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Winning At Retargeting: Tips To Reconnect & Convert

By Sean Johnston and Tori Holland





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Winning At Retargeting: **Tips To Reconnect & Convert**

By Sean Johnston & Tori Holland

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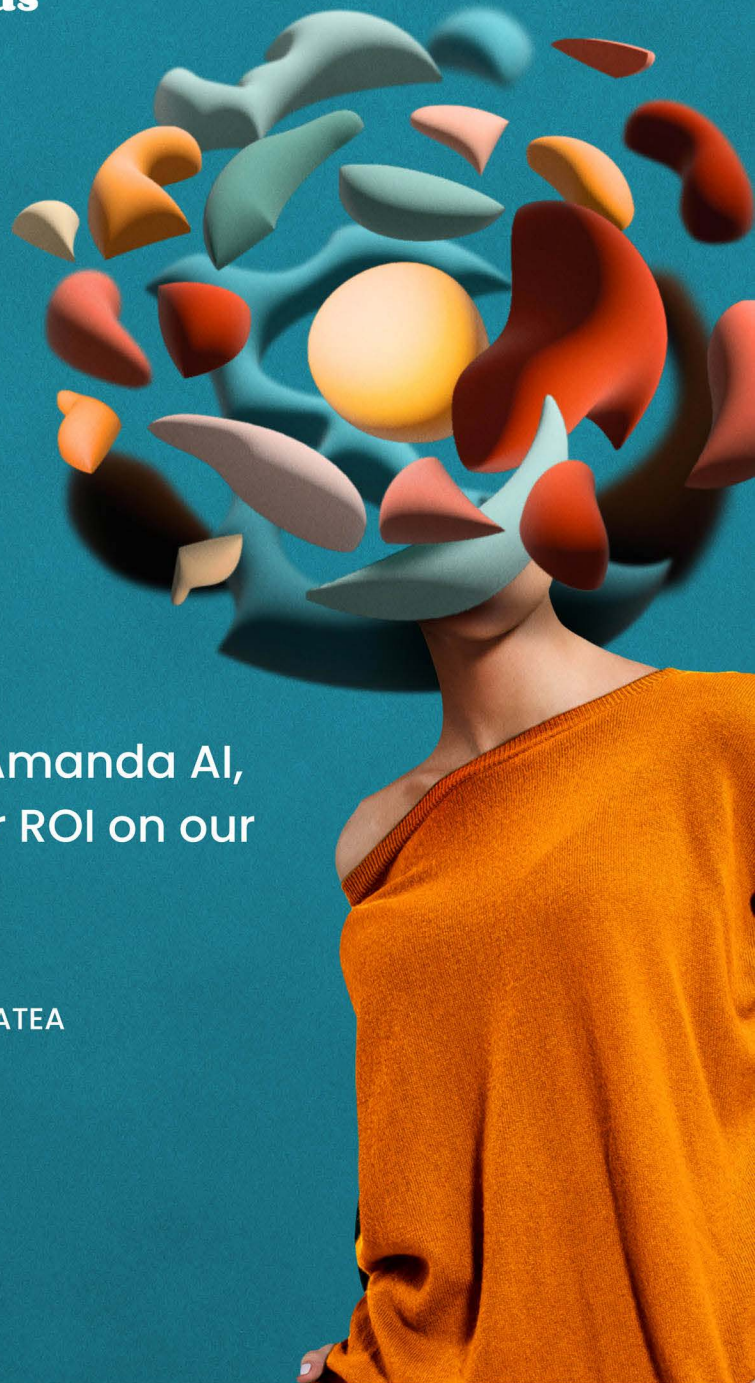
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Introduction

As digital marketers, we all know how difficult it can be to generate leads and handraisers for our client or company.

And in a world where consumers are bombarded with advertisements, both offline and online, it's important to take advantage of any signal that indicates an interested customer.

That's where remarketing and retargeting come in, and why these tactics should be a critical component of any marketing strategy.

To understand the vital role remarketing and retargeting play, let's examine the all-important cornerstone of marketing theory – the funnel.

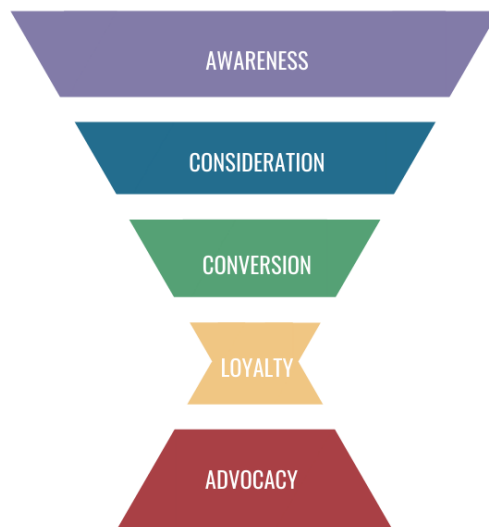


Image source: Closed Loop

During their “journey,” your ideal customer will move through the funnel, at first gaining **awareness** of your brand. This awareness may then move to **consideration** of your brand as they decide what and when to purchase. And finally, making the sale involves **conversion** of that customer from thinker to buyer.

Now, some customers (high intent ones) will complete this journey quickly, sometimes after seeing an ad for the first time. But most may require time and multiple touchpoints to move them through the funnel and complete their journey.

Remarketing and retargeting are tactics used to move people through the funnel, assisting them on the journey from being unaware of your brand to becoming paying customers.

By retargeting people who have demonstrated an interest or taken an action that may identify them as potential customers, we maintain their attention and improve their chances of converting to customers.

By remarketing to existing customers, we increase loyalty, reduce churn, and improve the long-term return on the investment we made to acquire them.

Just about every advertiser is remarketing and retargeting in some form or another – from the largest ecommerce brands that will serve you ads containing the exact item you were browsing on their website, to a simple sandwich shop that sends emails to visitors who sign up for coupons.

But, there are vast differences in the amount of attention, effort, and sophistication companies put into their remarketing and retargeting efforts.

That's why we're here to help you with this ebook. Our goal is to provide the knowledge and insight needed to start or uplevel your digital remarketing and retargeting efforts:

- How retargeting and remarketing work.
- Where best to deploy these tactics digitally.
- How to set up audiences.
- How to get the best results for your efforts.

Marketers need guidance now more than ever because of how quickly the digital landscape is evolving to adjust to new consumer privacy trends. For example, Apple's recent iOS 14.5 update made retargeting using [Facebook](#) and Google Ads much more difficult.

The juice is worth the squeeze, though. And marketers who can master the art of remarketing and retargeting will be rewarded with higher conversion rates, lower customer acquisition costs, and more loyal customers.

Planning For Remarketing & Retargeting Success

While retargeting and remarketing are similar in that they have a shared goal of increasing conversions, they differ in strategy and the funnel stage of the intended audience.

What Is Retargeting?

Retargeting is a tactic employed to re-engage with potential customers of your product or service based on certain 'on-site' or 'off-site' actions they have taken.

Though retargeting is not inherently restricted to one type of media, it most often is done through online or digital advertising.



Image source: Closed Loop

A display campaign run on Google Ads targeting people who have visited a certain section of your website is an example of retargeting based on an 'on-site' action.

A Facebook campaign targeting a list of people who attended a past event hosted by your brand is another example of retargeting but is based on an 'off-site' action.

What Is Remarketing?

On the other hand, remarketing is a tactic that is employed to re-engage with your customers or purchasers to upsell or cross-sell.

While remarketing is also not inherently restricted to one type of media, it is most often a tactic used with email marketing.

However, as digital advertising platforms develop more tools that allow for customer list uploads and continue to improve match rates, remarketing has become more prevalent on these platforms and will likely continue to grow.

An example of remarketing is a LinkedIn campaign that promotes a product upgrade to a list of current customers.

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Data source ⓘ ^

INCLUDE at least one of the following

- ☐ Company page
- ☐ Event
- ☐ Lead gen form
- ☐ Lookalike
- ☐ Third party
- ☐ Uploaded lists
- ☐ Video
- ☐ Website

Audience count ▼

Audience type ▼

Audience status ⓘ ▼

Create audience ▼ Create a lookalike Share a copy Delete

Upload a list

Company / Contact

Retarget by

Company page

Event

Lead gen form

Video

Website

Create

Lookalike

	Ownership	Status	Last audience count ↕
Company page	Owned	Audience: Ready Used in active campaigns: 1	690,000 members
Website Visitors	Owned	Audience: Archived Used in active campaigns: 0	1,300 members
ABM List Q1 Company List > 90% match rate	Owned	Audience: Archived Used in active campaigns: 0	6,100,000 members

Image source: Closed Loop

Retargeting vs. Remarketing

To simplify the difference between the two multifaceted tactics, it comes down to whether you are communicating with leads, which is retargeting, or upselling/cross-selling to customers, which is remarketing.

For more on the differences and overlap between retargeting and remarketing, check out [Remarketing vs. Retargeting: Are They The Same Thing?](#) by Susan Wenograd.

Planning Successful Campaigns

The successful execution of any marketing campaign starts in the planning stage, and remarketing and retargeting are no different.

It all starts with an understanding of the goals of your campaign. This may seem fundamental, almost simplistic, but knowing and aligning on your goals is an often overlooked element of your plan. Advertisers are sometimes so focused on the “how” and “where” that the “why” is just assumed.

But like a ship without a destination, lack of goal alignment can set your marketing campaign adrift on a sea of uncertainty.

Setting Objectives And Goals

Clear objectives and goals will ensure everyone working on your remarketing or retargeting campaign is laser-focused on the outcome. If we all know what we’re trying to accomplish with a clear metric defined, there should be little confusion.

To set an objective, it’s best to start with the end result in mind:

- What business outcome are we looking to improve?
- What specific audience actions further that outcome?
- How are we measuring success?

Objectives must be clear, specific and measurable. For example, *“improve customer loyalty,”* while a noble goal, is neither specific nor measurable.

However, *“Improve existing customer loyalty offer redemption by 10%”* offers both a specific action (offer redemption) and a specific goal (10%) to work towards.

Specific remarketing objectives include:

- Improvement of loyalty offers redemption.
- Increasing existing customer purchase frequency and order size.
- Increasing site engagement among existing customers.

Specific retargeting objectives include:

- Increasing site visitor to customer conversion volume.
- Reducing website shopping cart abandonment rates.
- Improving brand awareness and frequency among potential handraisers.

Specific goals can be a little more difficult to determine, as they are often a function of elements marketers can’t always control.

For example, your budget, user behaviors, and existing tools available (website, email marketing, offers/incentives) can have a significant impact on the overall volume or efficiency of your remarketing and retargeting campaigns.

Other Factors To Consider Before Launching

Before you embark on any new remarketing or retargeting campaign, take a detailed inventory of these factors and ensure you don’t have any potential issues that can derail your performance.

Creative: Do I have assets and copy differentiated from my prospecting campaigns?

Offers: Do I have a strong, compelling reason for customers to re-engage with my brand?

Lists: Do I have the existing customer lists I need to effectively target on my ad platforms?

Tracking: Do I have the needed pixels in place to track actions? Are my UTM parameters for retargeting and remarketing campaigns unique and trackable once a user takes action?

User Experience: Do I have an adequate destination for my campaign? Will audiences be able to easily accomplish the action we're intending them to?

Reporting: Do I have the ability to effectively measure and report on the impact of my campaign?

Tips For Getting Buy-In On Budget

Now that you have your goals, objectives, and vital items lined up, the final step is to secure the funds you need to launch your campaign.

While marketers are constantly fighting the budget battle, remarketing and retargeting campaigns can often be a lot less difficult to sell to your internal teams.

Why? Because:

- Remarketing and retargeting campaigns characteristically drive more efficient cost per results, compared to prospecting, since the audience is already familiar with your brand.
- Due to their specialized targeting and smaller audiences, remarketing and retargeting campaigns can be tested and executed for much less than broader prospecting campaigns.
- They are vital. Without remarketing and retargeting campaigns, advertisers are missing opportunities to convert hand-raisers and retain customers.

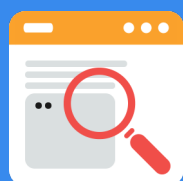
7 Call Insights To Inform Laser-Targeted Remarketing

Precision is the name of the game in successful remarketing campaigns. Call insights inform and support engaging creative, reduce wasted spend, and get your business in front of its most motivated audience via remarketing campaigns on Google Ads, Facebook Ads, and more. Here's how.



1. Call Source

The most basic of call tracking metrics, knowing the source of the call helps determine which campaign and messaging you're building on with your remarketing efforts. Call source tells you at a high level whether the call came from direct mail, Google Ads, organic search, etc.



2. Paid Search Keywords And Campaigns

Knowing that a prospect was driven to call by a Google Ad is useful; identifying which keywords and campaigns inspired the call is infinitely more so. It's possible with [dynamic number insertion](#) (DNI) and [Google Ads integration](#) with CallRail.



3. Website Visitor Session Data

DNI also enables advanced analytics for callers from the website. Visitor session data including referrer, landing page, pages visited, and active page during the call can be used to tailor content for your remarketing campaign. This aids in your understanding of how your holistic marketing strategy is working and how individual assets are interacting with each other.



4. Macro Topic And Keyword Trends

What matters most to your motivated audience right now? [Conversation Intelligence](#) displays keywords and phrases in a word cloud or bar graph so you can easily spot hot topics to create relevant remarketing creative around and inform your SEO or digital ad strategy.



5. Customer Pain Points

Conversation Intelligence can also help pinpoint specific pain points and challenges you can use to not only inform remarketing campaigns but improve your product and service, as well.



6. Caller History And Timeline

How many times has the caller interacted with your business via text, phone call, or form fill – and why? These insights enable you to plan remarketing campaigns that meet prospects where they are in their purchasing journey, and to create Lookalike Audiences targeting people like them, as well.



7. Time And Day

Reduce waste and maximize your remarketing ROI with dayparting. This enables your ads to display only at those times of day or on days of the week when your call analytics tell you that your target audience is most likely online.

Get To Know The Remarketing & Retargeting Landscape

Remarketing and retargeting campaigns can be run across pretty much all advertising platforms.

From the ad giants such as Google Ads, Facebook, Microsoft, and LinkedIn to the less common Twitter, Reddit, Quora, and even more niche platforms for AMB and programmatic, there are many places to run these campaigns.

How To Choose Platforms For Remarketing & Retargeting

Though, not all advertising platforms offer the same audience tools and capabilities. User behaviors and organic content types also vary greatly between platforms. All of which need to be considered carefully when determining where to run remarketing and retargeting campaigns.

Data Type

The first thing to consider when deciding on which platform(s) to run on is the type of data you have to target the audience you want to show ads to.

Will you be using a pixel-based audience? Or will you be uploading customer lists?

If uploading a list, what type of information do you have for each lead or customer?

List upload capabilities – formatting and data requirements will vary by platform – so before moving on to the next step, determine what platforms are technically possible to target the desired audience.

We'll discuss data sources, list types, and pixel-based retargeting under the [Power Your RM/RT Campaigns With Enhanced Customer Data](#) section of this ebook.

Match Rates

If uploading a customer list, consider the size of the list, match rates, and the minimum audience size requirements of each platform.

This is another technical aspect that can help you narrow down the list of platforms to run on.

Below are the match rates by platform that we typically see with our clients here at Closed Loop.

Google Ads	Microsoft	Facebook	LinkedIn	Twitter
40% - 50%	30% - 40%	60% - 70%	40% - 50%	30% - 40%

Note that the above are average observed match rates when uploading a list of email addresses directly into the ad platforms. The quality of the data you are uploading as well as the use of data enrichment tools can have a big impact on match rates.

We've also compiled the minimum audience size requirements across channels for you in the table below.

Google Ads	Microsoft	Facebook	LinkedIn	Twitter
1,000 active visitors	300 active members	100 people	300 members	100 users

Funnel Stage

Next, consider the funnel stage that your audience is currently in.

Are they in the early stages of product research? Are they comparison shopping or do they have it narrowed down to a short list of competitors?

Perhaps they are ready to trial your product or even move beyond a trial to a paid subscription?

Funnel stage is important to consider because after you've gone through the trouble of building a RM/RT audience, you'll want to ensure that they are actively using and engaging with the platforms you plan to show ads on.

For example, if you plan to retarget users who have visited your website at least once within the last 30 days but who have yet to convert, a social media platform or programmatic solution is your best bet as it's less likely these users will be searching for your targeted keywords in large enough volumes.

However, if you plan to retarget users further down in the funnel at the comparison stage, it is likely that they are conducting search queries for you and your competitors. In which case, you might show them a personalized search ad on Google Ads or Microsoft highlighting the benefits of your product vs. the competition.

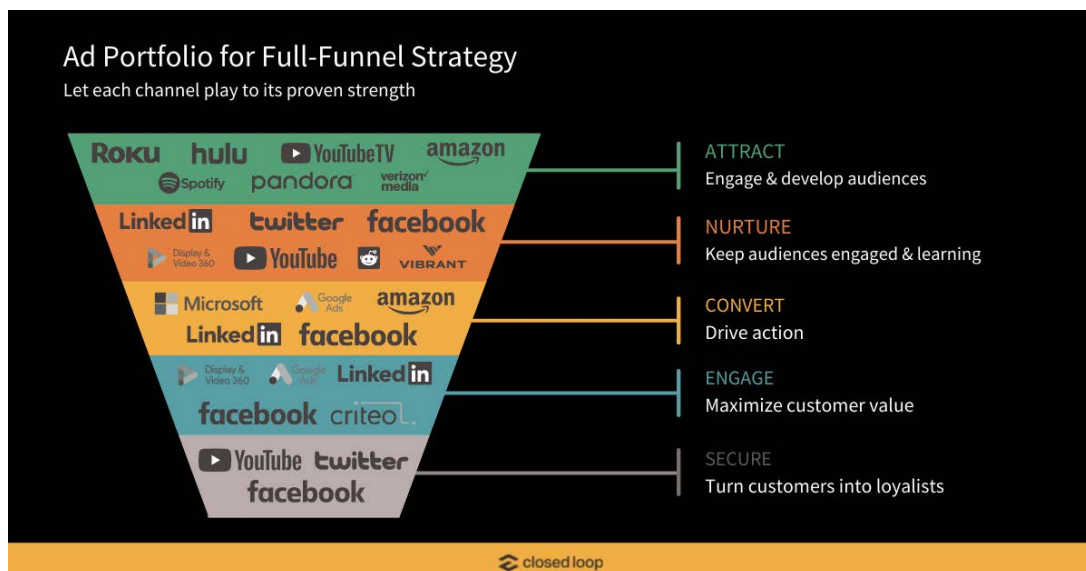


Image source: Closed Loop

Ad Context

Last but not least, consider the context your audience will see your ad in.

What other content might show on the platform next to your ad? Do your competitors have an ad presence on the platform?

Do you have creativity in the appropriate specs? Does the creative fit the tone and personality of the platform?

All in, you'll want to ensure that the environment in which your ad shows fits your brand and aligns with the previous communications you may have had with an audience.

Once you've determined which platform(s) you'll run on, the next step is to start building the actual campaigns.

If you are just dipping your toes into the water with remarketing and retargeting, [How To Launch Your First Google Ads Remarketing Campaign](#) by Brooke Osmondson provides a thorough step-by-step walkthrough of the campaign set-up process in Google Ads.

If you've run a few remarketing and retargeting campaigns before, or even if you are a seasoned pro, [14 Facebook Remarketing Strategies To Test](#) by Amy Bishop goes in depth on audience types and ways to target them. While her article is written with Facebook in mind, the audience strategies can be applied across platforms.

AMANDA \

6 Attribution Models You Should Know About To Increase Revenue



Noticed your sales increasing?

Want to continue down that path of success?

It's time to double down on the marketing strategy that worked.

Was it your show-stopping blog post that convinced them? Or was it a series of Facebook ads that made the difference? Maybe it was a combination of both?

Understanding which channels are responsible for revenue and which are underperforming is essential for marketing success.

Attribution modeling is the framework that software, like Google Analytics, uses to help you credit which marketing efforts are directly responsible for driving revenue.

Here are a few of the most popular attribution models to help you uncover what's driving sales and leads.



1. First Interaction Attribution

Perfect for discovering how your brand was discovered.

This model gives 100% credit for sales or conversions to the first interaction a customer has with your brand.



2. Last Interaction Attribution

Perfect for short buying cycles.

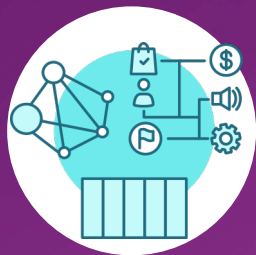
This type of attribution gives 100% of the credit to the last interaction before the sale.



3. Last Non-Direct Click Attribution

Perfect for understanding your shopper's research and considerations.

This model provides clarity by excluding direct clicks, allowing you to see the factors that caused the sale.



4. Linear Attribution

Perfect for optimizing each step of your customer journey.

This model shares the credit across the variety of touchpoints a customer has with your brand before purchasing.



5. Time-Decay Attribution

Perfect for optimizing the most effective steps of your customer journey. Similar to the Linear model, this model also factors in when the consumer touchpoint occurs.



6. Position-Based Attribution

Great for getting a high-level view of your full customer journey.

This model gives 40% to the first interaction and 40% to the last interaction. The remaining 20% is split between the customer's other touchpoints with your brands.

Now, it's time to pick the model that works best for your business and truly double down on the marketing strategies that work.

Curious to learn how to successfully track your sales without attribution models in a world where third-party cookies are no longer a thing?

[Learn More Over Here](#)

Power Your RM/RT Campaigns With Enhanced Customer Data

Let's take a closer look at on-site vs. off-site interactions and the data sources that these list types can be derived from.

Pixel-Based Retargeting

"On-site" interactions are measured through pixels or tags, which are essentially just pieces of code that are added to an advertiser's website to collect information on website visitors via a browser cookie.

This information is then sent back to the ad platforms to allow for list segmentation based on users' behaviors on the website.

The pixels that capture these 'on-site' behaviors are where the tactic inherits the name pixel-based retargeting.

There are three main types of data collected via pixel-based retargeting to take advantage of when creating audience segments.

Site Engagement

Site engagement metrics such as page depth, time on site, and visits to key pages can be great indicators of intent.

By creating retargeting segments of our most engaged users with these metrics, you can then target them with personalized ad messaging and creative.

Audience segments based on poor site engagement, such as visitors with a high bounce rate, can also be used to exclude those who are less likely to take future actions and improve the cost efficiency of your retargeting program.

URL Parameters

URL parameters, such as UTMs, are not only great for tracking leads through the sales funnel, but also for creating audience segments.

For example, you could take advantage of the cheaper CPCs on channels like Google Display, Twitter, or Reddit to build up an audience of site visitors and then retarget these visitors on lead gen channels like LinkedIn.

Pretty much any kind of information can be passed through via UTMs, but some common ones to consider creating audience segments off of are:

- utm_campaign
- utm_adgroup / utm_adset
- utm_ad / utm_creative
- utm_keyword
- utm_device
- utm_location

Past Actions

Of course, there is no signal of intent stronger than a user taking an action on your site, like completing a form, downloading a piece of content, or chatting with a sales rep.

It is important to stay top-of-mind by retargeting to users in these action-based audience segments.

You'll want to strike while the iron is hot and keep their interest, lest they forget or, worse, go with a competitor instead.

You can find additional audience segmentation ideas in Andrea Atzori's article [7 Ways To Segment Your Audience For Successful Retargeting](#).

“Off-site” interactions are measured by collecting lead data via encounters that happen off the brand’s website, like an in-person event or a content download via a lead aggregating partner.

This lead data is then stored via MarTech and Sales tools, such as Marketo and Salesforce, where customer data also resides.

Now, there are two ways to bring these lead and customer lists into advertising platforms for retargeting and remarketing.

Google Ads, Facebook, and LinkedIn offer Marketo integrations that allow for these lists to be seamlessly pushed over as audiences.

This is optimal from both a data privacy and time management perspective, as there is no need for exports of lead and customer information to pass between hands with this method. In other words, no PII is exchanging hands here.

The down-side to this integration is that it does take a bit of setting up and may require the help of the person/team who manages your Marketo platform.

If the integration isn’t an option, most ad platforms also allow for manual customer list uploads of either hashed or un-hashed data.

Before handling lists of customer information, be sure you are aware of the data privacy laws that regulate your industry and region. Note that the laws around sharing data with vendors and/or targeting lists based on lead or customer data will vary.

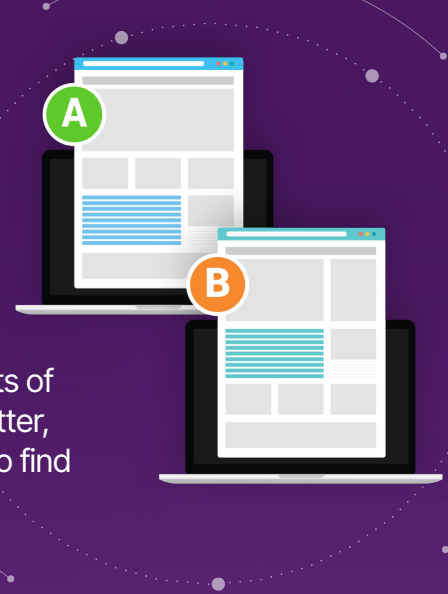
Both lists imported via the integration or by manual upload will require regular refreshes to keep them up-to-date.

Automation tools, such as Zapier, can help to keep your retargeting and remarketing lists as fresh as possible and ensure the success of your campaigns.



A/B Testing Images in Remarketing Campaigns: A Checklist

A/B testing your images can go a long way in improving the results of your remarketing campaigns on Google, Facebook, LinkedIn, Twitter, and other ad platforms. Keep these points in mind when testing to find the most engaging, highest-converting images possible.



Test One Element At A Time

When you're testing images, test only the images. Learn how to set up an A/B test so you have a control variant and a challenger. [Like this.](#)



Test Different Types Of Images

Test photos of your location, staff, or exterior against branded product images. Try different angles, backgrounds, and models to the ones you used on the product page.



Test Like Formats

Avoid judging a square ad of variant A against a leaderboard ad of variant B, for example. Take image sizes into consideration when making comparisons between individual ads.



Inspire An Emotional Reaction

Remember, these ads are appearing to consumers who have already had some interest in or interaction with your brand. Take the next step with imagery that entertains, inspires, or surprises.



Test Images On Each Platform

What resonates on Google Display may not perform the same in Facebook Ads. Don't count an image out until you've tested it on each network you use for remarketing.



Make Sure Images Align With Messaging

On networks where you can change multiple variables, such as Facebook, ensure that the images you're testing still make sense alongside the ad copy.



Challenge Your Design Assumptions

Yes, you want to keep a consistent brand wherever you appear online. However, you may need to test different color schemes or try a different design in order to [overcome banner blindness](#) on the sites where your ad appears.

Best Practices From Brands

Sometimes the best way to succeed with any marketing campaign is to emulate brands who've gotten it right. Here are a few examples to inspire your own campaigns.

Amazon: Using Ad Data To Maximize Impact

One advertiser that consistently ranks towards the top of our list when it comes to effective retargeting is one of the biggest brands in the world – Amazon.

Amazon's example is one of maximizing the impact of data and using the best tools available on the platform.

With their [Facebook dynamic product ads](#), Amazon can effectively combine the wealth of website behavior and customer data at their disposal to serve relevant product ads to specific groups of people, but at scale.

They know what you shop for and combine that with ad platform data to serve you up product suggestions that can be both timely and accurate.

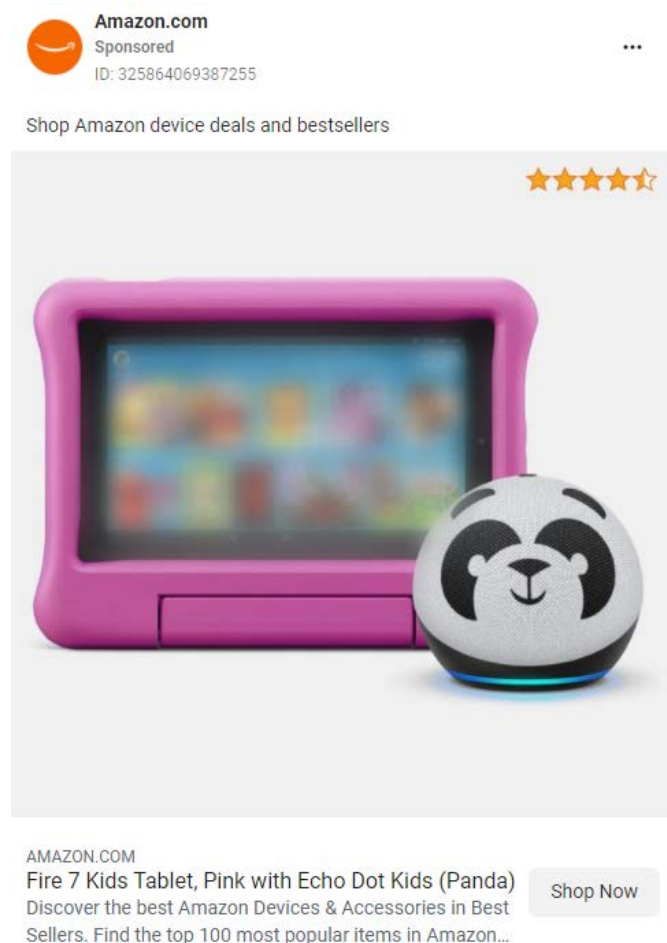


Image source: Closed Loop

Client A: Segmenting Audiences Based On Intent Signals

One of our clients, a rapidly growing SaaS company known for scheduling automation, takes advantage of their wealth of site engagement data by segmenting their website visitors into key page views, multiple pages viewed within a session, time on site, and scroll depth.

They then retarget their most engaged users via display and video ads, while excluding users who have visited pages only visible to logged in users, as these users have already taken the desired action.

Client B: Nurturing Leads By Funnel Stage

Another client of ours, a leading data transformation solution provider, makes use of the Marketo integrations across the ad platforms to nurture leads based on their current funnel stage.

Leads are retargeted with ads encouraging them to take the next action and increase their lead scores to become MQLs.

Current MQLs are also retargeted with thought leadership content to keep them engaged as they continue their journey further down the funnel.

Ad Creative Insights



“Human emotion is the driving factor behind human behavior. Knowing this, marketers can make reasonable attempts to understand how their audience is thinking about the things they interact with.”

An empathy map can help marketers think through this process. By mapping out the hopes, dreams, and fears of the target audience, marketers can begin to speak to each of these in their CTA context and copy.”

Chandal Nolasco da Silva, [Unusual Call To Action Examples That Actually Work](#)



“Zero in on the core problem or desire that brings customers to you, and brainstorm some ways to play up the emotion contained in it. Negative feelings can actually be better stimuli than positive ones since people are motivated to avoid pain, so don’t be afraid to leverage your audience’s anxiety, anger, or FOMO (fear of missing out).”

Some more positive emotions you can use to drive results include hopefulness, relief, and the feeling of being liked or admired by others.”

Adam Heitzman, [10 PPC Copywriting Best Practices For Extra Effective Text Ads](#)



“Thoughtful CTAs meet the consumer at their place in the shopping journey. If they browse a product collection, CTAs such as “Shop the Collection” or “See Our New Arrivals” spark interest in the brand. Offering free trials, catalogs, or exclusive deals are all opportunities to engage with your audience.

Customize call-to-actions for each business and industry. Using a “Shop Now” CTA is valuable for ecommerce retailers, whereas “Learn More” or “Download Now” CTAs offer connections for business-to-business (B2B) marketing.”

Jason Zotara, [Facebook Ads: Who's Best At Earning The Click & How It's Done](#)



“Post pandemic, there has been a real shift in marketing messages, and most brands are embracing sustainability and authenticity. Real stories, strong moral stance, and contribution are all essential values for brands to project. However, be wary of jumping on tropes and trends just to be part of a movement. Unless you are genuinely authentic, this can backfire and social media does not hold back to call out anyone who seeks to profiteer from a movement.

Connecting with an audience in 2022 is all about being credible, unique, and memorable. And, brands need to position themselves carefully, with consideration to nuanced shifts in culture.”

Shelley Walsh, [10 Top Advertising Campaigns & Why They Work](#)



“In his groundbreaking book “Influence” (published in 1984), Dr. Robert Cialdini details his years of research showing that the less available something is, the more likely people will want it. This can work in two ways: limited time, and limited quantity.

While this is a classic principle that has proven to be highly effective, it’s also one to use carefully. Scarcity only works as an advertising tactic when something truly is “scarce.” If your strategy is to have a 30% off sale once a month every month, don’t be surprised when ad copy stating “hurry, ends soon!” quickly becomes ineffective.”

Adam Proehl, [10 Classic Tips To Write Effective Google Ads Copy](#)



“YouTube’s Video Ad Builder is by far the easiest, fastest, and most flexible way to create a video for video advertising. While the tool is still in beta, it’s available to any advertiser that wants to sign up (as far as I can tell).

You have to [fill out their form](#) to request access and then wait about five days for a response. It’s a perfect tool for businesses that don’t have the resources to produce, shoot and edit videos from scratch. All you need are the same existing assets (images, text, and logos) you would need for a display ad.”

Pauline Jakober, [How To Make Video Ads On A Budget With YouTube Video Builder](#)

Key Takeaways

Remarketing and retargeting campaigns are invaluable tactics for moving audiences down the sales funnel. While the terms remarketing and retargeting are often used interchangeably, they have different meanings.

It's vital that marketers understand their differences and relation to know when and how to use these strategies to their advantage. As you execute your remarketing and retargeting campaigns, remember the following:

- ✓ Remarketing refers to re-engaging existing customers and increasing loyalty and post-purchase value.
- ✓ Retargeting refers to converting potential customers into paying customers.
- ✓ Successful development of remarketing or retargeting campaigns requires a clear marketing objective and goal that aligns with business goals.
- ✓ Before you execute any remarketing or retargeting campaign you must ensure you have the proper assets and elements in place, including creative, offers/incentives, customer lists, tracking, user experience, and reporting.
- ✓ To determine which platforms to run on, think about the type of data you have on your audience, the match rates of each platform, the funnel stage on your audience, and the context in which your audience will be exposed to your ad.
- ✓ There are three main types of audience data collected with pixel-based or 'on-site' retargeting: site engagement metrics, UTM based, and past conversion actions.
- ✓ Don't forget about retargeting prospects who have interacted with your brand in an 'off-site' manner.
- ✓ Make use of MarTech and Sales platform integrations to simplify and automate the customer list import process in a data privacy compliant manner.

About The Authors

As a digital marketing veteran since 2007, the Detroit native has developed and executed paid social media strategies across various verticals, including financial services, automotive, and CPG.

His expertise includes lead generation, strategy development, analytics, testing, and campaign optimization across companies like Intercom, Yext, and Clover. Bringing a breadth of experience from both the agency and client-side, Sean enjoys fostering customer growth and professional development for budding practitioners.

When Sean isn't driving innovation across client accounts or dispelling the myths about Facebook B2B advertising, you can find him working on his latest science fiction novel or playing the drums.



Creative by nature, Tori brings her natural passion for visual and verbal arts into her work on paid search, display, and video advertising for clients across a wide spectrum of industries, honing in on delivering strategic ads at the right place and time in the buyer journey.

A lifelong Texan, Tori is a graduate of the University at Texas-Austin, where she earned her B.S. in Advertising. She is currently based in the Dallas/ Fort Worth area, where she lives with her husband Elliot and her snuggly, sharp-dressed tuxedo cat, Pierre.



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Key Metrics	Impression Share, Spend by Match Type, CPA	
Spend Hierarchy	Channel & Platform Spend Distribution	
Account Structure	Campaign & Ad Group Organization	
Account Settings	Dayparting, Ad Rotation, Distribution, Geotargeting, etc.	
Bidding Strategy	ROI vs. Position	
Keyword Strategy	Match Types, Depth, QS, Search Query Reports, etc.	
Ad Copy Creative	Continuity, Testing, Differentiation, CTA, Automation, etc.	
Landing Page	Continuity, Design for Conversion	
Tracking & Metrics	Conversion Tracking, GA Usage	

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