Leadspace

Getting Started

Leadspace Studio

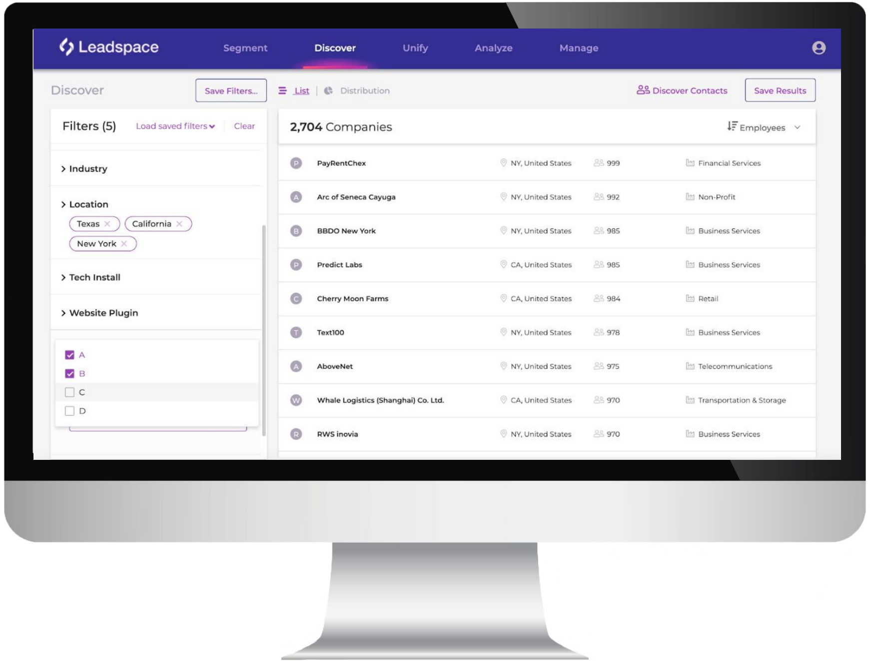
Quick Start Guide

Studio Overview

Leadspace Studio: An Overview

Studio is an all-in-one AI-driven solution for sales and marketing teams to find, create and accelerate pipelines with the highest probability of conversion.

Think of Studio as the complete control center for the Leadspace Customer Data Platform (CDP)—allowing you to get a clear view of your TAM, discovering segments and contacts for campaign audiences, explore your data health and more.



Key Benefits of Studio

Studio Highlights:

- Upload your own 1st party data files and use them as Segments to blend with other 1st or 3rd party data
- Get a Data Health Report on every enriched segment, including fill rates, duplicate rates, and verification of contacts and accounts across all your customer data sources
- Leverage Propensity, Persona, and Intent Model portfolio to continuously classify and score the B2B sales pipeline
- Build the best Profiles with improved buyer profiling and targeting by defining segments built from 30+ curated B2B third-party sources
- Activate Leadspace enriched, segmented, and scored customer data directly in systems of record (CRM/MAP) and systems of engagement

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Creating New Users in Studio

Creating new users in Studio

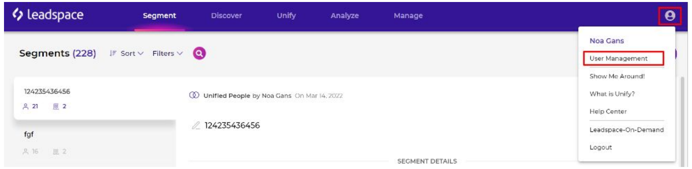
To log in to the Studio app, you must be created by the Leadspace admin.

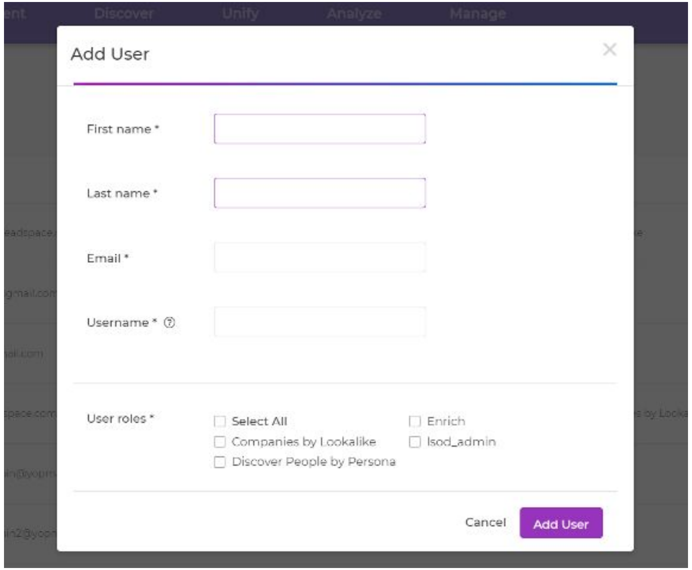
The Studio administrator can create new users by going to the ‘User Management' page. Click **Add User**

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 (generally structured as firstname.lastname)
- User role (to define which activities the user can perform)

Login using: https://studio.leadspace.com/





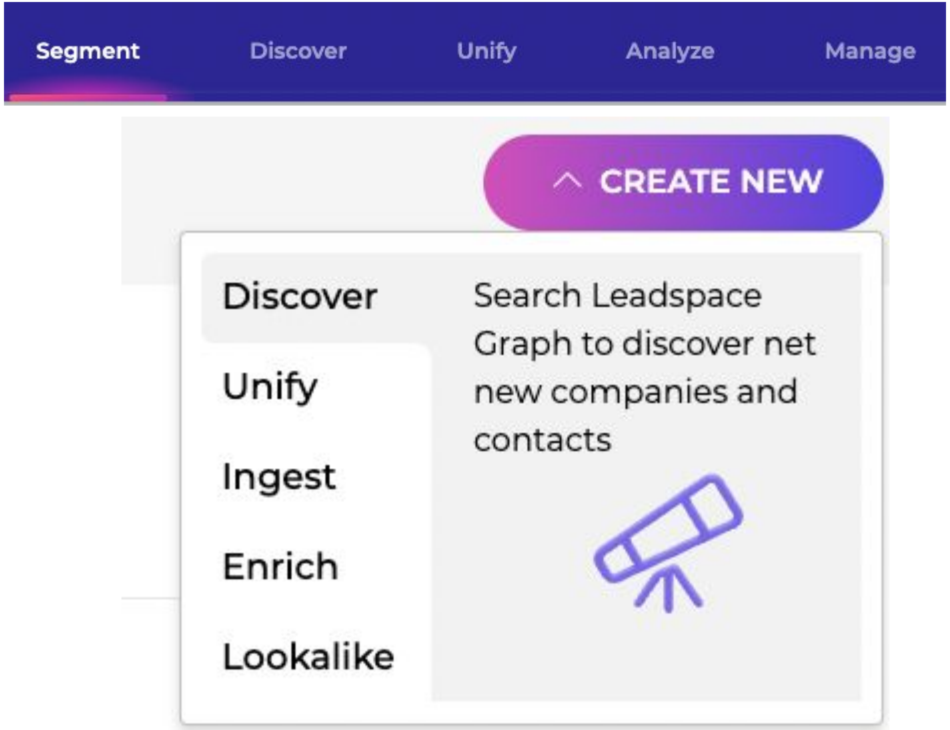
Navigation Overview

There are two primary ways to navigate through Studio to get to where you want to be.

Navigation Bar
This bar at the top quickly allows you to access the following sections:

- Segment
- Discover
- Unify
- Analyze
- Manage

Quick Access Menu: Quickly access primary actions from the **Segment Dashboard** > **Create New**



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Discovery & Segmentation

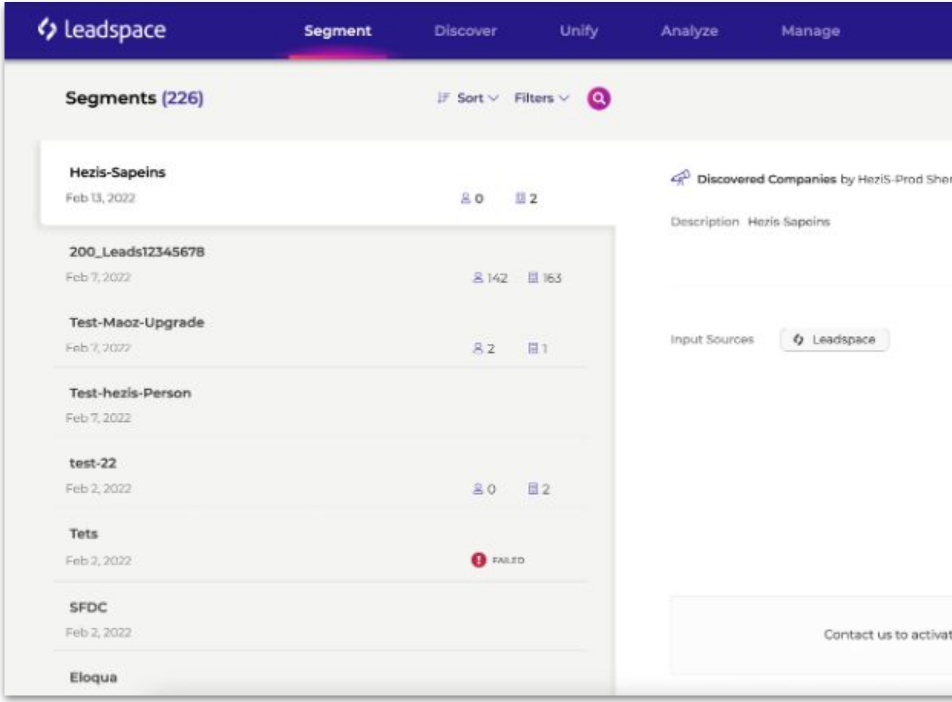
Segment Dashboard Overview

Key Components

The Segments list

These are the segments created by you 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.

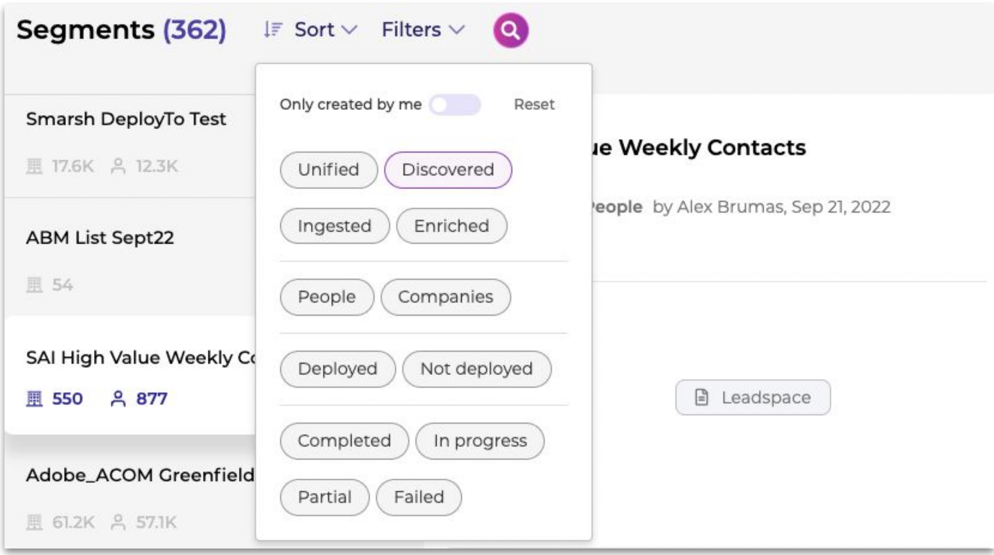
- The list of actions supported by each segment type varies.
- The list of possible actions can be accessed either via the 3 dots on the segment list or the icons + 3 dots on the details area.
- Download a CSV, Deploy to an external system, Discover people, Delete a segment, Unify & Segment, Filter Segment



Segment Dashboard Overview

Key Components Continued

- **Sort dropdown** - Choose the sorting to be used for showing the segments list.
- **Filters menu** - allows you to filter the dashboard by:
    - Unified /Discovered/ Ingested/ Enriched
    - People /Companies
    - Deployed/Not deployed
    - In progress/ Failed
- **Only created by me toggle** - allows you to show/hide Segments created by other team members.
- **Search bar** - allows you to quickly filter the dashboard by specific terms found in the Segment's details like segment name, tags, or description.



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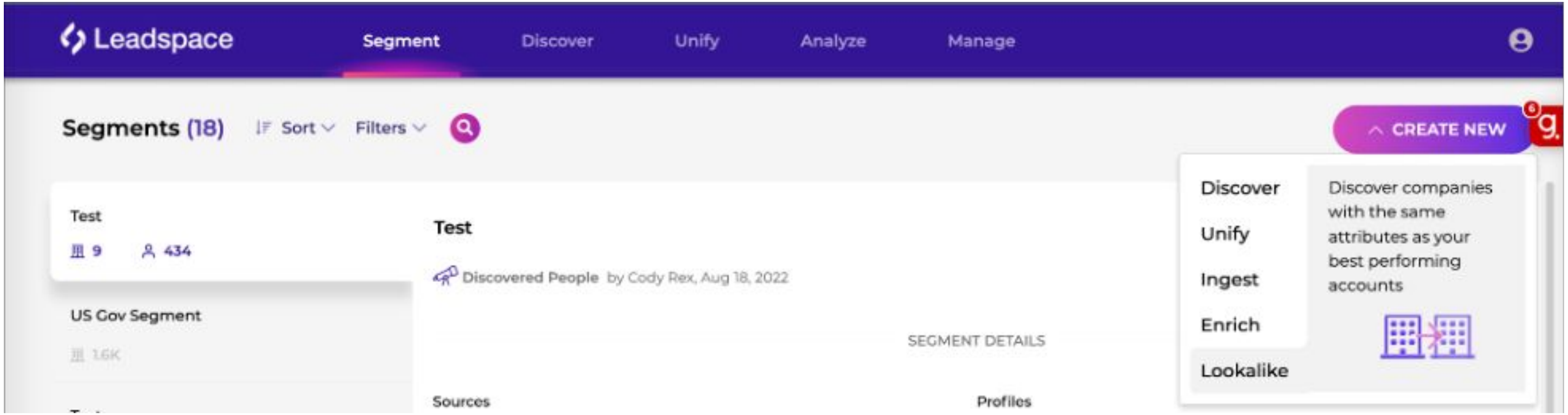
Discover: Companies by Lookalike

Discovering Companies by Lookalike

Take an existing list of companies or create an ad-hoc 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.



Discover: Companies by Lookalike

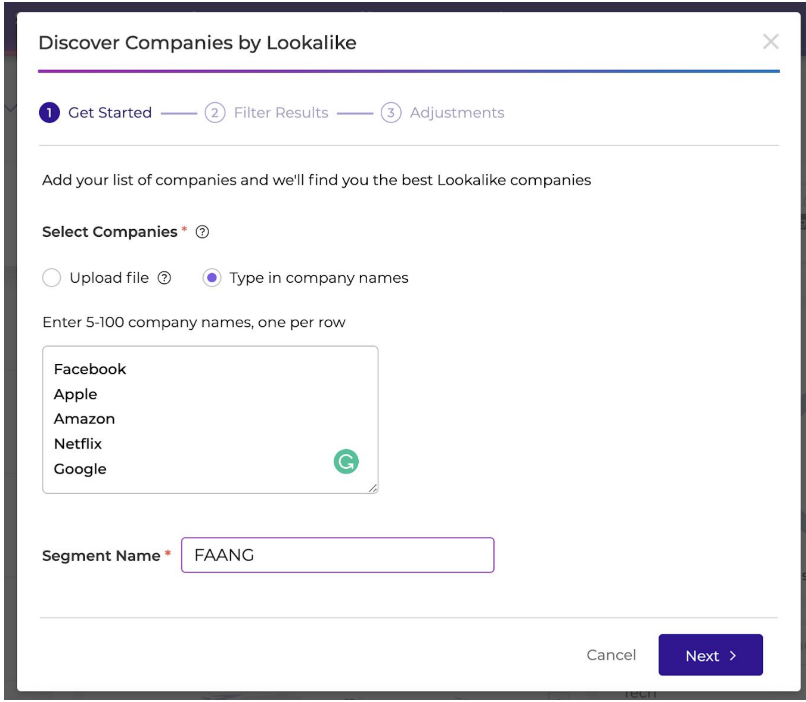
Getting Started

To start a Lookalike segment, go to **Create New** > **Lookalike**

Steps for using the Lookalike wizard:

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

- Select **Upload file**
    - if you are going to import your Company list
- **Type in Company names**
    - If you would like to input Company names in the multi-line text field manually.
- You will want to make sure to add a line break between each Company in your list, a minimum of 5 and a maximum of 10



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Discover: Companies by Lookalike

Name your segment

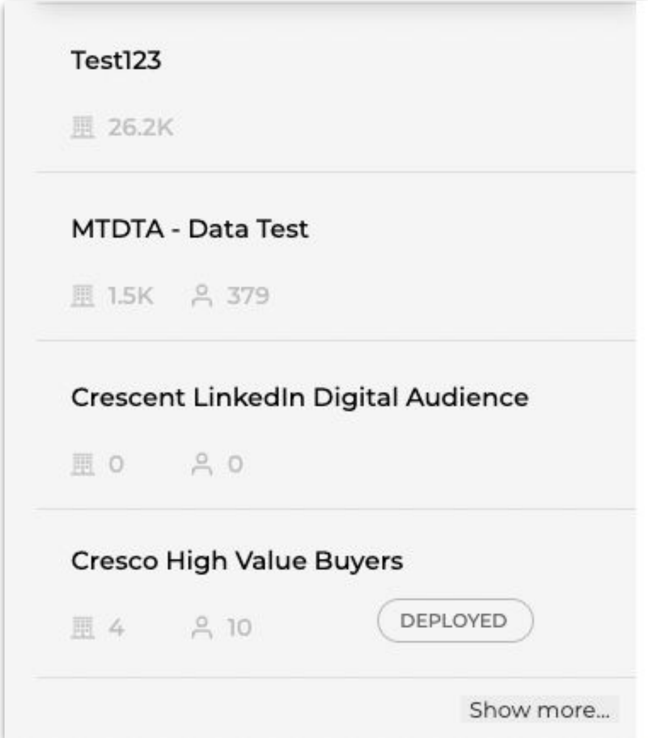
- This will be the title of the Segment card (which can be edited also post-creation of the Lookalike segment). Click **Next**.

Choose the criteria

- For your Lookalike segment. Include or exclude companies based on the following criteria:
    - Location
    - Industries
    - Revenue
    - Employee size

Adjustments

- Limit the number of records you return and upload a suppression file if there are certain companies you would like to exclude from the Lookalike results.
- Once you hit **Create**, you'll be taken to the segments tab, where a new Segment card will be created on the left side of the screen



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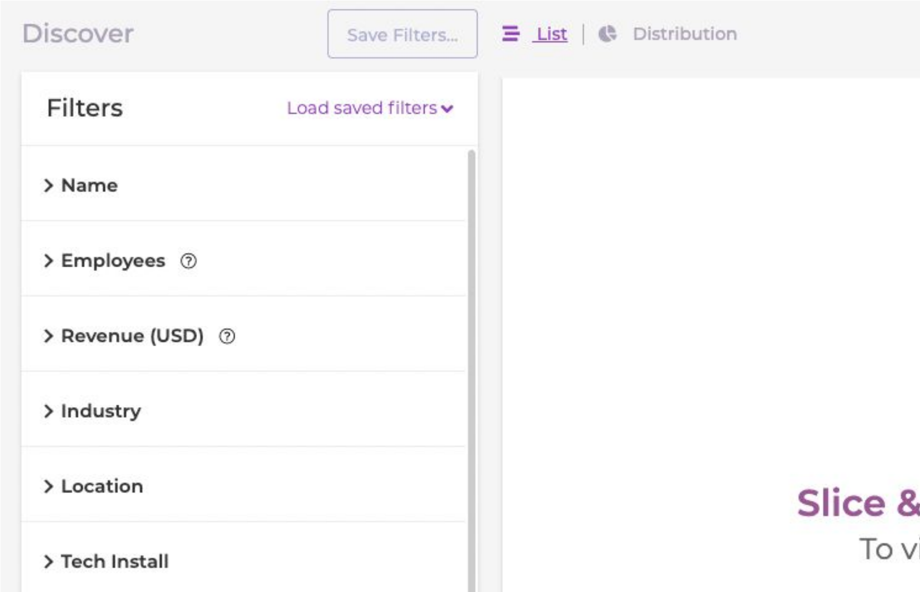
Discover: Companies by Criteria

Discovering Companies by Criteria

Discover Companies by Criteria (Sometimes referred to as Segment Builder) is a visual, intuitive UX to easily create segments from a superior multi-source B2B Graph, including 1st party data and scoring.

Here, you can do the following:

- 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.



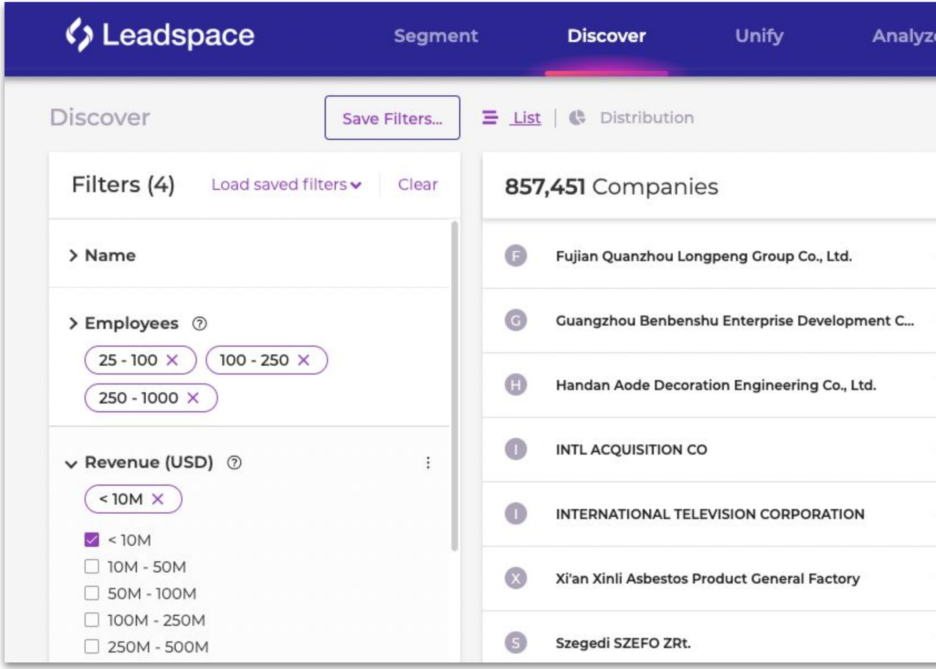
Discover: Companies by Criteria

How Discovery Works
Can be accessed in Studio in two ways:

- From **Segment tab** > **Create New** > **Discover**
- **Navigation** > **Discover** Tab

Choosing your Filters

- Select a **Filter** dropdown, then **Choose your Criteria.**
- You get the list of available filters on your left side:
- It contains a set of 1st and 3rd party firmographic filters
    - Includes: Employees, revenue, industry, and even tech install, 1st party scores, and intent are all options
    - By default, whenever you select filters, you will see the list of companies that results from the chosen filters.
- In the list view, see a preview of the 100 top companies



Discover: Companies by Criteria

Saving your Segment

Once you’re happy with your Segment results, save your segment.

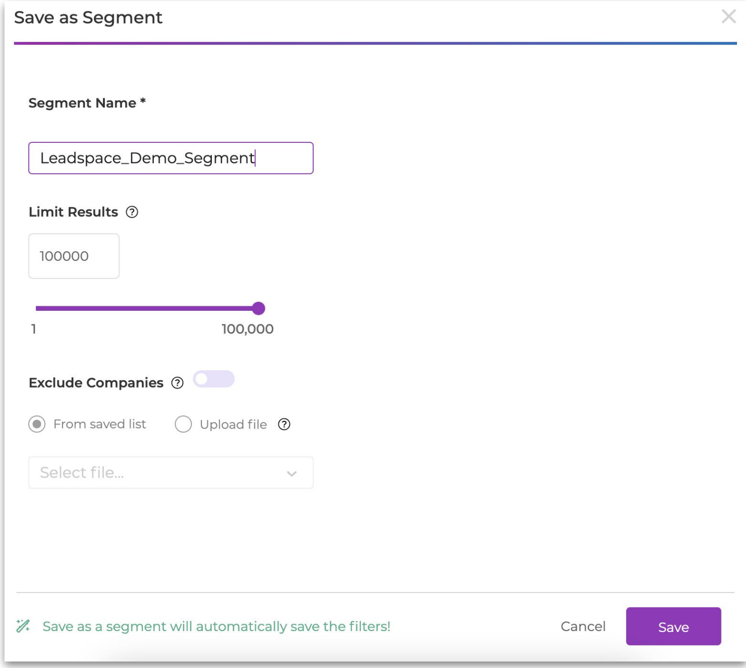
- On the upper right, hit **Save Results.** Here, you get to define the following:

Name your Segment

- Choose a name for your segment.

Limit Results

- Here you can limit the results returned for your segment. If you’d like to limit the results **Grab the Slider** > Slide to your desired Segment size.
    - Note: Leadspace ranks the results based on the Company's size and the segment can include up to 100K companies.



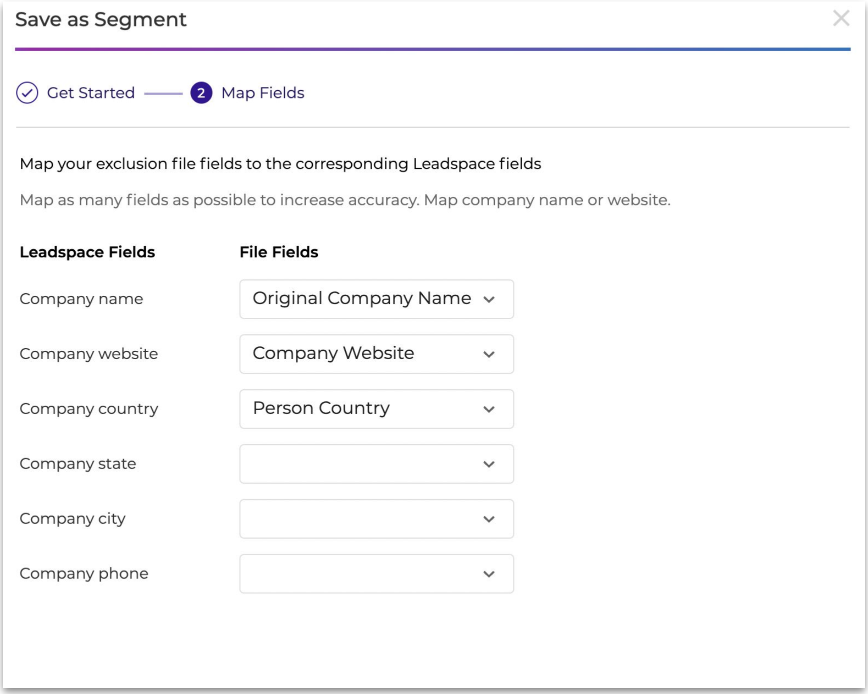
Discover: Companies by Criteria

Exclude companies

- This allows you to indicate known/existing companies, and thus exclude them from the results.
- To do so: Click **Upload** > **Find** your file a file. Only supports .csv files.
- Mapping the headers: To do so, find the **Leadspace Field** then **click the dropdown** > **Find** the corresponding field

Saving your Segment

- Once you've completed your field mapping, click **Save.**
- You'll be taken back to the Segment Dashboard and provided a **Status Bar** on Segment



Discover: People by Persona

Discover Contacts

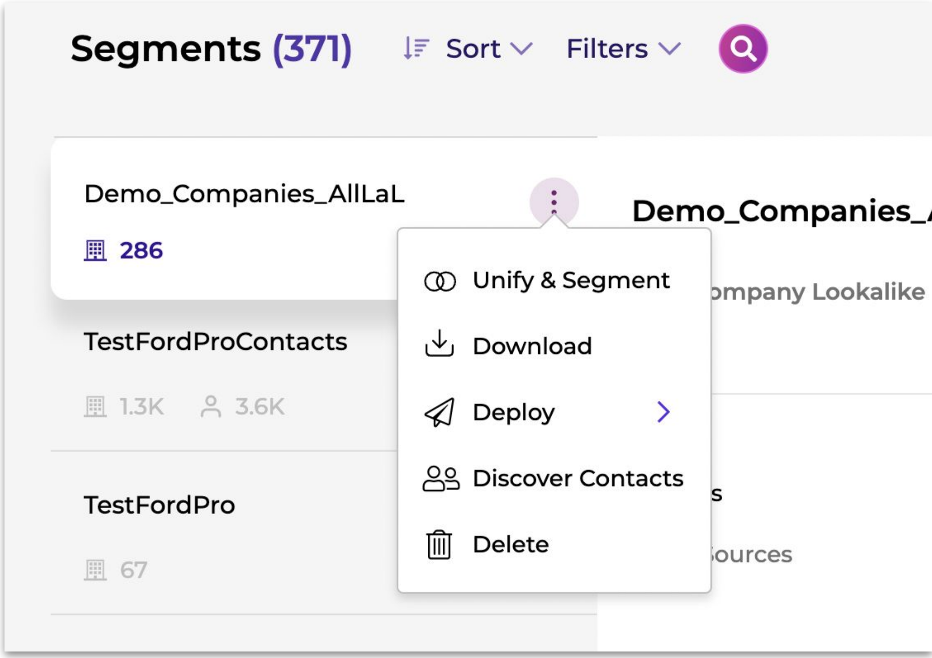
Find the Discover People by Persona configuration box through two different methods

From the Discover Screen

- From the **Discover** screen select **Discover Contacts**
- A dialog box will then appear which will allow you to enter the criteria

From the Segment Dashboard

- Find a **Company Segment** you'd like to Discover Contacts for
- From either the vertical dot menu on the segment card, click **Menu** > **Discover Contacts**
- Otherwise, from the menu on the Segment Details, click **Menu** > **Discover Contacts**



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Discover: People by Persona

Configuring your Persona Criteria

- Once you've opened the configuration tool, then **Name your Segment.** Click **Next**
- *You must make at least **one** criteria selection to Discover*

Select your Personas

- Select up to five (5) **Personas** for your segment. Select your minimum Persona Score (Min. 30)

Department

- Choose your **Department**(s) that you would like to discover

Levels

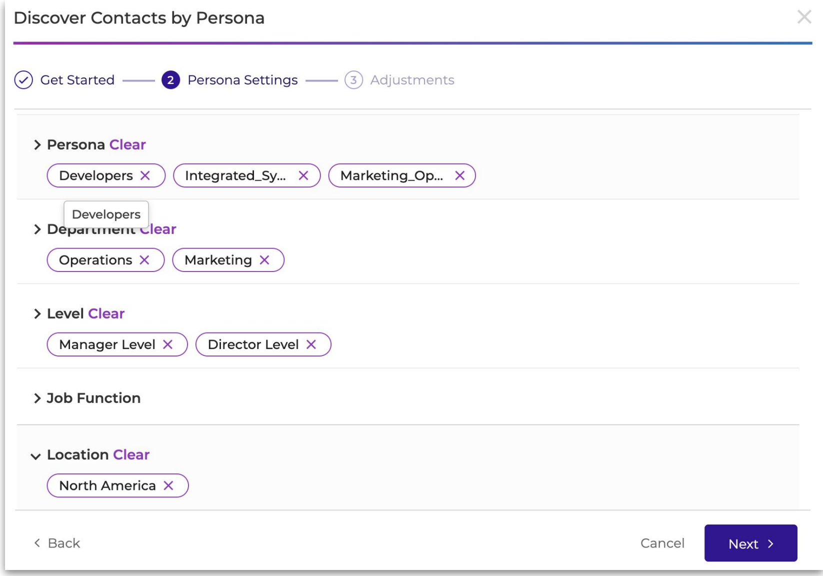
- Select the **Levels** of the Contacts you'd like to find to support your initiative

Job Function

- If there are Job Functions you're interested, make your selections here

Location

- Restrict your matches to **Locations** that match your needs



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Discover: People by Persona

Configuring your Persona Criteria: Adjustments

- The last step to Discovering Contacts by Persona are to **adjust your results** by key criteria

Required contact details

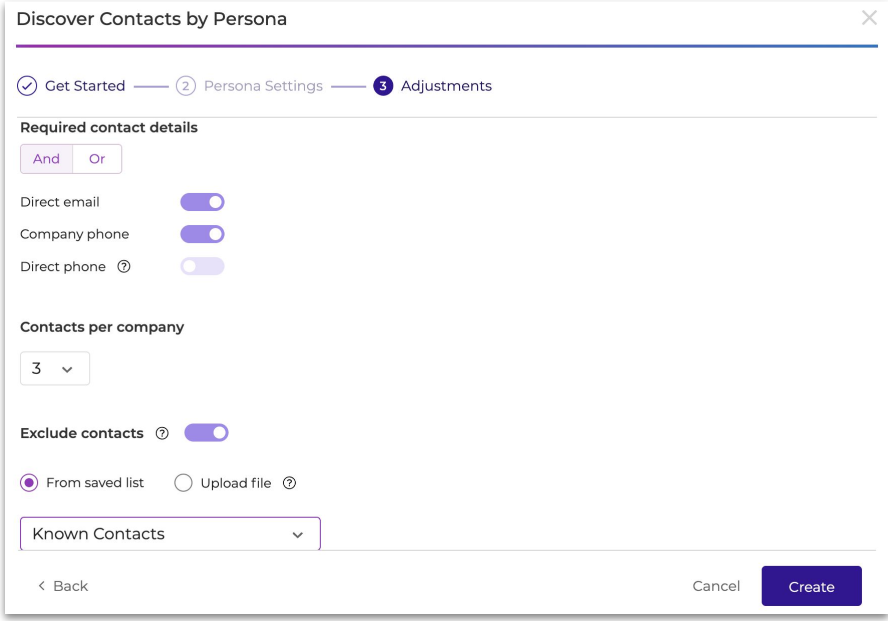
- If it's imperative you have one of the following, ensure you click the **toggle button** > **toggle on** so your results return the mandatory data
    - Direct Email, Company Phone, or Direct Phone
        - Direct Phone: Will decrease # of results

Contacts Per Company

- To limit the contacts per Company, select up to 100 per Company
    - Contacts are returned in order of Persona Score

Exclude Contacts

- To suppress contacts, either **Upload File** of contacts, or select **From Saved List**



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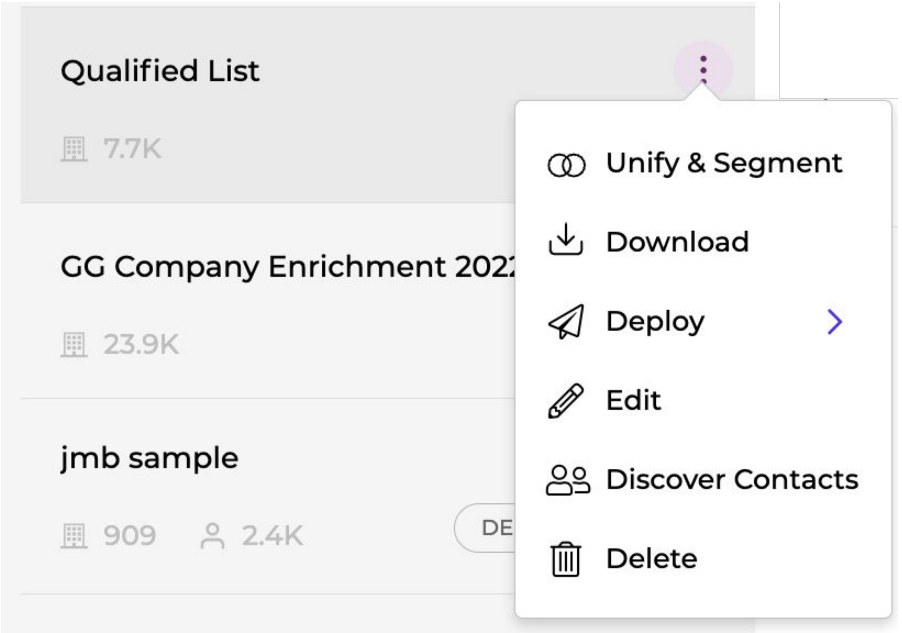
Deploying Segments

Deploying Segments

Leadspace Studio allows you to deploy your enriched data directly to LinkedIn. We will review how to utilize the Deploy-to LinkedIn feature

Getting Started:
Once the integration has been enabled, a new 'Deploy' option will be available in the 3 vertical dots

All available deploy to integrations we have set up will be highlighted under the 'Deploy' box. Click **more** to see additionally available integrations.



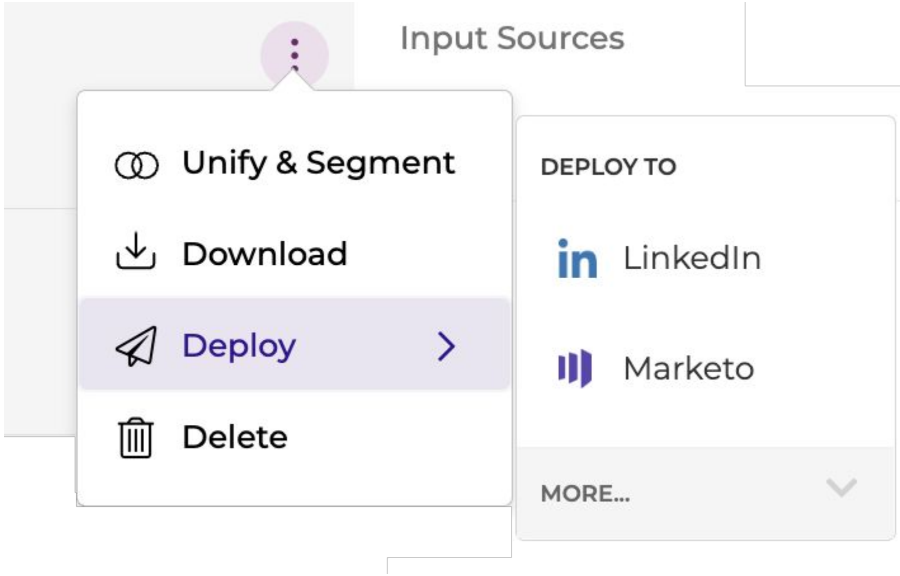
Deploying Segments

Selecting your Segment
Find a Segment you've created historically, or Select the Person or Company Segment you just created

- Click the **vertical dot** menu on the segment card and you'll receive a dropdown with **Segment Options**
- From here, if you're ready to deploy this segment**, hover** > **Deploy**
- Upon hovering over, you'll receive a submenu with your available **destinations**

Deployment Best Practices

- Segments should be at max~100k records or else we risk failure for segment build on LI side.



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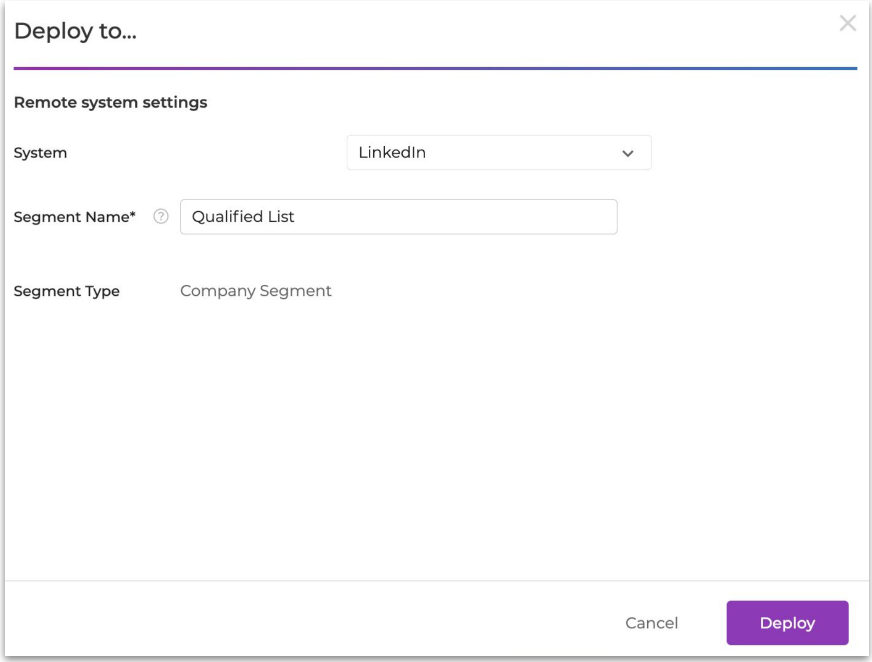
Deploying Segments

Choose your Destination
Once you've found your available destinations, you'll want to choose **LinkedIn**

- Shift your hover from **Deploy > LinkedIn**
- Select **LinkedIn**
- From here, a dialogue box will appear allowing you to configure your deployment

Define your Remote System Settings
Here you'll finalize your deployment criteria

- Ensure System = **LinkedIn**
- Name your **segment** with a recognizable name you can find later
- **Segment type** reflects the type of segment built. Options are Company or Person



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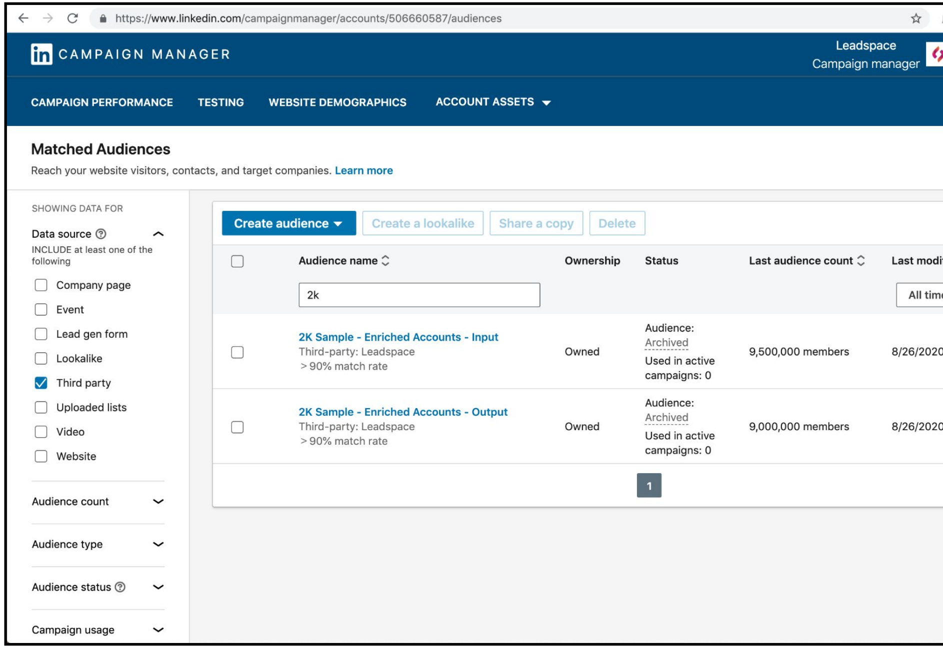
Deploying Segments

Deploy your Segment
Once you’re happy with your **Settings**, it's time to deploy

- Once ready select **Deploy**

Deployment Timing

- Upon deployment, your **Segment** will fall into the LS Queue
- Once completed, you’ll see a confirmation in the form of a **LinkedIn icon** in Studio
    - Note that it will take 24 - 48 hours for the segment to be available for use within LinkedIn
- Once LinkedIn has processed your segment, it will be available as **Third-party** data source for use



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Enrich People & Companies

Getting Started with Enrichment

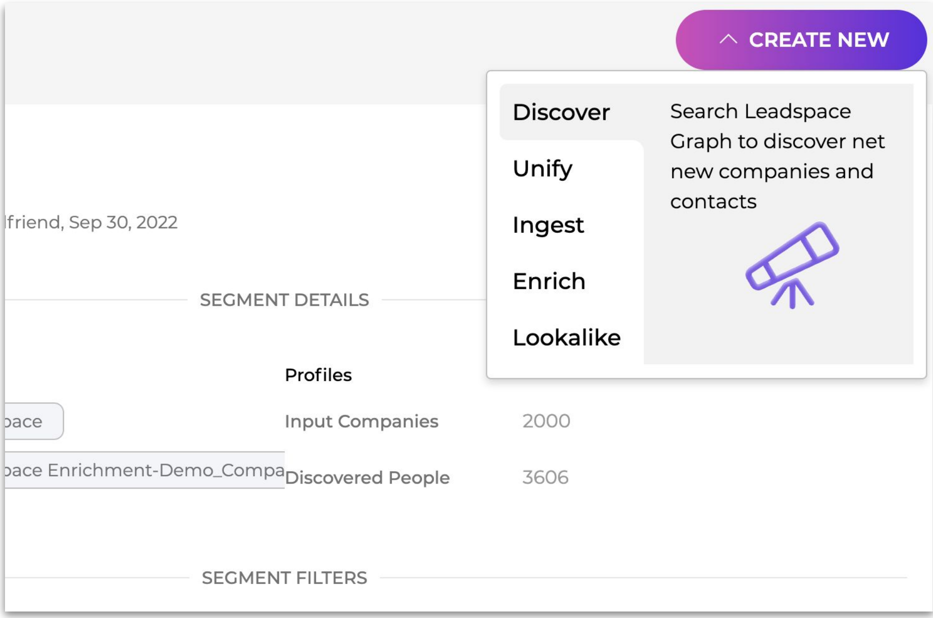
Leadspace Studio offers the opportunity to enrich people and companies.

General Comments about enrichment in Studio:

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

Getting Started with Enrichment

- You can Enrich an uploaded list of people or companies from the segment tab by clicking on the **Create New** button
- From there, select **Enrich**



Enriching People

Enriching Contacts

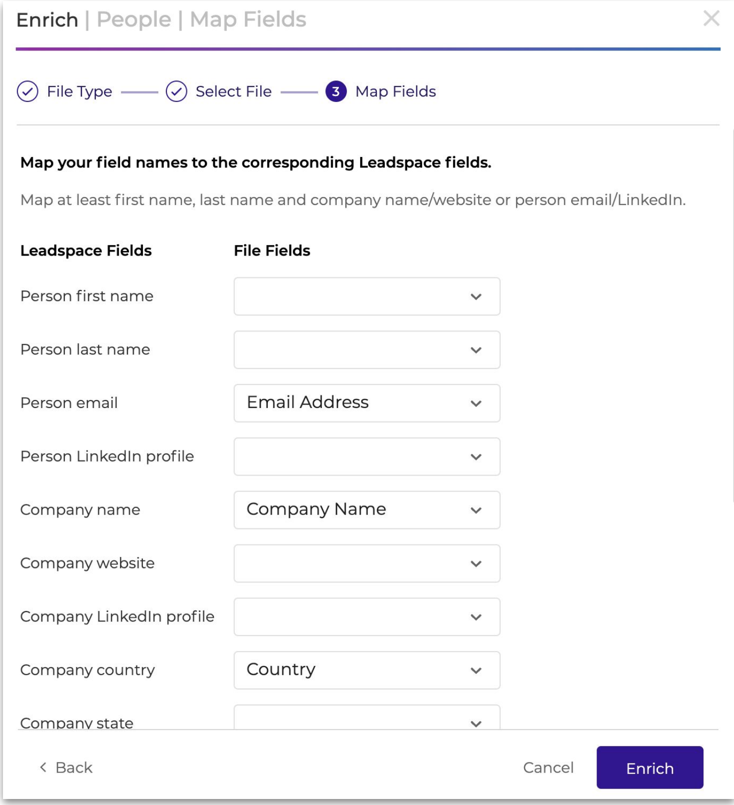
- After clicking **Enrich,** select **People** to enrich a list of people to add Leadspace Insights. A people file usually includes demographic and firmographic data.

Select your File & Name your Segment

- Upload file by dragging a CSV or clicking **browse files** > upload
    - **Note:** only supports .csv files, up to 1M records
- Once your upload is complete, enter your **Segment Name**

Map your Headers

- Find the **Leadspace Field** to map then **click the dropdown** > **Find** the corresponding file field and indicate which column has the associated field.
    - **Note:** The more fields you maps, the better the results will be.
- Map at least first name, last name and Company name/website or person email/LinkedIn.



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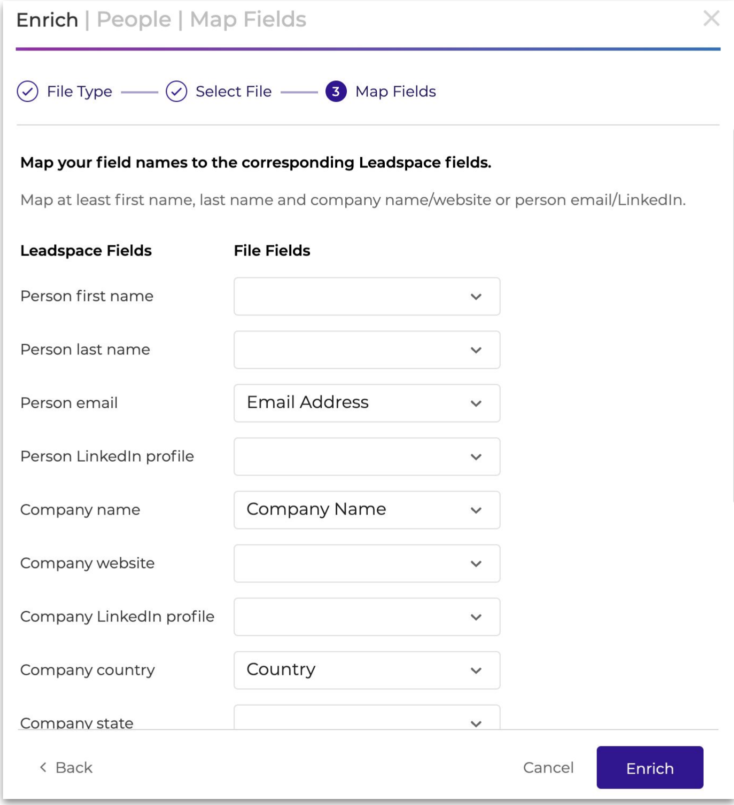
Enriching People

A Note about Custom Fields

- You have the option to map a **Custom Field.** The primary use case is to inform us to take it into account in the predictive models.
- Thus, if you have a predictive model and it uses custom fields, you should name that field/s precisely with the names defined in the predictive model.

Enrich your People file

- Once you've completed your criteria and field mapping, click **Enrich** to start the enrichment process.
- Upon selecting **Enrich** you'll be taken back to the **Segment Dashboard**
- A new Segment card will be created on the left side of the screen, and the segment details will be presented on the right side.



Enriching Companies

Enriching Companies

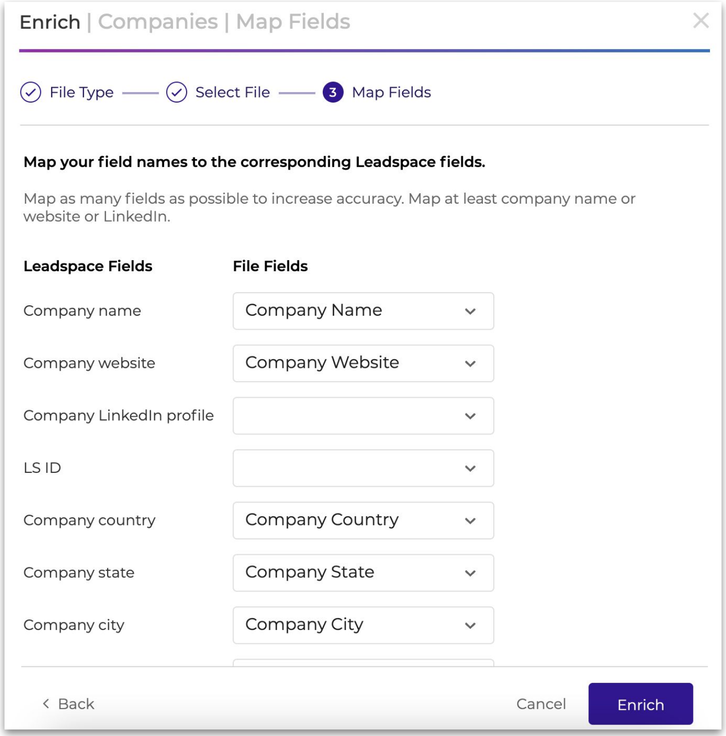
- After clicking **Enrich,** select **Companies** to enrich a list of people to add Leadspace Insights. A Company usually includes firmographic data.

Select your File & Name your Segment

- Upload file by dragging a CSV or clicking **browse files** > upload

Map your Headers

- Find the **Leadspace Field** to map then **click the dropdown** > **Find** the corresponding file field and indicate which column has the associated field.
    - **Note:** The more fields you maps, the better the results will be.
- Map as many fields as possible to increase accuracy. Map at least Company name or website or LinkedIn.



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Enriching Companies

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Enrich your Companies

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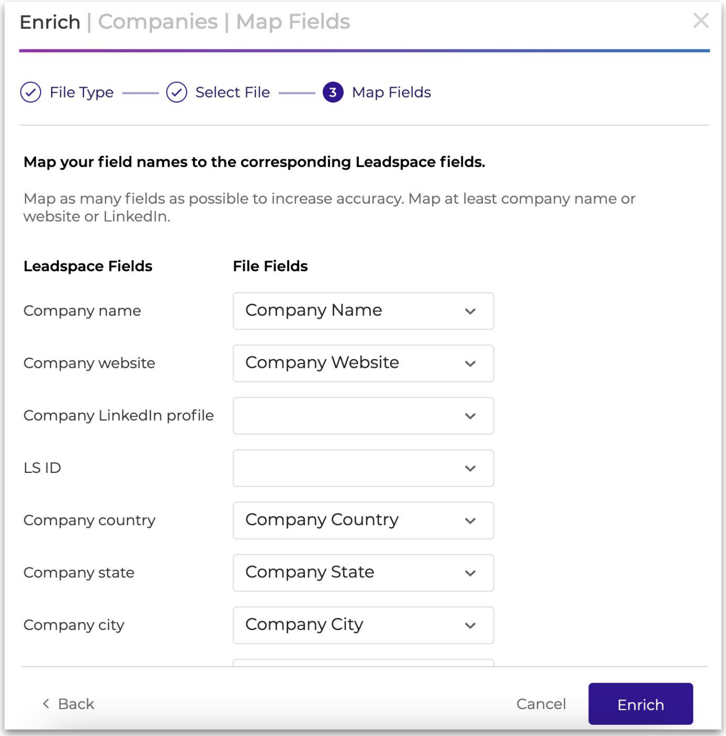

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Ingest Data

Getting Started with Ingestion

Leadspace Studio gives you the ability to upload a CSV file with your data to create a raw data segment. We call this **ingestion.**

Ingest Data Overview

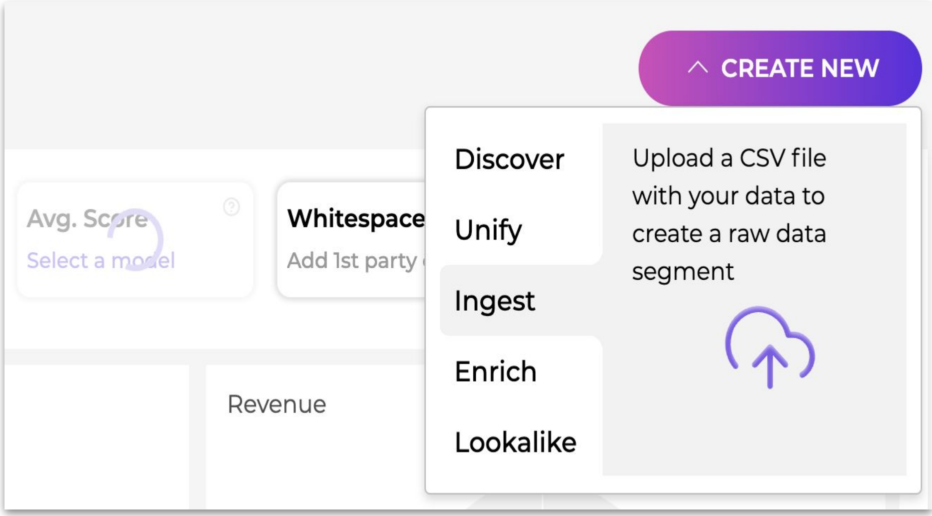
- You have the ability to ingest both people data and Company data
- When you ingest a segment, Ingest will create a segment containing the *raw data*
- The ingest feature does not enrich your raw segment

Requirements

- You can ingest only CSV files uploaded to the system in this process.

Getting Started with Ingestion

- You can ingest an uploaded list of people or companies from the segment tab by clicking on the **Create New** button, and select **Ingest**



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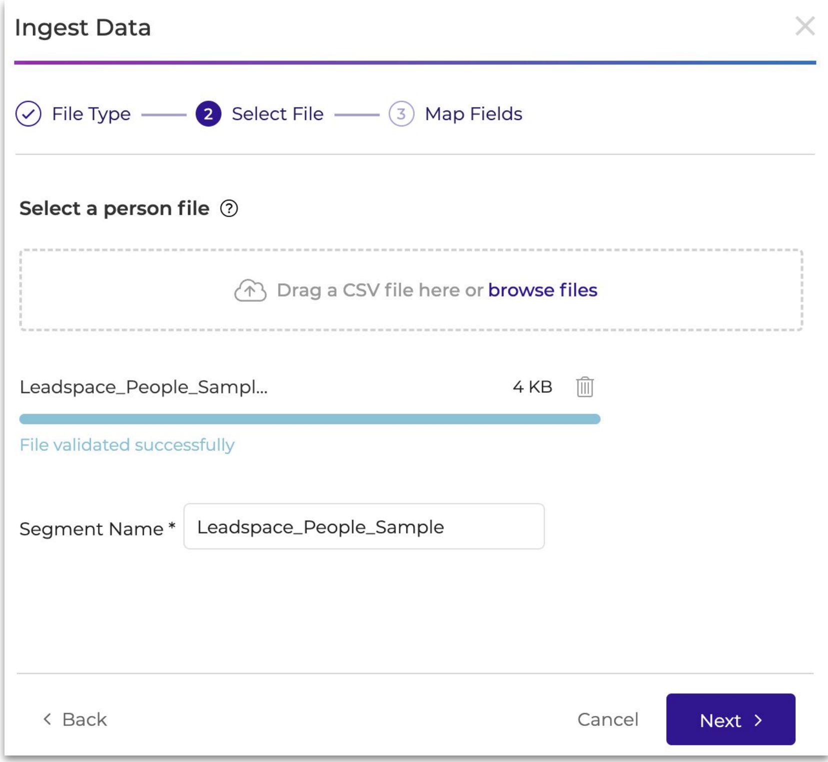
Ingesting People

Ingesting People

- After clicking **Enrich,** select **People** to import a single CSV (UTF-8) file.
- Your file must contain at least one of the following:
    - First & Last name
    - Email
    - Company name
    - Company website
    - Matching key
- Matching keys allow matching records on a field you've marked as a Company ID. i.e. SFDC Account ID could be the primary key for matching Company records.

Select your File & Name your Segment

- Upload file by dragging a CSV or clicking **browse files** > upload
    - **Note:** only supports .csv files, up to 1M records
- Once your upload is complete, enter your **Segment Name**



Ingesting People

Field Mapping Considerations

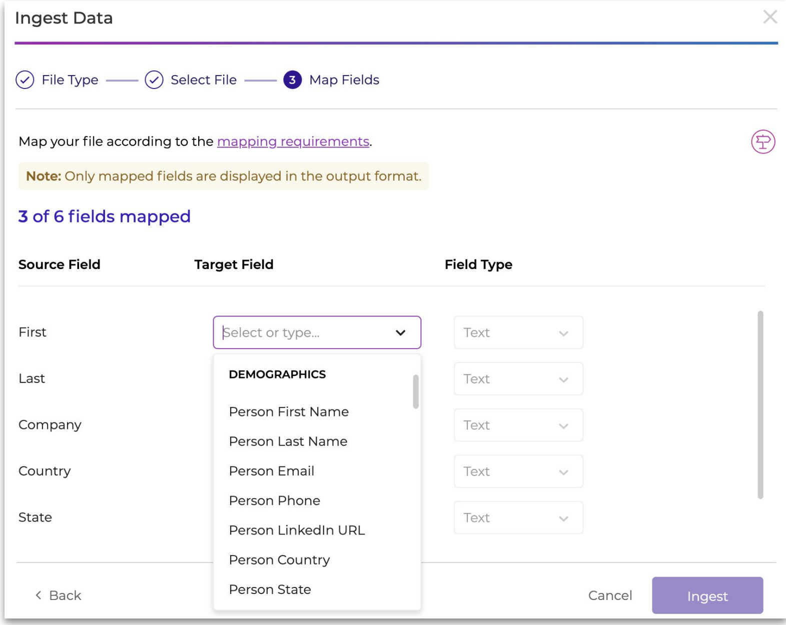
- Map at least one of the following:
  - Person First & Last Name & Company Name/Website/ Linkedin URL, Person Email, Person LinkedIn URL, Matching key
- Map the fields you wish to include in the output file. Leadspace automatically maps corresponding fields

Map your Fields

- Find the **Source Field** on the left, then select the **Target Field** dropdown, choose the corresponding **Leadspace Field**, and select
  - **Note:** Field type will automatically update
- Map at least first name, last name and Company name/website or person email/LinkedIn.

Ingest your People

- Once you've completed you field mapping, click **Ingest** to start the ingestion process.



Ingesting Companies

Ingesting Companies

- After clicking **Enrich,** select **People** to import a single CSV (UTF-8)
- Your file must contain at least one of the following:
  - Company name,
  - Company website
  - Matching key
- Matching keys allow matching records on a field you've marked as a Company ID. i.e. SFDC Account ID could be the primary key for matching Company records.

Select your File & Name your Segment

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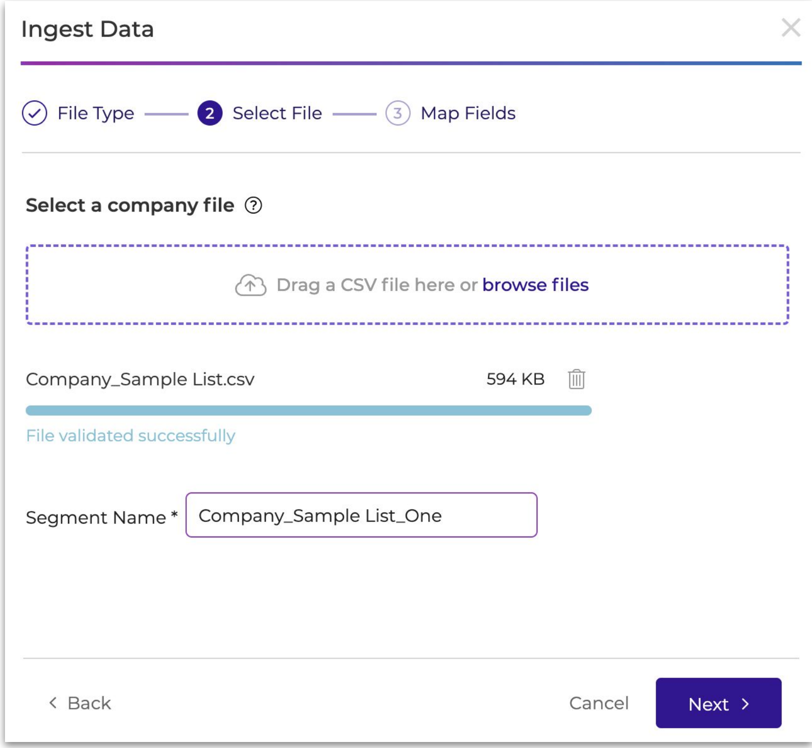

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Ingesting Companies

Field Mapping Considerations

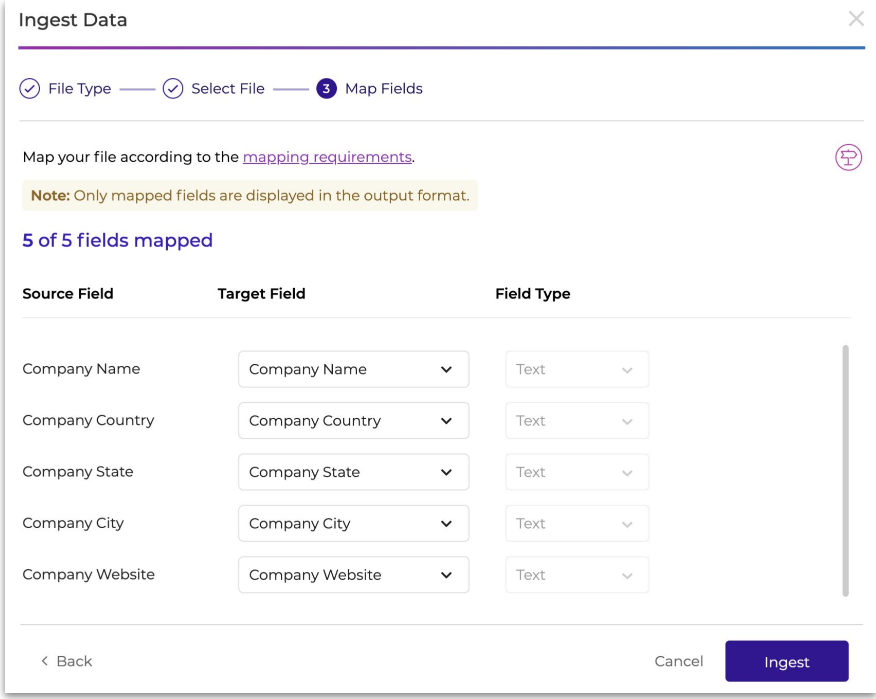
- Map at least one of the following:
  - Company Name, Company Website, LS ID, Company Linkedin URL, Matching key
- Map the fields you wish to include in the output file. Leadspace automatically maps corresponding fields

Map your Fields

- Find the **Source Field** on the left, then select the **Target Field** dropdown, choose the corresponding **Leadspace Field**, and select
  - **Note:** Field type will automatically update
- Map at least one value noted above

Ingest your Companies

- Once you've completed you field mapping, click **Ingest** to start the ingestion process.



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Unify

Getting Started Unify

Unification is a brand new feature that Leadspace offers. Unify allows you to create - from one or more input segments - a unique list of people or companies' profiles, clean from duplications and enriched by LS sources.

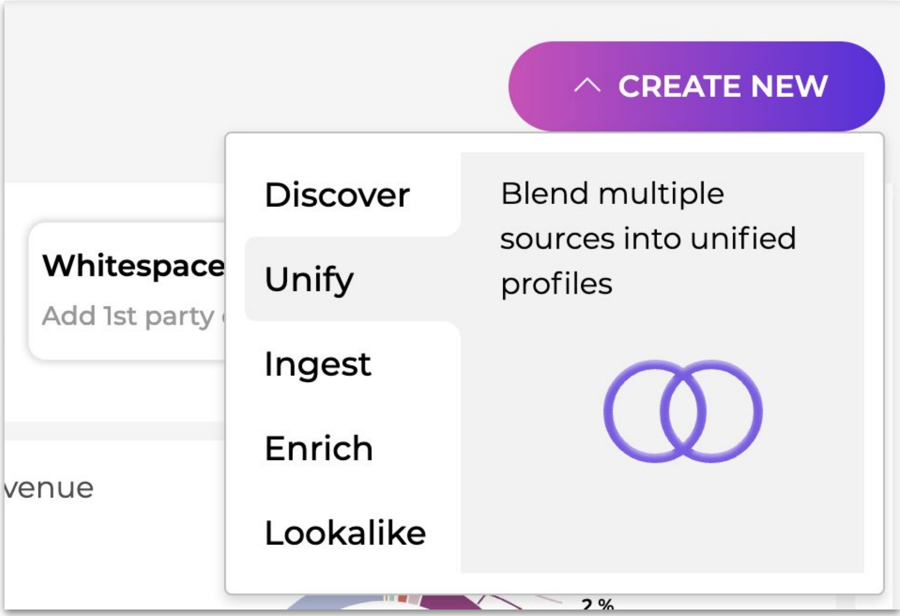
Unify Overview

- You have the ability to ingest both people and Company unified segments
- When you unify a segment, Leadspace will create a new segment containing the *unified* data set

Creating Segments

There are 3 ways can create a new unified segment:

1. Segment tab > click **Create New** > Select **Unify**
2. From anywhere on the platform, click **Unify**
3. From the segment list on Segment tab> select **segment** > dropdown > clicking on the Unify & Segment



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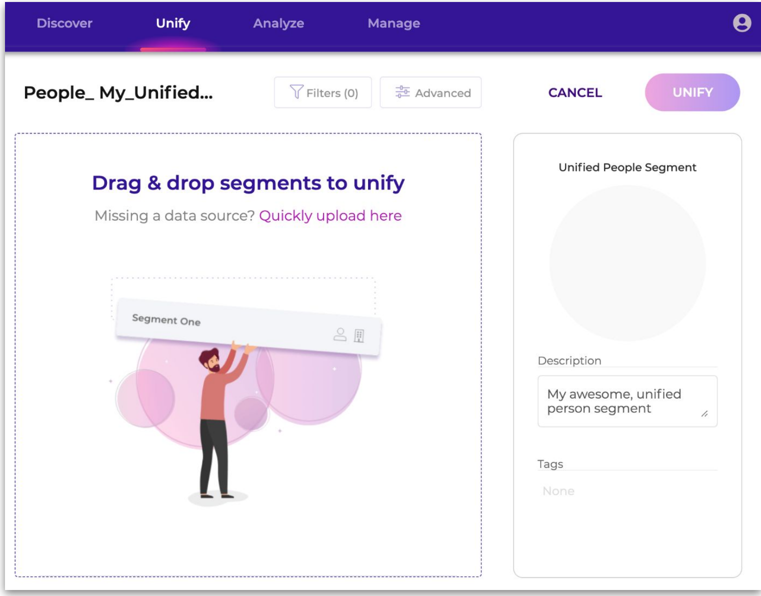
People Unification

Selecting your Segment Type

- After clicking **Unify**, a dialog box will open allowing you to choose the type of Segment you'd like to unify
- Select **People**, and **name** your segment
- Add a **description** if you'd like, but is not mandatory
- Include any tags to help you identify the segment in the future
- Click **Continue**

Unify Canvas

- By clicking on "Continue," you will be forwarded to the **Unify Canvas** a dedicated screen that allows dragging and dropping segments You wishes to unify and setting the unification configuration.
- The Canvas contains the following modules
  - Segment List - this is the list of segments you've created
  - Drag & Drop UI - Drag a Segment or Upload
  - Segment Unification Overview - Overview of the Unified Segment Overlap



Leadspace

People Unification

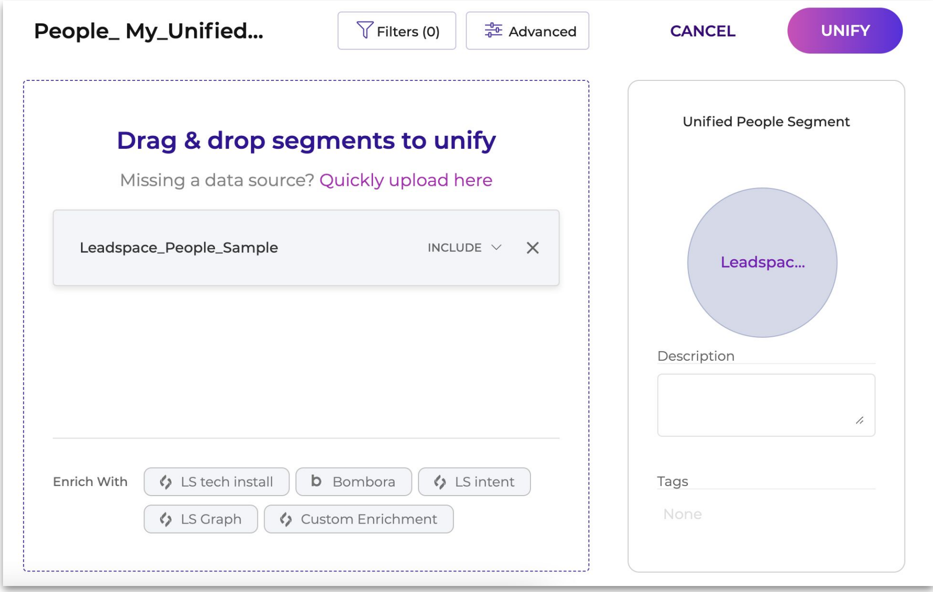
Select your Person Input Segments - Add inputs to the canvas in two ways:

Upload a File

- Try uploading a small file (up to 10MB) on the fly. Select **Quickly upload here**, select **People**, and upload your CSV
    - Refer to Ingest People to learn more about this flow

Add an Existing Segment

- Drag an existing people segment, one by one, onto the canvas to start your unification
- Note: All four segment types (ingested, discovery, enriched, unified) should be available for unification
    - For People Unification, add a segment that includes person-level records
- Ensure **Include** is selected for the segment



People Unification

Add a Secondary Segment

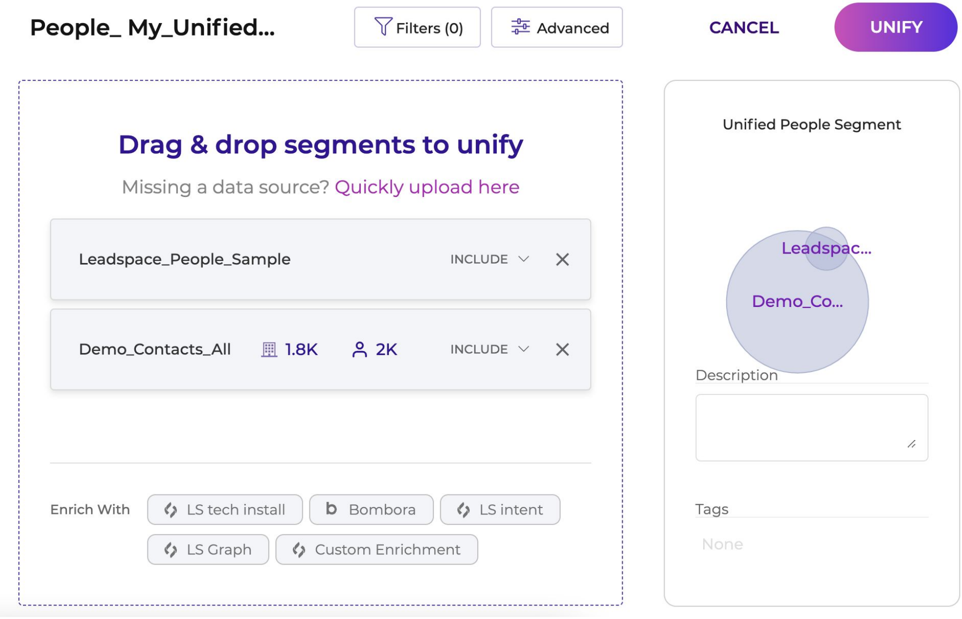
- Unification requires at least two Segments, or files, to be added to the canvas
- Upload another file, as instructed previously, or drag another Segment
- Ensure **Include** is selected for the segment to make sure it's included in your segment

Unification Overview

- Once you've added your second segment, you'll see the Segment Unification Overview visualize the overlap of your segments, in other words, a visualization of what's to be unified

To add a Suppression - you can do this in a few ways:

- Suppress existing segment by clicking **include** dropdown and selecting **exclude**
- Upload a **Data Source**, and mark as **Exclude**



Leadspace

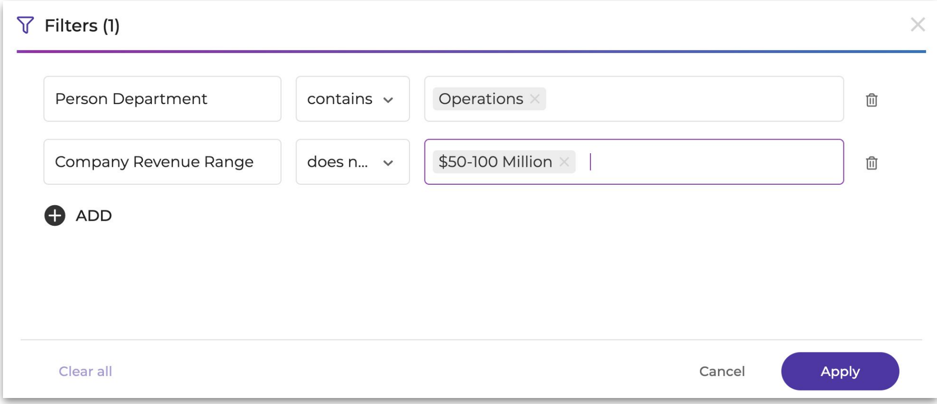
People Unification

Enrich With

- This offers an overview of all sources that the customer's data is enriched with by default - according to the configuration in the Admin UI (not clickable, not removable).

Add Filters

- To narrow your Unification, add **Filters** to define further criteria. Click **Filters.** A filter configuration tool will appear, allowing you to add criteria.
    - People Unification supports demographic and firmographic
- Go to **Select Field** and choose a field to filter on, then select an operator (contains, does not contain) and then select your **value** from the dropdown, then hit **Apply**
    - You can select multiple filters for any unified segment

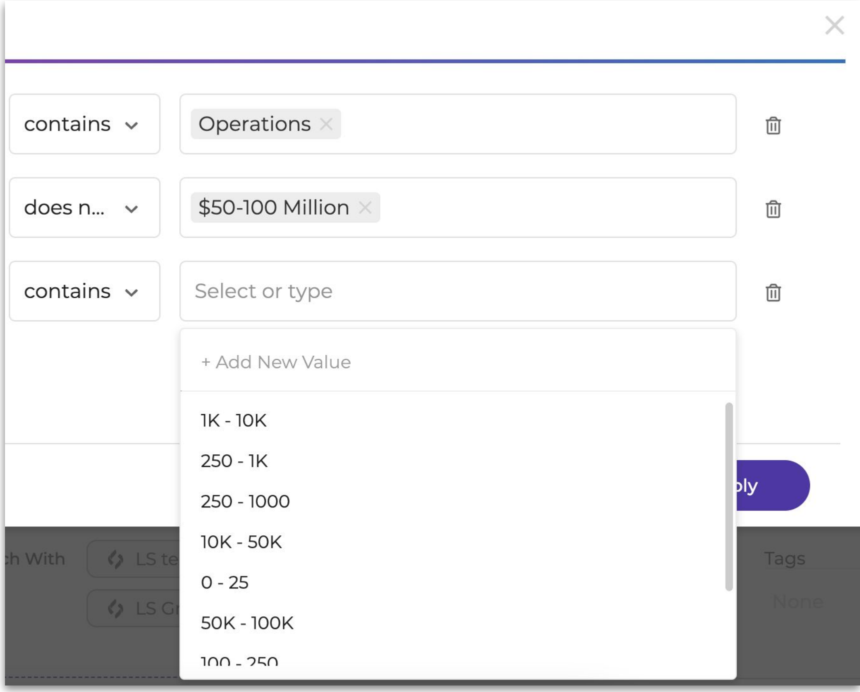


Leadspace

People Unification

Filtering Options

- There are no limitations on # of filters users can add.
- Supported operators:
  - “Contains”/ “not contains” (allowing multiple values)
  - Supported values - Text only (currently, numbers will be read as text as well)
- Supported fields for filtering: **Demographic/Firmographic**
  - Template fields (including BYOL sources etc..)
  - Custom fields
    - Dynamic fields are not supported.
    - Fields are categorized into buckets:
      - Demographics
      - Firmographics
      - System Fields
      - Identifiers
      - Custom Fields
      - Additional LS Fields



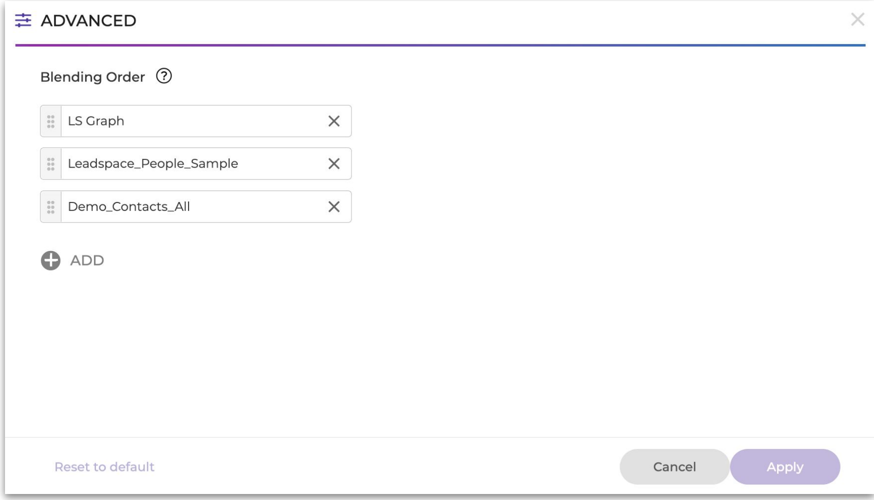
People Unification

Advanced Options

- The "Advanced" option currently contains only Blending

Blending

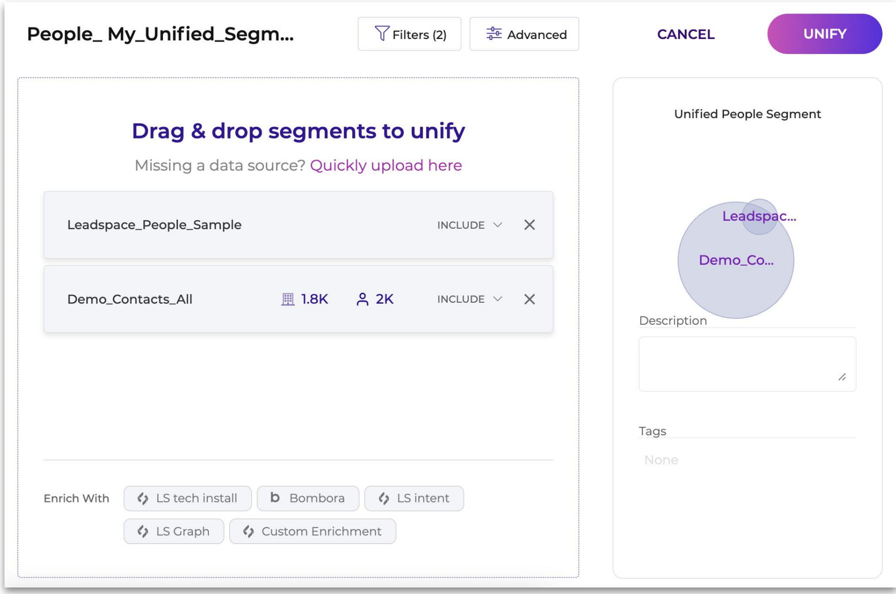
- The feature allows you to prioritize the order of sources that will populate the output fields of the unified segment. To change the order, drag **fields** around
- The blending occurs by the source level and not field specific.
- All Input sources appear according to the following order:
  - LS Graph
  - Unified segments
  - Discovery Segment
  - Ingested segments
- The option to Add new source will be available only if you chooses to remove one of the sources from the blending order.



People Unification

Unifying your People Segment

- Once you've completed your configuration, click **Unify**
- You'll be taken back to the Segment Dashboard and provided a **Status Bar** on your Unified Segment



Leadspace

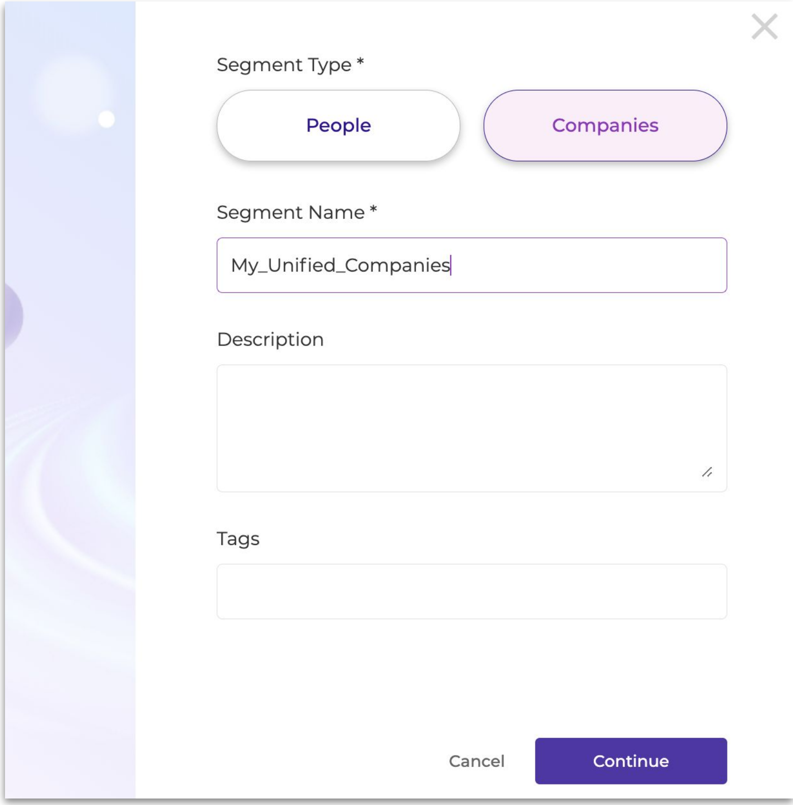
Company Unification

Selecting your Segment Type

- After clicking **Unify**, a dialog box will open allowing you to choose the type of Segment you'd like to unify
- Select **Company**, and **name** your segment
- Add a **description** if you'd like, but is not mandatory
- Include any tags to help you identify the segment in the future
- Click **Continue**

Unify Canvas

- By clicking on "Continue," you will be forwarded to the **Unify Canvas** a dedicated screen that allows dragging and dropping segments You wishes to unify and setting the unification configuration.
- The Canvas contains the following modules
  - Segment List - this is the list of segments you've created
  - Drag & Drop UI - Drag a Segment or Upload
  - Segment Unification Overview - Overview of the Unified Segment Overlap



Company Unification

Select your Company Input Segments - Add inputs to the canvas in two ways:

Upload a File

- Try uploading a small file (up to 10MB) on the fly. Select **Quickly upload here**, select **Companies**, and upload your CSV
  - Refer to [Ingest Companies]() to learn more about this flow

Add an Existing Segment

- Drag an existing Company segment, one by one, onto the canvas to start your unification
- Note: All four segment types (ingested, discovery, enriched, unified) are available for unification
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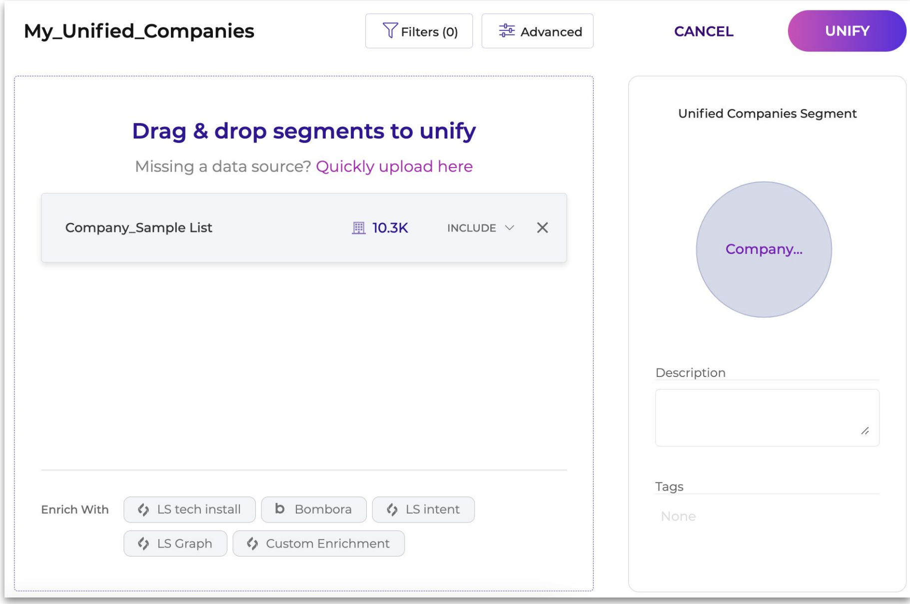
- Ensure **Include** is selected for the segment



Company Unification

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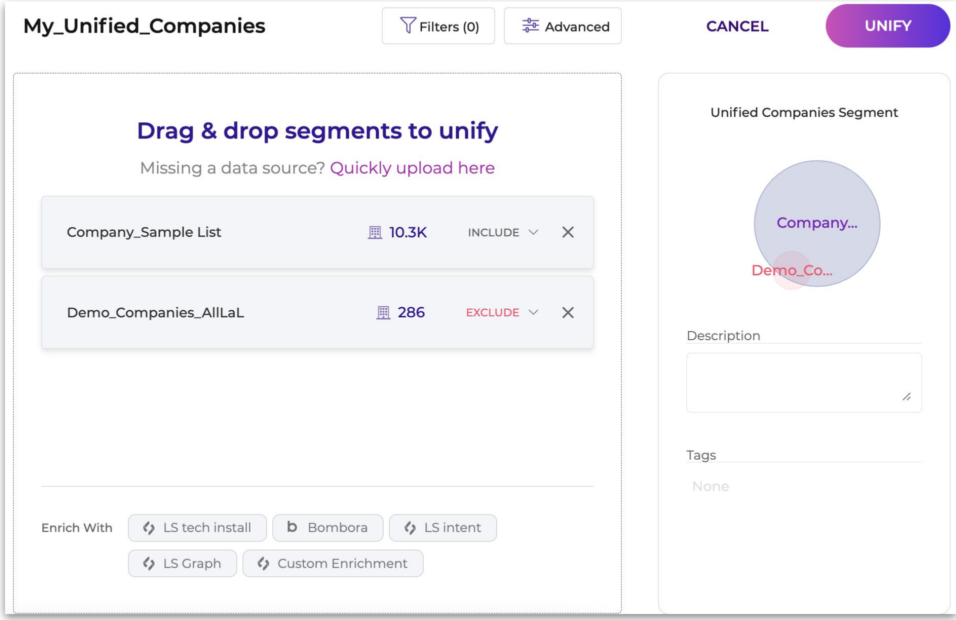

Leadspace

Company Unification

Enrich With

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    - Company Unification supports firmographic
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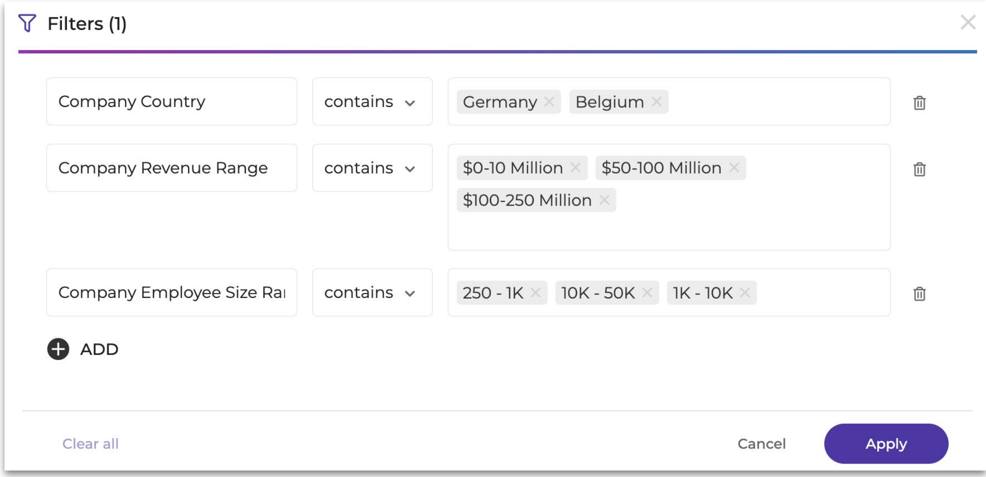

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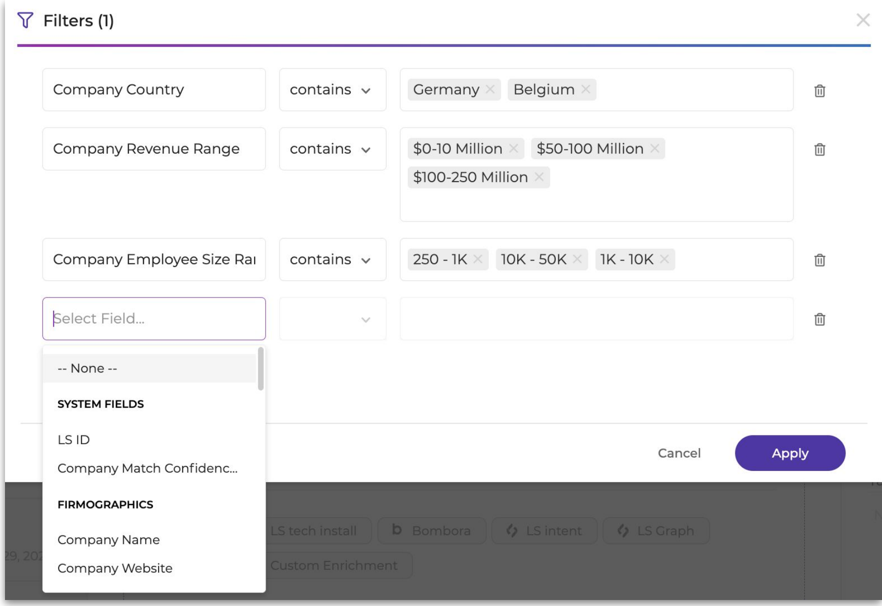

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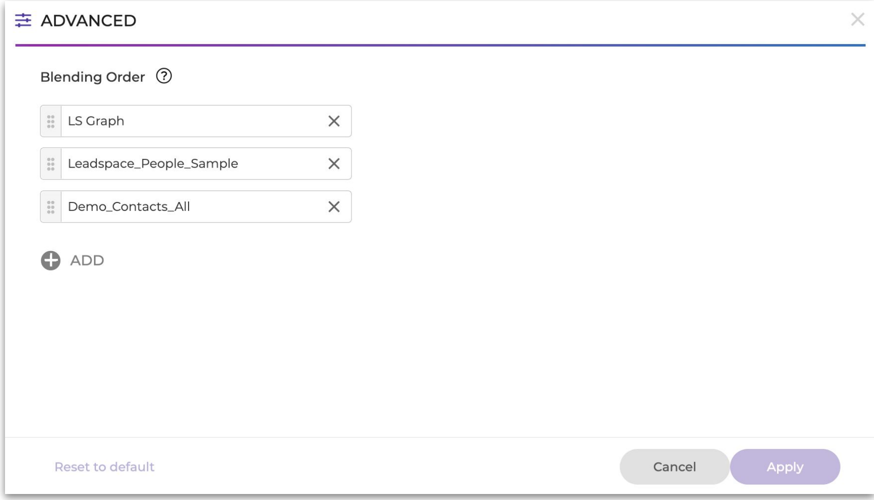

Company Unification

Unifying your Company Segment

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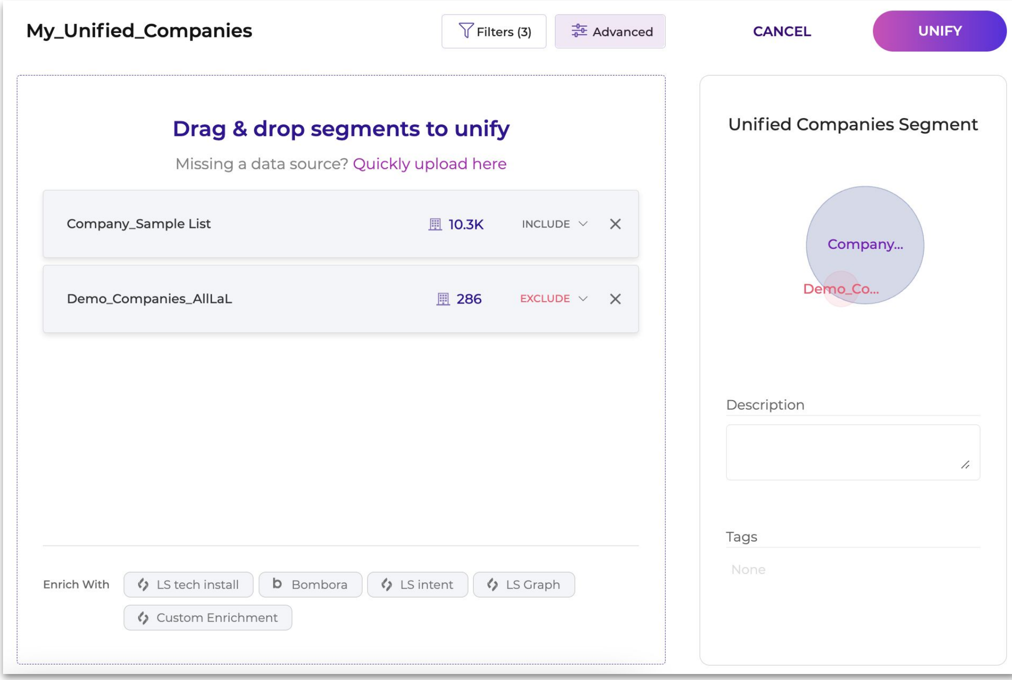

Leadspace

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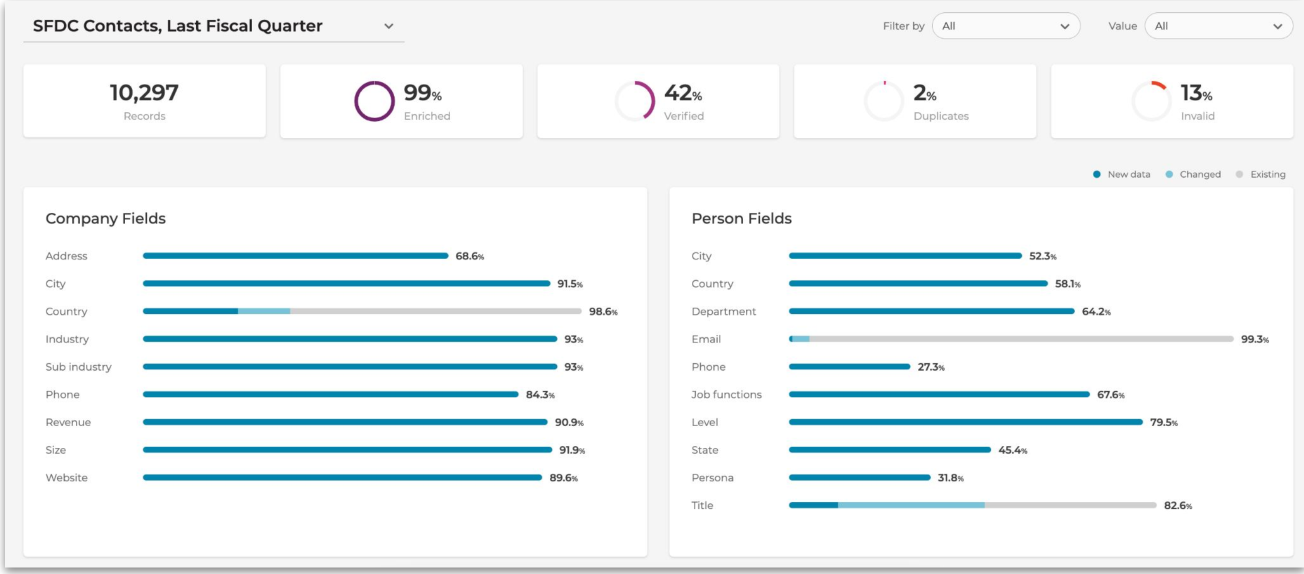
Manage

Getting Started with Manage

The Manage tab contains the Data Health Report (DHR).

The DHR is designed to provide data-related insights - the data's state (quality and population rate) before Leadspace and after.

Only off-line project work conducted by Leadspace Professional Services will be displayed under Manage.



Leadspace

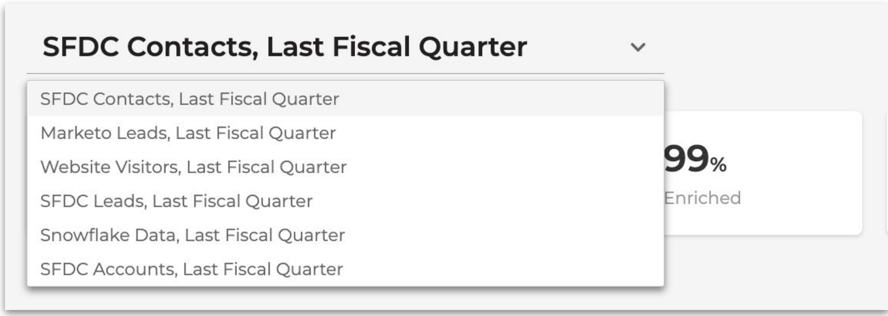
The Data Health Report

Segment Dropdown - 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 value within to filter by.

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

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



The Data Health Report

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.

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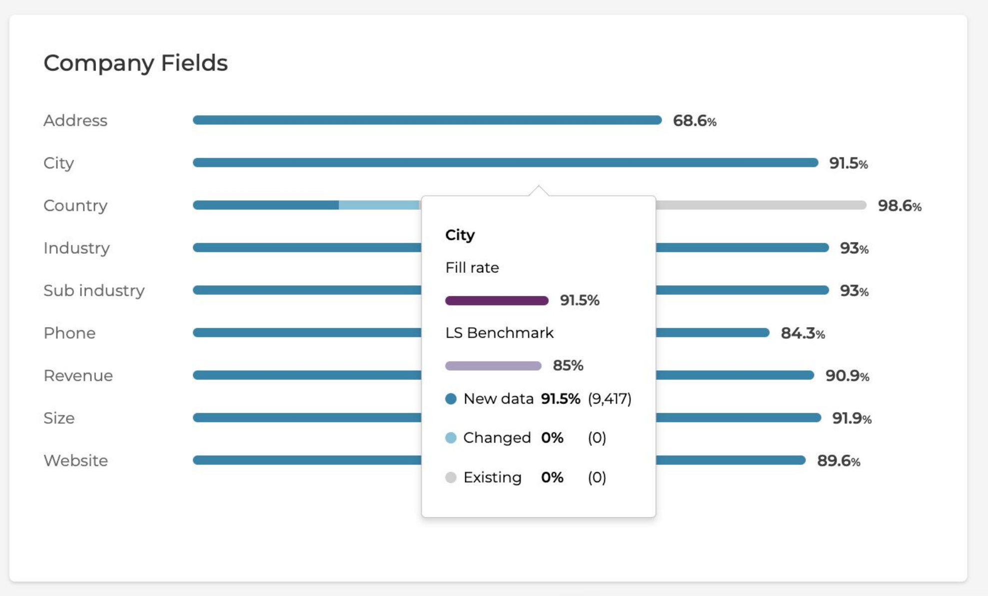


Leadspace

The Data Health Report

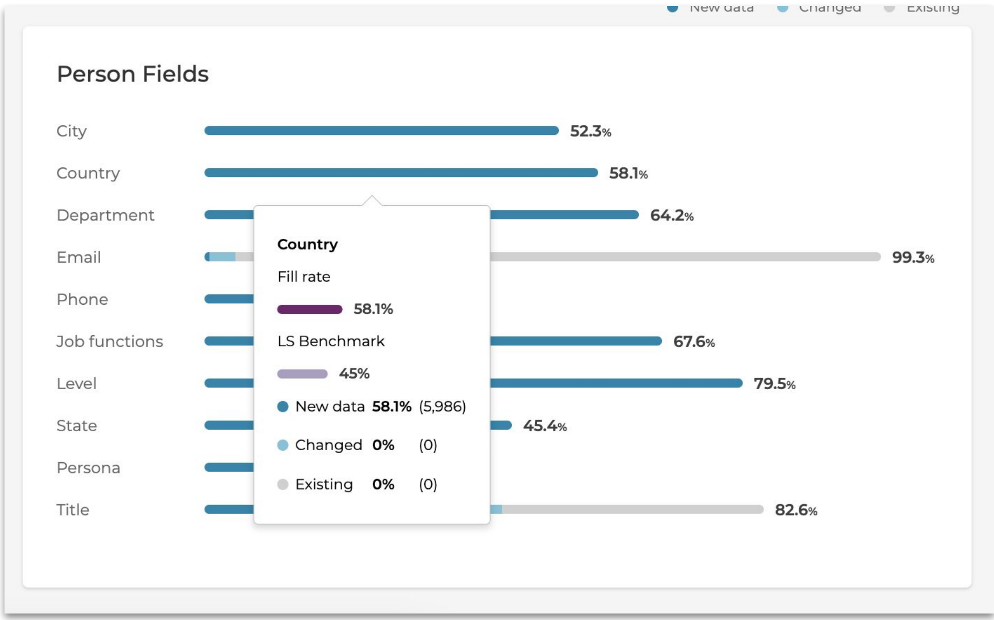
Records - the number of records shown in the current view (post-filters).

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.).

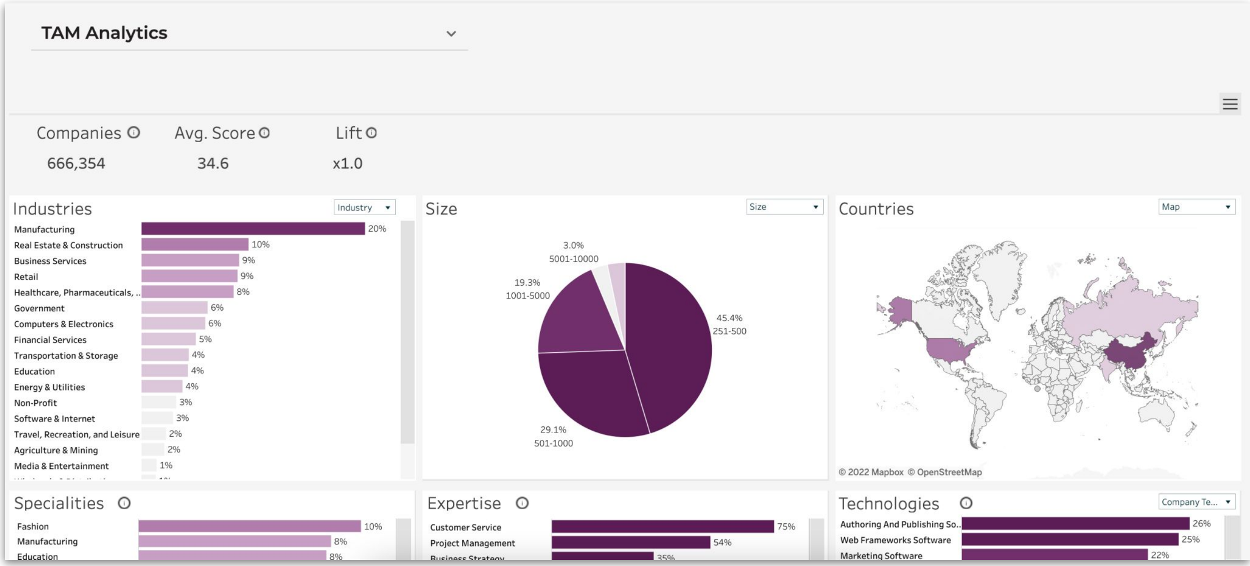


Analyze

Getting Started with Analyze

In this tab, you will see all the reports created for you that were done off-line by Leadspace Professional Services. You will get a drop-down that contains all the available reports, and when choosing a specific report, the report will be shown on this page.

Depending on the models and reports built for you, you should expect to see at least one of the following report types in the Analyze tab, which will aid you in developing a better understanding of your data:



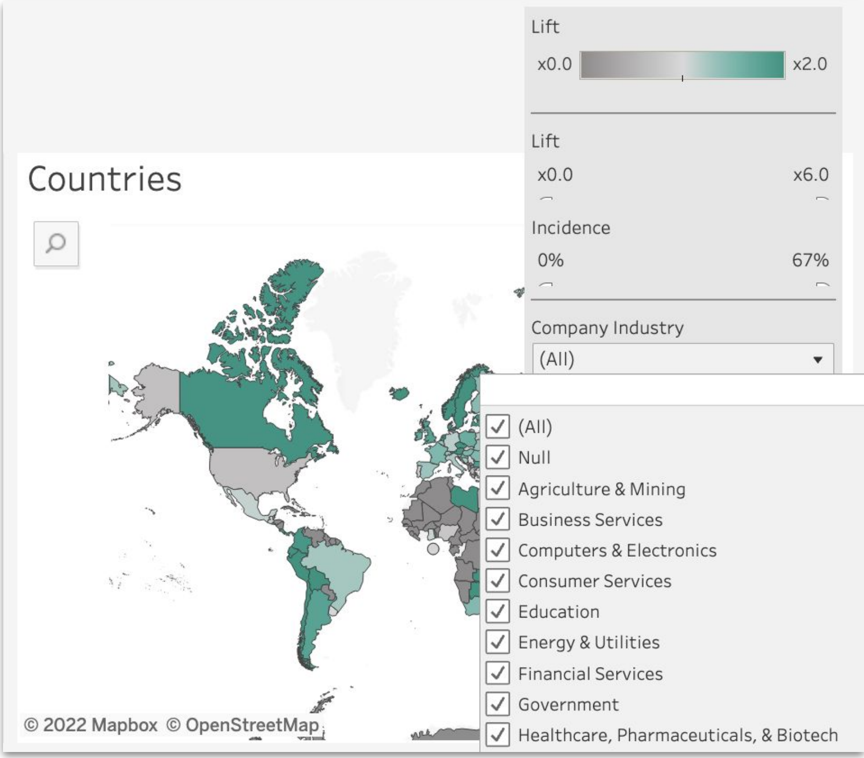
ICP Report

ICP (Ideal Customer Profile)

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

Critical components in the company report:

- **Audience Type filter** - ability to examine ICP on the Company, Person, and Intent level
- **Segment Filters** - the hamburger icon opens a sidebar allowing you to show the analysis for a specific segment
- Companies are the # of companies shown in the current view based on the defined conversion goal.
- **Converted** - the number of converted Companies or People shown in the current view (post-filters) based on the conversion goal defined



Leadspace

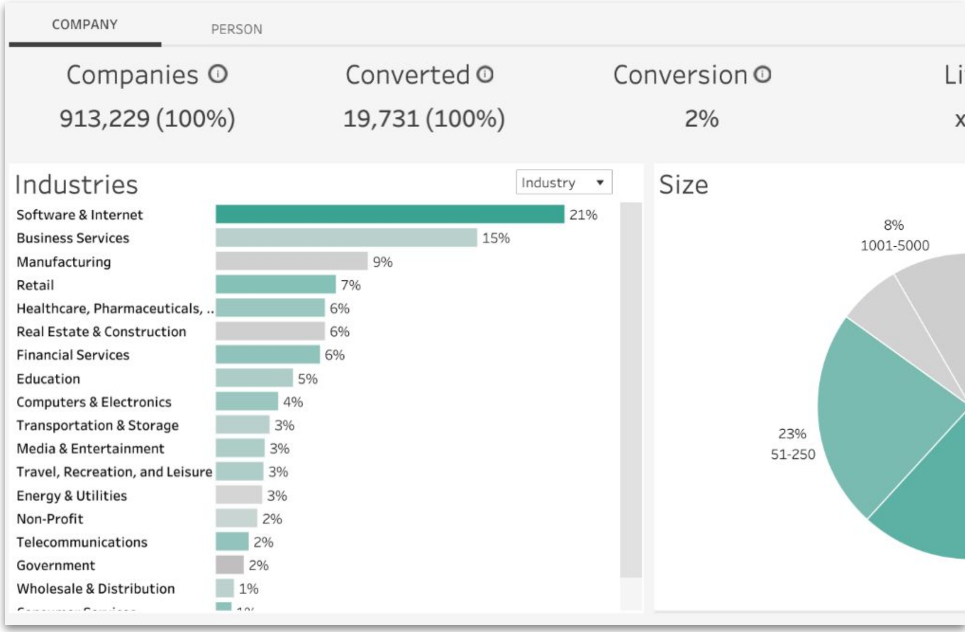
ICP Report

Critical components in the company report:

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

Other Components

- 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).



Leadspace

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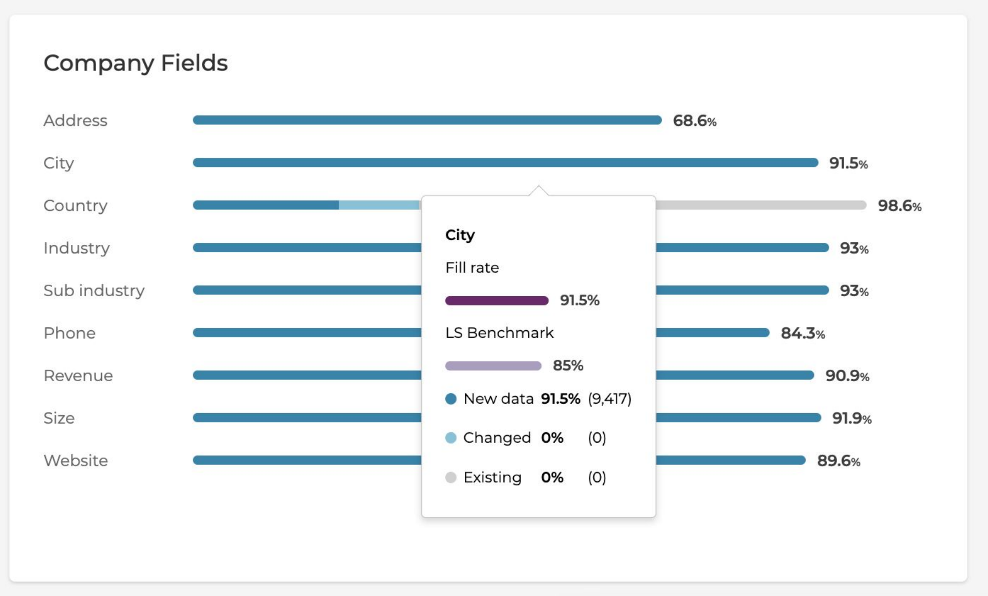

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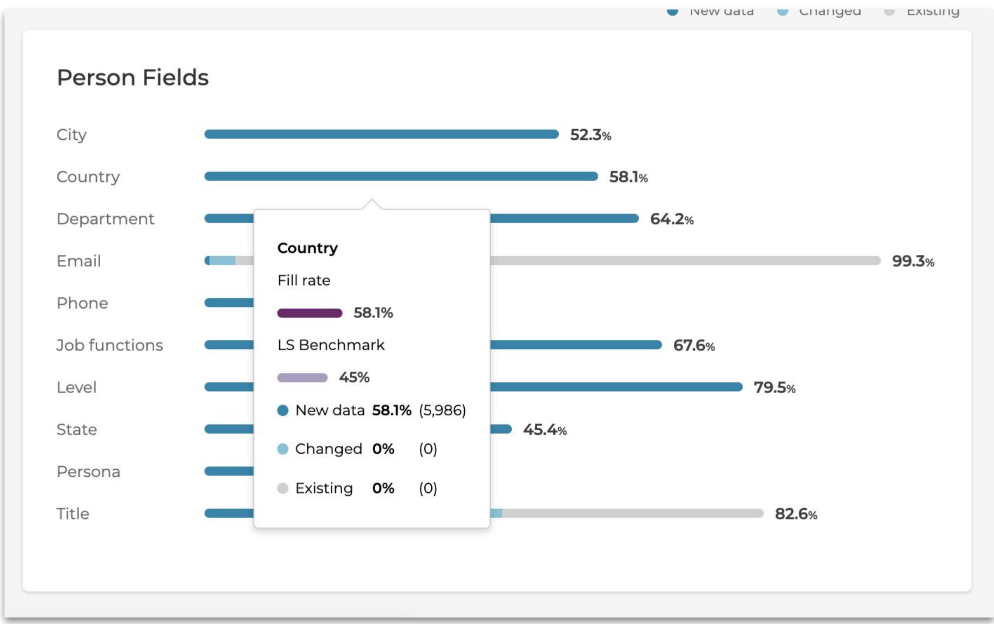

Leadspace

Questions