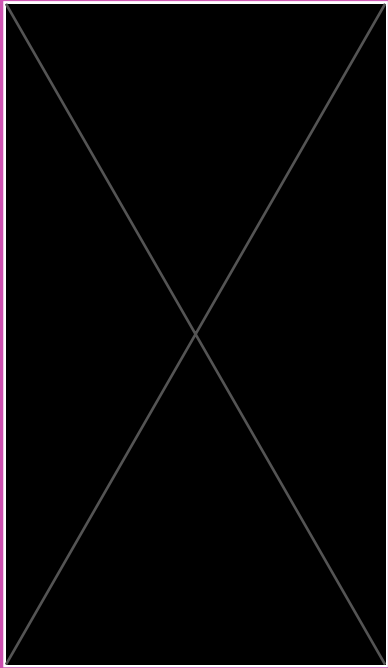


November 2005

2026 Product Strategy Sales & Marketing

Sales Systems Roadmap





Frictionless Activation

Frictionless Activation

Intuitive UI and **smarter, more connected capabilities** empowers sellers with the information they need to accelerate response times to buyers.

By reducing internal friction points at every stage of the sales process, teams can **focus on driving outcomes**.

- Inline Opportunity Editor
- Sales Landing Page
- Scatter & Upfront PMP
- PAM
- Salesforce Platform Modernization



Opportunity Clean-Up Field

Reducing clutter and surfacing only the fields that matter for faster and smarter selling

Problem Statement

Salesforce Opportunity records contained outdated, redundant, or low-value fields, creating a cluttered UI

End Goal

Create a simplified, intuitive CRM experience for Sales

53% of fields were hidden on the Digital Opportunity layout

Previous UI – 62 Fields

Opportunity: Proposed Layouts - Digital Sports

Deal ID: Proposed Layouts | Stage: RFP | Total Property(s) Budget: USD 10.00 | Deal Logged By: National | Opportunity Record Type: NBCU Ad Sales Digital | Opportunity Owner: Diana Tur

Details | Properties | Opportunity Team | Files | Chatter | LinkedIn Navigator | JiffiNow Meetings | Contact Roles

Opportunity Information

Opportunity Name: Proposed Layouts - Digital Sports | Opportunity Owner: Diana Tur | Probability (%): 20% | Stage: RFP | Reason for Loss: Admin/Duplicate Entry | Start Date: 4/15/2025 | End Date: 4/15/2025 | Close Date: 4/15/2025 | Account Name: Coca-Cola Company | Category: Beverages Non-Alcoholic | Agency Name: Esomco Global, LLC - AGENCY | Grand Parent Agency: Magna Family | RFP ID: Sample Text | RFP ID: Sample Text | Lead Source: Google Natural Search | Opportunity Source Detail: Sample Text | AX Partnership Buddy: Sample Text

Budget Information

Total Property(s) Budget: USD 1,000.00 | OP1 Exchange Rate: Sample Text | Total Estimated: USD 575.54

National Information

Marketplace: Scatter | Season: 20/21 | Total GP Influence Budget: USD 7,495.00 | Year: 2020 | Global Influencer: Sample Text | Liability Wipe: No | Global Deal: N/A, CNBC UK, CNBC Asia | Local Deal: ReachTV, Extension, SpotOn | OperativeOne Proposal ID: Sample Text | Activation Type: OpenAP, Cross Platform Advanced, DR Pre-empt

Comments

Description: Sample Text | Marketing Comments: Sample Text | Deal Comments: Sample Text

International Budget Information (Not)

Total Gross Budget: USD 0.00 | Agency Comm Share: USD 40,820.24 | Total Net Property(s) Budget: USD 0.00 | 3rd Party Agency/Rep Comm Share: USD 0.00 | Cost of Sales: USD 514.73 | Agency Comm Share %: 47.873% | Total Revenue Share: USD 495.30

International Information

Sales Region: National | Company Code: | Country: | Tier: Tier 4/Prospect - Low

System Information

Created By: RHM int@usf | 1/24/2025 10:20 AM | Attributable Lead Campaign: Sample Text | Last Modified By: RHM int@usf | 1/24/2025 10:20 AM | Deal Logged By: National

Local Information

Estimated Budget: |

System Information

Created By: Katrina Sarabia, 4/24/2025 10:08 AM | Last Modified By: Katrina Sarabia, 5/19/2025 12:25 PM

Slimmed Down UI – 30 Fields

Opportunity: Coca-Cola Company - Milan 2026 Olympics - Olympics Digital

Account Name: Coca-Cola Company | Total Property(s) Budget: USD 1,000.00 | Stage: RFP | Opportunity Owner: Sample Text | Opportunity Record Type: NBCU Ad Sales Digital | Opportunity Owner: Diana Tur

Details | Properties | Opportunity Team | Files | Chatter | LinkedIn Navigator | JiffiNow Meetings | Contact Roles | Audience Intake Requests

Opportunity Information

Opportunity Name: Coca-Cola Company - Milan 2026 Olympics - Olympics Digital | Opportunity Owner: Diana Tur | Probability (%): 20% | Stage: RFP | Reason for Loss: Admin/Duplicate Entry | Start Date: 4/15/2025 | End Date: 4/15/2025 | Close Date: 4/15/2025 | Account Name: Coca-Cola Company | Category: Beverages Non-Alcoholic | Agency Name: Esomco Global, LLC - AGENCY | Grand Parent Agency: Magna Family | RFP ID: Sample Text | RFP ID: Sample Text | Lead Source: Google Natural Search | Opportunity Source Detail: Sample Text | AX Partnership Buddy: Sample Text

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Criteria for Field Removal:

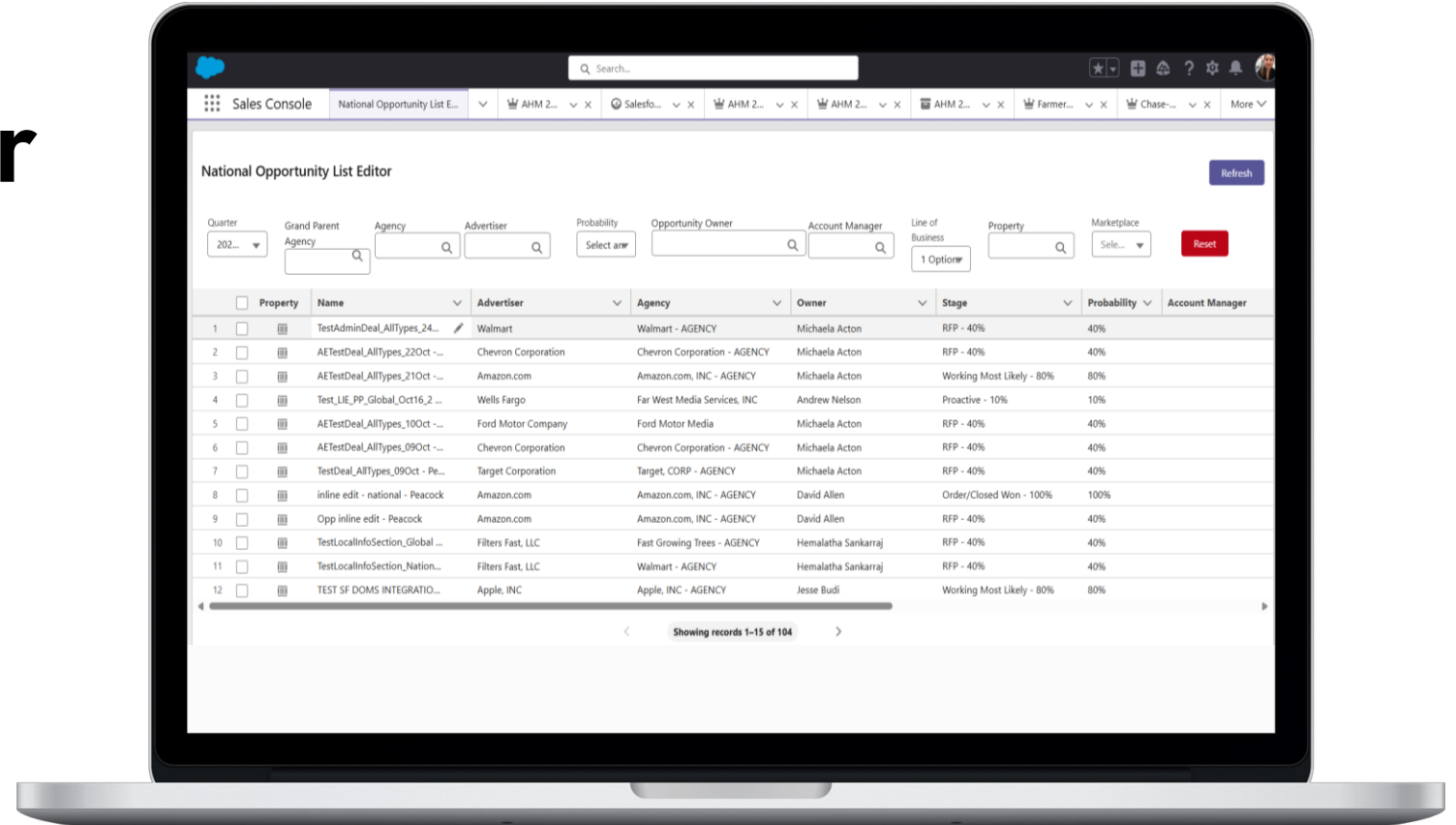
- ✓ Minimal usage in the last year
- ✓ Obsolete use case
- ✓ Redundant data

In-line Opportunity Editor

Accelerating pipeline accuracy and efficiency

Improvements:

- 1 **Simplifies the user experience;**
Reduces time to manage pipeline by 80%!
- 2 **Ensures timely, accurate data entry,** improving visibility into deal health
- 3 **Enhances data integrity,** providing a cleaner, more reliable pipeline view



Streamlined updates today enrich our data with critical context, setting the stage for powerful AI insights and smarter automation ahead.

Sales Landing Page

Centralizing key data points to drive action and adoption

Unified View of Business



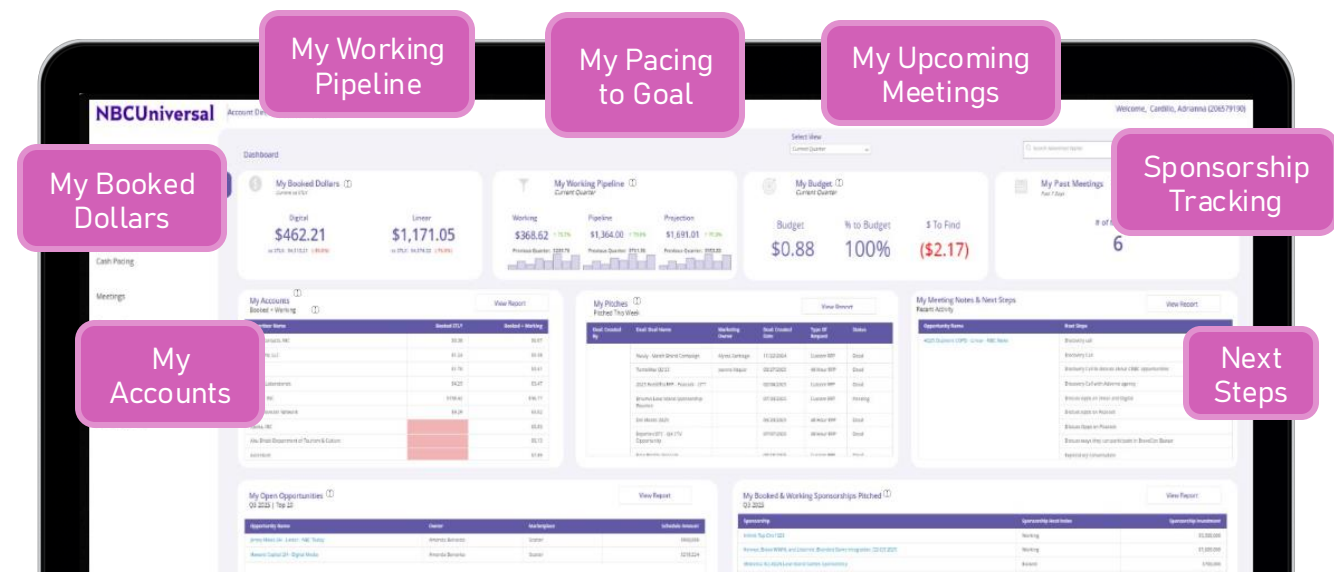
- Integrates data from UDF, transactional systems, and offline sources into one dashboard.
- Turns Salesforce into a single command center for all sales performance metrics and activities.
- Give sellers and leaders a real-time, trusted view of performance. Dependent on process adoption.

Simplified Seller Experience

>>> more about informing what's next, actionable



- Provides a personalized, intuitive interface with key data front and center.
- Reduces click and manual navigation, making it easier to update opportunities and manage accounts.
> Navigate directly to where we need to go to make the changes.
- Encourages consistent data through ownership and accountability



Universal Team Revamp

Easier maintenance, better account visibility

Future State

Update UI

- Reorder columns
- Clean-up Fields
- Account Cards & Hyperlinks

Improve UX

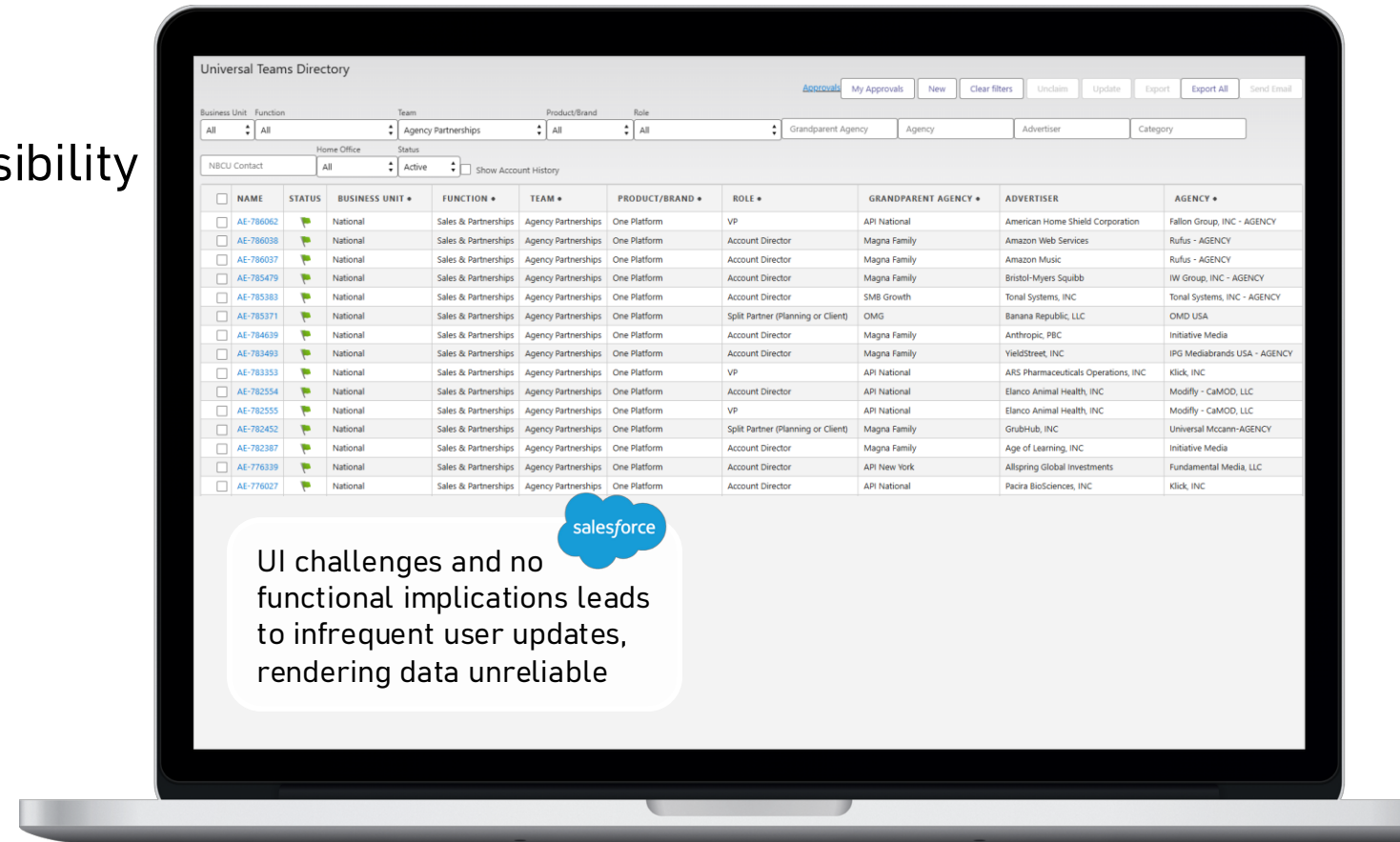
- Simpler data loads for easier maintenance
- Account Pod Logic
- UT Record Creation Wizard

Integrated Functionality

- Improved PMP Processes
- Opportunity Creation
- Landing Page & Dashboards

Empower Users

- Account Ownership & Management
- Visibility for Leaders Across Teams
- Easier Navigation
- Enable Local and SMBG hunters



Current State:

Challenging UI that is hard to decipher core working team:

- Lack of hyperlinks
- Critical columns require horizontal scrolling
- Difficult to navigate

No integration with Salesforce functionality + inconsistent maintenance

PMP

Bringing PMP Revenue Into Salesforce: From Manual to Automated

PMP Revenue is a large and growing part of our business that is currently not represented in Salesforce. Bringing these deals into the system will mitigate manual processes around agencies, accounts and AD ownership.

Current State:

- Upfront PMP plans are booked in Op1 without connection to Salesforce.
- Scatter PMP is booked directly in FreeWheel with limited visibility until time of order.
- \$21M unmapped YTD, managed in SharePoint
- Manual account ownership claiming (SharePoint)

Future State:

- Hubble integration with Salesforce to bring in Upfront and Scatter PMP for holistic revenue view
- AI tools to automate advertiser mapping
- Leverage Universal Teams to establish AD account ownership

By the numbers...

\$1B

in programmatic revenue

7,500

PMP deals booked in 2025 YTD

10k

advertisers annually mapped from Double-Verify to MDM.

75%

of revenue in 1:1 Deals

25%

of revenue in 1:Many Deals

150

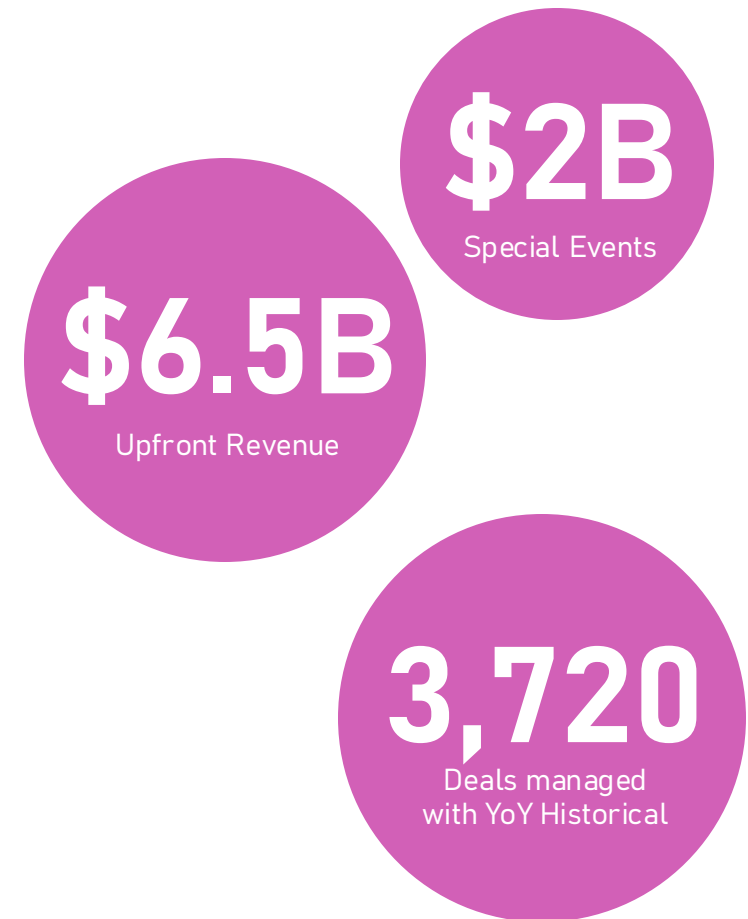
Manually mapped ADs per month

PAM '26/'27 Upfront

Maintain and improve our Upfront registration tool

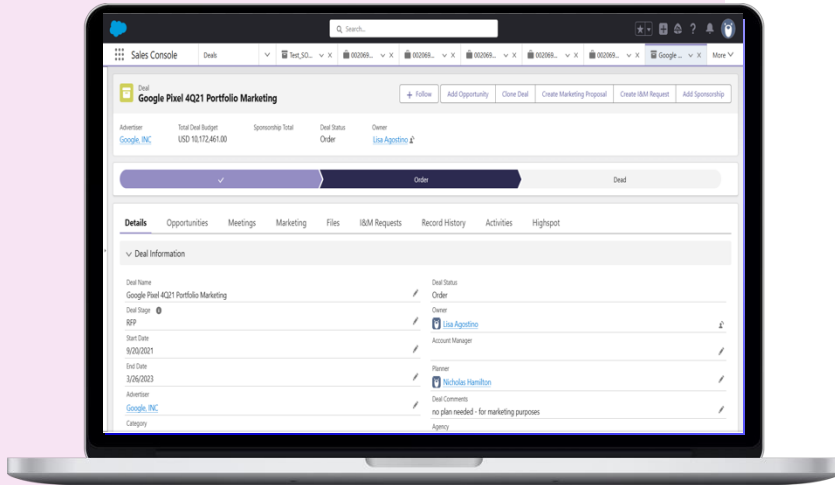
2025-2026 At a Glance

Process and Module Enhancements	
PAM vs OMS Reconciliation	Enhanced automation and importation of pricing data
Stealth Mode	More filter options; Enter asks in grid view
Agency Gateway	Enter digital dollars as Net
BAU Enhancements	Grid view for ADs, update Admin page for better Support functionality



Modernize Salesforce

Platform evaluation to support **efficiency, accuracy,** and strategic **focus**



Why now

Launched in 2007, Salesforce was built to support a traditional linear-first and digital sales model.

With shifting media and client dynamics, we need a CRM that supports a modern, digital-first sales strategy.

What We're Doing

Partnering with Qvest to analyze the current Salesforce environment—identifying:

- What's working effectively?
- What's limiting scale and automation?
- What must evolve to support  modern sales strategy?

What We'll Gain

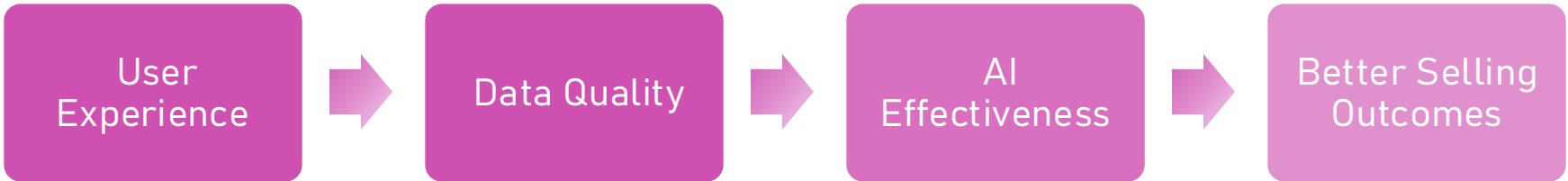
Data-driven recommendation on our Salesforce platform's long-term direction

A **scalable, foundation** for future modernization and automation initiatives

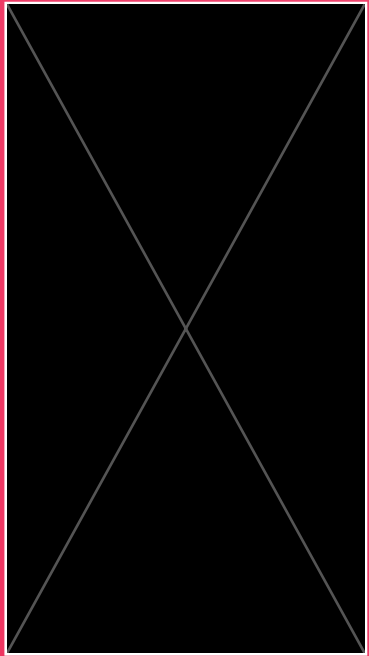
Cleaner CRM data that **power AI tools** to help us win more business.

Optimized User Experience: The Foundation for AI-Driven Selling

Fueling AI with the clean, contextual data it needs to elevate how we sell



Optimized Feature	Result for Sellers	AI Enablement
Opportunity Filed Clean UP	Simplified, intuitive CRM experience	Meaningful, high-value data
In-line editing	Fewer manual steps	Consistent structured data
Sales Landing Page	All key info in one place	Context-rich activity tracking
Universal Teams	Account ownership and visibility	Enhanced data governance
PMP	Holistic pipeline view	Connected data ecosystem
PAM	Data Integrity across Systems	More complete and timely CRM data



Revenue Growth Opportunities

Revenue Growth Opportunities

Sponsorships are a key growth driver, outpacing premium video by 12x.

Through better tracking, sellers can unlock more revenue opportunities with the help and **expansion of sponsorship and marketing support.**

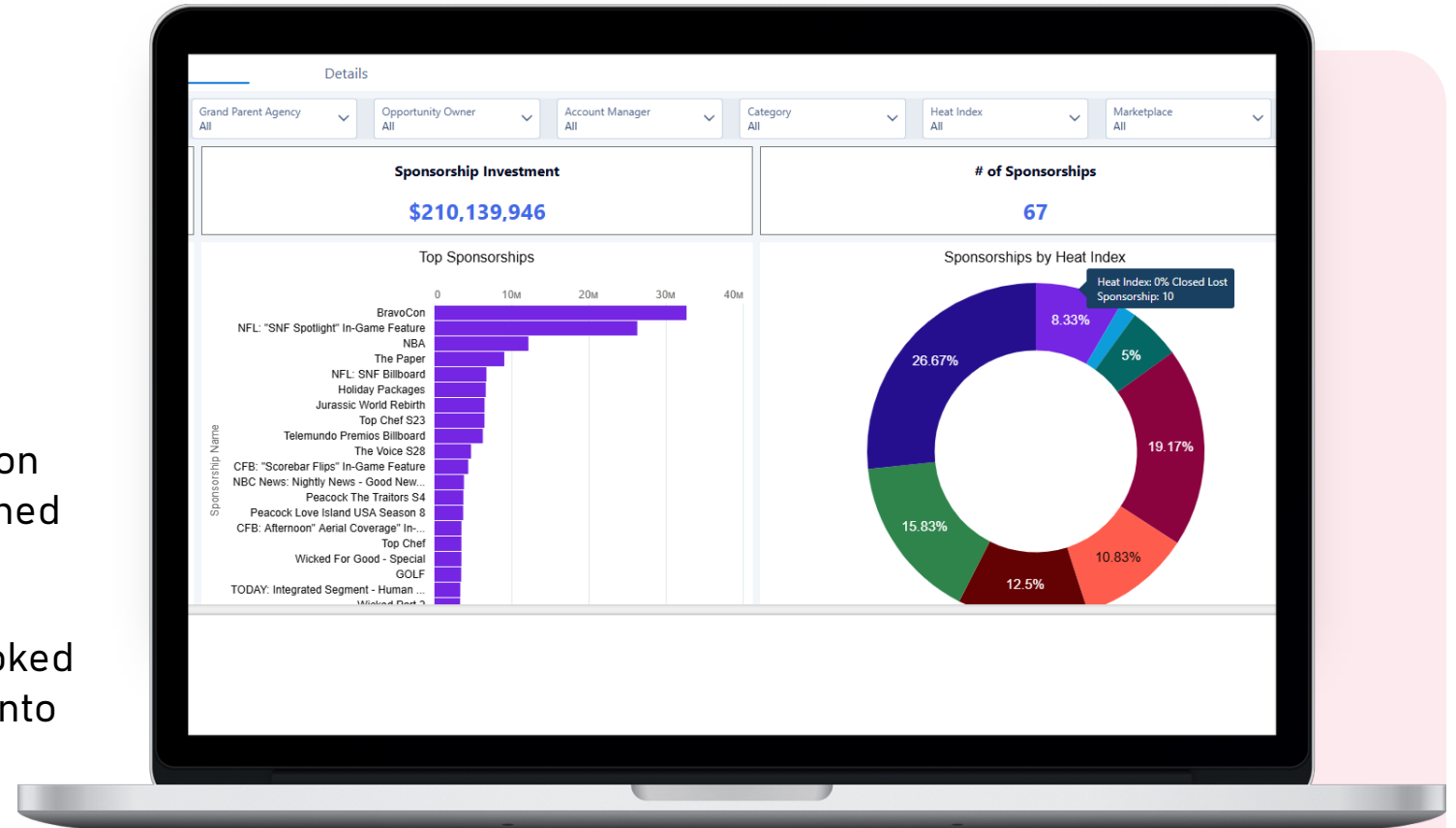
- Sponsorship & Ad Product Tracking
- Trade Marketing Event Attribution

Sponsorship Tracking To Date

Consolidating Sponsorship revenue in one platform

What We've Accomplished:

- 1 **Pre-sales visibility** and reporting on what Sponsorships are being pitched and to who.
- 2 **Central dashboard** to quantify booked Sponsorships, providing insights into P2P process and close rates.
- 3 **\$210 million** in Sponsorship revenue reported on thus far!



Sponsorship Revenue Dashboard

Ad Product Sponsorships

Enhancements to expand sponsorship tracking and provide pre-Sales visibility and reporting

Current Challenges

- Disparate views of the Ad Product pipeline
- Lack of a unified system to track all Sponsorship types, including Ad Products
- Manual and time-consuming process to measure revenue performance against total Opportunity dollars
- No single source of truth connecting pre-sale through post-sale

Why This Matters:

- 1 Equips Sales with revenue insights to recommend the right Ad Products to buyers
- 2 Reduces time spent consolidating Ad Product data that is currently housed in multiple platforms

Next Steps:

- 1 Incorporate Ad Products into Sponsorships roster in Salesforce
- 2 Add to Product Marketing Bot for sellers to quickly search and receive key Ad Products insights for their specific client needs

Trade Marketing Events Attribution

Associate key marketing initiatives and client attendance to revenue

Gaps in Attribution Today

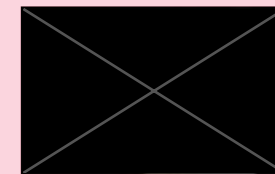
- 7 tentpole events are captured in Salesforce: CES, SXSW, Shoptalk, POSSIBLE, Upfront, Cannes, Advertising Week
- No link between marketing event participation and generated revenue
- Build ability to tie individual client spend to specific events for ROI visibility

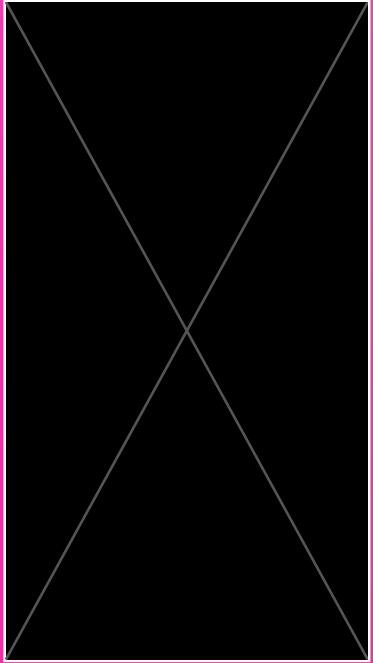


Building a Unified Attribution Framework in Salesforce

- Empowering our marketing teams to re-engage high-value clients and focus on initiatives that drive the greatest business impact
- Establishing end-to-end visibility across the Lead-to-Opportunity lifecycle
- Enabling tracking and insights to evaluate marketing performance and optimize efforts

ADWEEK





Client Base Expansion

Client Base Expansion

Deploy tools to help sellers expand their client base by **scaling prospect delivery and lead management** to drive new revenue.

- — Lead Qualification and Creation
- — Lead Prospecting
- — Universal Ads: Direct Integration

Streamline the lead workflow

to reduce manual inputs,
freeing up Sales to focus
on prospecting

Minimize operational friction

to increase selling time, drive
higher lead volume, and
accelerate revenue growth

Leads Process

Current State Challenges



- Disjointed, cumbersome workflow
- Different screens for Deals vs. Leads
- Multiple forms for each step

Inefficient
Processes



Multiple duplicative steps to confirm
account eligibility and locate contacts

Difficult
**Lead
Qualification**



- Lack of ownership and follow-up protocols
- Unattended leads do not expire, remaining outstanding in perpetuity

Unclear
**Maintenance
Process**



Limited visibility into the full lead cycle due
to fragmented reporting

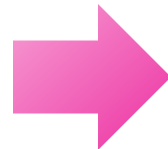
Limited
**Reporting
& Visibility**

SMBG Lead Account Qualification

Prototype chatbot to quickly access and search Salesforce to verify lead.

- Quickly access Salesforce Opportunity data and Universal Teams to qualify lead with one ask
- Simplified process will **reduce time spent from 45 min to 25 min per lead.**

Current State:
45 min



Future State:
25 min

SMBG Lead Account Creation **LIVE**

Automated process reduced from 25 mins to 5 mins per lead.

- Collapsed 3 forms into one simple form for fewer clicks and de-duplicated fields
- 22 field in original MDM ticket was reduced to 8

Current State:
25 min



Future State:
5 min

Lead Prospecting

Scale Seller Productivity through Sales Engagement Tooling

Current Outreach Email Velocity

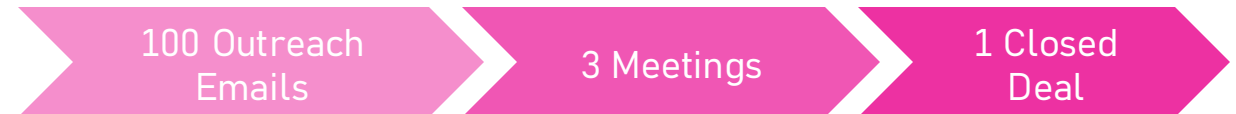
~1.5 Weeks Per Deal

** Split across all FT UA Sellers.*

Potential Sales Engagement Partner(s)



Common Guidance



What do we need to accelerate our Sales?

- Decrease research time required to hunt for new business
- Light touch outreach and prospect engagement
- High-quality, high scoring leads, delivered to our sellers
- 360 degree understanding of our leads through their lifecycle

What does a perfect match look like?

- Flexible, personalized pipeline management, with simple tools to customize how sellers work
- Intelligent, right-fit prospect recommendations of new potential clients
- Seamless management of potential clients across email, calls, and other channels, all in one place

What we are solving

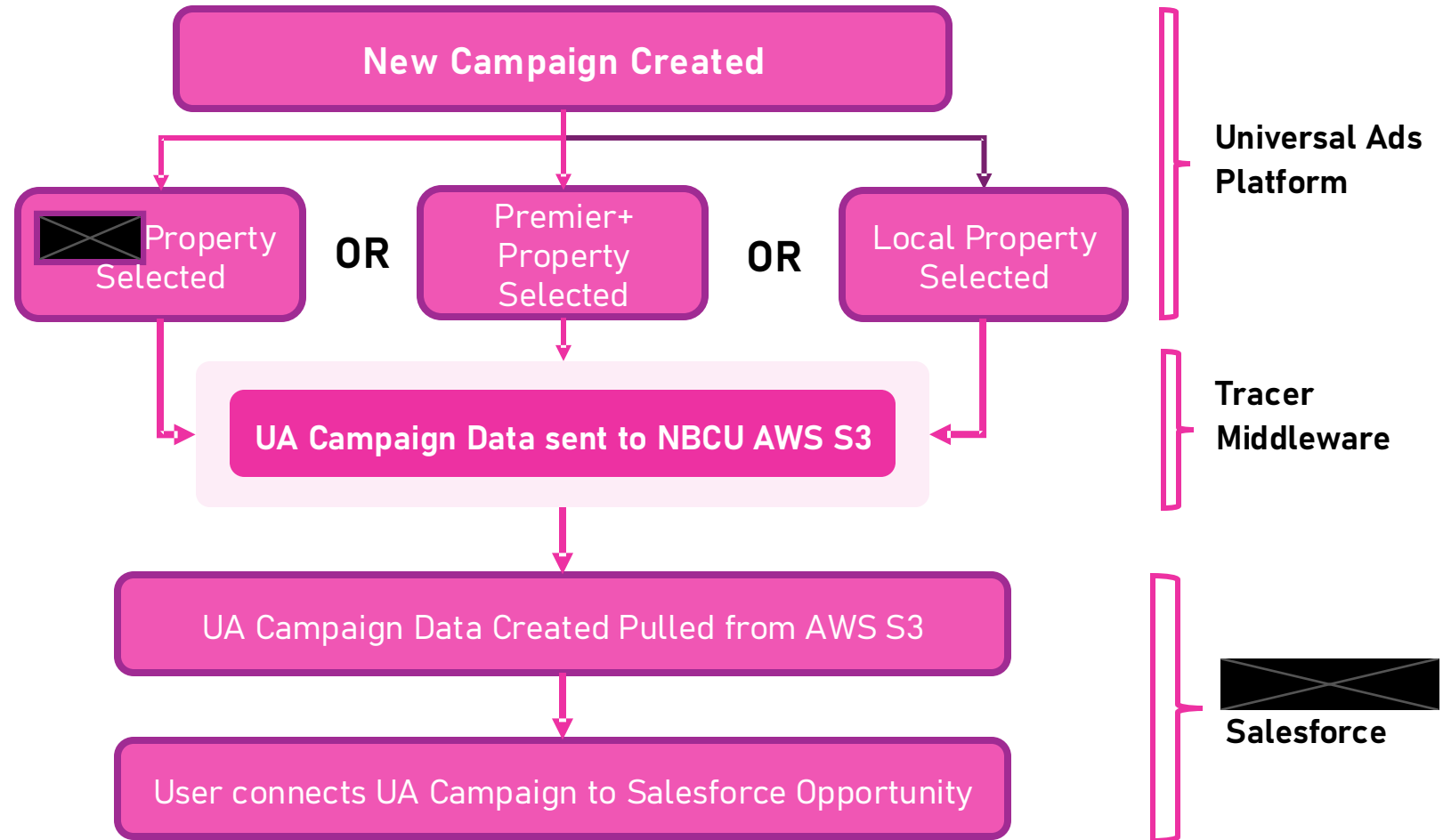
- We need to track  properties being sold on Universal Ads
- Retrieval of  property sales data from 

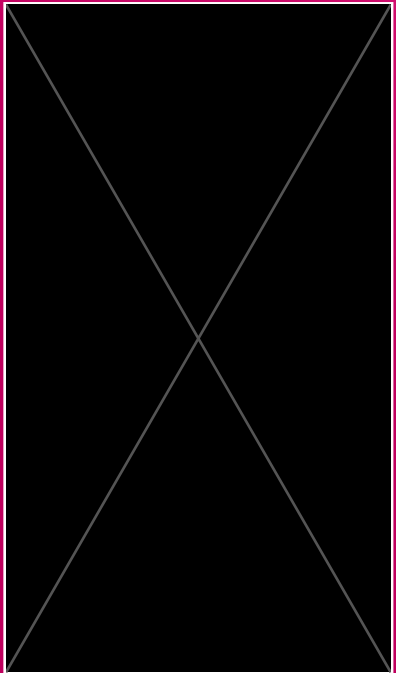
Why we are solving

- Support UA revenue target of \$93M
- Attribute sales data to the right accounts for full visibility

Universal Ads Salesforce Bridge

Automate UA Revenue Sync between 





Sales Automation

Product Inception

RFP / 48x48 Automation

PROBLEM

- RFP Responses are a **highly manual** and **resource intensive** process that rely on **siloe data** and lack robust data-driven insights, resulting in **inefficiencies** and **missed revenue** opportunities.

GOAL

- Bring AI and automation to the RFP process to **decrease client turn-around times** and **increase win rates** through improved, data-informed responses

Why Inception?

- **Healthy Debate! Bring perspective from multiple stakeholder groups:** Sales Enablement, Brand Partnerships, Development, Creative, Platform Monetization, Strategy, APS & O&T
- **Define key players & their roles**
- **Align on MVP Scope**
- **Highlight risks to success**
- **Ensures “shared consciousness” across teams**

RFP Automation MVP Scope

Where we're landing

What's IN:

1

AM/AD Uploads RFP
via Salesforce

2

Agent parses RFP
submission to
understand campaign
client objectives and
target audience

3

Agent references required inputs
to generate a proposed response
inclusive of audience/category
insights, sponsorship
opportunities, and media plan
package options.

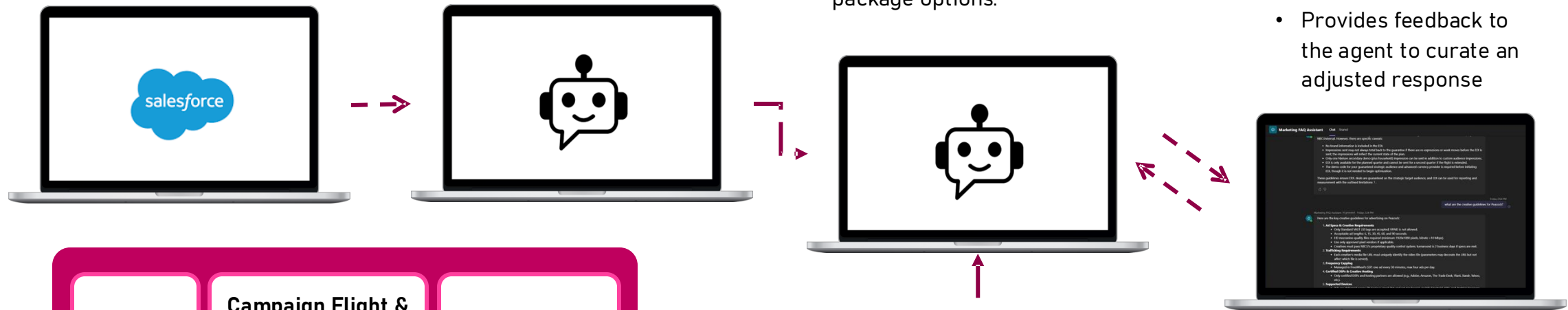
4

Sales Enablement reviews

- Approves and begins building client deliverable

OR

- Provides feedback to the agent to curate an adjusted response



What's OUT: (But still important for future phases)!

- AI generated PPTX deliverable
- Structured data for all inputs and outputs
- Fully transactable media plans
- Support for renewals/custom RFPs