



## **SALES DOSSIER**

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## Executive Overview

Omeda is a leading customer data platform and marketing technology provider specializing in audience development, engagement, and monetization for media and information companies. Headquartered in Chicago, Illinois, Omeda has demonstrated consistent financial growth, marked by a significant surge in revenue and profitability in recent years driven by strategic acquisitions and expansion into new markets. The company's focus has been on strengthening its platform capabilities, particularly in areas such as data analytics, marketing automation, and audience management. Key strategic initiatives include enhancing their CDP offerings, expanding their customer base through targeted acquisitions, and developing innovative solutions for first-party data management in a privacy-focused environment. These efforts are geared towards solidifying Omeda's position as a dominant player in the evolving media and information landscape.

## Core Products and Services

Omeda provides a customer data platform (CDP) purpose-built for media and publishing companies. This platform allows clients to collect, unify, and activate first-party audience data to improve audience engagement, subscriptions, and advertising revenue. Omeda's CDP offers a suite of integrated tools, including audience segmentation, email marketing, subscription management, and data analytics. The platform is designed to handle the complex data requirements of media companies, allowing them to track user behavior across multiple channels (web, email, social, events) and create a single view of each customer. This unified view enables personalized messaging and targeted advertising campaigns, driving stronger audience relationships and increasing revenue. Omeda's subscription management tools streamline the subscription lifecycle, from acquisition to renewal, helping publishers optimize their subscription businesses. Furthermore, the platform facilitates audience insights and reporting, providing clients with valuable data on audience demographics, preferences, and engagement patterns. Omeda's solutions are tailored to meet the unique challenges faced by media companies in today's rapidly evolving digital landscape, enabling them to effectively monetize their content and build sustainable audience relationships. They also offer consulting and implementation services to ensure successful platform integration and utilization, along with ongoing training and support.

## Industry Challenges

### Challenge 1: Increasing Data Privacy Regulations and Compliance Requirements

- **Impact:** Stringent regulations like GDPR and CCPA impact Omeda's data collection, storage, and processing practices. This requires significant investments in compliance technology, legal expertise, and updated data management processes. Failure to comply can lead to hefty fines, reputational damage, and loss of customer trust.

It also impacts Omeda's ability to leverage data for personalized marketing, potentially limiting the effectiveness of its solutions.

- **Rationale:** The global regulatory landscape is shifting towards stricter data privacy, impacting all companies handling personal data. Reports from Gartner and Forrester consistently highlight the increasing costs associated with data privacy compliance. Omeda's publicly available resources highlight their commitment to GDPR and CCPA, indicating they are actively addressing this challenge by investing in compliance measures.

### **Challenge 2: The Rise of a Cookieless Future and Evolving Identity Resolution**

- **Impact:** The phasing out of third-party cookies and other tracking mechanisms directly affects Omeda's ability to track user behavior across websites and personalize marketing campaigns. This necessitates a shift towards first-party data strategies and alternative identity solutions. Omeda must adapt its platform and services to support these new approaches and help its clients navigate the cookieless landscape.
- **Rationale:** Google's decision to phase out third-party cookies and the increasing adoption of privacy-focused browsers like Safari and Firefox have significantly altered the digital advertising ecosystem. Industry publications like AdExchanger and Digiday extensively cover this shift and its impact on marketing technology providers. Omeda's emphasis on first-party data strategies in their marketing materials suggests they are adapting to this change.

### **Challenge 3: Intensifying Competition from Larger MarTech Platforms**

- **Impact:** Large, integrated marketing clouds like Adobe, Salesforce, and Oracle offer a broader suite of solutions, posing a competitive threat to specialized providers like Omeda. These larger players can leverage economies of scale and offer bundled services, potentially attracting Omeda's customers with more comprehensive offerings.
- **Rationale:** The MarTech landscape is consolidating, with larger platforms acquiring smaller players to expand their capabilities. Industry reports from companies like Scott Brinker highlight the increasing complexity and consolidation within the MarTech landscape. Omeda's focus on a specific niche (B2B media and events) might be a strategy to differentiate itself and avoid direct competition with these larger players.

### **Challenge 4: Demand for Advanced Analytics and AI-Powered Marketing Solutions**

- **Impact:** Customers are increasingly expecting sophisticated analytics, predictive modeling, and AI-driven personalization capabilities from their MarTech platforms. Omeda needs to continuously invest in R&D and incorporate these advanced features into its offerings to remain competitive and meet evolving customer demands.
- **Rationale:** The adoption of AI and machine learning in marketing is rapidly growing. Reports from McKinsey and Gartner highlight the transformative potential of these technologies in improving marketing effectiveness. Omeda likely needs to incorporate these technologies into its platform to remain competitive and provide value to its clients.

### **Challenge 5: Talent Acquisition and Retention in a Competitive Market**

- **Impact:** The demand for skilled data scientists, software engineers, and marketing technologists is high. Omeda faces challenges in attracting and retaining top talent, especially as it competes with larger tech companies offering higher salaries and more extensive benefits. This talent shortage can hinder product development, innovation, and customer support.
- **Rationale:** The tech industry is experiencing a widespread talent shortage. Reports from LinkedIn and other job boards highlight the difficulty in finding and retaining skilled tech professionals. Omeda needs to invest in competitive compensation packages, employee development programs, and a strong company culture to attract and retain the best talent.

## **Potential AI Use Cases Industry**

### **1. AI-Powered Audience Segmentation and Personalization**

**Description:** This use case involves leveraging AI to enhance Omeda's audience segmentation and personalization capabilities. By utilizing machine learning algorithms, Omeda can develop more sophisticated models that analyze audience behavior patterns, preferences, and demographics across various channels. The system would automatically segment audiences into highly targeted groups based on these insights, allowing for more precise targeting in marketing campaigns. Moreover, using Natural Language Processing (NLP), the platform could personalize content

recommendations in real time, improving engagement and conversion rates. For instance, the system could dynamically alter email content or website layouts to suit individual user profiles, increasing audience retention and monetization potential.

**Rationale:** Given Omeda's emphasis on audience engagement and monetization, enhancing personalization can significantly improve customer experience and engagement metrics. Consumers expect tailored interactions, and personalized content is proven to have higher engagement rates. This aligns with Omeda's goal to provide value in a competitive digital landscape by offering advanced audience insights and marketing solutions.

#### **Tools Used:**

- **Machine Learning Frameworks (TensorFlow, PyTorch):** For building predictive models that analyze user data.
- **NLP Tools (SpaCy, NLTK):** For understanding and generating personalized content in email and web interfaces.
- **Data Lakes/Data Warehouses (AWS, Google BigQuery):** To store and process large volumes of audience data for machine learning models.

## **2. Smart Subscription Lifecycle Management**

**Description:** Omeda can implement AI algorithms to optimize subscription management by predicting customer behavior and automating lifecycle processes. This system would use predictive analytics to identify subscribers at risk of churn and implement retention strategies, such as personalized offers or content suggestions, to re-engage them. Additionally, AI can streamline customer acquisition by automating A/B testing for marketing campaigns, ensuring the most effective strategies are employed. The system could also optimize renewal processes by predicting the best timing for renewal prompts and suggesting personalized packages based on historical subscriber data.

**Rationale:** Enhancing the subscription lifecycle is crucial as it directly impacts revenue and subscriber retention. By using AI to anticipate churn and personalize interactions, Omeda can improve its subscription management features, addressing the broader industry challenge of fluctuating revenue streams and the need for effective monetization strategies.

### Tools Used:

- **Predictive Analytics Platforms (IBM SPSS, Salesforce Einstein):** To create models that predict subscriber behavior.
- **Marketing Automation Tools (Marketo, HubSpot):** To automate campaign testing and execution.
- **CRM Systems (Omeda CDP, custom integrations):** For managing subscriber data and insights.

### 3. Compliance and Data Governance Automation

**Description:** This use case involves deploying AI-driven tools to automate compliance with data privacy regulations like GDPR and CCPA. The system would use machine learning to continuously monitor data flows, automatically flagging compliance risks and suggesting corrective actions. It would also provide audit trails and reporting tools to ensure transparency and accountability in data governance. Additionally, an AI chatbot could be integrated to assist in real-time queries regarding user data requests or compliance status, enhancing customer trust and operational efficiency.

**Rationale:** With increasing data privacy concerns and regulations, automated compliance solutions are essential for avoiding legal pitfalls and maintaining customer trust. By integrating AI in compliance processes, Omeda can efficiently manage its legal obligations, reduce operational costs, and maintain its reputation as a leader in data management.

### Tools Used:

- **AI-Driven Compliance Platforms (OneTrust, TrustArc):** For automating data privacy compliance processes.
- **Chatbot Technology (Dialogflow, Microsoft Bot Framework):** For real-time compliance support and customer interactions.
- **Data Monitoring Tools (Splunk, LogRhythm):** To track and audit data movements and compliance processes.

### 4. Predictive Content Monetization Strategies

**Description:** Omeda can utilize AI to develop predictive models for optimizing content monetization strategies. This system would analyze historical data and market trends to forecast content performance, suggesting pricing models and distribution channels that maximize revenue. AI could also assess competitive content dynamics to provide strategic

recommendations for content creation and marketing efforts. Furthermore, audience feedback analysis can guide content personalization, ensuring that it aligns with consumer interests and maximizes potential monetization through subscriptions and advertising.

**Rationale:** The shift towards digital content demands innovative monetization strategies. By leveraging AI to predict and optimize content strategies, Omeda can effectively enhance revenue streams and stay competitive in the media and information landscape.

**Tools Used:**

- **Predictive Analytics Software (SAS, RapidMiner):** For forecasting content performance and pricing strategies.
- **Business Intelligence Tools (Tableau, Power BI):** For visualizing data insights and competitive analysis.
- **Sentiment Analysis Tools (VADER, IBM Watson):** To interpret audience feedback and tweak content personalization.

## **5. AI-Driven Campaign Performance Optimization**

**Description:** Omeda can enhance its marketing platform by integrating AI to optimize campaign performance in real-time. This use case would involve real-time analytics to monitor campaign effectiveness, employing machine learning algorithms to identify performance patterns and suggest adjustments. AI could automatically adjust parameters like targeting, bidding, and content placement to ensure optimal ROI. Furthermore, integrating sentiment analysis and trend detection could refine messaging strategies and improve campaign effectiveness across digital channels.

**Rationale:** Optimizing marketing campaigns is critical for maximizing revenue and engagement. By integrating AI, Omeda can provide improved campaign management capabilities, addressing the need for data-driven marketing strategies in a competitive industry environment.

**Tools Used:**

- **Real-Time Analytics Platforms (Google Analytics 360, Snowflake):** For monitoring and analyzing campaign data.

- **Machine Learning Ops Tools (Azure ML, AWS SageMaker):** To deploy and manage machine learning models in production.
- **Sentiment Analysis APIs (MonkeyLearn, Lexalytics):** To refine messaging strategies based on audience sentiment.

## Business Challenges

### 1. Maintaining a High Standard of Workplace Culture

- **Impact:** Sustaining a high workplace culture can affect employee satisfaction and retention, critical for the company's stability and ability to attract top talent. It is essential to keep employees motivated and engaged, which in turn positively affects productivity and company reputation.
- **Rationale:** Earning the "Top Workplaces 2022" honor by the Chicago Tribune sets a high benchmark for workplace culture. As expectations rise internally and externally due to this recognition, Omeda must continuously innovate in its HR practices and employee engagement strategies to maintain its status.

### 2. Keeping Up with Rapid Evolution of Data Analytics and Marketing Strategies

- **Impact:** Lagging in the adoption of new data analytics and marketing strategies can reduce competitive advantage, hinder customer acquisition and retention, and ultimately impact revenue growth.
- **Rationale:** The ongoing evolution in digital marketing and data analytics necessitates continuous adaptation. Omeda, which deals with audience data, must stay at the forefront of employing cutting-edge tools and methodologies to effectively engage and grow its audience.

### 3. Ensuring Data Privacy and Governance Amidst Growing Regulations

- **Impact:** Failure to comply with stringent data regulations such as GDPR and CCPA could lead to hefty fines and damage to brand reputation, while also losing customer trust.
- **Rationale:** As a company that handles significant amounts of audience data, ensuring data privacy is crucial. The increased emphasis on data governance and privacy regulations presents a continuous compliance challenge that Omeda must navigate carefully.

#### 4. Adapting to Digital Transformation in Publishing

- **Impact:** Inability to adapt to digital changes could see Omeda losing market share to competitors who offer more digital-savvy solutions. Successful adaptation, however, provides opportunities for innovative subscription models and enhanced digital engagement with audiences.
- **Rationale:** As the industry shifts towards digital, publishers must innovate in subscription models and digital content delivery. Omeda, serving the publishing sector, faces the direct challenge of aiding its clients through this transformation to ensure sustained demand for its services.

#### 5. Leadership Transition with New CEO Appointment

- **Impact:** Leadership transitions can create periods of uncertainty that affect strategic continuity, culture, and confidence among employees and investors. Successfully navigating this can strengthen the company's leadership and strategic direction.
- **Rationale:** With the recent appointment of James Capo as CEO, Omeda faces the challenge of ensuring a smooth transition that aligns with its strategic goals. Leadership transitions are critical times that require effective communication and strategic foresight to maintain or accelerate growth and operational excellence.

# Potential Snowflake Use Cases

Title: "Unified Customer Data Platform Enhancement with Snowflake"

Description: This use case focuses on enhancing Omeda's existing Customer Data Platform (CDP) by leveraging Snowflake's cloud-based data storage and analytics capabilities. Omeda's CDP is central to its mission of gathering and unifying audience data for media companies. By integrating Snowflake, Omeda can streamline data ingestion, integration, and insights extraction, enabling real-time data processing and advanced analytics. Snowflake's high concurrency and scalability support the processing and analysis of large volumes of first-party data from various channels, such as web, email, and social media. Advanced analytics and AI models can be applied to this data to derive deeper audience insights, improve segmentation, and foster personalized content and advertising strategies.

Rationale: The rationale for this use case is drawn from the experience of State Street using Snowflake to manage and integrate data for its investment platform. As noted in State Street's case study, Snowflake's architecture enabled them to consolidate data across silos, facilitating a single source of truth and enhancing decision-making capabilities. Similarly, Omeda can leverage Snowflake to integrate diverse audience data sources, reducing data fragmentation and improving customer insights. This integration would address Omeda's challenge of leveraging data-driven marketing strategies and enhance audience engagement and retention.

Tools Used:

- Snowflake Data Cloud: For scalable data storage and cross-source data integration.
- SnowSQL and Python: For building and maintaining data pipelines.
- AI/ML frameworks such as TensorFlow or PyTorch: For advanced analytics and audience segmentation.
- Business Intelligence tools such as Tableau: For data visualization and reporting.

Rating: High - This use case is grounded in robust examples from Snowflake's existing client successes and directly addresses Omeda's core business challenges and objectives.

Title: "First-Party Data Monetization and Privacy Compliance"

Description: Omeda can monetize its first-party data assets while ensuring strict compliance with data privacy regulations like GDPR and CCPA. This use case involves leveraging Snowflake's secure data sharing capabilities and data governance features to form a 'data marketplace' where anonymized audience segments can be shared with trusted partners and advertisers. Omeda can implement advanced data governance frameworks within Snowflake to maintain compliance and uphold consumer privacy. Advertisers can access these anonymized insights to run targeted campaigns, thereby opening up new revenue streams for Omeda.

Rationale: This use case was inspired by MarketScan's case study, where Snowflake's platform was used to securely share real-world health data, significantly enhancing client collaboration and offering new market opportunities. Omeda can apply similar principles to responsibly capitalize on its data assets and meet increasing regulatory demands while fostering partner relationships and enabling new revenue models.

Tools Used:

- Snowflake Secure Data Sharing: For safe sharing of data insights.
- Snowflake Data Marketplace: To facilitate extended data sharing and monetization.
- Compliance tools integrated with Snowflake: For maintaining regulatory standards.

Rating: High - This initiative addresses a significant industry trend toward privacy-oriented data usage while opening new avenues for revenue, making it highly relevant to Omeda's strategic goals.

Title: "Real-Time Analytics and Campaign Performance Optimization"

Description: By integrating Snowflake, Omeda can revolutionize its email marketing and advertising analytics with real-time insights. As a CDP, delivering timely, data-driven campaign performance insights is crucial for Omeda. Snowflake's architecture enables fast data processing and real-time analytics, allowing marketing coordinators at Omeda to make dynamic adjustments to campaigns based on performance metrics. This capability enhances the effectiveness of campaigns, optimizing engagement and ROI for media and publishing clients.

Rationale: This use case draws from Aflac's success with Snowflake in significantly speeding up data processing times, which allowed for more frequent model runs and better data-driven decision-making. Similarly, Omeda can leverage Snowflake to reduce time from data ingestion to insights, thus optimizing marketing campaigns more effectively.

Tools Used:

- Snowflake's real-time streaming capability: For ingesting and processing campaign data.
- Analytics and BI tools like Power BI or Tableau: For visualizing performance metrics.
- Custom ML models: To analyze and predict campaign outcomes.

Rating: Medium - While there is strong evidence from existing case studies, the impact depends on the seamless integration of Snowflake with Omeda's current marketing infrastructure.

Title: "Strategic Partners and Subscription Monetization"

Description: This use case proposes leveraging Snowflake's multi-cloud capabilities to expand Omeda's subscription and strategic partnership offerings. By creating a central data hub facilitated by Snowflake, Omeda can offer enhanced subscription features such as advanced content personalization, targeted promotional offers, and dynamic subscription pricing models. The data hub enables seamless data sharing among partners, facilitating enriched insights and co-created content strategies that enhance subscriber value and drive revenue growth.

Rationale: Inspired by Compare Club's comprehensive Snowflake integration, which improved data sharing across different touchpoints and enabled more effective marketing campaigns. By applying similar strategies, Omeda can create a richer subscription ecosystem that attracts and retains customers, further monetizing its offerings.

Tools Used:

- Snowflake's multi-cloud architecture: For unified data management across partnerships.
- Dynamic pricing models using Snowflake's capabilities: To personalize subscription pricing.
- Data science tools integrated with Snowflake: To enhance content personalization and partner collaboration strategies.

Rating: Medium - The strategic direction aligns with Omeda's expansion goals; however, it requires extensive partnership alignment and technology integration to realize its full potential.

Title: "Enhanced Data Governance and Audience Privacy Assurance"

Description: Implementing robust data governance frameworks using Snowflake can equip Omeda with the tools to handle increasing privacy regulations efficiently while maintaining high data quality standards. This use case involves establishing comprehensive governance protocols and utilizing Snowflake's suite of security and data compliance tools to safeguard audience data. The focus is to assure media clients and subscribers of data privacy and security while enabling high-quality, compliant audience insights.

Rationale: This concept is validated by Allianz's implementation of Snowflake, which helped manage data governance and compliance across various regulatory environments. For Omeda, assuring its clients about data handling best practices can be a differentiator and foster trust in its CDP.

Tools Used:

- Snowflake's data governance and compliance tools: For maintaining data standards and regulatory compliance.
- Integrated compliance solutions: To enhance regulatory reporting capabilities.
- Audit trail features of Snowflake: For maintaining a transparent data management process.

Rating: High - Addressing compliance and data privacy is a pressing challenge in the media sector, and implementing this use case will likely resonate well with Omeda's stakeholders.

## Potential Omeda AI Use Cases

### 1. Automated Audience Segmentation Enhancement

**Description:** This use case involves developing AI-driven algorithms to automate and refine audience segmentation using Omeda's rich first-party data. By leveraging machine learning models, the system will detect patterns and segment audiences into highly specific groups based on demographics, behavior, and engagement levels across multiple channels

like web, email, and social media. The AI engine will continuously learn from new data inputs to offer increasingly precise segmentation over time, thereby allowing for hyper-personalized marketing interventions and content targeting. This approach promises to boost engagement rates and improve conversion metrics significantly.

**Rationale:** Audience engagement and retention are crucial for media companies. By enhancing segmentation, Omeda can personalize marketing actions more effectively, thus increasing audience involvement and satisfaction. This use case addresses the challenge of data-driven marketing strategy development highlighted in the company's strategic initiatives.

**Tools Used:**

- **Python & Scikit-learn:** For developing and training machine learning models.
- **Amazon SageMaker or Google Cloud AI Platform:** To deploy and manage models in a cloud environment.
- **Tableau or Looker:** For visualization of segmentation patterns and campaign insights.

## **2. AI-Driven Subscription Prediction and Optimization**

**Description:** An AI-driven solution focused on predicting subscription cancellations and optimizing renewals. By utilizing predictive analytics and natural language processing, Omeda can analyze past user interactions, content consumption patterns, and behavioral cues to forecast the likelihood of a subscriber canceling their service. The system would generate tailored retention offers or proactive support outreach plans in response to predicted risks, thereby minimizing churn and enhancing subscription renewal rates.

**Rationale:** The subscription management cycle is critical to revenue optimization for publishing companies. Predictive analytics can preemptively flag potential cancellations, allowing Omeda to address issues before they lead to churn. This aligns with Omeda's challenge of enhancing audience retention and optimizing subscription models.

**Tools Used:**

- **TensorFlow or PyTorch:** For building and training predictive models.
- **AWS Lambda or Google Cloud Functions:** For deploying and running prediction algorithms serverlessly.
- **Power BI or Qlik:** For dashboard creation to monitor and visualize churn risks.

## **3. Real-time Campaign Performance Optimization**

**Description:** Develop an intelligent system to dynamically adjust and optimize live marketing campaigns based on real-time data analytics. The machine learning engine would analyze metrics like click-through rates, engagement times, and user feedback in real time, enabling the platform to automatically adjust marketing strategies and content emphasis to maximize campaign performance.

**Rationale:** Marketing campaign performance optimization is an ongoing effort for Omeda. Leveraging real-time analytics ensures the company can adapt rapidly to market conditions and user responses, aligning with its business challenge of campaign performance optimization.

**Tools Used:**

- **Apache Kafka or AWS Kinesis:** For real-time data streaming and processing.
- **Google Analytics API:** To continuously feed real-time site and campaign data.
- **Jupyter Notebooks for Analysis:** Allowing data scientists to iteratively explore and refine optimization models.

#### **4. Privacy-First Data Monetization Strategies**

**Description:** Develop AI-driven models that utilize federated learning to create data products that extract business insights without compromising user privacy. This technique will help Omeda offer anonymized audience insights for advertisers who can benefit from behavior patterns and consumption trends without accessing raw data. They can also refine these strategies to accommodate changing privacy regulations seamlessly.

**Rationale:** With increasing data privacy regulations, developing a privacy-compliant yet lucrative data monetization strategy is a strategic imperative for Omeda. Federated learning ensures user data isn't shared unnecessarily, addressing compliance while unlocking monetizable insights.

**Tools Used:**

- **Federated Learning Frameworks (TensorFlow Federated):** To train models on decentralized data.
- **Python for Data Engineering Tasks:** To preprocess and anonymize data appropriately.
- **Compliance Tools (OneTrust, BigID):** To ensure continuous adherence to regulations like GDPR and CCPA.

#### **5. AI-Powered Content Personalization Engine**

**Description:** Introduce an AI-powered content recommendation engine that enhances user experience by delivering personalized content suggestions based on user preferences and historical consumption patterns. Using machine learning algorithms, the system personalizes content queues and newsletters to align with individual subscriber interests, thus boosting user engagement and satisfaction.

**Rationale:** Content personalization is key to maintaining user engagement and reducing attrition. By leveraging AI for content curation, Omeda can drive deeper user involvement and satisfaction, aligning with the need for innovative audience engagement strategies noted in their strategic initiatives.

**Tools Used:**

- **Natural Language Processing (NLP) Libraries (spaCy):** For analyzing content topics and sentiment.
- **Recommendation Systems Frameworks (Surprise, LightFM):** To develop collaborative filtering recommendation systems.
- **Apache Airflow:** For workflow automation in deploying content recommendation tasks.

Implementing these AI use cases will enable Omeda to tackle its prevalent challenges effectively, leveraging data insights while maintaining compliance and reinforcing audience relationships in today's dynamic media landscape.