Leadspace

Leadspace Studio

User Guide

August 2022

Contents

Introduction

About Leadspace Studio

Leadspace Studio is the complete control center for the Leadspace Customer Data Platform (CDP) and replaces Leadspace On-Demand as the main web application.

It includes the ability to get a clear view of your TAM, quickly view details on your key audiences, and see how they're activated across channels.

Expand into more, new accounts just like your best customers by creating new segments.

The platform now contains some new advanced abilities that were not included in LSOD such as Unify, which allows you to get single, clean and deduped Company and People profiles lists.

You can also explore visualizations of your data to uncover ideal customer profiles, and review the performance of your AI-driven models and scoring with embedded analytics.

You can get reports to see your overall data health, and where the CDP is helping you improve.

Ultimately, this will be your single application for viewing and managing your Leadspace instance.

Supported Browsers

Leadspace On-Demand is supported in the following browsers:

- Chrome

Studio Users and Roles

The Studio app supports two roles:

1. **Leadspace On-Demand Administrator:** Allowed to create and view segments, as well as create new users
2. **Leadspace On-Demand User:** Allowed to create, view and deploy segments

Logging In to Studio

Creating new users in Studio

To log in to the Studio app, a user should be created by the Leadspace administrator.

An administrator user will be created by the Leadspace team. The administrator will receive an email with access details and will be required to define a password that will be used for logging in to the app.

The Studio administrator can create new users by going to the 'User Management' page:
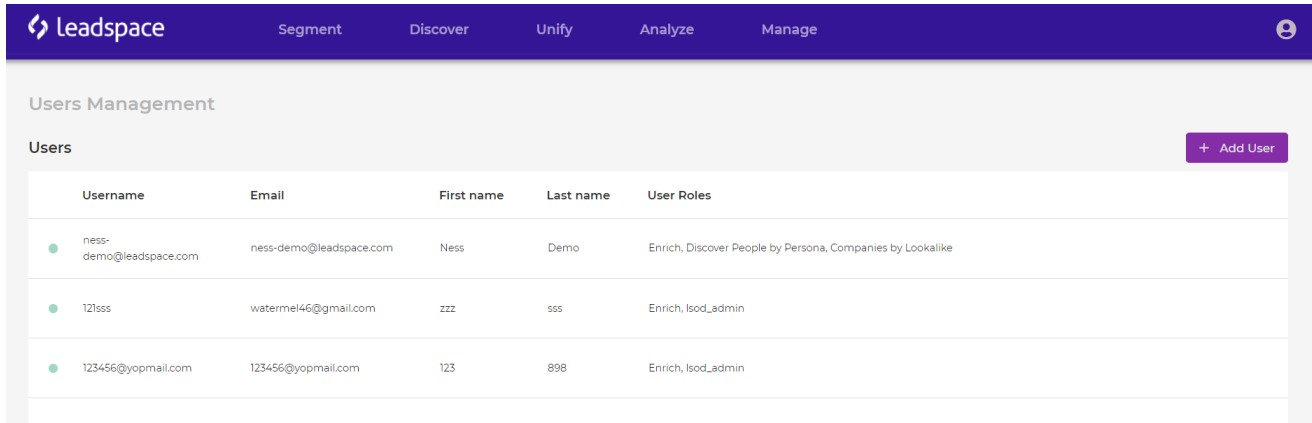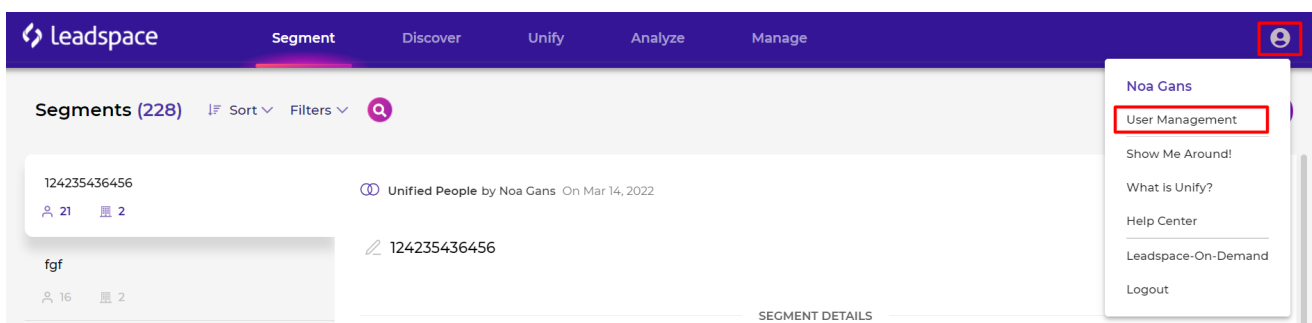
This page allows you to create non-admin users.

The following information should be added for each new user (all fields are mandatory):

- First name
- Last name
- Email address (used as unique identifier)
- User name
- User role (to define which activities the user can perform)

Clicking 'Add User' will create the user in the Studio users list.

After a user has been created they will get an email with a link to the application and a request to update a new password.

Once the new password is set, the user can access the application.

Logging into the Studio app

Users that are created successfully can access the Studio application via the following link:
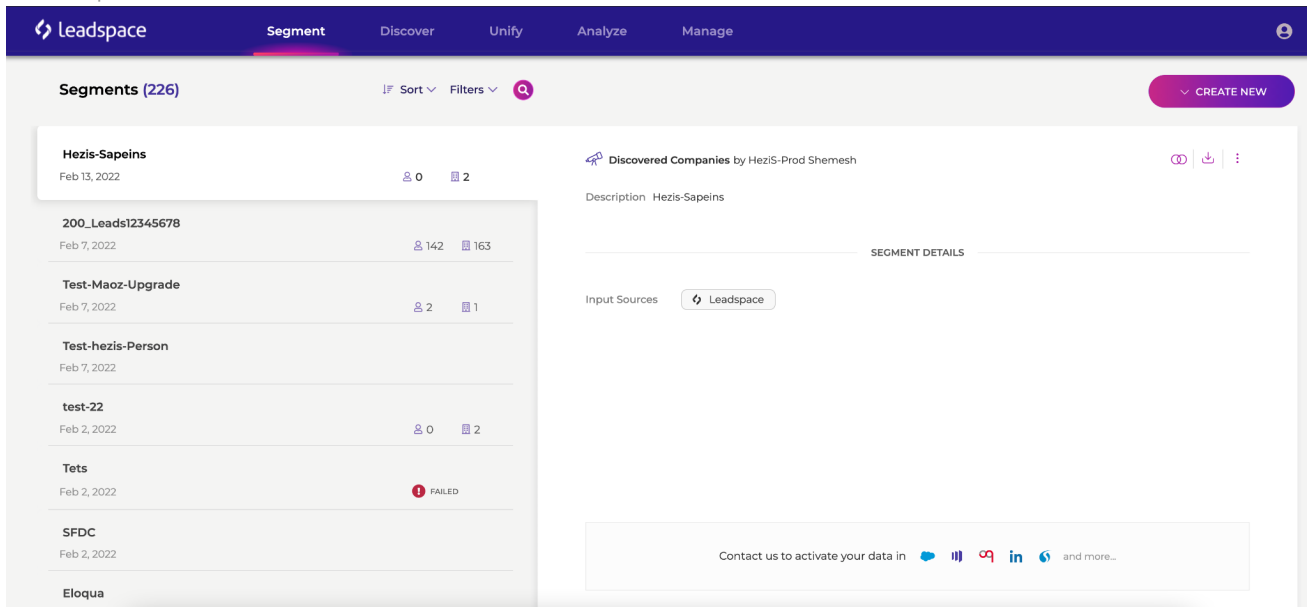
https://studio.leadspace.com/

Note: In case a user needs to update their password, there is a 'Forgot Password?' link in the log in page.
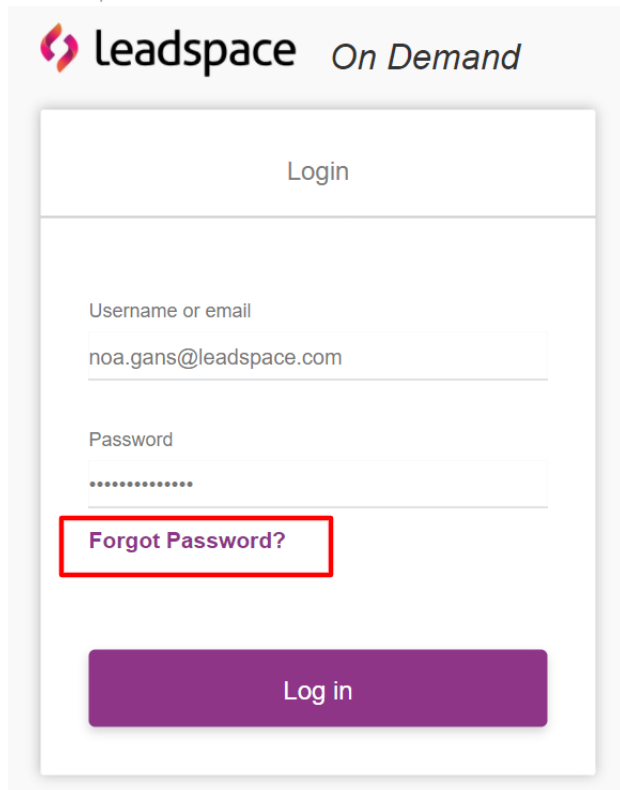
Segments

The Segments Dashboard

Upon login to the Leadspace Studio application, users are landed on the Segments dashboard.

This screen has several key components:

- <u>The Segments list</u> - these are the segments created by the user and other members of the team. Each Segment can be from a different type and the details shown on the right side will change accordingly.

  The list of actions supported from each segment type varies. The list of possible actions can be accessed either via the 3 dots on the segment list or the icons + 3 dots on the details area.

  Possible actions are:

  - Download a CSV

  - Deploy to an external system

  - Discover people (available from a discovered company segment only): also known internally as "People expansion". This ability allows users to discover people profiles that match their filter criteria (persona, department etc..) and work at the companies within the selected segment.

  - Delete a segment

  - Unify & Segment

  - Filter Segment (available only for segments from type "Unified")

- Sort dropdown - Choose the sorting to be used for showing the segments list.

- Filters menu - This allows the user to filter the dashboard by:

  - Unified /Discovered/ Ingested/ Enriched

  - People /Companies

  - Deployed/Not deployed

  - In progress/ Failed

- "Only created by me" toggle - (Located inside the Filters menu) this allows the user to show/hide Segments created by other team members.

- Search bar - this allows the user to quickly filter the dashboard by specific terms found in the Segment's details like segment name, tags or description.

"Discover" Steps

What is Discover Companies by Criteria (Sometimes referred to as Segment Builder)?

- A visual, intuitive UX to easily create segments from a superior multi-source B2B Graph, including 1st party data and scoring.
- Create the best target account lists for ABM programs with a comprehensive view — including intent, tech install, and scores.
- Includes "Global Parent" tab on individual company overview card showing details of the ultimate global parent organization for that company.

- Distribution View displays the mix of companies across employees, revenue, industry, and location, to give users a strategic view and help them adjust before saving.

HOW IT WORKS:

Can be accessed in Studio by two ways:

1. From Segment tab > "Create New" button > "Discover" button
2. From any screen in the platform > clicking on "Discover" Tab

Users can select various criteria like employees, revenue, industry, and even tech install, 1st party scores, and intent.

Results show as criteria are added, with the ability to examine individual company records to see what kinds of data will be included. Once the segment is created, it can be easily expanded with personas at those companies and deployed to connected systems.

Note: The discovery ability should be available to customers with access to Leadspace Studio. Subject to discovery credits.
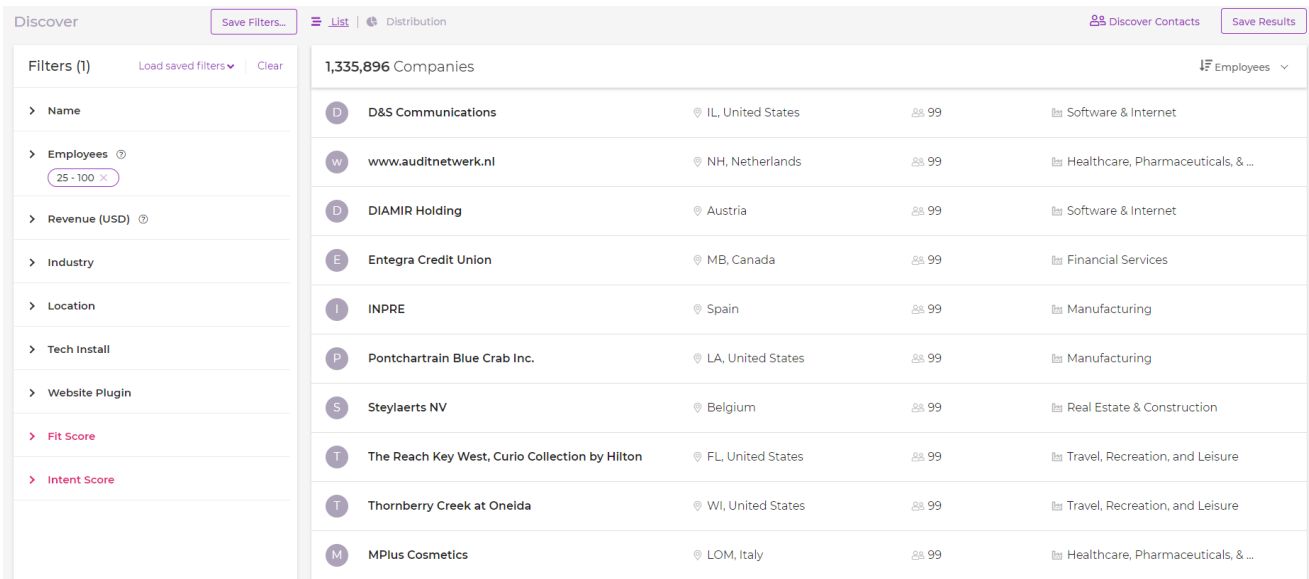
When you start a search for Companies by Criteria and enter the segment builder, you get the list of available filters on your left side.

It contains a set of 3rd party firmographic filters - along with some 1st party scores (Fit and Intent if those are part of your Leadspace solution) - which you can use.

By default, whenever you select filters, you will see the list of companies that results from the chosen filters.

In the list view you can see a preview of the 100 top companies. When pressing each company's row, the company's line expands and you can see additional information about this company.
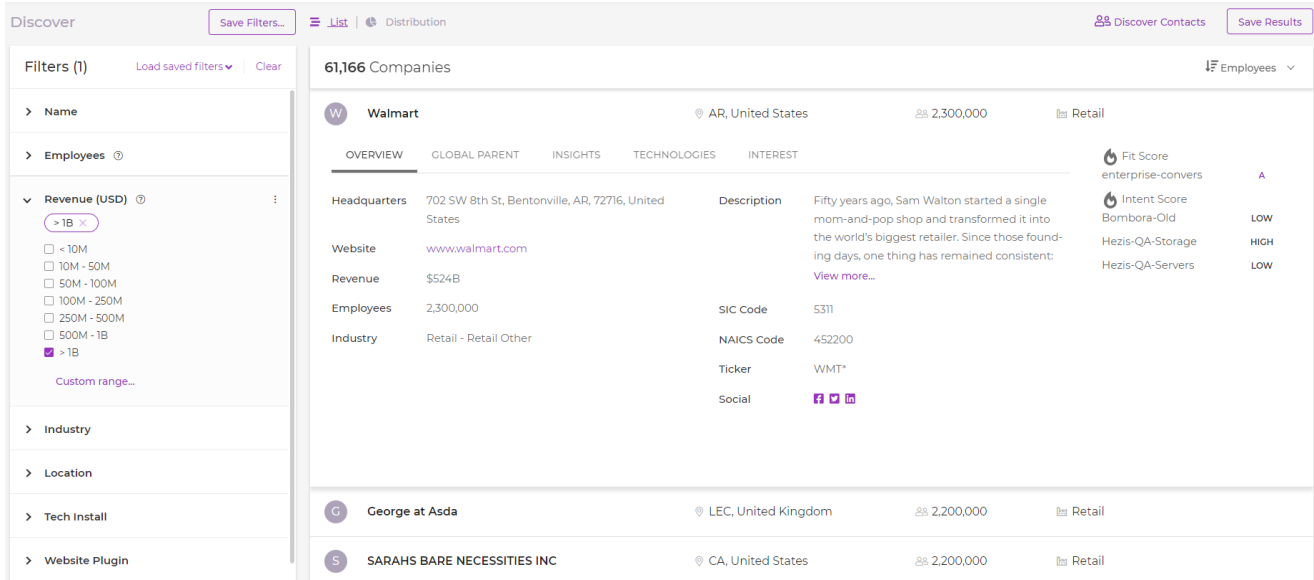
You can also switch to the distribution view where you can see how the list is distributed using different graphs.
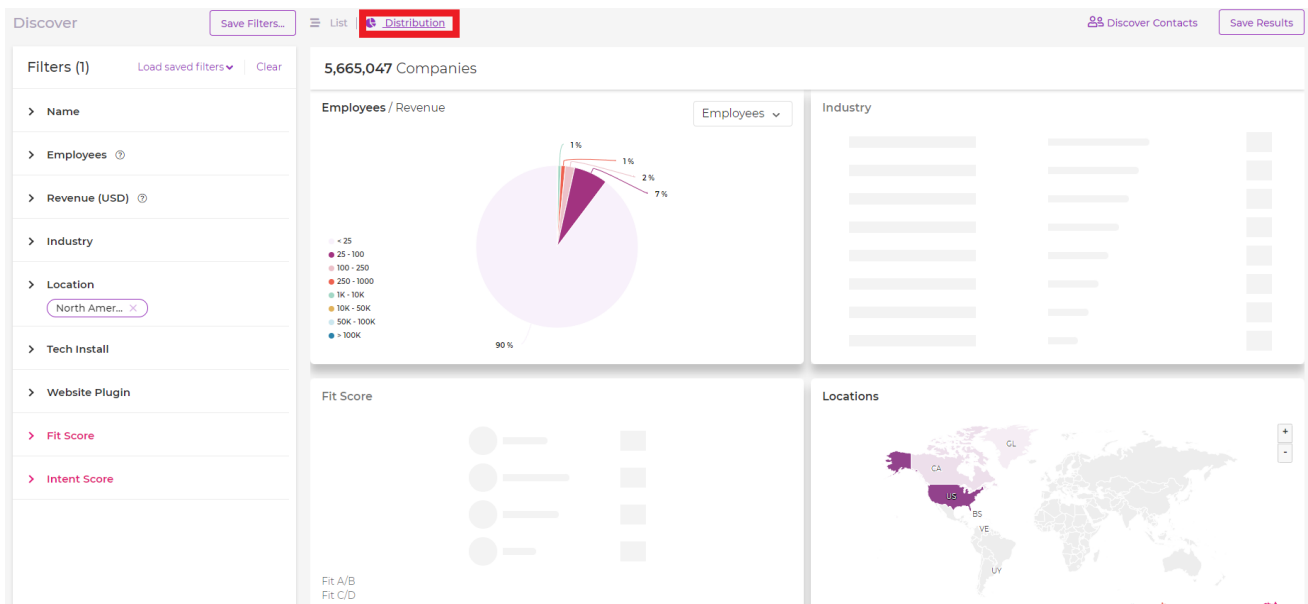
The actions which are available in the segment builder (Discover Companies) are:

1. Slice and dice Leadspace's company graph by applying filters to get to the segment you'd like.

2.   Save Results button - save the list of companies who met the criteria as a segment; (when you save your segment, the related filter is saved for you automatically).

3.   Name your segment - this will be the title of the Segment card later shown in the Segments dashboard.

4.   Limit results - allows the user to limit the number of companies discovered. The segment can include up to 100K companies.

5.   Exclude companies - allows the user to indicate known/existing companies, and thus to exclude them from the results. This could be done in one of 2 ways:

   5.1.   Choose from previously uploaded files.

   5.2.   Uploading a file (which will require mapping the headers). Only supports .csv files.

   5.3.   Mapping the headers - indicate which column has the "company name", "company website", etc. **Please note**: the more fields a user maps, the better the results will be.

6.   Save Filters -

   6.1   Save the current filtering for future use by clicking the "Save Filter" button and name it.

   6.2   Retrieve saved filtering settings by clicking the filter window and pick your saved filter. You can narrow the filter options to the ones created only by you, by turning on the toggle, or to the ones who have segments created / don't have segments (All Filters, Without segments, or With segments).
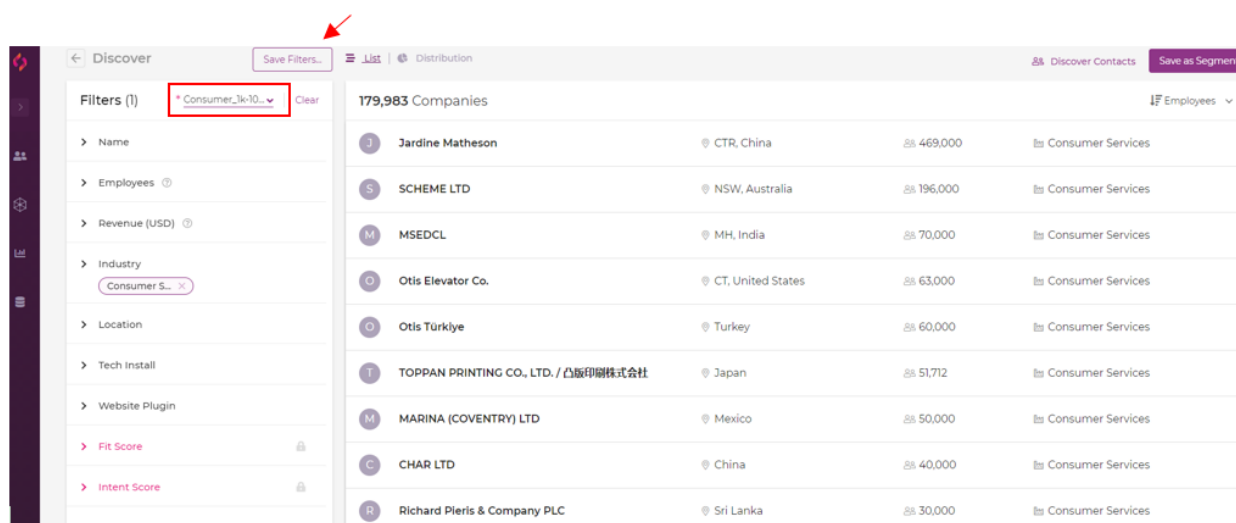
7. Expansion to People by Persona- directly from segment builder. By clicking "Discover Contacts"- this action actually creates a segment from the current filtered list + provides a relevant contact list for this accounts segment. You can also create a 'People by Persona' segment using a completed person or company enrichment segment.

Upon clicking "Save", the user would be taken back to the Segments dashboard, where a new Segment card would be created with an indicator showing progress toward completion.

"Lookalike" steps

Studio offers the same lookalike capabilities that were supported in LSOD.

You can take an existing list of companies or create an adhoc list of companies in a text entry field and run it through a lookalike segment to find companies that have similar locations, industries, employee size and revenue.

To start a Lookalike segment, click on "Create New" → Lookalike:
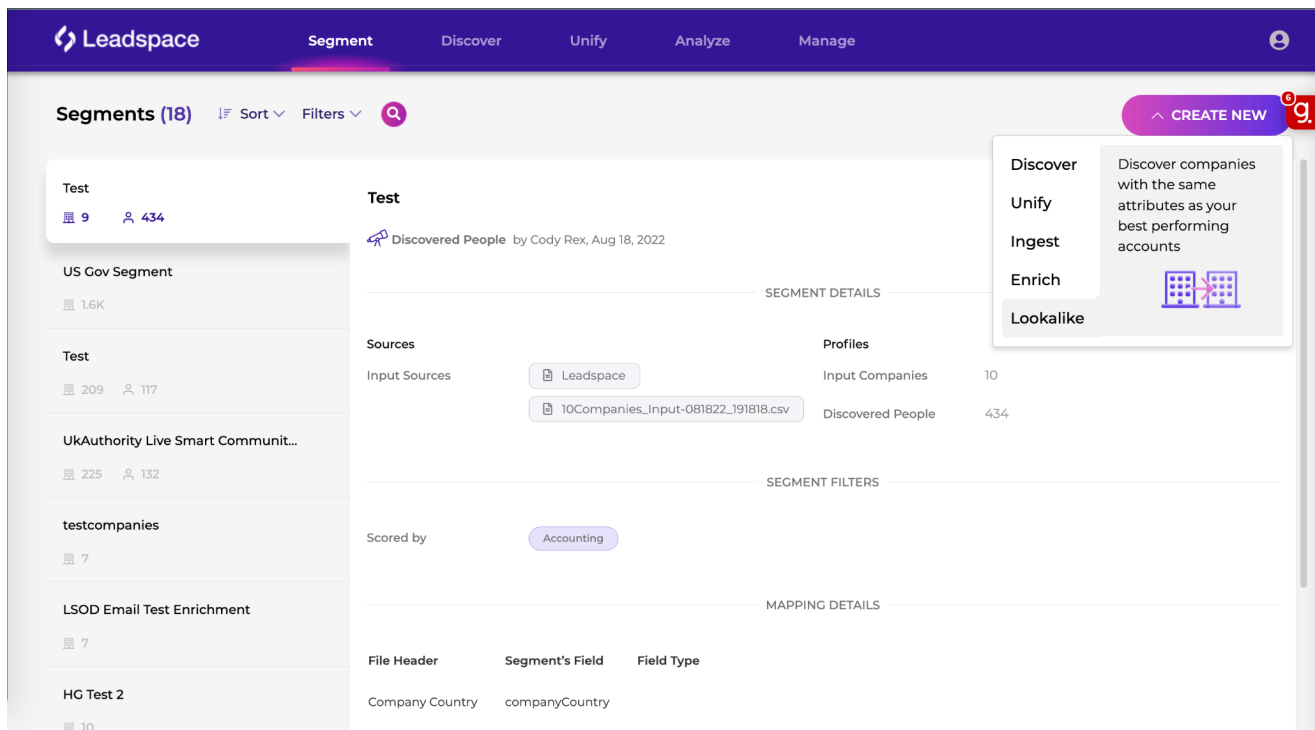
General Comments about Lookalike in Studio:

1. The user can upload a CSV file with company records to use as the basis for the Lookalike. Users can also create a list of companies in a multi-line text field.

2. The uploaded CSV input file won't be saved/available for download, only the resulting Lookalike file
3. Lookalike segments use Net New credits

<u>Steps for using the Lookalike wizard:</u>

1. Click on the "Create New" button in the segment tab and then click on "Lookalike".

2. Select "Upload file" if you are going to import your own company list, or "Type in company names" if you would like to manually input company names in the multi-line text field.

    2.1. You will want to make sure to add a line break between each company in your list, minimum 5 and maximum 100.

3. Name your segment: this will be the title of the Segment card later shown in the Segments list and details (which can be edited also post-creation of the Lookalike segment). Click "Next".

4. Choose the criteria for your Lookalike segment. You can include or exclude companies based on the following criteria:

    4.1. Location

    4.2. Industries

    4.3. Revenue

    4.4. Employee size

5. In the "Adjustments" step, you can limit the amt. of records you return and upload a suppression file is there are certain companies you would like to exclude from the Lookalike results.

6. Upon clicking on "Create" button,, the user will be taken back to the Segments tab, where a new Segment card will be created on the left side of the screen and on the right side the segment details will be presented.

"Enrich Companies/People" steps

Studio offers the same enrichment capabilities that were supported in LSOD.

You can Enrich an uploaded list of people or companies from the segment tab by clicking on the "Create New" button:

General Comments about enrichment in Studio:

1. The user can enrich only CSV files that are uploaded to the system in this process. The option of enriching existing segments in Studio is currently not supported.
2. The uploaded CSV input file won't be saved/available for download, only the enriched file.

Steps for using the enrichment wizard:

7. Click on the "Create New" button in the segment tab and then click on "Enrich".

8. In the pop-up window, choose whether you want to enrich a people or company list. Note, people file usually includes both demographic (people info) and firmographic (company info), while company file contains firmographic without demographic data.

9. Name your segment: this will be the title of the Segment card later shown in the Segments list and details (which can be edited also post-creation of the enriched segment).

10. Upload file - only supports .csv files, up to 1M records

11. Map file headers - indicate which column has the "company name", "company website", etc **Please note**: the more fields a user maps, the better the results will be.

12.   The user has an option to map "custom field" -the main use case is to inform us to take it into account in the predictive models. Thus, in case the user has a predictive model and it uses custom fields, the user should name that field/s exactly with the names that are defined in the predictive model.

13.   Upon clicking on "Enrich", the user will be taken back to the Segments tab, where a new Segment card will be created on the left side of the screen and on the right side the segment details will be presented.

Enrich segments in Studio

Enriched Segments Actions

The user can perform the actions below for each enriched segment:

1. Unify & segment
2. Download
3. Delete
4. Deploy to - LinkedIn, Eloqua, Marketo, SalesLoft, Google and Facebook

Enriched Segments Details

The enriched segment details appear on the right side of the window next to each segment card and include the following information:

1. Segment Name (editable by a click on the name box)

2. Segment type - enriched People or Companies

3. Date + creator name

4. Input Sources

5. Automated DHR (Data Health Report) - each enriched type segment in Studio has a data health report that is being calculated automatically once the segment is created. In order to access the DHR report, click on the "View Report" button that is located in the DHR illustration in the segment details section.

     a. The DHR has the same structure and fields as the "stand alone" reports that were created upon request in the manage tab.

     b. Limitations:

i. The DHR section won't appear in segment details if it was created offline (not in Studio) and uploaded to the system. In that case, a stand alone DHR can be created by the analyst team and uploaded to the [manage](#) tab.

ii. 1st party filters are not supported. Only the following filters are supported: Employee Size, Company Revenues, Company Regions, Person Title, Person Country. The full spec can be found [here](#).
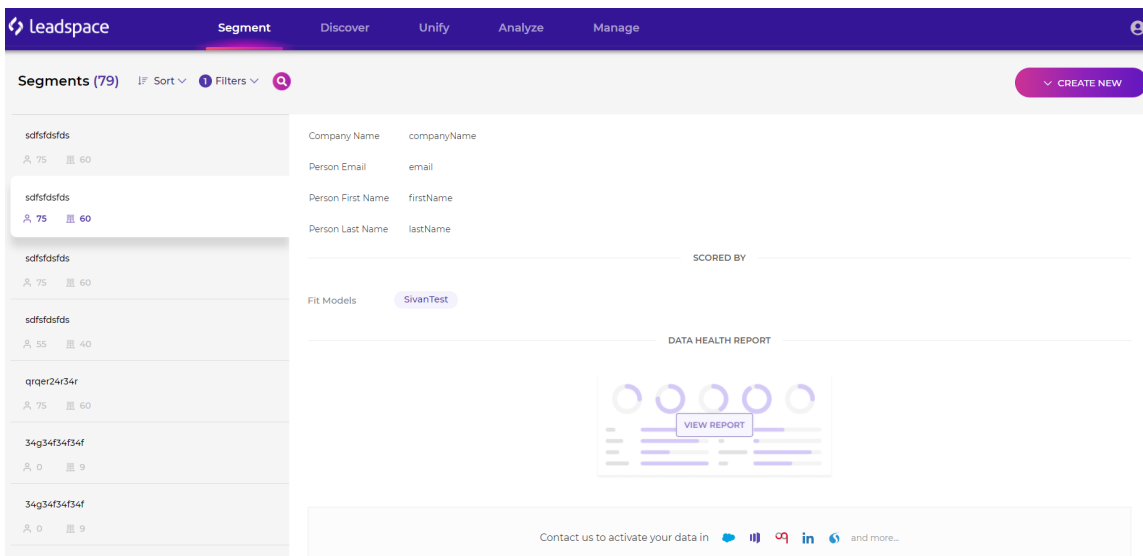
6. Scored by section (include Technologies and company/people models)

Unify

<u>What is unify?</u>
Unification is a brand new feature that Leadspace offers. Unify allows users to create - from one or more input segments - a unique list of people or companies profiles, clean from duplications and enriched by LS sources - Graph and BYOL sources (e.g Zoominfo), in addition to users' first party data (including CDI).

New unified segment can be created by 3 ways:
1. Segment tab > clicking on "Create New" Button > Clicking on "Unify"
2. From anywhere in the platform clicking on "Unify" Tab
3. From the segment list on "Segment tab > picking specific segment > opening the actions dropdown menu > clicking on "UNIFY & SEGMENT" button

By using the first two options mentioned above, the user will initiate a wizard that will guide them through the required steps to create a new unified segment:

1. Defining segment type - People or Company
2. Providing a unique segment name (mandatory)
3. Providing a general description for your segment (optional). It will appear in the segment details.
4. Adding tags by typing values and clicking "enter" (optional). Can be used later for search.

By clicking on "Continue", the user will be forwarded to the "Unify Canvas", a dedicated screen that allows dragging and dropping of segments the user wishes to unify, and
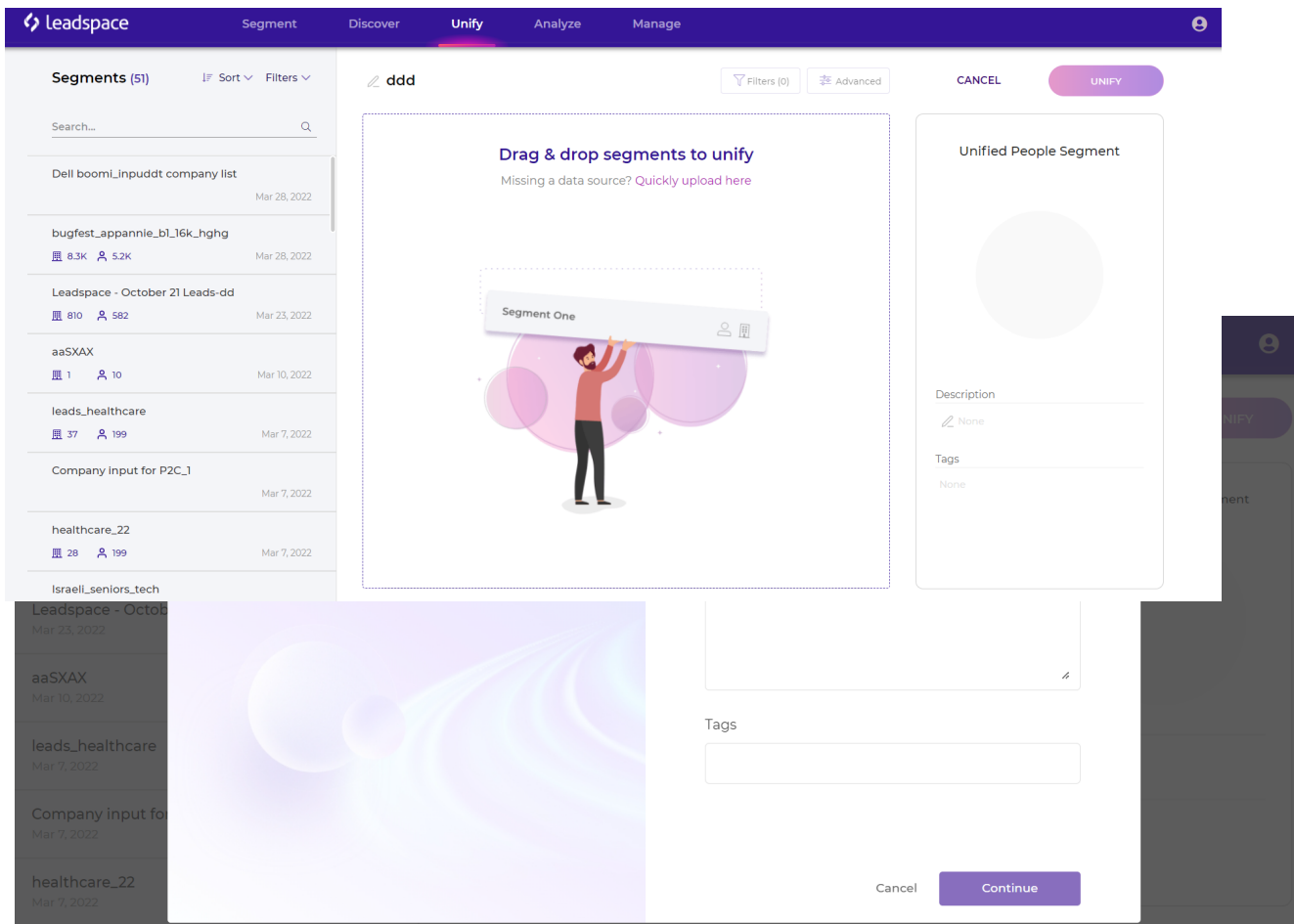

setting the unification configuration.

Selecting Input Segments

1. The User must provide at least 1 source as an input, and up to 10 max (including exclusion sources).

2. The user can add inputs to the canvas by two ways:

    a. uploading a small file (up to 10MB) on the fly - using "Quickly upload here". The file can be saved for future use as a segment or only used for the current flow.

    b. Dragging and dropping, one by one, segments that appear on the list at the left side of the screen.

    c. Note, all 4 segments types (ingested, discovery, enriched, unified) should be available for unification.

3. To suppress a segment, just add it to the canvas and mark it as "excluded". (See screenshot below.)
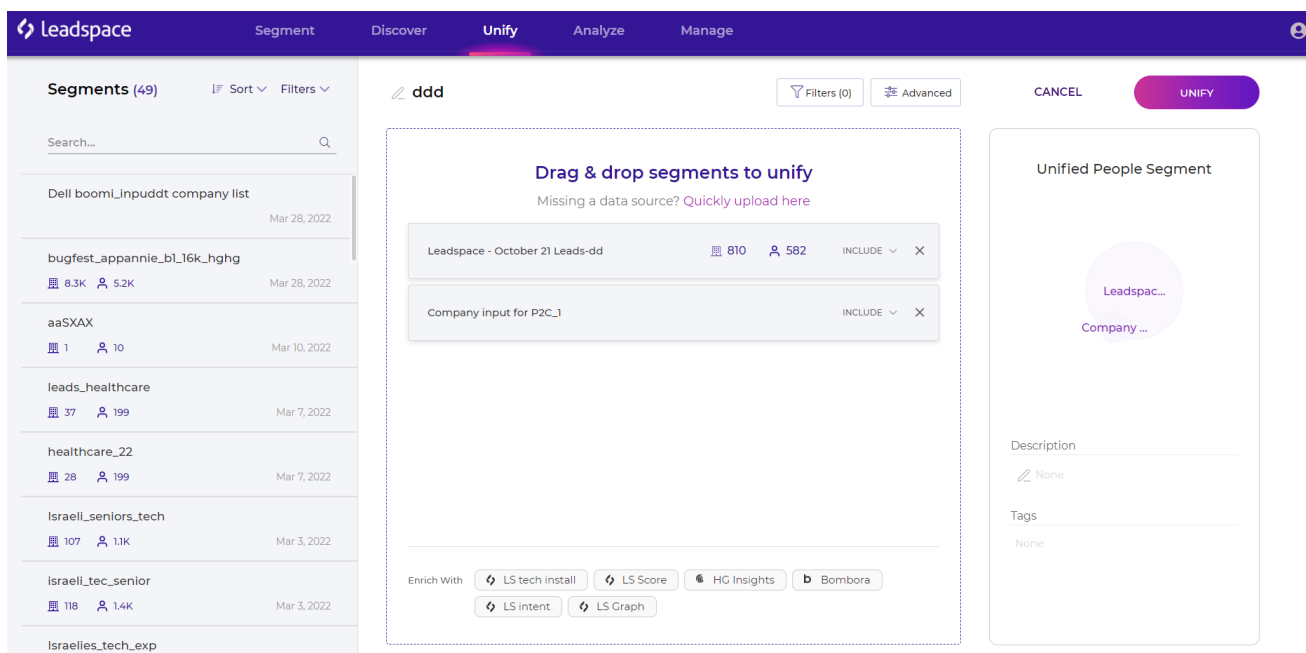
4. The segment name, tags and description can be edited at this stage on the right side.

5. Illustration (on the right side) is aimed for differentiating between inclusion and exclusion sources + relative files sizes, and doesn't represent the actual overlap in numbers of records.

6. Enrich With - all sources that the customer's data is enriched with by default - according to configuration in the Admin UI (not clickable, not removable).

On the top of the page there are two settings components for "Advanced" and "Filters":

Filters

1. By clicking on "Filters" - a new pop-up window will be opened and will allow the

user to configure the required filters.
2. There are no limitations on # of filters users can add.
3. Supported operators:
    a. "Contains"/ "not contains" (allowing multiple values)
4. Supported values - Text only (currently numbers will be read as text as well)

5. Supported fields for filtering:
    a. Template fields (including BYOL sources etc..)
    b. Custom fields
6. Dynamic fields are not supported. (The only exception is if the input sources are unified segments themselves.)

7. Fields are categorized into buckets:
    a. Demographics
    b. Firmographics
    c. System Fields
    d. Identifiers
    e. Custom Fields
    f. Additional LS Fields
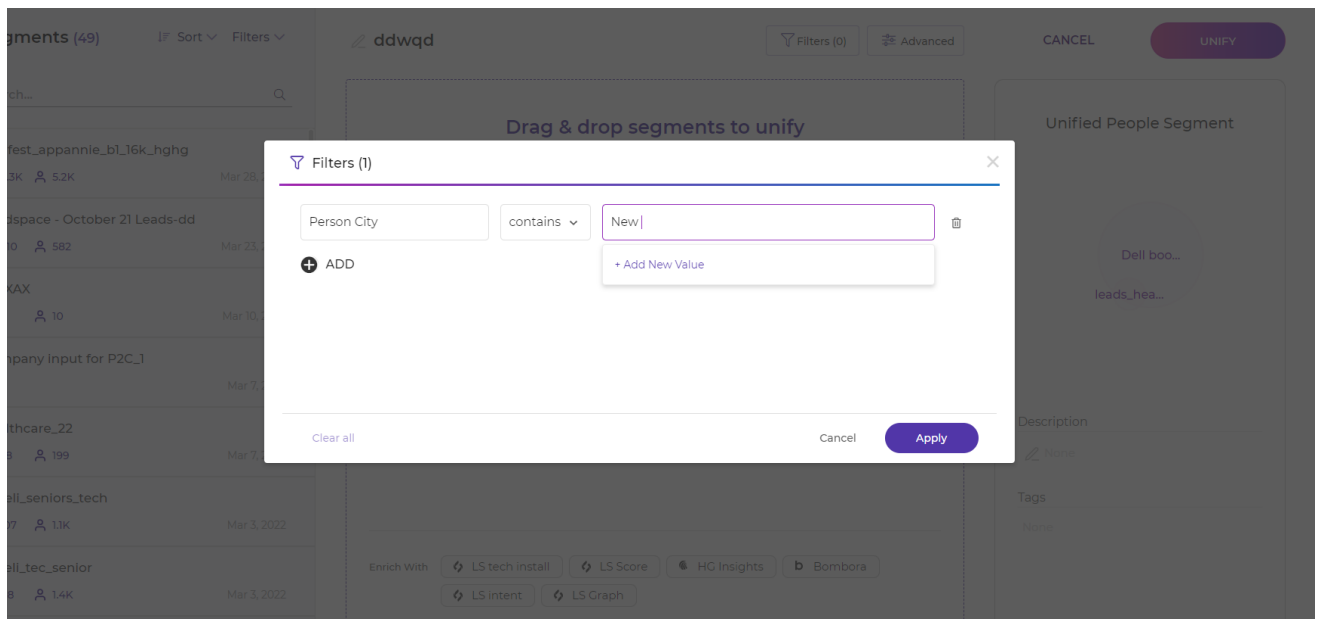
"Advanced"
    1. The "Advanced" option currently contains only Blending.

    2. The feature allows the user to determine the order of sources that will populate the output fields of the unified segment.

3. The blending occurs by the source level and not field specific.

4. All Input sources appear according to the following order:
   a. LS Graph
   b. Unified segments
   c. Discovery Segment
   d. Ingested segments

5. The option to Add new source will be available only if the user chooses to remove one of the sources from the blending order.
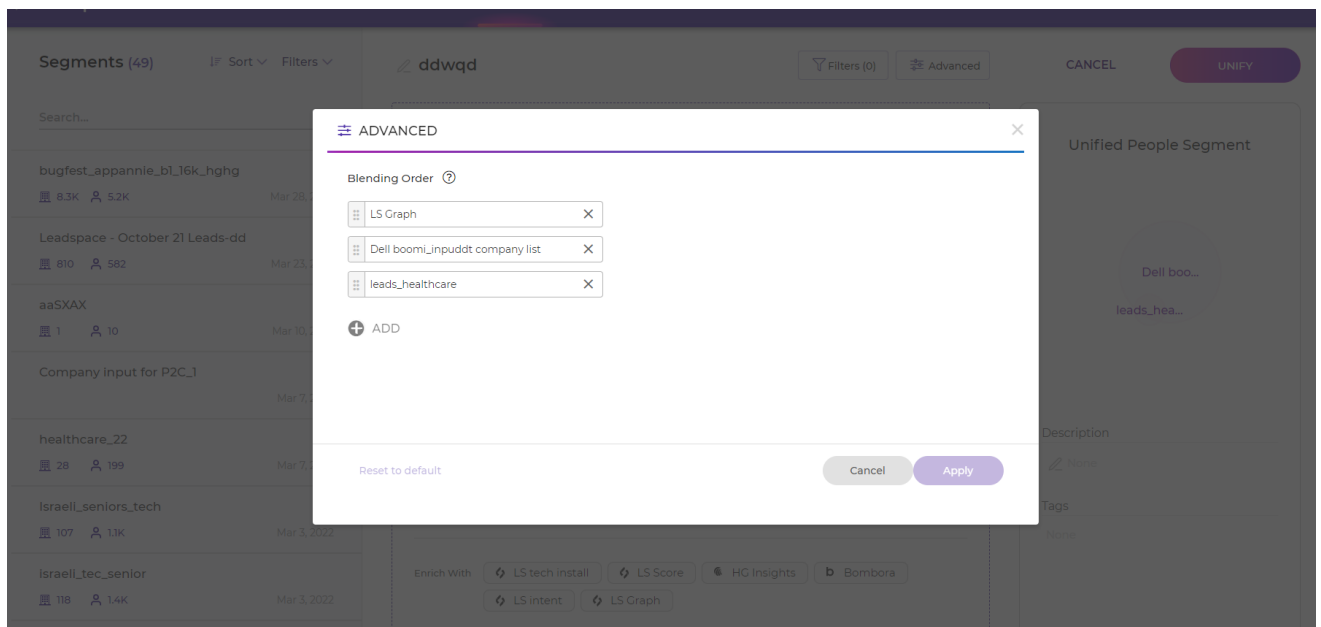
After finishing configuration, the user should click on the "Unify" button to send the request. Then the user will immediately be directed to the segment tab and will be able to see an indication that the segment is being created.

TAM Segment - COMING SOON!

The Total Addressable Market (TAM) segment is created automatically by Leadspace and contains all of the LS Graph data. All Companies are presented according to the following breakdown:

- Company Size

- Revenue
- Location
- Industry
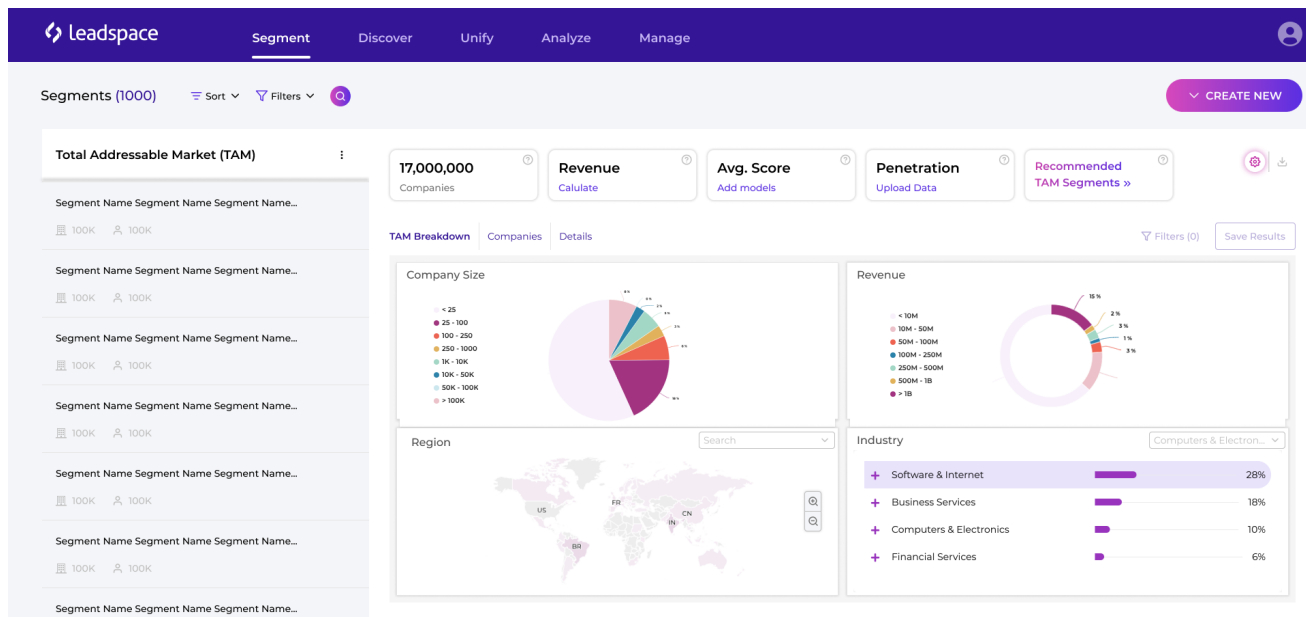
Four metrics will be calculated according to the user's definition of the TAM:

- **All companies** - number of companies that match the criteria
- **Revenue** - the expected revenue the company will have if all customers in TAM close a deal. This metric requires users' avg. deal size input in order to calculate.
- **Avg LS Score** - the avg fit score for all companies in TAM. Users must have a fit model defined in Leadspace in order to get this metric.
- **Penetration** - *coming soon* - % of customers from all companies in TAM. It requires users' input of existing customers.

Administrator users are able to define their own TAM by clicking on the "Settings" icon and opening the configuration screen.
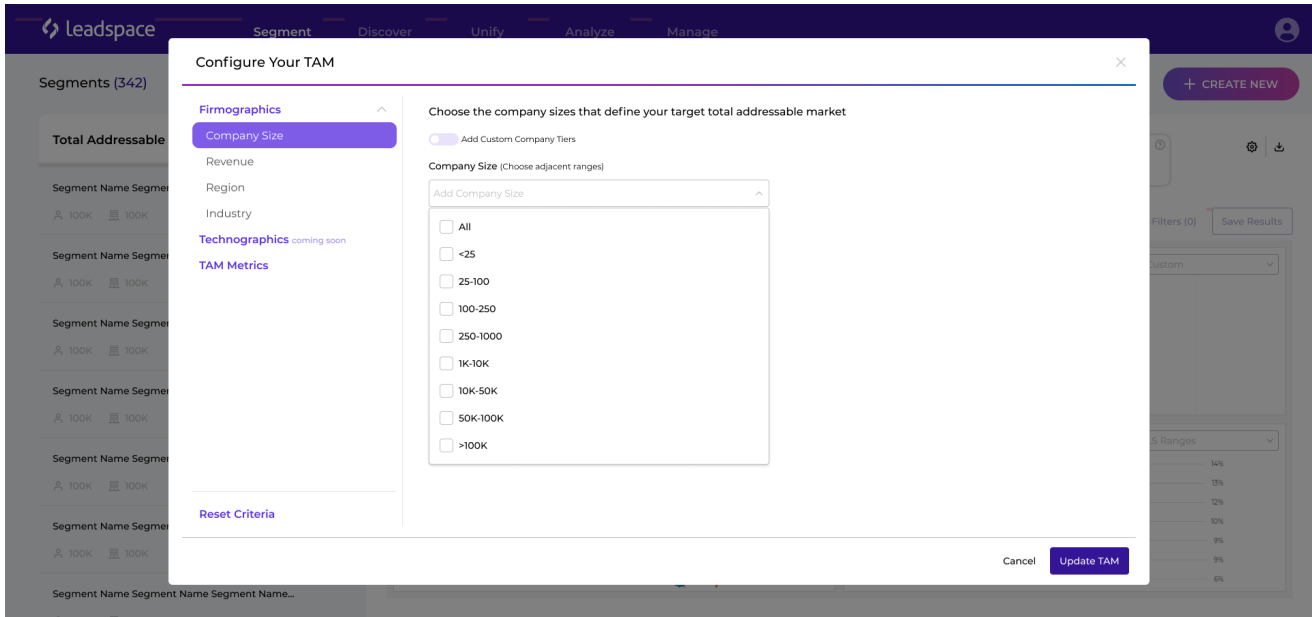
Here, users can define their criteria that filters the TAM, by 4 dimensions (company size, revenue, region, industry).

Users can choose from the ranges offered or customize their own ranges and name them.
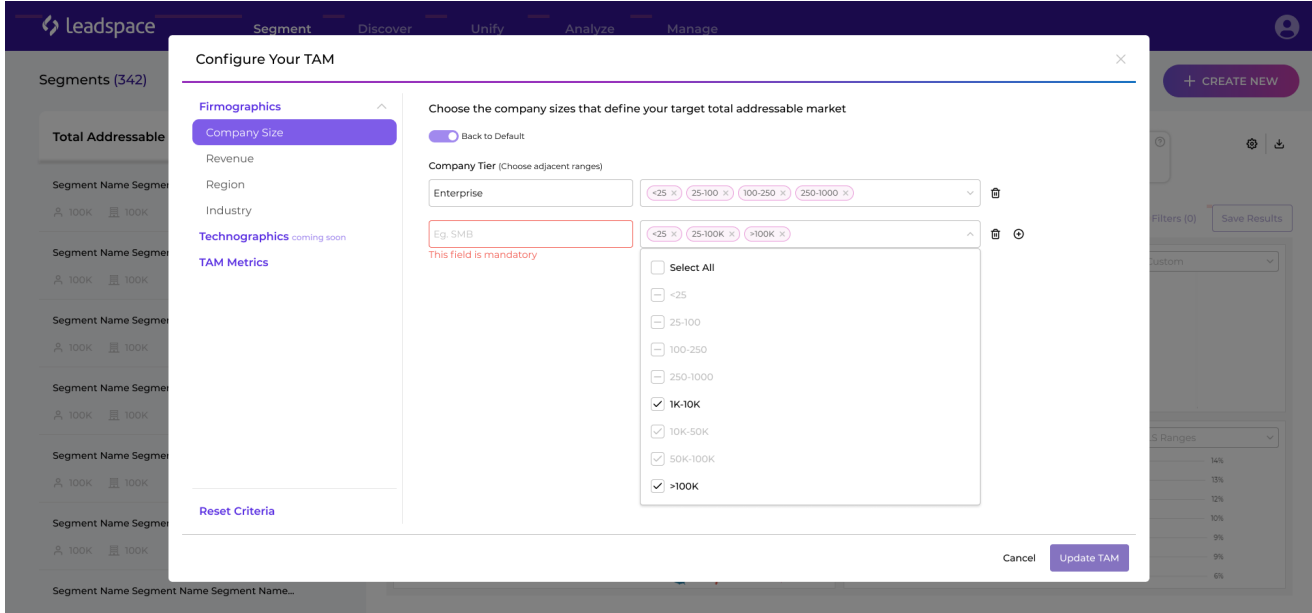
Note: when choosing to customize ranges, labeling them is mandatory.

TAM metrics - in this screen the user can define the input needed in order to calculate the following metrics:

- Revenue
- Avg. LS Score.

Revenue

In order to calculate the expected revenue, the user should input the avg. deal size they're tracking.

The user can insert one avg deal size value that represents the total avg. of all deals.

If applicable, the user can also insert the avg. deal size according to company size/ revenue ranges to get more precise revenue metric results.

Note: If the user defined custom ranges of company size OR revenue, the avg deal size input breakdown is according to this definition.

If the user didn't define custom ranges (not on company size and not on revenue) the user should choose if he would like to insert the avg. deal size input according to size/revenue.

Average LS Score

If the user has a fit model defined in their account, the avg score of all the companies in TAM will be calculated according to this model.

If there is more than one model, the user should choose the desired model to use for the calculation.

Saving TAM Segment

Only Admin users will be able to set the TAM configuration, edit the TAM, and save the definitions.

Saving and updating the TAM is done by clicking on the "Update TAM" button on the configuration pop-up.
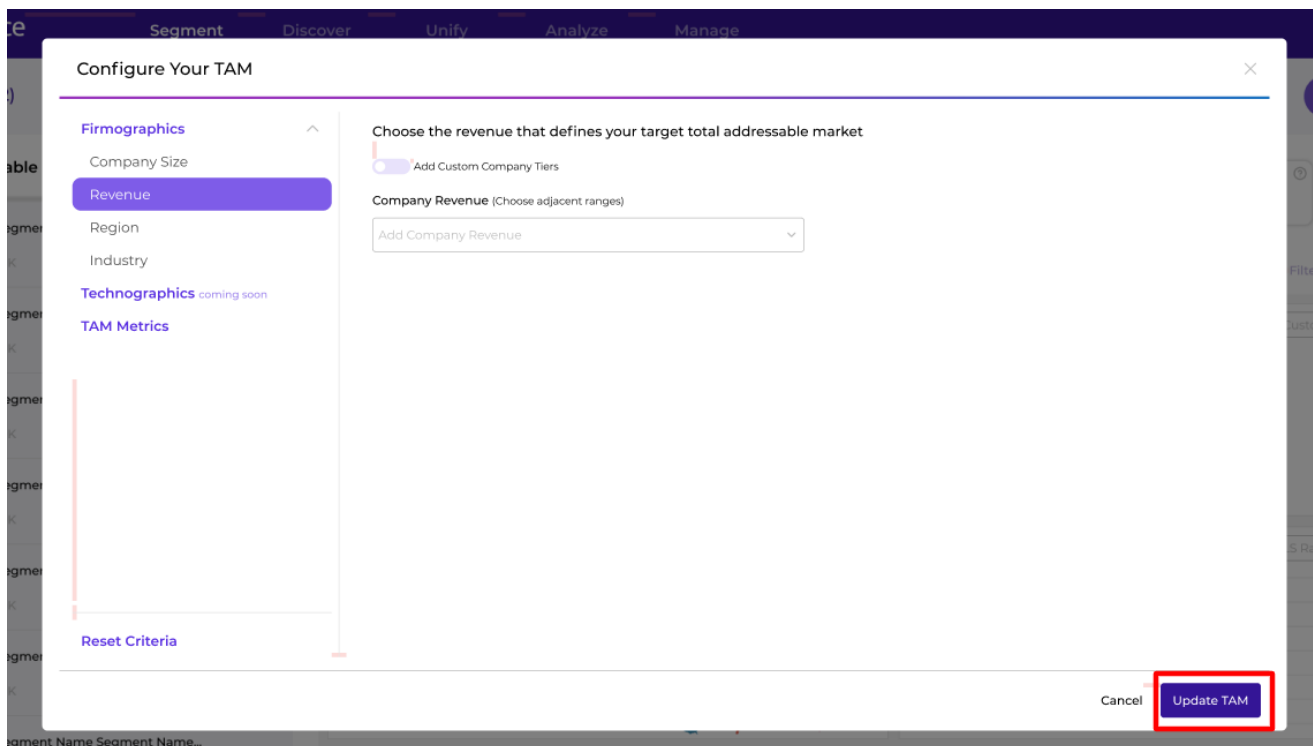
Clicking on "Reset Criteria" will reset all definitions to the default TAM, meaning all companies in LS Graph will be presented again.

Recommended Segments

Auto-generated segments will be created according to the user's customized ranges definition - meaning that the trigger for creating these segments is the definition of custom ranges.

Once the user finishes configuring the TAM and clicks "Update TAM", the list of the suggested segments is presented to the user, and segments that will finally be created are substituted to the user's choice.
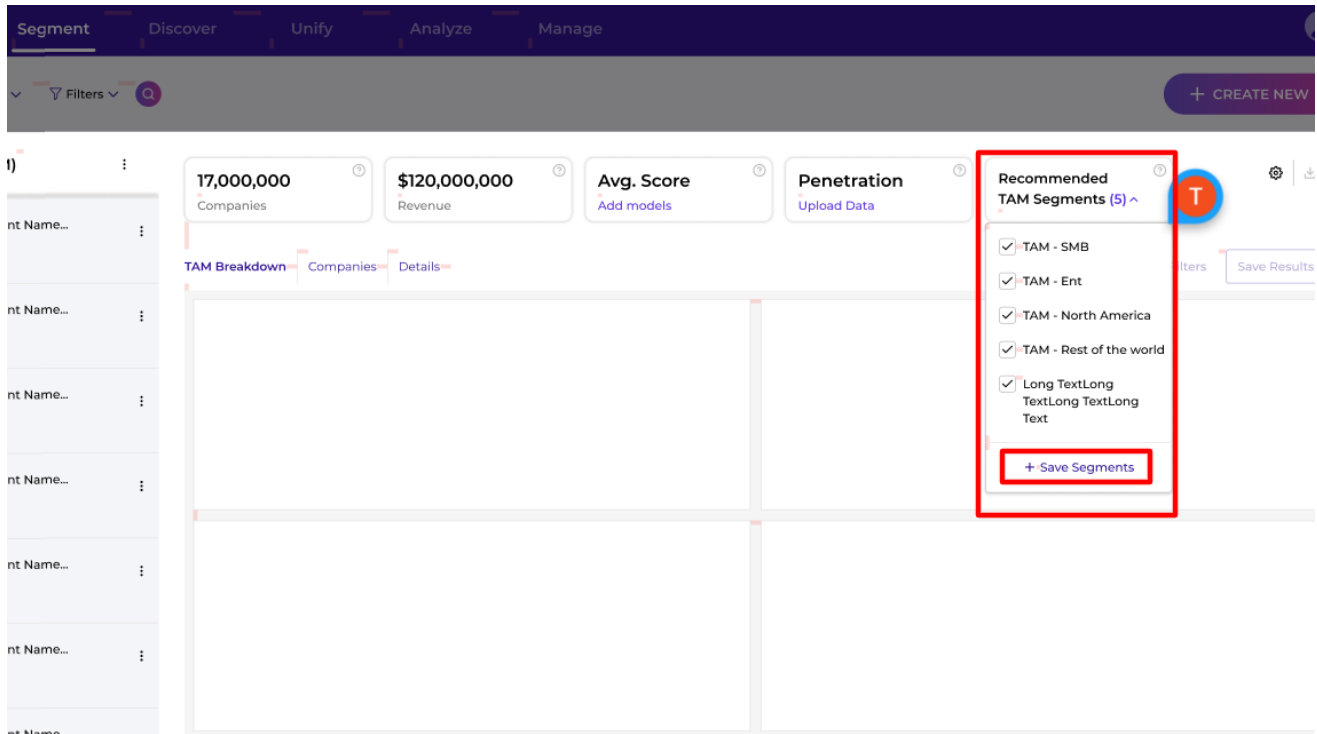
Each segment reflects the distribution of a custom range. For example, a user defined the following custom ranges for size:

Label	Ranges
SMB	<25, 25-100
Enterprise	250-1000, 1k-10k

Two recommended segments will be suggested to the user:
- TAM - SMB - will include all companies with the size of <25, 25-100
- TAM - Enterprise - will include all companies with the size of 250-1000, 1k-10k.

When new custom ranges are defined or the existing custom ranges are edited, new recommended segments that reflect the changes will be suggested to the user.

Analyze

In this tab, you will be able to see all the reports created for you. You will get a drop-down which contains all the available reports, and when choosing a specific report, the report will be shown in this page.

One of the reports you will see there is the ICP:

ICP (Ideal Customer Profile)

The Ideal Customer Profile (ICP) report is designed to provide data-related insights on firmographic, demographic and behavioral attributes of Companies and People expected to become a company's most valuable customers.

Key components in the company report

- Audience Type filter - ability to examine ICP on the Company, Person and Intent level.

- Segment Filters - on the top right side, the hamburger icon opens a side bar that allows the user to show the analysis for a specific part of the segment, by choosing a field and specific value within to filter by.

- Companies - the number of companies shown in the current view (post-filters) based on the conversion goal defined.

- Converted - the number of converted Companies or Ppeople shown in the current view (post-filters) based on the conversion goal defined.

- Lift - defines the conversion x times over the average conversion in segment (pre-filters).

- Company Industries/Sub-Industries

- Company Size/Revenue

- Company Country

- Company Specialties - Beyond Industry Company Specialization

- Company Expertise - Aggregated people up expertise on the company level

- Company Technologies - Tech Install and Website Technologies (including customer taxonomy on predefined technology clusters).
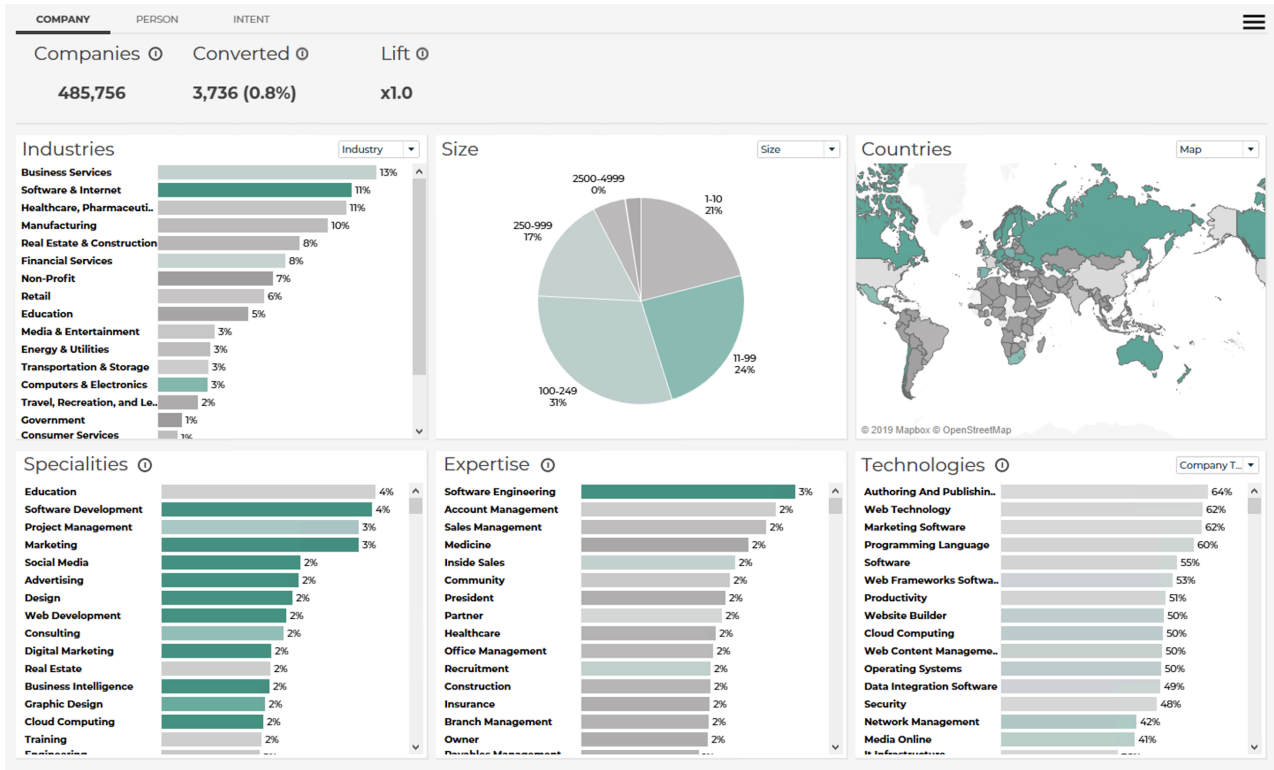
Key components in the person report

- Audience Type filter - ability to examine ICP on the Company, Person and Intent level.

- Segment Filters - on the top right side, the hamburger icon opens a side bar that allows the user to show the analysis for a specific part of the segment, by choosing a field and specific value within to filter by.

- People - the number of Companies or People shown in the current view (post-filters) based on the conversion goal defined.

- Converted - the number of converted people shown in the current view (post-filters) based on the conversion goal defined.

- Lift - defines the conversion x times over the average conversion in segment (pre-filters).

- Person Level

- Person Department

- Person Country

- Person Personas

- Person Job Functions

- Person Expertise
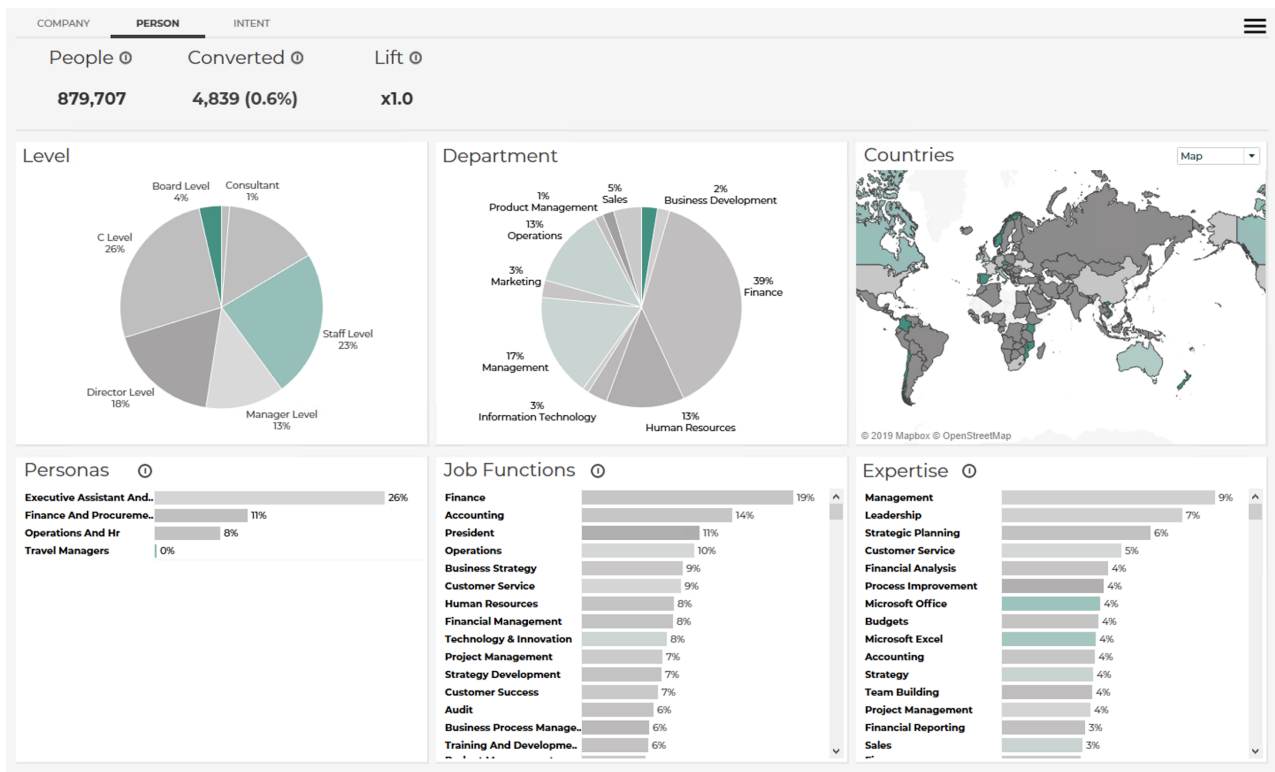
How to create a report

Currently, these reports can only be produced offline by our data analyst team. Users can reach out to their CSM to request this, and upon creation it will show in their Leadspace Studio account.

Manage

Data Health Report

The Manage tab contains only the Data Health Report (DHR). The DHR is designed to provide data-related insights - the state (quality and population rate) of the data before Leadspace, and after.
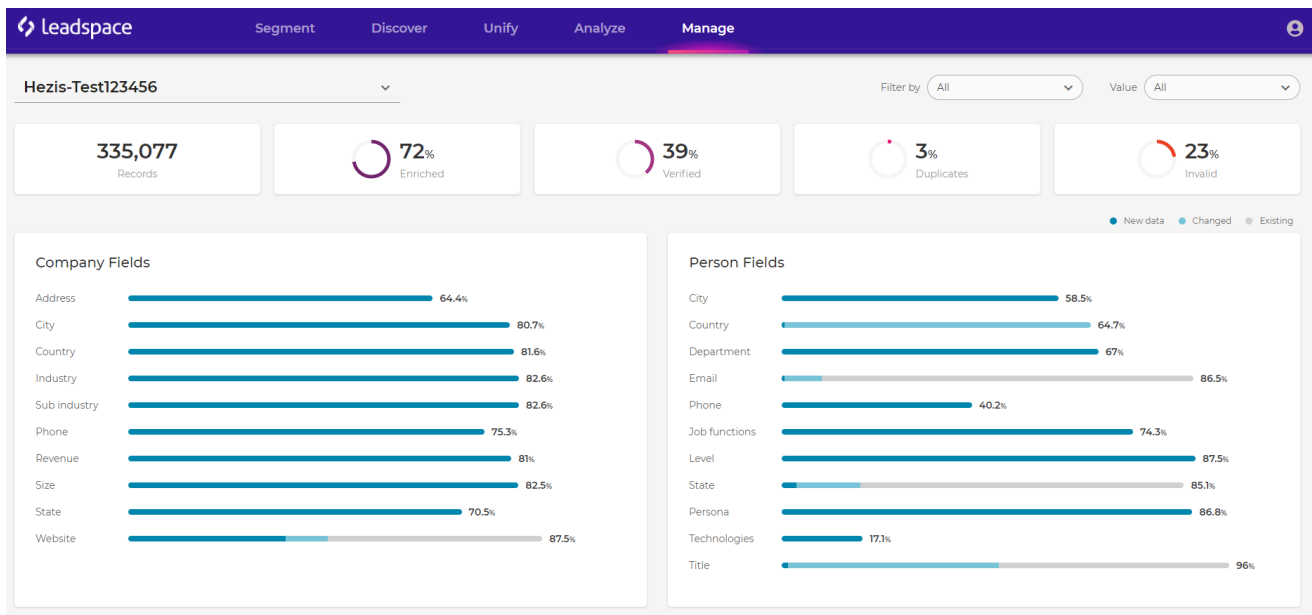
Key components in the report

- Segment picker - in the top-left corner, users can choose which segment report to show.

- Filter by / value - these pickers allow the user to show the analysis for a specific part of the segment, by choosing a field and specific value within to filter by.

- Records - the number of records shown in the current view (post-filters).

- Enriched - the enrichment rate of the current view. Hovering over this metric shows more granular information (person/company enriched).

- Verified - for people enriched, how many of them were verified. Hovering over shows more granular information (social/email verification).

- Duplicates - records that were tagged as duplicates by Leadspace.

- Invalid - records that were tagged as invalid by Leadspace. Hovering over shows more granular information (invalid input, moved, etc.).

- Company and person fields - the heart of the screen, shows key signals broken out into 3 groups:

    - New data - where 1st party data was missing, and Leadspace populated with new data.

    - Changed - where 1st party data existed, but Leadspace found better, more accurate data to populate.

    - Existing - where 1st party data existed, and Leadspace had nothing to add or change.

How to create a report

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