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01

The Marketer's Data Challenge

Marketing leaders face shifting market dynamics

Regulation

Data privacy and brand risk continue to increase with legislation

- GDPR, CCPA...
- Right to Delete
- Right to Opt-Out

Fragmentation

Everyone is becoming a walled garden with different data requirements

- Media Networks
- OTT and Streaming
- Non-Integrated Systems

Generative AI

Growing AI resources and challenges

- Image and video generation
- Tagging and classifications
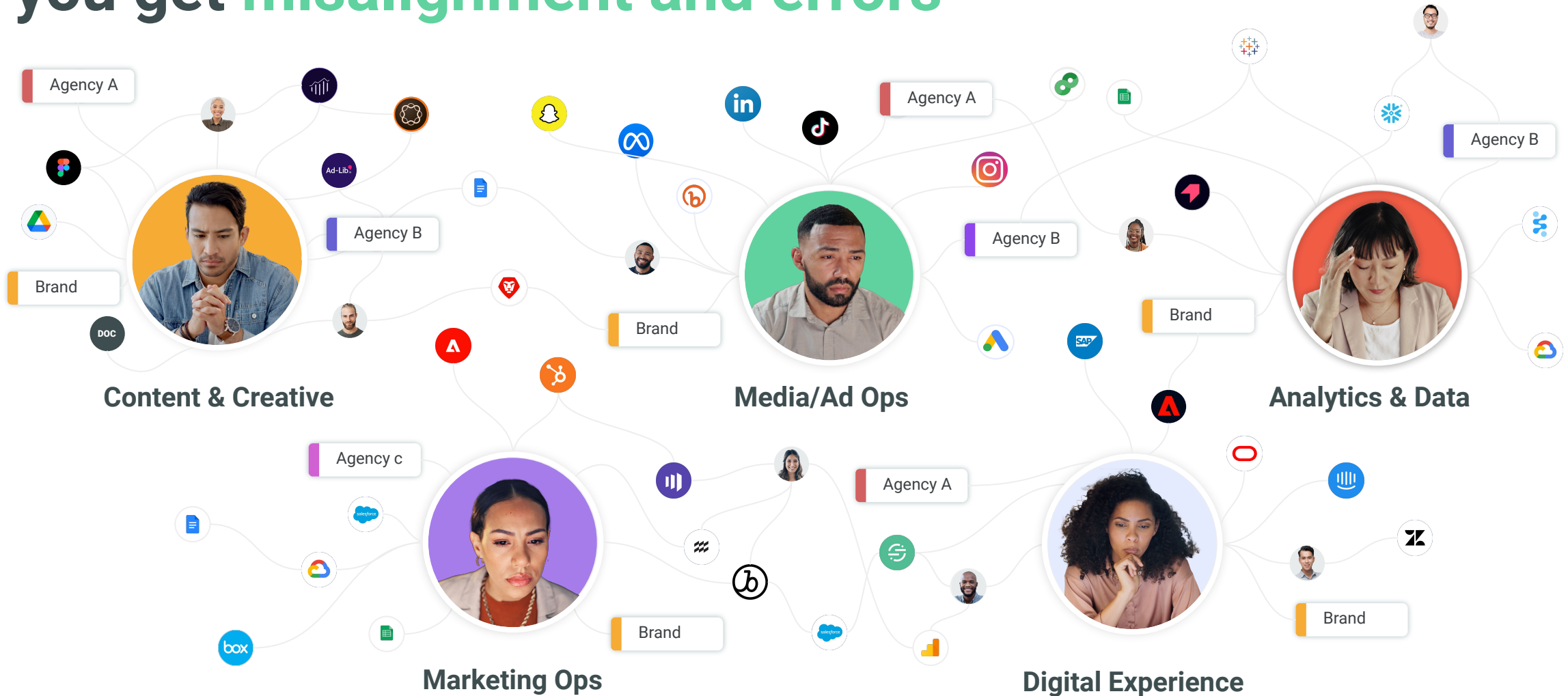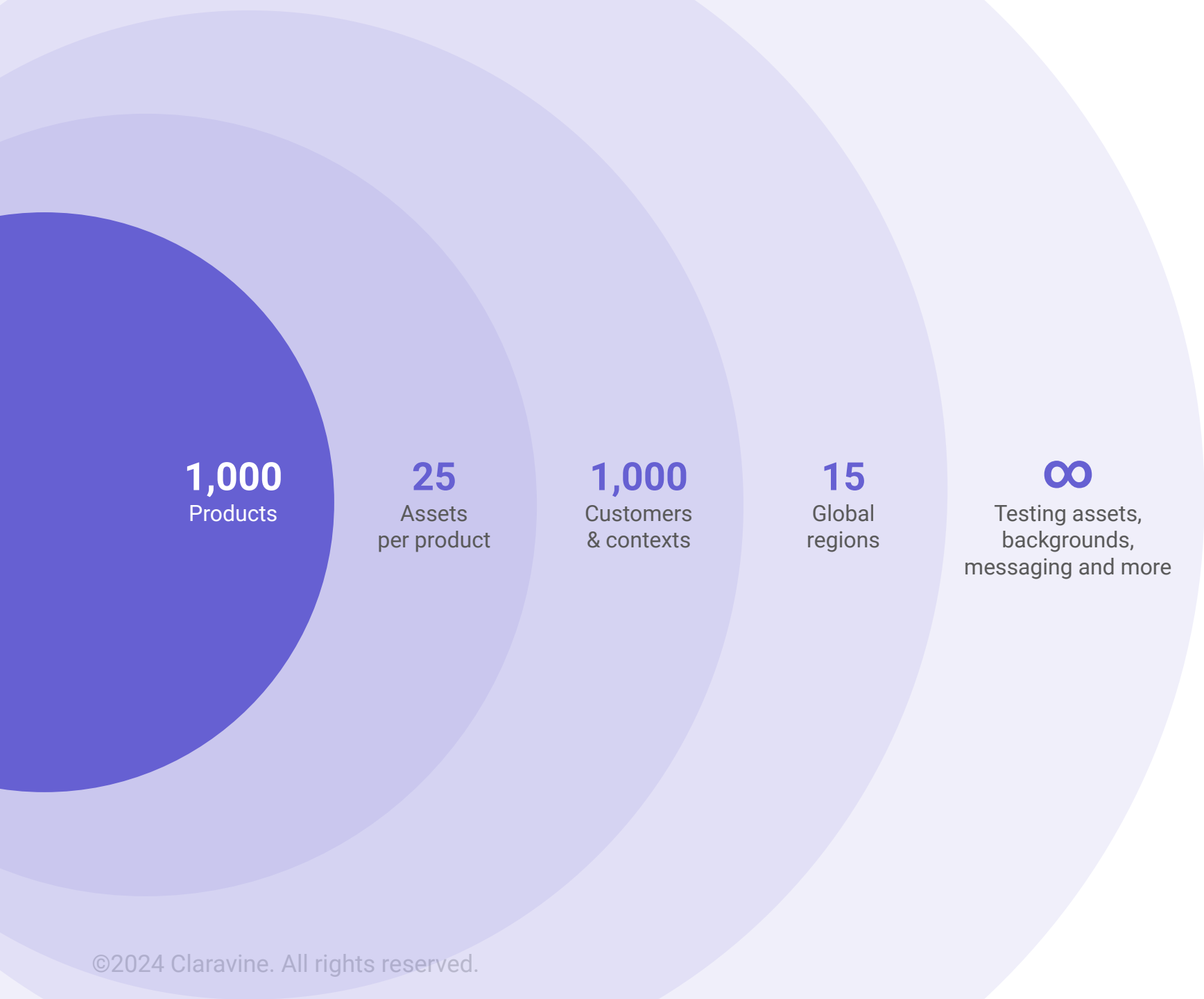- Testing and optimization

Signal-Loss

Ability to connect with consumers and measure engagement is shifting

- 3P Cookie Deprecation
- SKAd Network
- ATT
- Privacy Relay

Layer in people and tech, you get misalignment and errors

Content & Creative

Media/Ad Ops

Analytics & Data

Marketing Ops

Digital Experience

Agency A
Agency B
Brand
Agency c

1,000
Products

25
Assets
per product

1,000
Customers
& contexts

15
Global
regions

∞
Testing assets,
backgrounds,
messaging and more

Demand for content is accelerating while budgets tighten

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02

Take the Drama Out of Your Marketing Data®
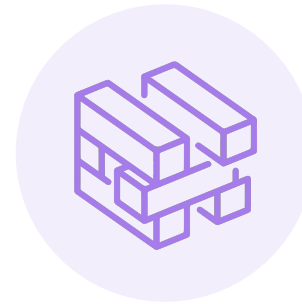
Your marketing metadata needs...

A Source of Truth

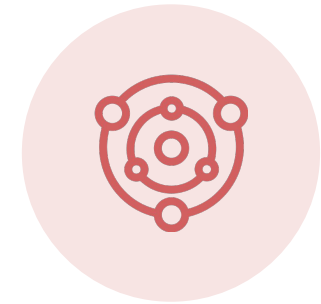Central storage and management of marketing metadata

A Data Playbook

Accessible, custom guidance for marketing, data teams, and partners

A System of Intelligence

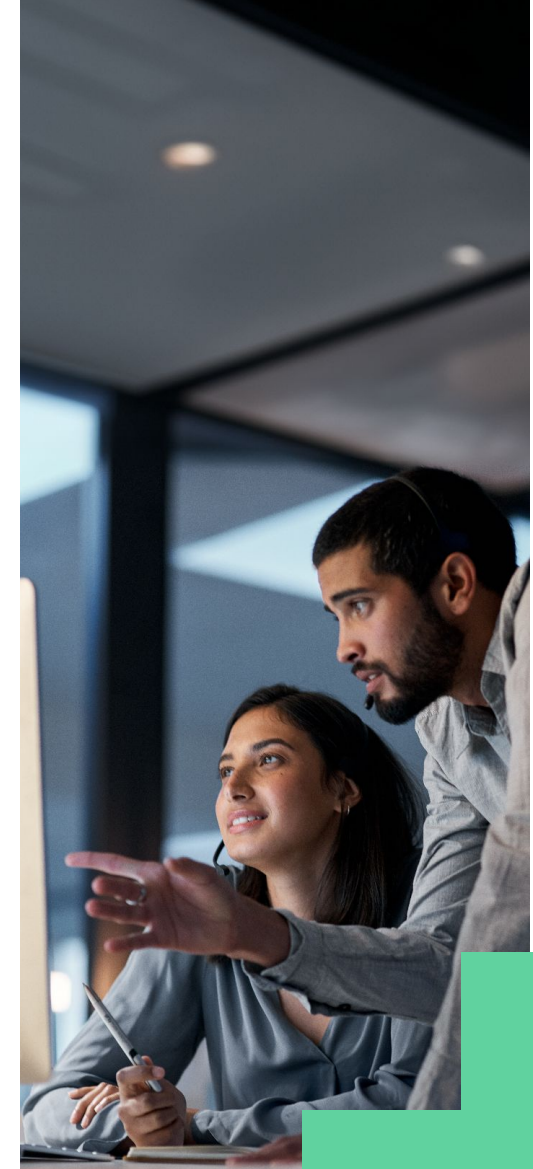Actionable data, accessible across systems and boosted by AI/ML

A Hub for Coordination

Tools for collaboration and change management between teams and tech

Step1:
Taxonomy Discovery

Identification of gaps and opportunities to enhance
marketing campaign taxonomy and data governance

Step 1

Taxonomy Audit

Start by grounding in the current marketing taxonomy and processes across channels.

Begin by reviewing existing taxonomy documentation and conducting stakeholder interviews with each of the marketing channel teams. Includes teams such as:

1. **Performance Marketing Channel Teams**
   (i.e. social, display/programmatic, paid search, etc.)

2. **Brand & Agency Teams**

3. **Marketing Strategy & Creative Teams**
   (incl. creative, GTM, and product marketing teams)

Current state taxonomy audit should focus on existing naming conventions and metadata tracking processes, and review of typical reporting activities and processes.

Common Audit Finding Examples

Uncoordinated Taxonomies Across Teams

Current naming taxonomies are not coordinated across channel teams, and also differ between brand and performance marketing teams.

Manual Ad Hoc Reporting with Workarounds

Reporting is done mostly ad hoc and manually by teams as workaround for centralized reporting. Difficulty connecting front and back-end metrics.

Unclear Audience vs. Channel Distinctions

The line is blurred between channels and audiences in current reporting, and there is desire to make this clearer in future state.

Existing Taxonomy Tech Challenges

Current taxonomy system works for capturing metadata related to tracking codes but is inefficient for most teams with major governance challenges.

Disconnect between Strategy & Activation

The GTM process dissolves after the campaign managers engage with creative team. No clear connection between strategy and channel teams.

Informal Taxonomy Roles & Responsibilities Alignment

No formal agreement exists on roles, responsibilities, and ownership across teams regarding taxonomy and tracking.

Step 1

Taxonomy
Gap Analysis

Leveraging findings from the audit, conduct a gap analysis focused on identifying attributes that need to be added to the future marketing taxonomy.

Gap analysis activities should center on three primary questions to define a list of goal taxonomy fields for all channels:
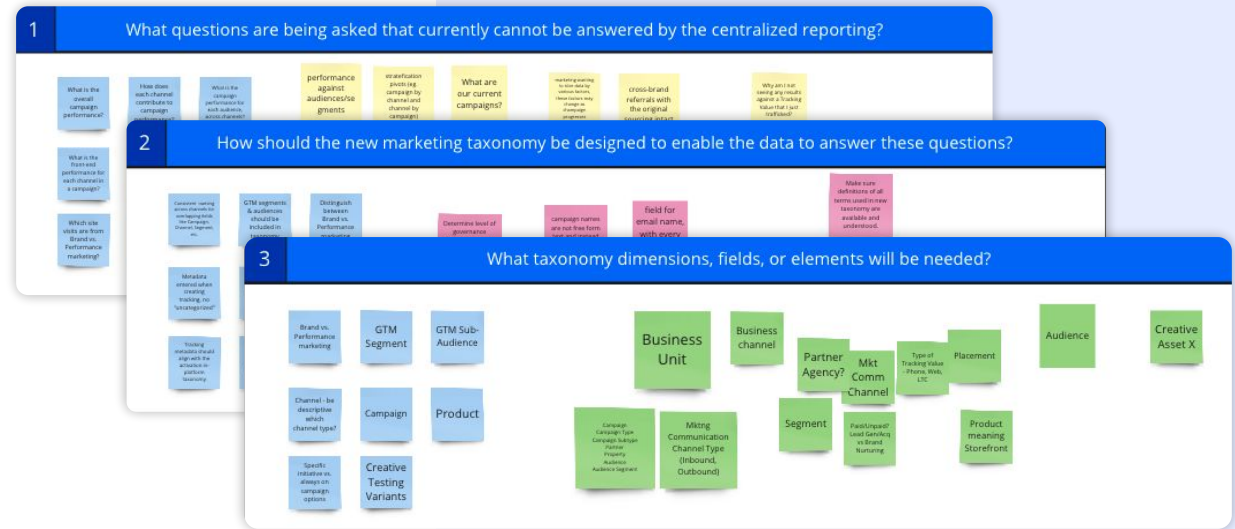
- What questions are being asked today that cannot be answered by centralized reporting?

- How should the new marketing taxonomy be designed to enable the data to answer these questions?

- What taxonomy dimensions, fields, or elements will be needed?


TAXONOMY GAP ANALYSIS FINDINGS

Goal Fields to be in Taxonomy Across Channels	Detail
LOB	Line of business...
Campaign Type	B2C / B2B / Talent Acquisition
Campaign Subtype	Always On vs. Specific Initiative
Campaign Name	Always On vs. GTM Initiative Name
Campaign Phase	Always On vs. Phase Name (Freeform)
Marketing Comms Channel	Marketing Channel Used to Reach Out to Clients
Marketing Type	Brand vs. Performance Marketing
Media Property	Previously called 'Partner', "Facebook" for example
Target GTM Segment	The 5 GTM Strategic Segments
Target GTM Audience	GTM Audience

Fields Added to Certain Channels	Detail
Device	Desktop / Mobile / Laptop / Cross-Device
Geo	Targeted geographic region
Rate Type	CPM, CPC, CPA, etc.

Fields with Associated Metadata	Detail
Paid vs. Owned	Based on Marketing Comms Channel
Agency	Based on Marketing Type, for "Brand" associated Agency = UM
Media Partner	Based on Media Property, for example Media Property = "Facebook" and associated Media Partner = "Meta"
Application Name	Based on Click Destination URL

Step 2: Taxonomy & Data Governance Strategy

Taxonomy and data governance solution to streamline data strategy and tracking to make reporting and analytics more powerful and actionable.
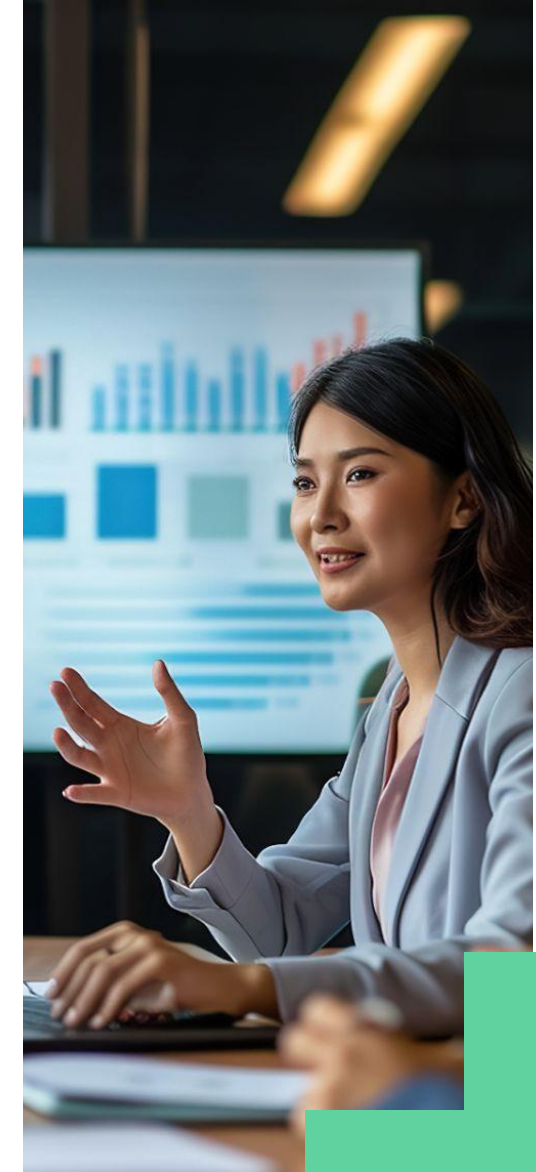
Taxonomy Design Framework
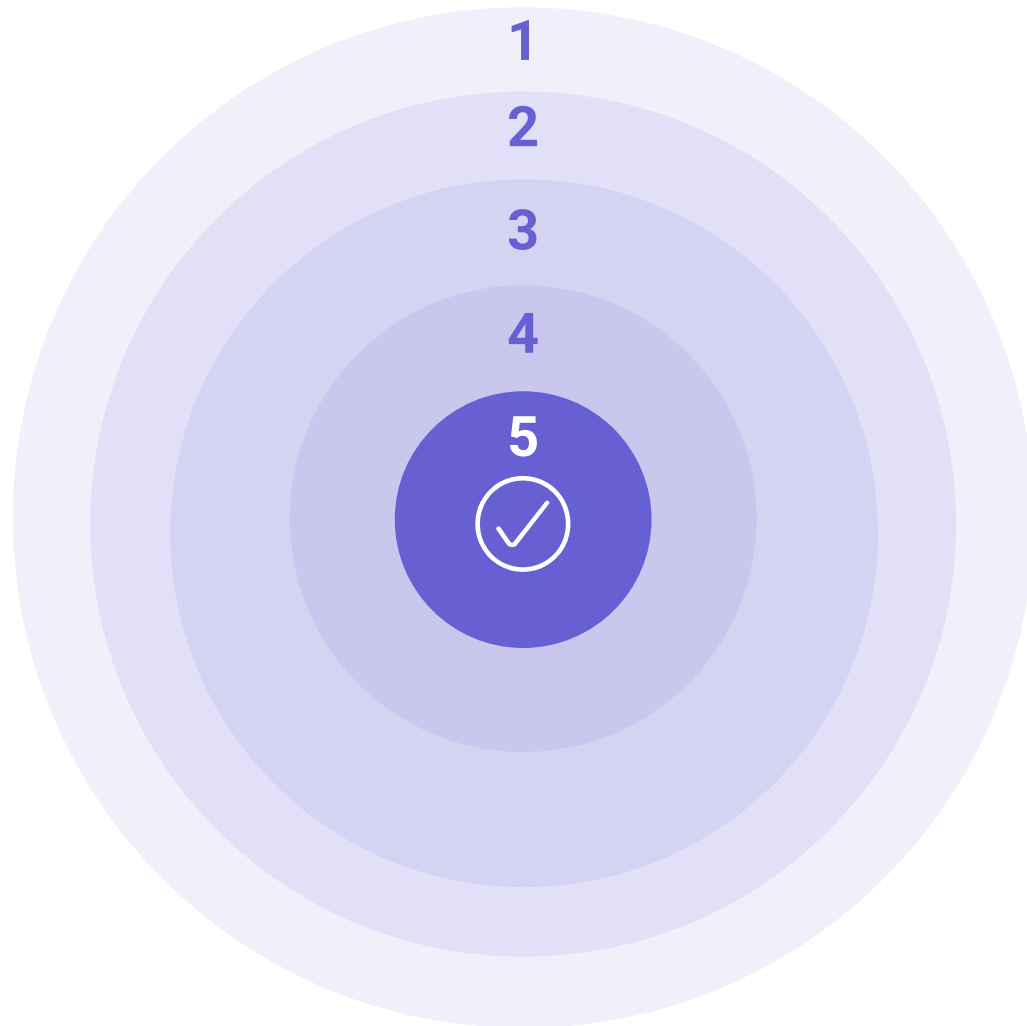
01 Channel / Focus Area

Prioritize marketing channels to be incorporated into enterprise data taxonomy standard processes.

02 Templates

A collection of taxonomy elements, such as fields or patterns, that express data standards for a specific type of data. **This is the basic Claravine work unit.**

03 Users

Who will need access to the specific template and data governance processes for this specific channel and template(s).

04 Inputs

The type of data that will inform the campaign taxonomy and data governance for each specific channel and template.

05 Outputs

Final desired output for each channel and template(s) following specific conventions and standards.
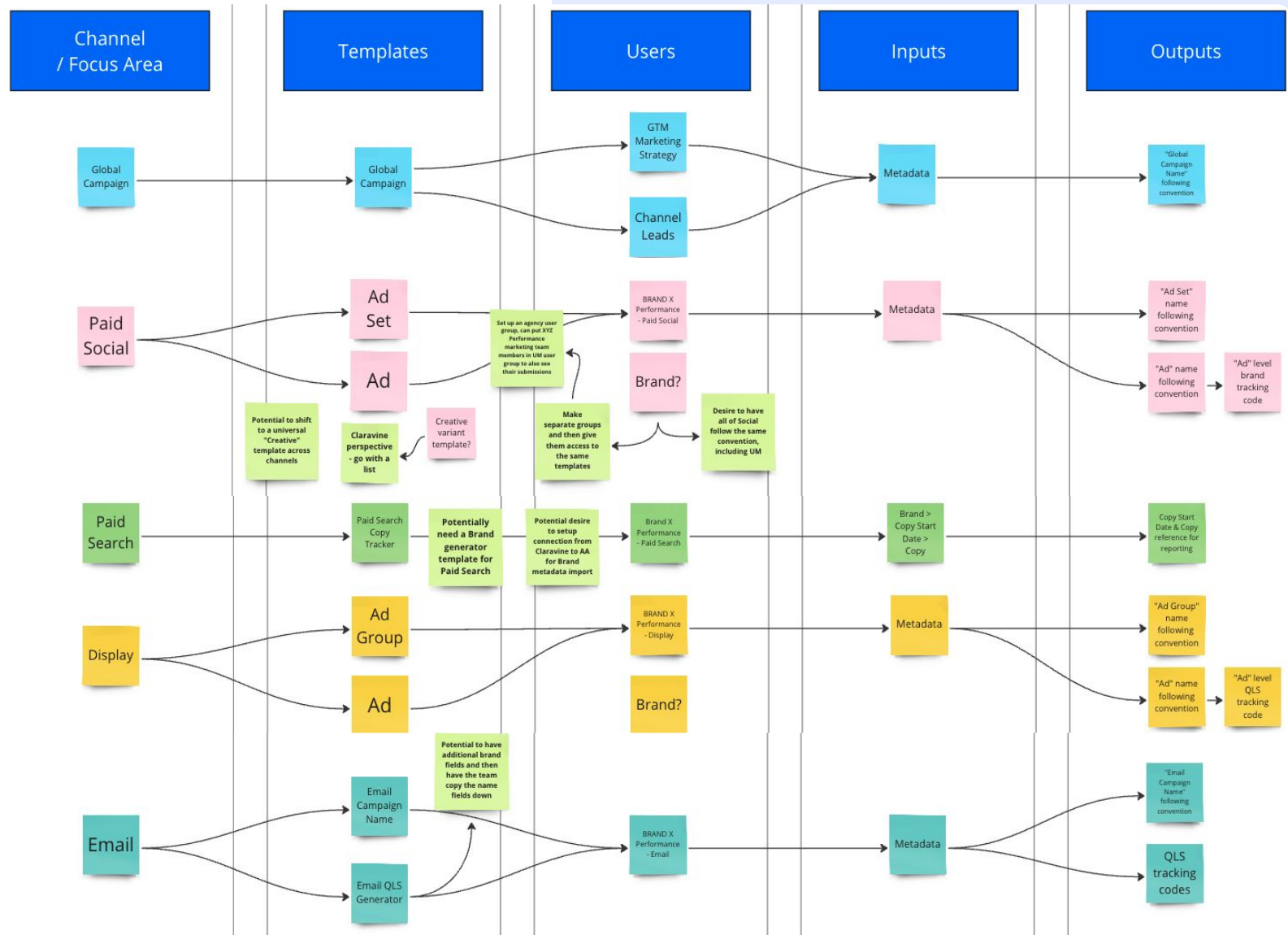
Define & Prioritize Critical Taxonomy Workflows

Align on **priority marketing channels** to design initial data governance standards for leveraging taxonomy technology.

Sample marketing channels:

- Global Campaigns
- Paid Social
- Paid Search
- Display / Programmatic
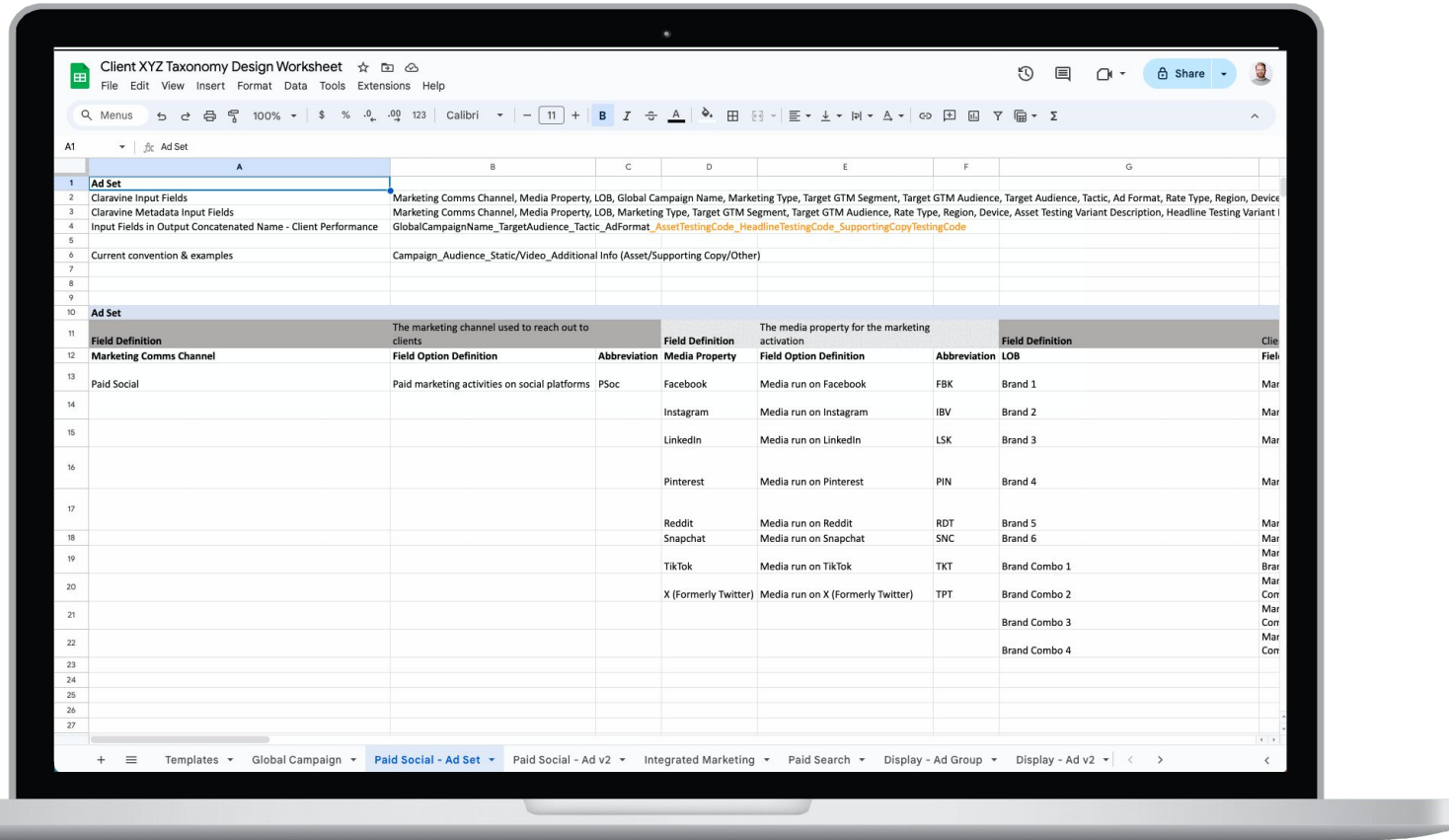- Email
- Linear TV
- Lead Buying
- Affiliate

Translate Workflows to Brand-Specific Taxonomy Standards

Taxonomy Worksheet

- Create a "Marketing Taxonomy Design Worksheet" that includes:
  - Input metadata fields
  - Output naming convention for marketing platforms
  - Output tracking codes for URL and lead tracking per channel
- Design worksheet to drive conversation in taxonomy refinement sessions and final requirements definition prior to taxonomy implementation.

Translate Workflows to Brand-Specific Taxonomy Standards

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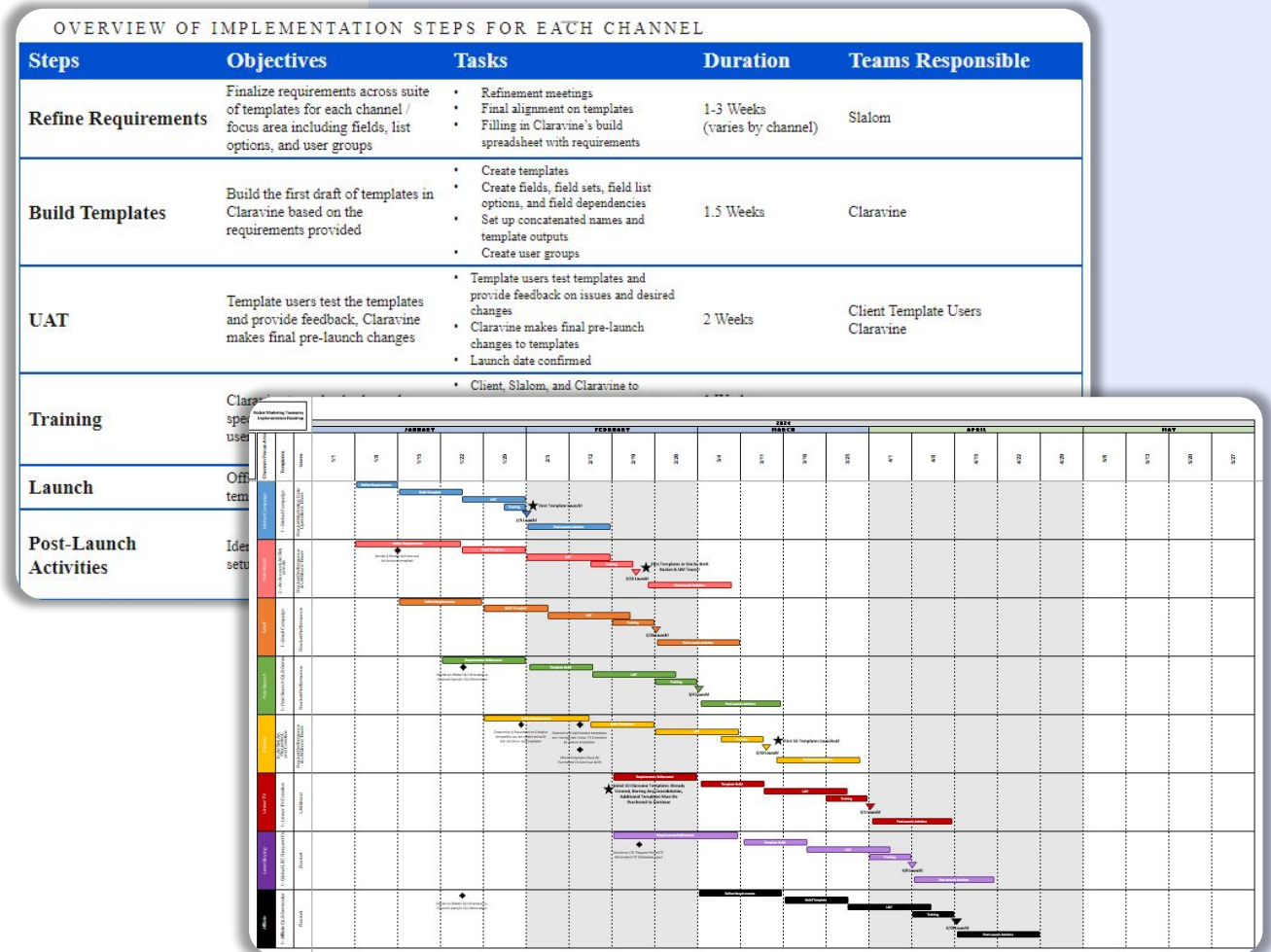
Taxonomy Implementation Roadmap

Map out the implementation stages and sequence to guide the enterprise taxonomy implementation.

With the strategy defined, Claravine & Slalom partner to develop an implementation roadmap for taxonomy adoption.

Roadmap should include alignment taxonomy objectives, tasks, duration, and teams responsible for the following implementation stages:

- Refine requirements
- Build templates & UAT
- Pre-launch Training
- Launch & Post-Launch Support

Each implementation phase was estimated for completion in approximately six weeks.

OVERVIEW OF IMPLEMENTATION STEPS FOR EACH CHANNEL

Steps	Objectives	Tasks	Duration	Teams Responsible
Refine Requirements	Finalize requirements across suite of templates for each channel / focus area including fields, list options, and user groups	• Refinement meetings • Final alignment on templates • Filling in Claravine's build spreadsheet with requirements	1-3 Weeks (varies by channel)	Slalom
Build Templates	Build the first draft of templates in Claravine based on the requirements provided	• Create templates • Create fields, field sets, field list options, and field dependencies • Set up concatenated names and template outputs • Create user groups	1.5 Weeks	Claravine
UAT	Template users test the templates and provide feedback, Claravine makes final pre-launch changes	• Template users test templates and provide feedback on issues and desired changes • Claravine makes final pre-launch changes to templates • Launch date confirmed	2 Weeks	Client Template Users Claravine
Training		• Client, Slalom, and Claravine to		
Launch				
Post-Launch Activities				

Customer Success:
How a leading US mortgage provider revamped its enterprise data taxonomy

Slalom & Claravine partnered to identify gaps in the organization's current campaign taxonomy and implement best-in-class taxonomy standards and processes.
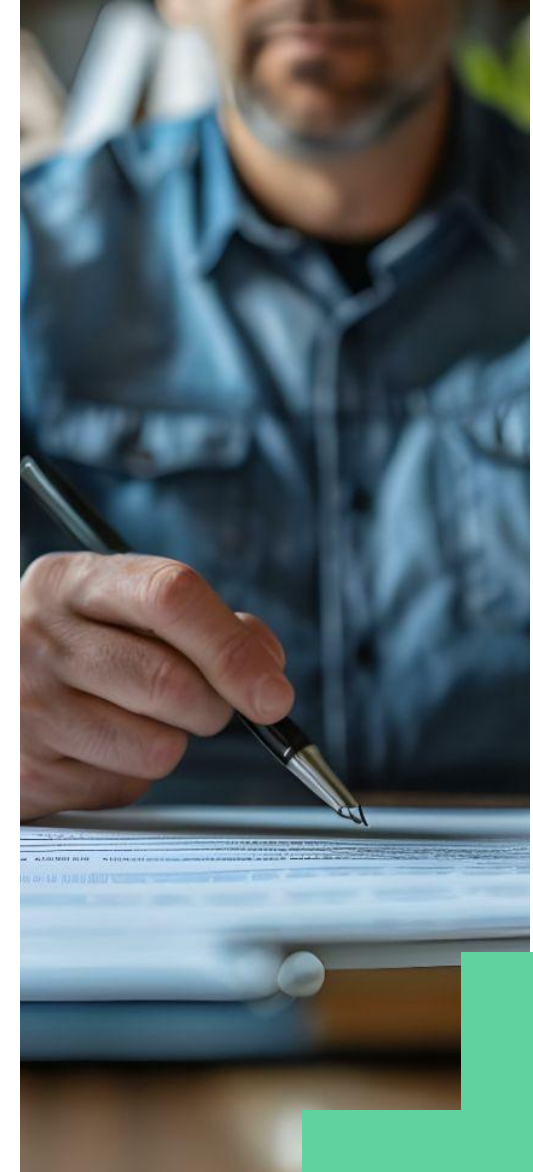
Success Story:

Leading Home Mortgage Provider

Challenge

Inconsistent marketing taxonomy across teams

Lack of tools / technology to enable marketing taxonomy governance and standardization

Major gaps in centralized reporting due to missing performance tracking metadata

Solution

Taxonomy Assessment & Strategic Roadmap

- Taxonomy Audit & Stakeholder Interviews
- Gap Analysis
- New Taxonomy Strategy & Design
- Taxonomy Implementation Roadmap
- Communications & Platform Onboarding Plan

Data Standards & Governance Design

- Usable Data Standards in 6 Weeks
- Consistent & Standardized Naming Conventions for all Marketing Channels
- Effective Governance over Marketing taxonomy
- Implementation roadmap and timing expectations

Results

~50% **Reduction in time spent cleaning data**

Taxonomy Rollout Timelines

	Week 1-2 **Taxonomy Review**	**Week 3-4** **Taxonomy Design**	**Week 5-6** **Roadmap & Comms Planning**	**Week 7+** **Implementation**
Activites	• Interviews with key brands and stakeholders for full 360 view • Break down current taxonomy and media operating model across all channels and brands to be able to distill any similarities, gaps, and inconsistencies in tracking management • Understand current reporting challenges because of the current taxonomy	• Interviews with key brands and stakeholders for full 360 view • Break down current taxonomy and media operating model across all channels and brands to be able to distill any similarities, gaps, and inconsistencies in tracking management • Understand current reporting challenges because of the current taxonomy	• Create a roadmap to implement new taxonomy across brands and teams as well as update dashboarding implementation to prepare for taxonomy launch • Prepare organization for wider adoption of taxonomy/tracking management platform being used internally • Continued refinement of the initial future state taxonomy design	• Guide each channel through the road mapped requirements refinement, template build, UAT, training, launch, and post-launch steps • Build templates in Claravine platform • Work with client data teams on ingestion of Claravine data to enable reporting
Deliverables	• Taxonomy Audit • Current State Analysis	• Taxonomy Gap Analysis	• Desired Future State Taxonomy • Taxonomy Implementation Roadmap • Comms & Training Plan	• Claravine Template launches • ETL Requirements for Ingesting Claravine Data
Outcomes	Grounding in the current marketing taxonomy and processes across channels.	Identified taxonomy gaps to be accounted for in designing the future state taxonomy.	Initial pass of future state taxonomy and a roadmap to guide ongoing requirements refinement and Claravine implementation.	Client teams using Claravine for their marketing taxonomy needs in live campaigns, now with a standardized and governed taxonomy.

The **Future** State of Marketing

James Davis 11:22 AM
Head of Data & Analytics

@Sarah Wilson, I love how campaigns are configured and setup for optimization

Michael Brown 6:17 AM
VP of Marketing Effectiveness

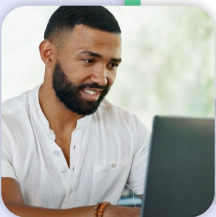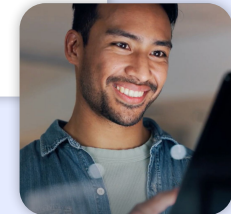@Grace Fan, My decisions and optimizations are fast and accurate

Sarah Wilson 4:10 PM
Media Supervisor

@Chris Zive, Every experience has the right creative asset!

Chris Zive 4:10 PM
Director of Content Strategy

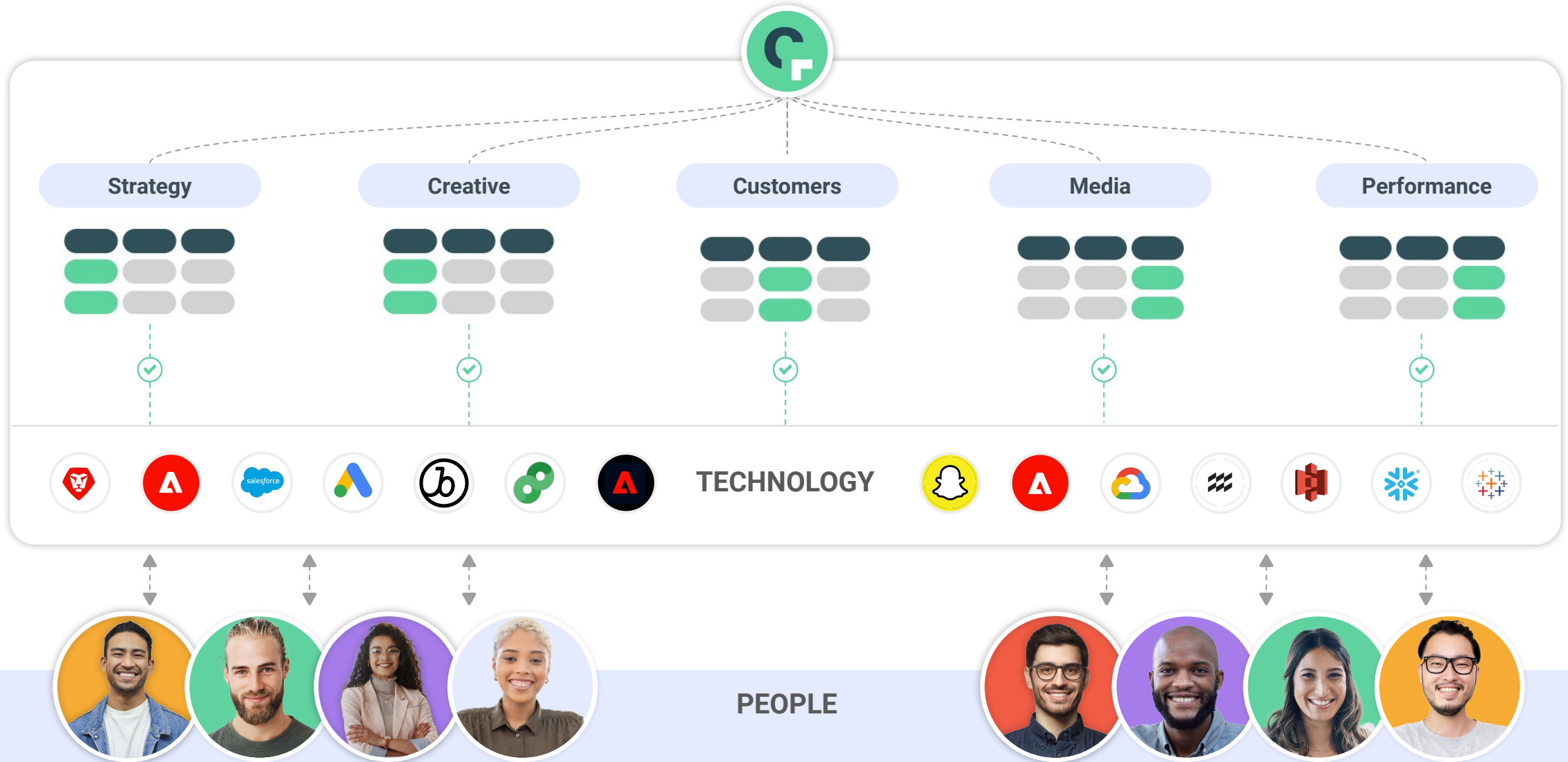@James Davis, Love it! All the creative assets are tagged and easy to find.

Join marketing leaders leveraging data standards today

0:59

Collaboration and connections facilitated with standards

Strategy

Creative

Customers
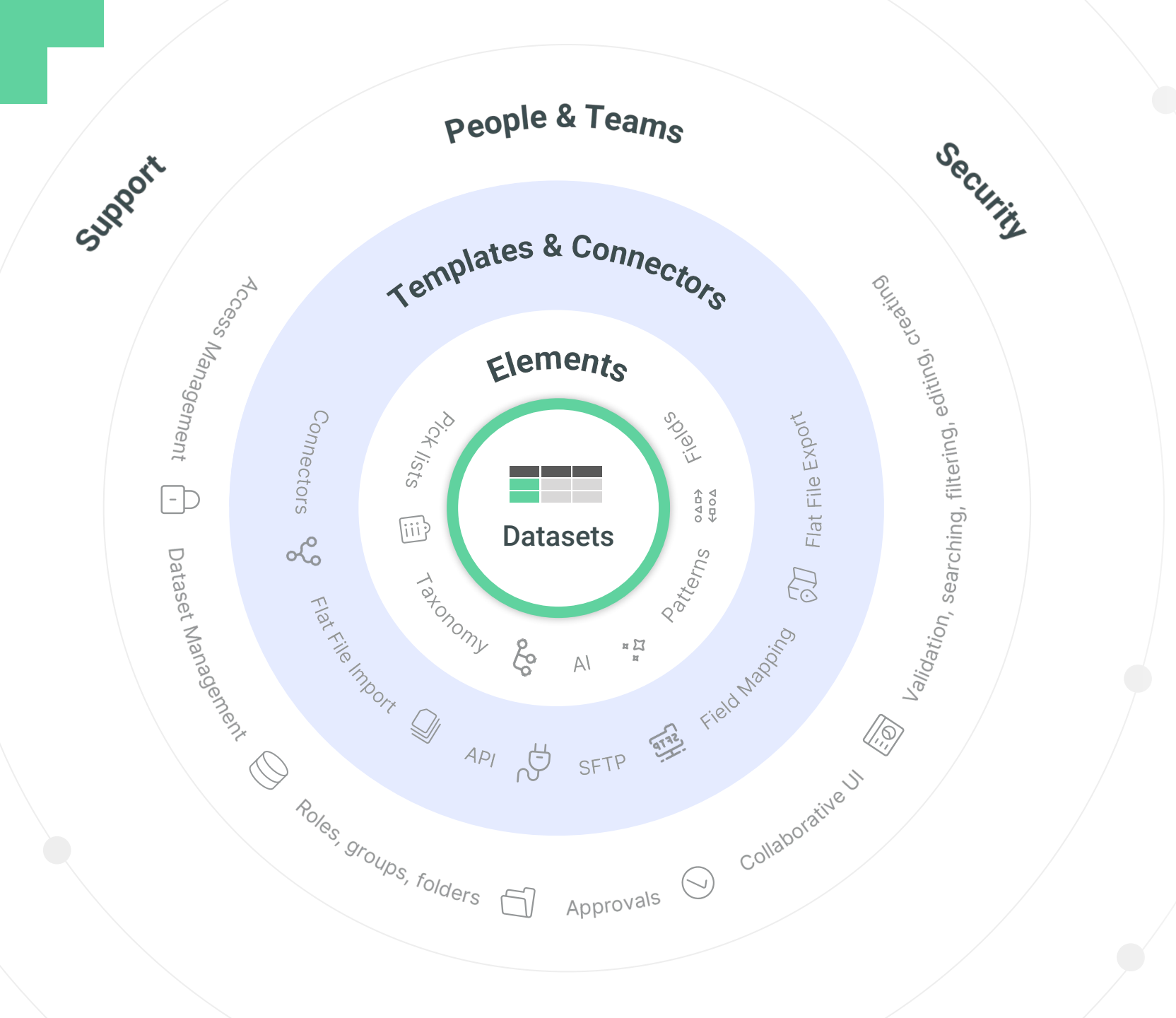
Media

Performance

TECHNOLOGY

PEOPLE

claravine

We take the **drama out of marketing data** by standardizing data at the source, creating a world where people, teams, and technology have a shared understanding of their data.
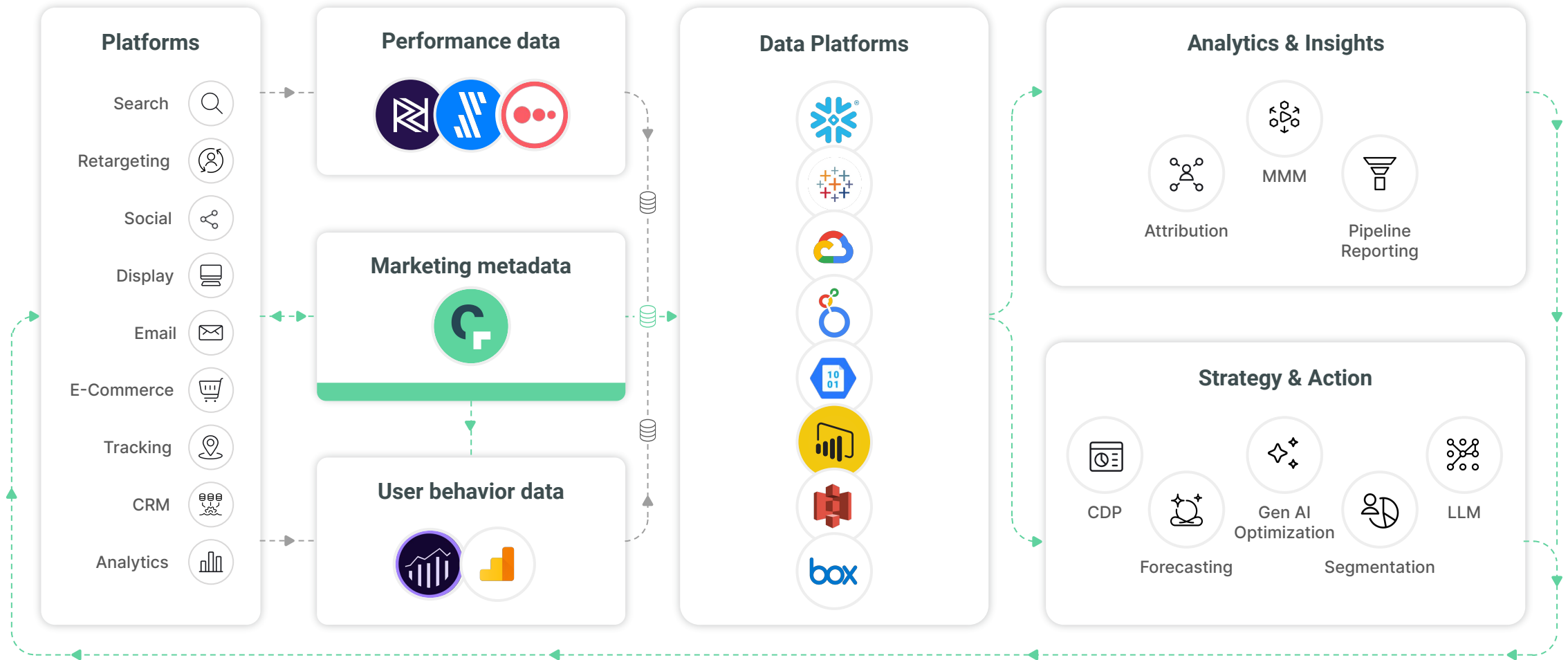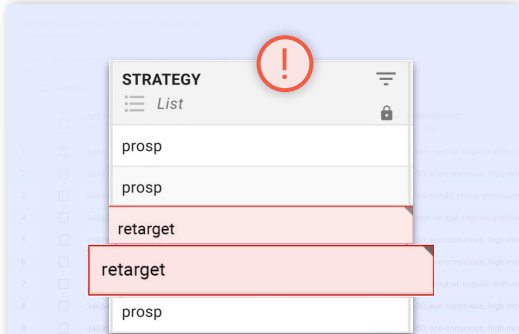
Our Platform
The Data
Standards Cloud

Our Platform in Your Marketing Ecosystem

Platforms
- Search
- Retargeting
- Social
- Display
- Email
- E-Commerce
- Tracking
- CRM
- Analytics

Performance data

Marketing metadata

User behavior data

Data Platforms

Analytics & Insights
- Attribution
- MMM
- Pipeline Reporting

Strategy & Action
- CDP
- Forecasting
- Gen AI Optimization
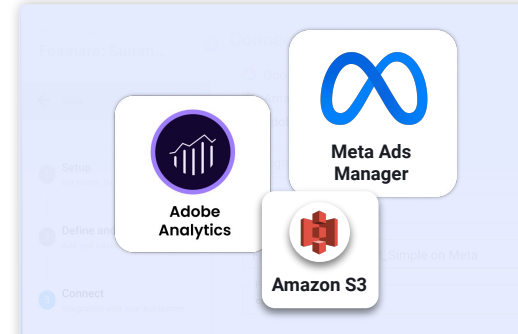- Segmentation
- LLM

Data Standards In-Action

Improve the integrity of existing data
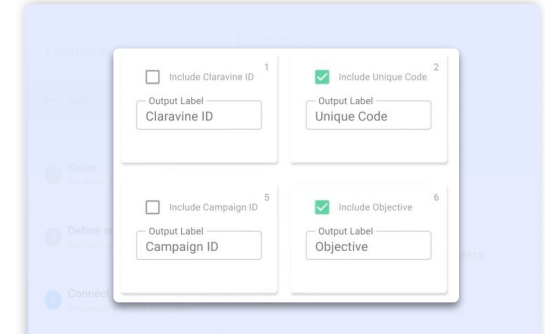—
Centrally store and manage marketing metadata
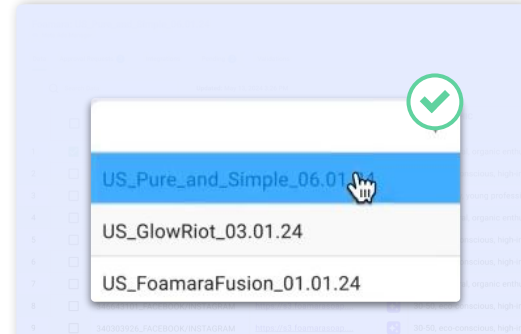
Improve the integrity of data as it's created
—
Align your data, teams, and partners from the start

Put your standardized data to work
—
Maximize the utility, flexibility, and value of data

Future-proof systems and processes
—
Empower marketing and data teams to adapt

Better Together: Claravine + Slalom

6 Weeks to Standardized Data Taxonomy

claravine

The Data Standards Cloud® platform

Data Taxonomy Best Practices

Template Build and Integrations

+

slalom

Taxonomy Audit & Gap Analysis

Metadata & Taxonomy Strategy

Implementation Roadmap & Support

Customer

Project Prioritization

Existing Taxonomy Intel

Internal Project Support & Approvals

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Thank You.