EXECUTIVE ARCHITECTURE BRIEF | PAID ACQUISITION & CLOSED-LOOP OCT

Scaling $60M+ Paid Acquisition & Insourcing Closed-Loop OCT

How I Replace Vanity Metrics With Held-Appointment Margin, Reallocate $240K+ in Media & Agency Waste, and Lift Qualified Appointments +47% YoY

$60M+/Yr	8.4M Rows	+47% YoY	$240K+/Yr
Annual Paid Media Directed (Spinutech)	90-Location Bottoms-Up Media Forecast	Qualified Sales Appointments (Q1-Q3)	Agency OpEx & Zero-Yield Spend Reallocated

> **The Diagnostic Bottleneck:** Most performance marketing programs optimize Smart Bidding toward shallow top-of-funnel form fills while cookie loss buckets 80%+ of web leads as Direct Traffic. Across multi-location lead generation and high-consideration B2B acquisition, that disconnect inflates platform ROAS, hides Audience Network waste, and starves sales teams of closable pipeline.

1. Closed-Loop OCT, GA4/BigQuery Session Stitching & CRO Split-Testing

- **Fixing the 83.3% Direct Traffic Blind Spot:** As Director of Demand Generation (Reporting to CRO) at a global M&A advisory firm, I audited 1,624 web contacts where 83.3% showed as Direct Traffic due to second-session cookie delays and 25% came via ungated calendar links. I deployed hidden GA4 client ID (_ga) form capture joined to BigQuery, a CallRail >3-minute paid-call source rule, and GCLID/MSCLKID offline conversion uploads tied strictly to Held Appointments.
- **High-Ticket Pipeline & Landing Page CRO:** Restructured commercial-intent search segmentation, isolated Microsoft Audience Network bleed into capped retargeting ($98/verified request), and launched 50/50 advisory landing page split-tests, lifting qualified inbound appointments +47% YoY and sourcing a $9M transaction-value opportunity.

2. Multi-Location & Regulated Lead Gen Economics ($60M+ Enterprise Portfolio)

- **90-Location Bottoms-Up Forecasting:** As Associate Director, Paid Media at Spinutech, I directed $60M+ in annual spend across Google Ads, Microsoft Ads, SA360, YouTube, PMax, and programmatic DSPs, building an 8.4M-row multi-year capacity and CPL/CPA forecast across 90 Pella Windows & Doors franchise territories.
- **Home Services & Regulated Vertical Rigor:** Led flagship customer acquisition programs for Neighborly (Roto-Rooter, Mosquito Joe), Delta Dental, and NCMIC, aligning local market budget pacing with call-center capacity, TCPA/DNC compliance, and lead-to-sale margin.

3. Capital Reallocation Playbook & Held-Sit Unit Economics

- **$240K+ Annualized P&L Reallocation:** Cut annualized operating expenses by $144K ($9K/month paid media agency insourced plus $3K/month in redundant email tooling retired) and reallocated $100K+ in zero-yield programmatic display spend into high-intent brand search (recovering 40.26% budget-lost impression share).
- **First-90-Day Diagnostic Cadence:** Days 1-30: Audit GCLID/OCT parity, Direct Traffic cookie loss, and wasted search/audience terms. Days 31-60: Lock reporting on Held Appointments and Cost per Signed Engagement ($11.2K CAC / 2.7x first-fee payback benchmark). Days 61-90: Scale 50/50 CRO split-tests and automated daily pacing alerts.

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