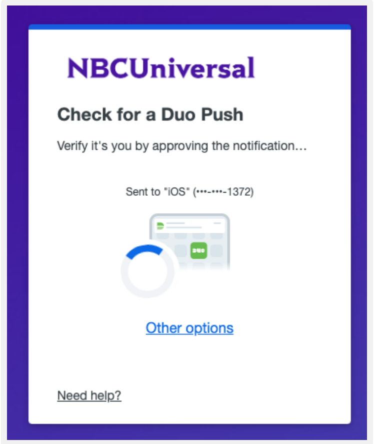
3. Enter your NBCU email and click **Continue**.



4. Select **Company or School Account**.

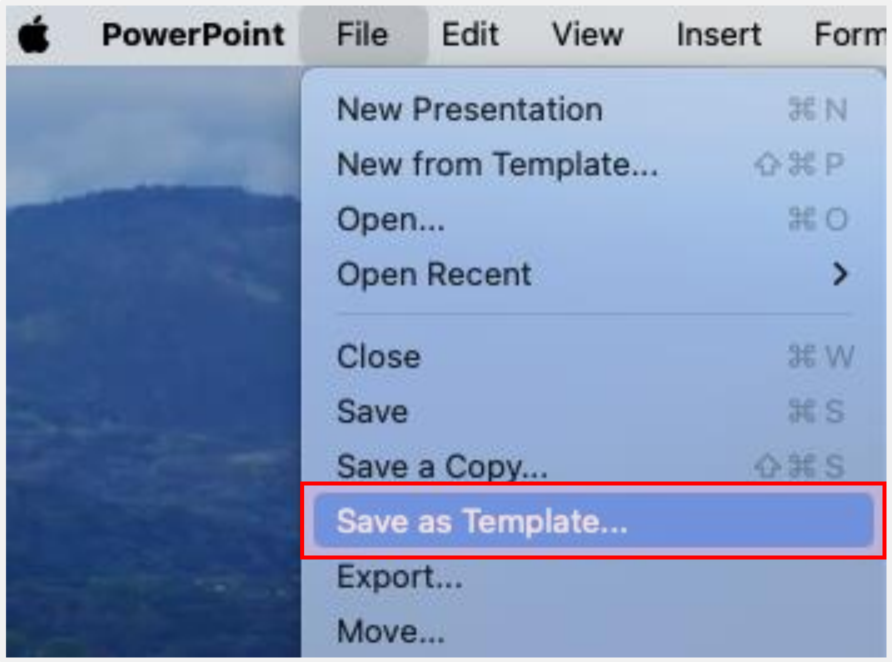


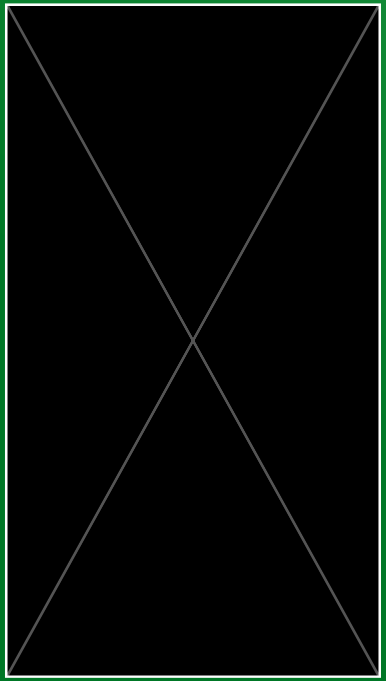
5. Enter your SSO information and complete the Duo Push.



2025 case study template

1. In PowerPoint, open the [2025 Case Study template](#).
2. Click **File** and select **Save as Template**.



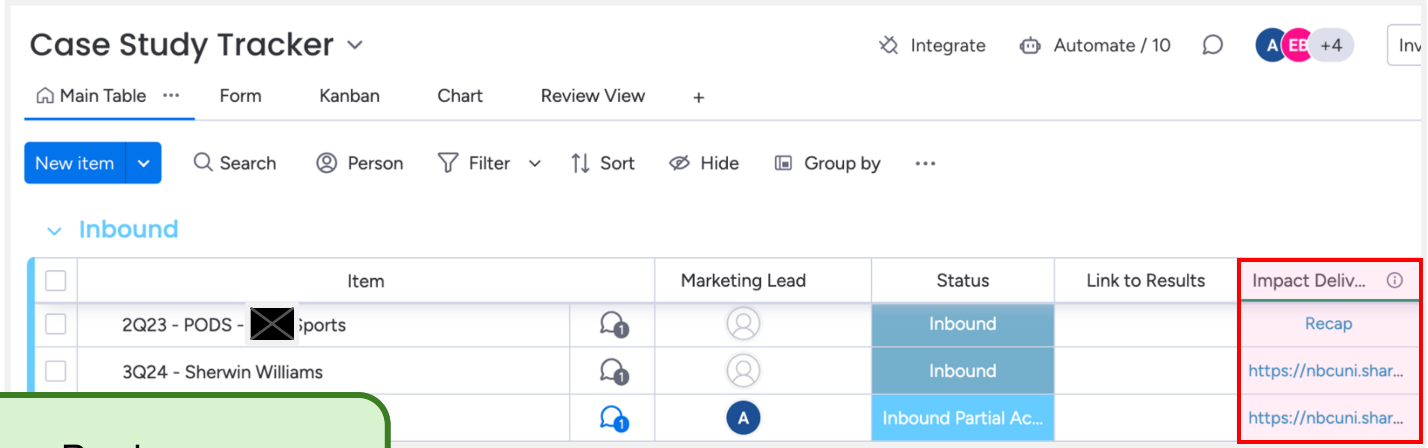


Step 1:

Reviewing the Monday board

Case study tracker

1. Visit the [Case Study Tracker]() Monday board.
2. Navigate to the **Impact Delivery** column.
3. Click on the Impact Delivery link and use the document from the Ad Impact team to create the case study.

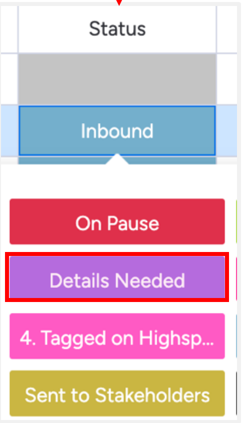


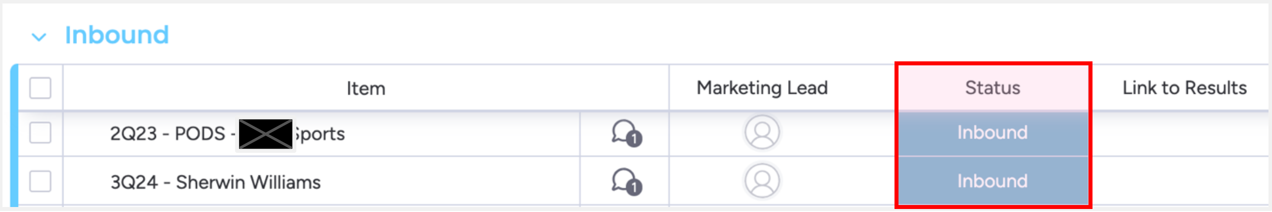
Review case studies **monthly**

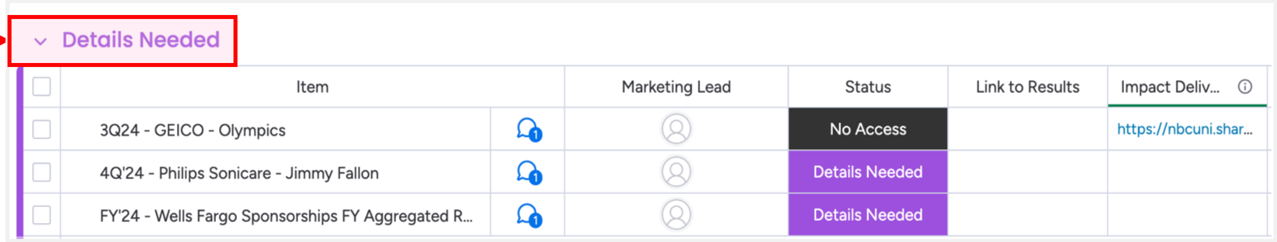
Missing links

If the Impact Delivery link is **missing**, change the status to **Details Needed**.

- The change in status will populate the case study to the **Details Needed** sub-board.



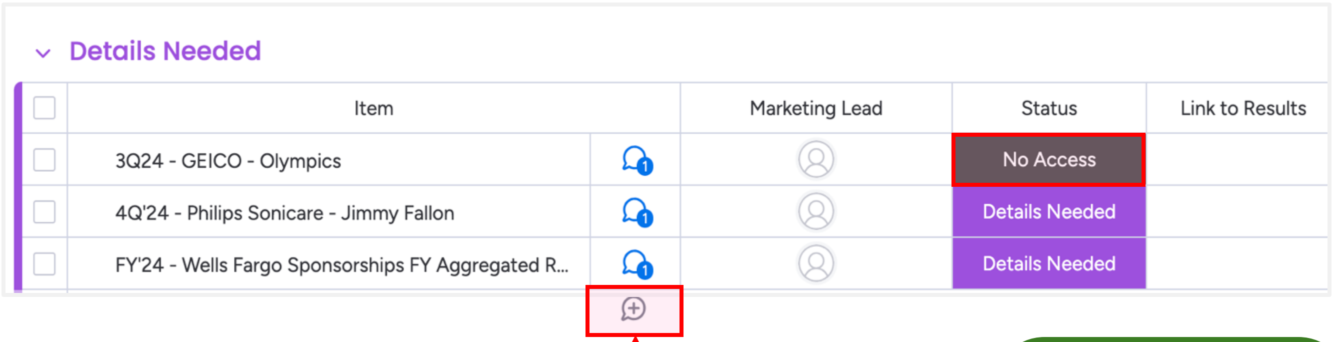




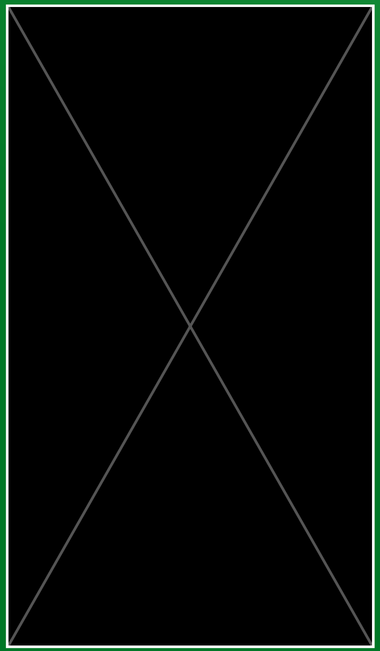
Missing links, cont'd

If the Impact Delivery link is **present** but has **restricted access**, change the status of the case study to Details Needed.

- The change in status will populate the case study to the **Details Needed** sub-board.
- Update the status to **No Access**.



Add a comment explaining what is missing (e.g., **Missing Impact Delivery link**).



Step 2:

Creating the case study

Case study slide checklist:

- ❑ Determine if you will be including **one**, **two**, or **three** compelling **metrics**.
- ❑ Choose the **template** aligning with your number of metrics.
- ❑ Add **name** of product
- ❑ Add **headline** (e.g., [**Type of company**] saw [**positive result**] related to [**KPI**])
- ❑ Change **image**: For shows/event sponsorships use image from show, otherwise use Adobe stock imagery related to the industry
- ❑ Choose one **color** within the template throughout the slide and ensure stock image coordinates
- ❑ Add **lowest funnel stat** + related source (if applicable)
- ❑ Add **secondary stats** (if applicable) + related source (if applicable)

Unless otherwise noted, you will create a **masked** case study.

This means we **do not disclose** the name of the advertiser in the case study.

[redacted]

Slide checklist

Name of product

Template color choice

Headline

Lowest funnel stat

Related source

Secondary stats

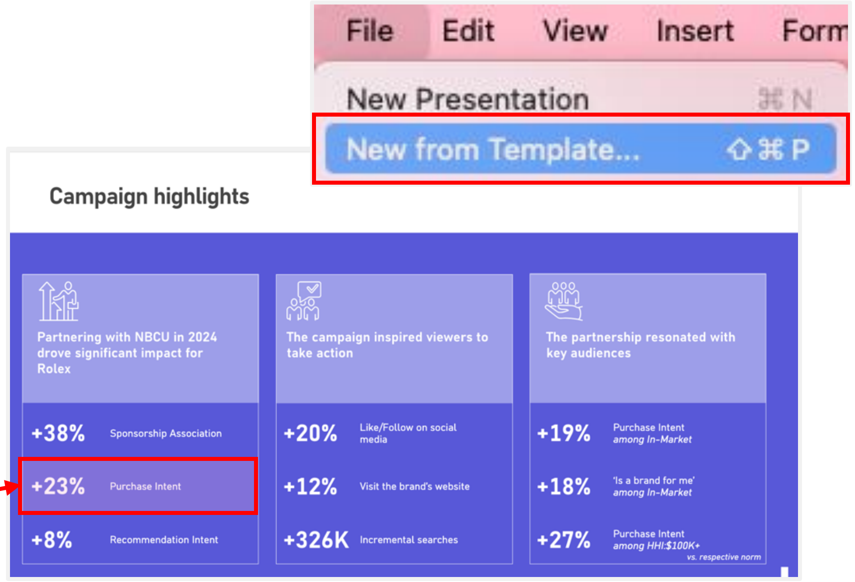
Imagery related to the industry

Choosing metrics

1. In PowerPoint, Click **File** and select **New from Template**.

2. Open the Impact Delivery deck accompanying the case study and look for 1-3 compelling metrics.

Note: The metric lowest to in the funnel (closest to purchase) should be the **hero number**.



Adding presenter notes

[INTERNAL] Client was NYX.

The Challenge: A global makeup brand wanted to make the most of their cross-platform ad spend to **drive brand lift among their target audience**.

The Solution: We partnered with the client to run an **OPTA cross-platform campaign** optimized to reach a custom audience, followed by a custom **Kantar study to measure the impact** of the campaign.

Flight Dates: 6/10/24-6/30/24

Target Audience:
•Trendsetters **OR** Confident/Self-Sufficient (Efficient, Organized, Diligent, Thorough, Candid, Self-Assured) HHs **OR** Affluent/Influential & Successful HHs **OR** Reality TV Show Viewers **AND**
•HHs In Market for Beauty Related Products **OR** Frequent Cosmetic & Beauty High Spenders **AND**
•Social Media Influencers **OR** Highly Active Online Users **OR** Millennials
Linear / Digital Spend Allocation - 75/25%

*When discussing the in-target audience, the control group was 437 and exposed group was 1,403.
Measurement objective: partner with Kantar to measure the impact of the NBCU campaign in driving brand lift for NYX brand metrics
Measurement methodology: relative lift calculated from exposed vs. control
•**Control:** unexposed to the NBCU campaign (n=488)
•**Total Exposed:** exposed to the NBCU campaign and falls outside of target audience (n=1,488)
•**Target Exposed:** exposed and within target audience segment (n=1,403)
•Exposure is determined at the ad unit level via a combination of Comcast STB data & opportunity-to-see using ad-logs and pixel for digital

In PowerPoint, include **Advertiser name**, **Challenge**, **Solution**, and **Campaign flight dates**.

Note: For audience-based products, include info on the target audience.

Example

Challenge: The client wanted to drive [**metrics measured**].

Solution: We partnered with them on a sponsorship that ran across [**properties, etc.**] followed by measurement with [**measurement partner**] to access the impact of the sponsorship

Naming

Template for case study titles

Masked = [**Product name**] – [**Industry Category**] – [**KPI**] – [**#QYY**]

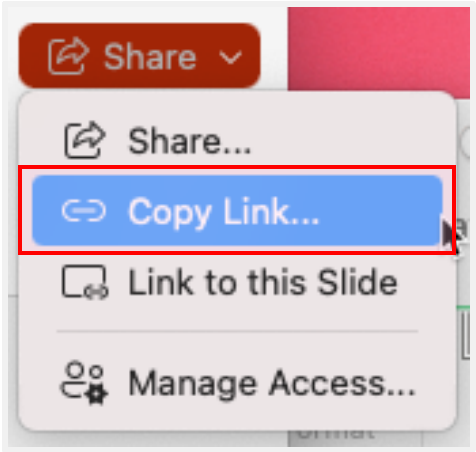
Unmasked = [**Product name**] – [**Client Name**] – [**KPI**] – [**#QYY**]

Product name	File title	Slide title	In thanks to…
DDL	DDL	Data-Driven Linear (DDL)	their [redacted] DDL campaign
OPTA	OPTA	Cross-Platform (XP)	their [redacted] ne Platform otal Audience (OPTA) campaign
Streaming/Real-Time Outcome Measurement/ Peacock Ad Manager/ Programmatic	[redacted] Streaming	[redacted] Streaming	their [redacted] performance-based streaming campaign
Partnerships (LinkedIn/ Walmart/ Instacart)	**Partner Name**] x [redacted]	[redacted] x [**Partner Name**]	data collaboration between [redacted] & [**Partner Name**]
TikTok Pulse Premiere	TikTok Pulse Premiere	TikTok Pulse Premiere	[redacted] premium content partnership with TikTok
Live Events, Sports, Show, Property, or Experience Sponsorship	Show, Property, or Event Name Sponsorship	Show, Property, or Event Name Sponsorship	thei [redacted] sponsors p

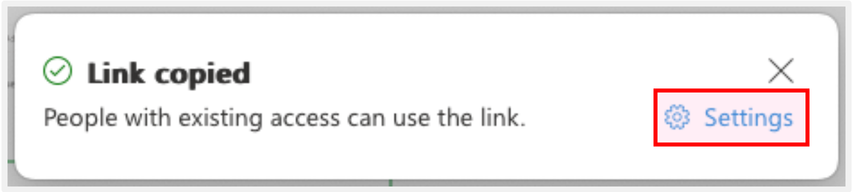
Saving in SharePoint

Save your working case studies to the **Case Study WIP** folder in SharePoint

1. In PowerPoint, click **Share** and select **Copy Link**.



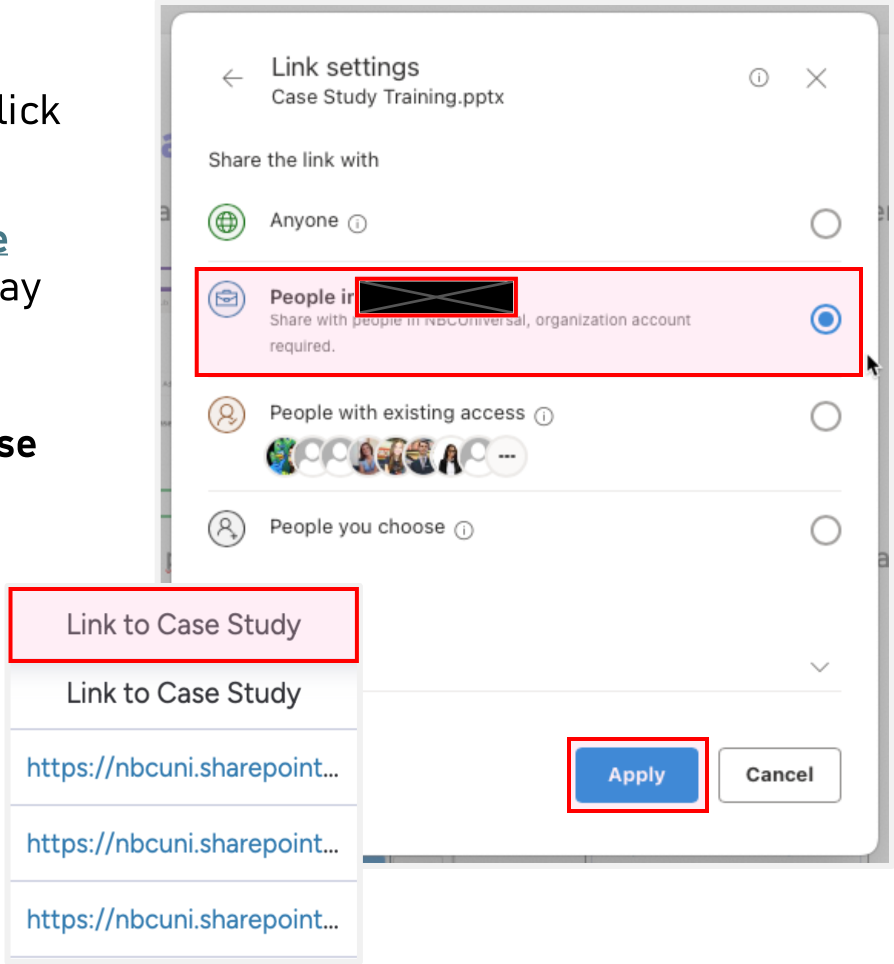
2. Click on **Settings** in the pop-up.



Linking case studies to Monday board

Save your working case studies to the **Case Study WIP** folder in SharePoint

3. Select **People in NBCUniversal** and click **Apply**.
4. Navigate to the [Case Study Tracker](#) Monday board.
5. Go to the **Link to Case Study** column.
6. Paste the case study link.



Step 3:

Approval process

Ready to review

Prior to uploading to Highspot, case studies will be sent to Lisa, Damian, and the Ad Impact team for approval.

1. Once you have completed a case study, navigate to the Case Study Tracker Monday board.
2. Go to the **Status** column and change the status to **Ready for Review**.

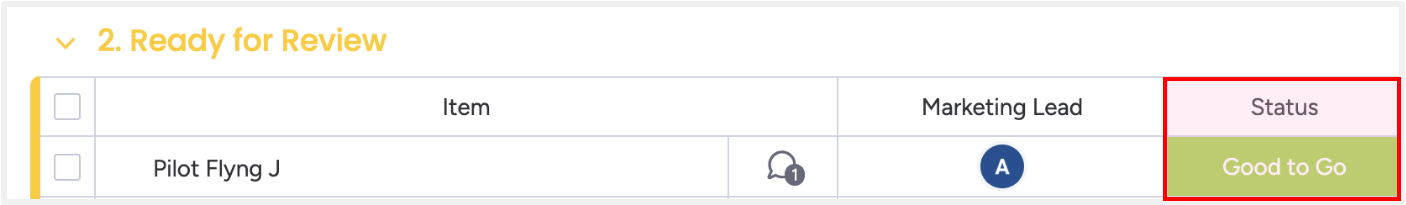
2. Ready for Review

	Item		Marketing Lead	Status
	2Q-3Q'24 - Nissan - Telemundo Summer Concert ...	2	D	2. Ready for Revie...
	3Q23-1Q24 - Applebee's - SNF		D	2. Ready for Revie...
	4Q24 - Lunazul TKCS - Tier 2		D	2. Ready for Revie...

Out for review

Prior to uploading to Highspot, case studies will be sent to Lisa, Damian, and the Ad Impact team for approval.

2. Reach out to the team for questions and update the case study with edits.
    - If there are no edits, navigate to the **Status** column and change the status to **Good to Go**.
3. All case studies with the **Good to Go** status will then be moved to the **Out for Review** sub-board.

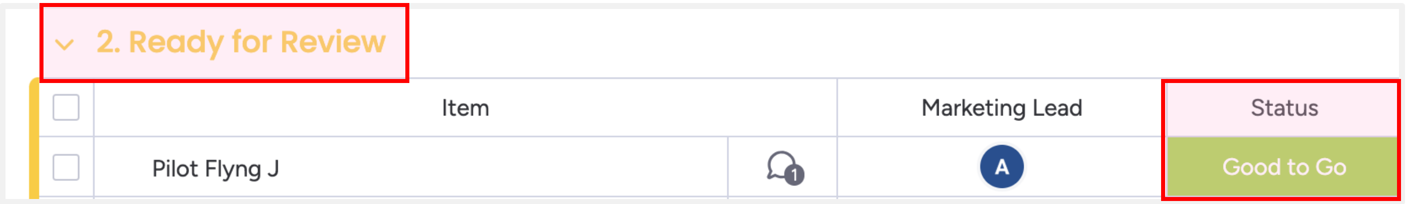


Connecting on feedback

Monthly, emails will be sent to Lisa, Damian, and Ad Impact with:

- List of all **case studies** completed that week
- Link to **case study tracker** and Review View
- Reminder to **add feedback** by Friday of that week

After all comments have been addressed and the case study is complete, ensure it has been populated to the **Out for Review** sub-board and that its status reads **Good to Go**.



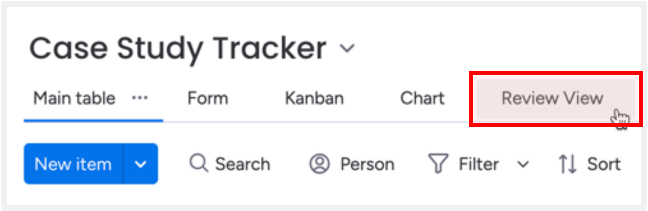
Email template

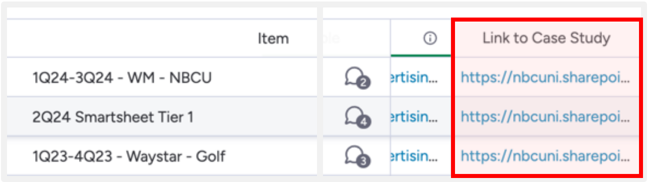
Hi everyone!

We have a batch of case studies ready for your review!

How to access and review:

1. Visit our [Case Study Tracker] Monday board.
2. Select **Review View** at the top of the board, this will display all case studies in the **Out for Review** sub-board.
3. Navigate to the **Link to Case Study** column and click on the link to open the case study in PowerPoint.
4. In PowerPoint, add any questions or edits as comments on the slide.
5. Only change the case study's status on if you do not want the case study to be revised or added to Highspot. In that case, change the status from **Good to Go** to **Graveyard**.





Please submit all comments by [**Date**].

After that, we will review your feedback, make revisions, and add the case studies to the Highspot library. If there are no comments by that [**Date**], we will consider the case study approved and add it to Highspot.

Thank you in advanced for your feedback! Please don't hesitate to reach out if you have any questions.

Step 4:

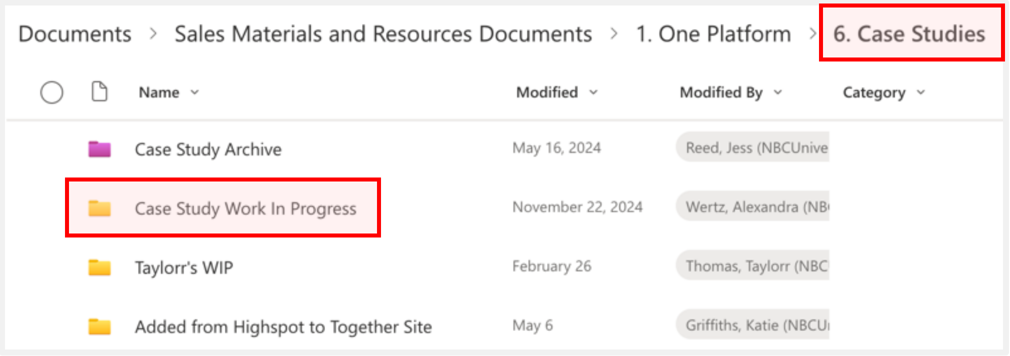
Uploading to Highspot

SharePoint to Highspot

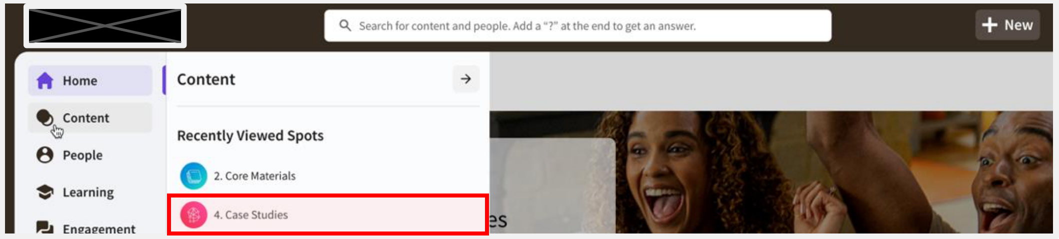
1. In SharePoint, navigate to the Case Studies folder.

2. In Monday, on the Case Study Tracker board, check that the case study is in the **Out for Review** sub-board with the status of **Good to Go**.

2. Back in SharePoint, move the **Good to Go** case studies from the Case Study Work in Progress subfolder to the general Case Studies folder (i.e., not in any subfolders).

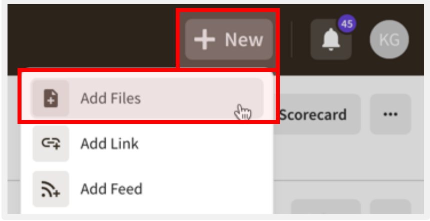


4. Go to Highspot and navigate to the Case Studies spot.



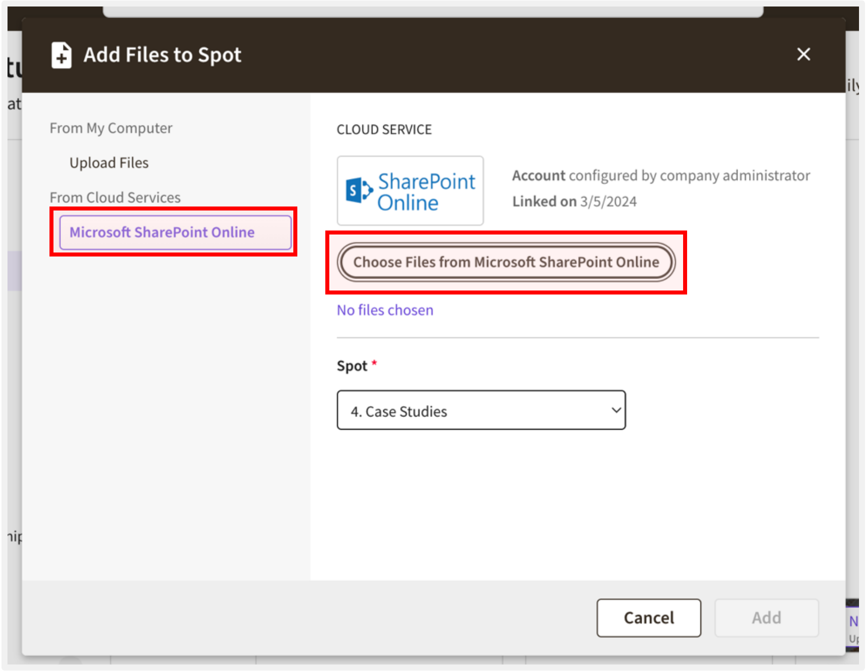
Transferring case study to Highspot

5. At the top right, click **New** and select **Add Files** and the **Add Files to Spot** dialog box will open.



6. Ensure **Microsoft SharePoint Online** is selected under **From Cloud Services**.

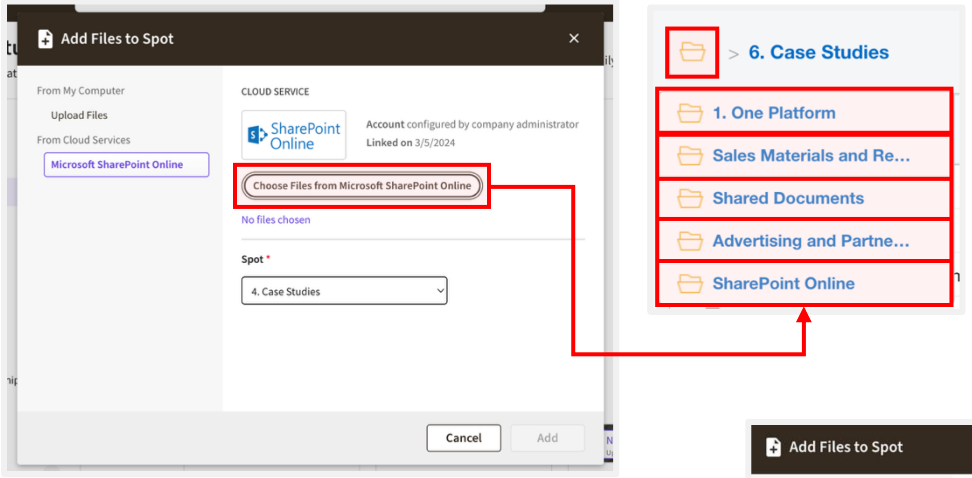
7. Below the **Cloud Service** heading, click on **Choose Files from Microsoft SharePoint Online**.



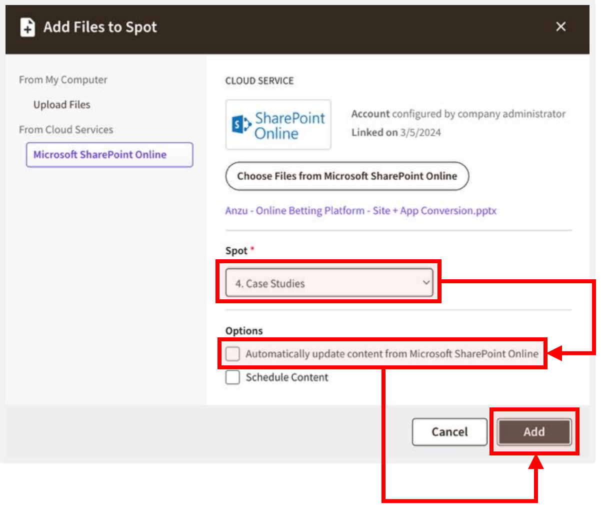
Transferring case study to Highspot, cont'd

5. In the dialog box, navigate to your **Case Studies** folder:

   SharePoint Online > **Advertising and Partnerships Toolkit** > **Shared Documents** > **Sales Materials and Resources** > **1. One Platform** > **6. Case Studies**



6. Locate the case study you want to upload to Highspot and click **Select**.
7. Ensure **4. Case Studies** is selected from the **Spot** dropdown.
8. Under **Options**, ensure the box beside **Automatically update content from Microsoft SharePoint Online** is checked.
9. Click **Add**.



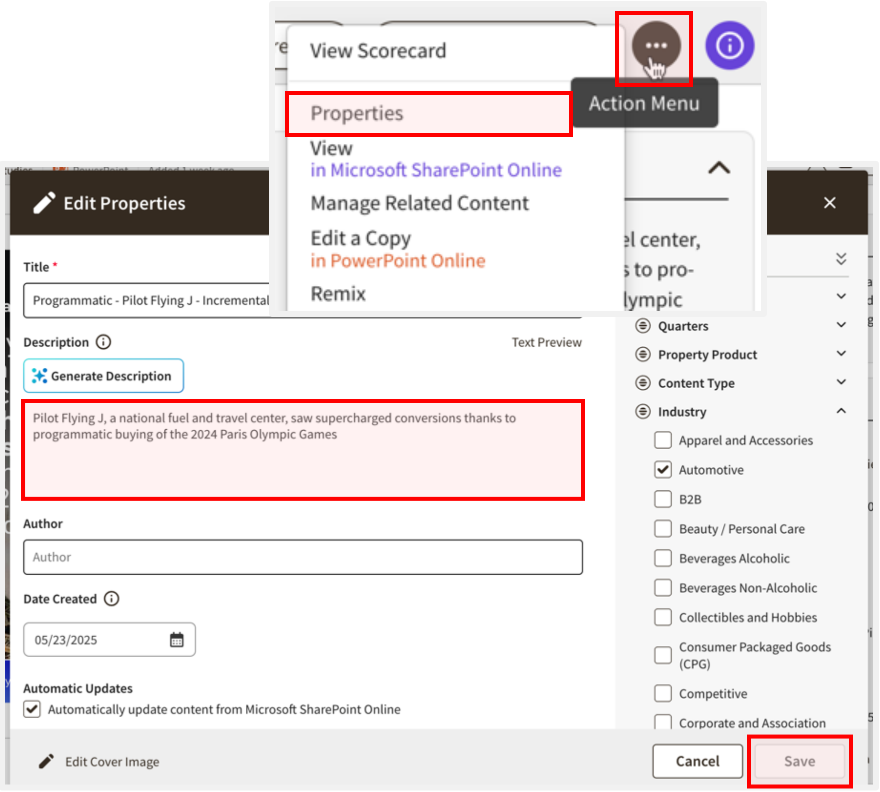
Highspot tagging

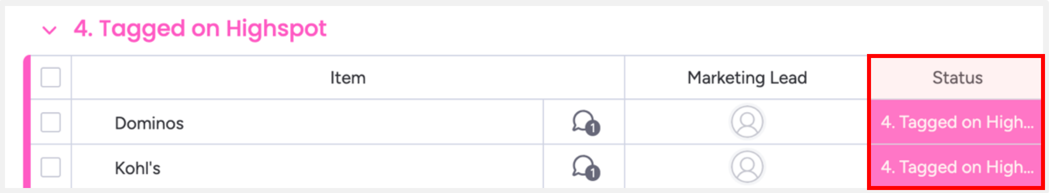
Once the case study is uploaded to Highspot, you will need to **add tags**.

1. In Highspot, click the **Action Menu** (ellipsis) at the top right and select **Properties**. The **Edit Properties** dialog box will open.

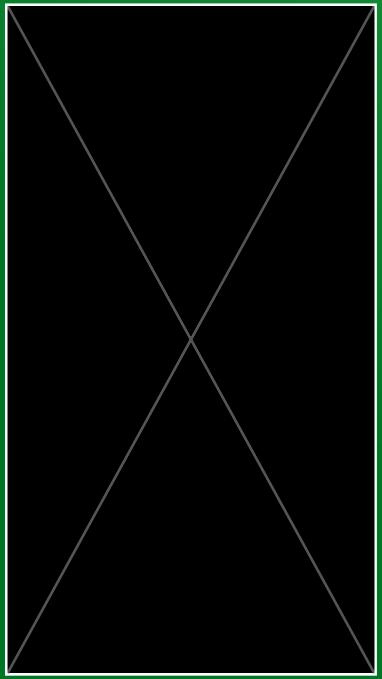
2. Update the expiration date to never expire and fill out the **Description** text box.

3. Add/update as many relevant tags as possible and click **Save**.





4. Navigate to the **Case Study Tracker** Monday board and change the status of the case study to **Tagged on Highspot**.



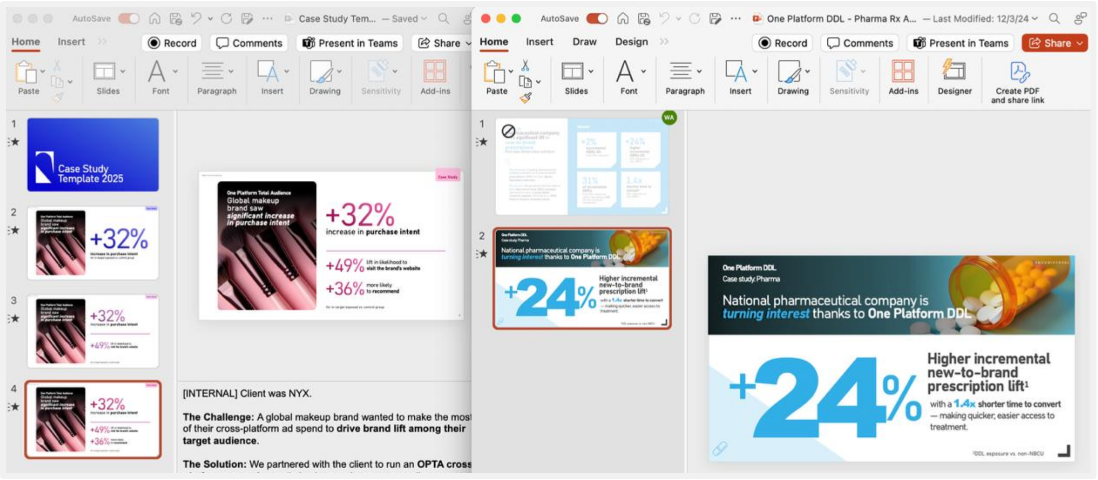
Retemplating guide 2025

Steps 1–2

Retemplating guide 2025

1

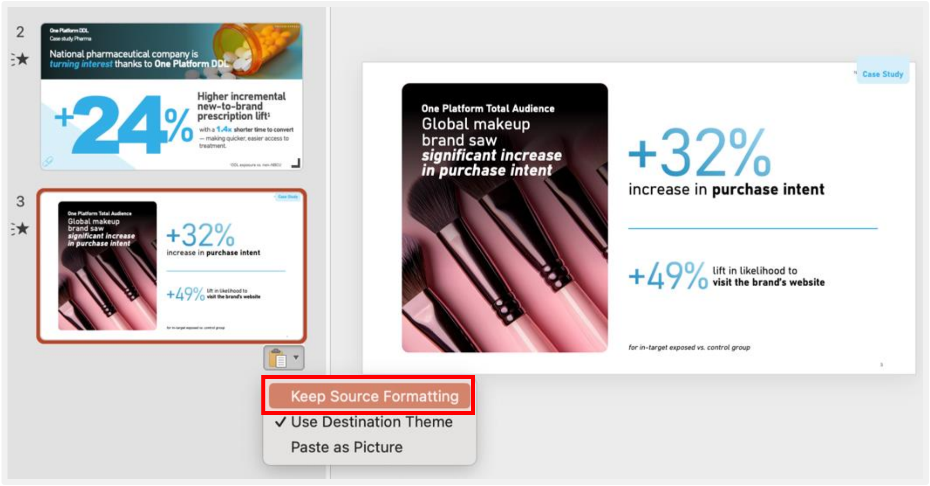
- In SharePoint, open the case study in the old template.
- Open the **2025 Case Study template**.
- Determine which version of the new template to use based on the **number** of metrics.



2

Copy the new template slide and paste it into the case study.

Note: Make sure to select **Keep Source Formatting** when pasting.



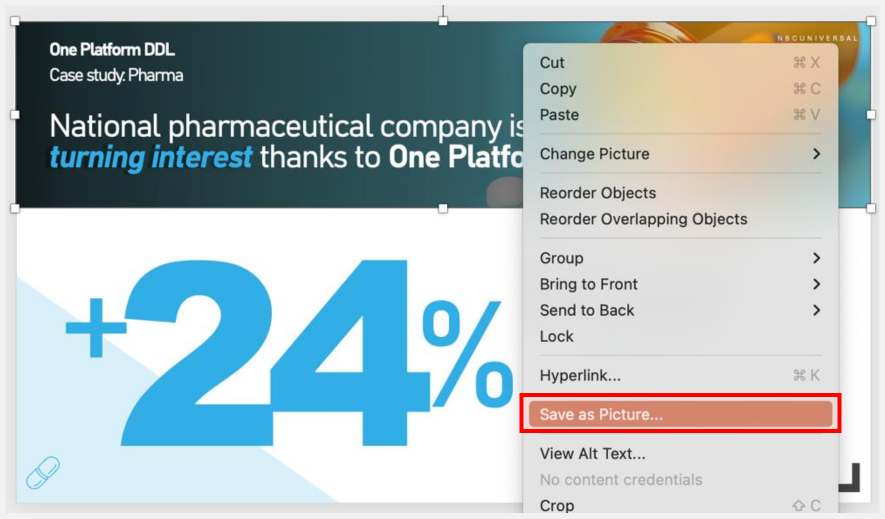
Steps 3–4
Retemplating guide 2025

3

In PowerPoint, transfer information from the old slide to slide in the updated template.

4

Right-click on the image from the old case study and select **Save as Picture**.



Steps 5-6

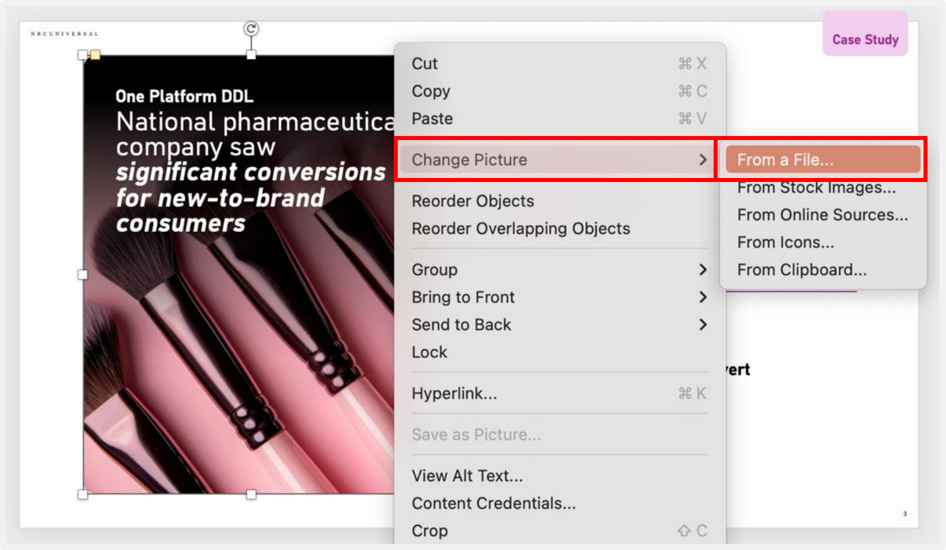
Retemplating guide 2025

5

- Right-click on the image in the updated case study and click **Change Picture**.
- Select **From a File** and replace it with the image your previously saved.

6

Adjust the template colors to match the image.



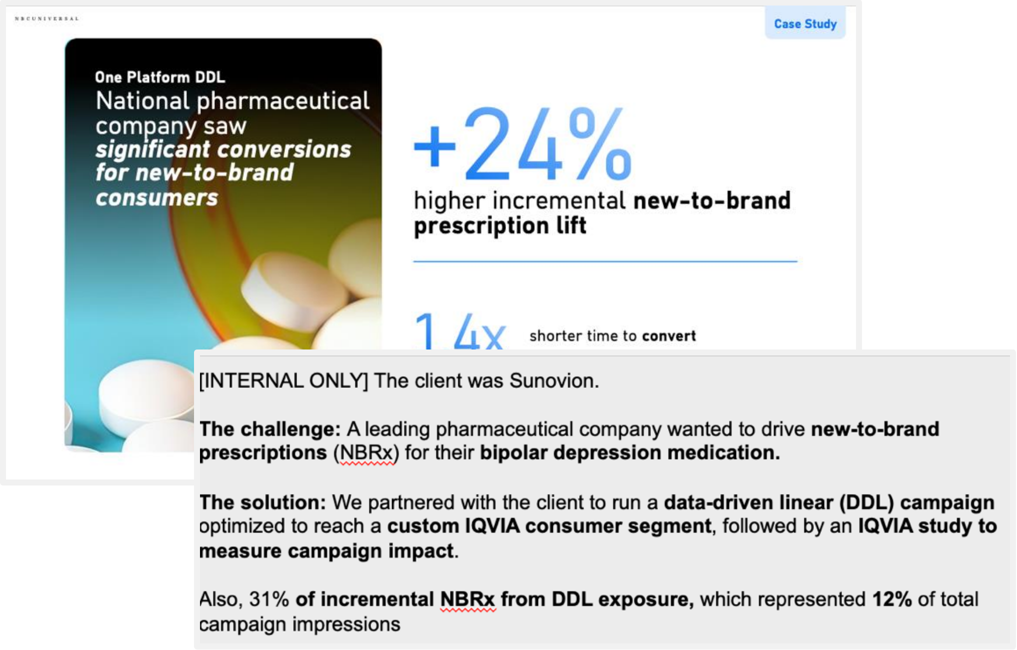
[redacted]

Steps 7–8

Retemplating guide 2025

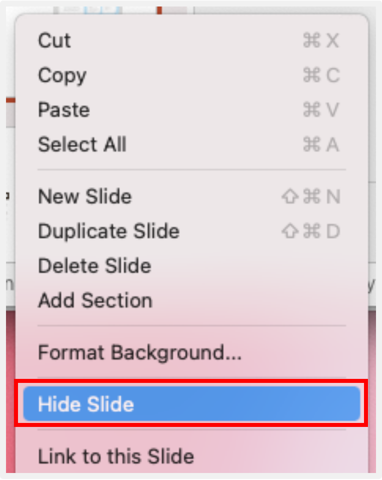
7

- Copy and paste the **Challenge** and **Solution** from the oldest case study into the presenter notes.
- Copy and paste the notes section of the other, dated case study into the presenter notes.



8

Right-click on any case studies in the older template and select **Hide Slide.**

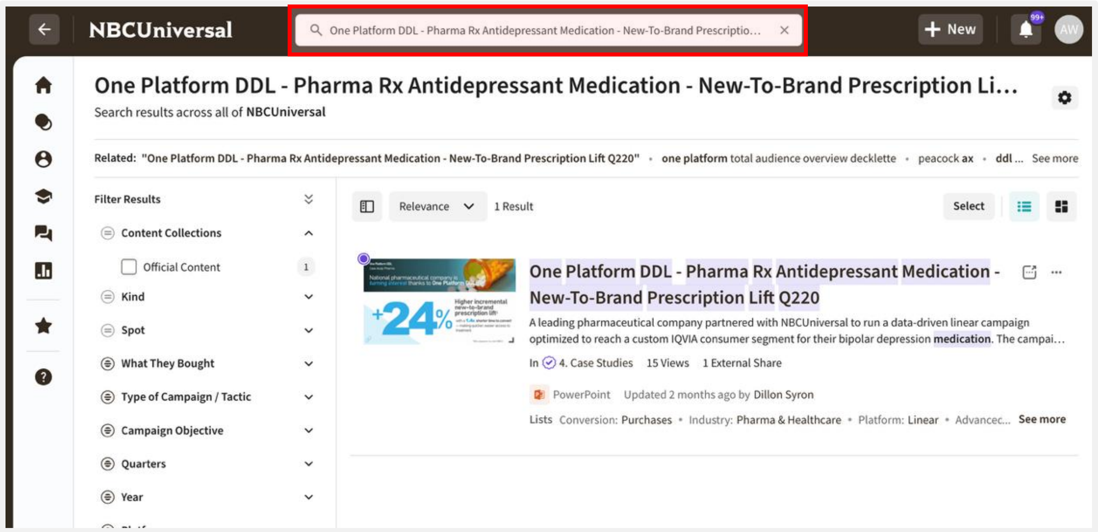


Steps 9–10

Retemplating guide 2025

9

- Navigate to the Highspot Case Studies spot.
- Search the title of the case study you just completed.



10

- Open the case study, click on the **ellipses** at the top right, select **Update Version**.

Note: It will take a few minutes to process.