Paid audience quality and exclusions

Service offer brief | Proposed quick-win sprint | Updated 30 October 2026

This offer keeps the data feeding paid campaigns aligned with the accounts the business wants to reach. It connects audience eligibility, identifiers and CRM changes to a maintained audience, with the media owner responsible for campaign execution.

Positioning: Fix one acquisition audience so it follows your ICP and CRM exclusions, with a refresh process your media team can use.

Headline: Keep your paid audience aligned with your sales targeting.

Entry CTA: Review one audience's exclusions and refresh process with Hamid.

First workflow

The entry sprint covers lifecycle exclusions and freshness: one corrected audience, an explained change report and a tested refresh. Check the required identifiers as part of that work. Broader identifier-coverage projects, extra account tiers and additional platforms are separately scoped.

Proposed quick-win package

Included	Proposed boundary
Delivery	A 10-working-day build sprint after the readiness check. Confirm the completion date and review points before kickoff.
Population	One acquisition audience, up to 1,000 input contact records across the baseline and initial refresh test. Confirm platform eligibility and minimum audience size before selling live activation.
Connections	One CRM, one ad platform and one supported activation method, verified in the client's workspace before commitment.
Review	One agreed sample, one consolidated refinement round and one documented release or keep-the-baseline decision.
Observation	A separate 30-calendar-day observation window after release. The client operates observation unless ongoing support is contracted.

These are proposed package limits confirmed after reviewing access, data quality and the receiving owner's capacity. Missing access or changed requirements require a revised scope and date. Additional records, integrations, variants and review rounds are scoped separately.

Buyer and qualification

The buyer is a Head of Demand Generation, Growth or Marketing Ops. RevOps owns lifecycle definitions and the CRM; the media buyer controls campaign settings, creative and spend. A useful trigger is repeated CSV work, poor audience matching, stale contacts or acquisition ads reaching customers and open opportunities.

A suitable client already runs paid campaigns, has a defined audience, can access the relevant platform and CRM, and has enough eligible records for the chosen activation method. Establish platform, geography and identifier requirements during scoping. The earlier US visitor restriction does not automatically apply to this service.

Qualify out situations where audience size cannot support the campaign, the ICP remains undefined or weak creative and conversion tracking are the actual bottlenecks. A larger matched audience can still be the wrong audience; fit and exclusions need separate checks.

This fits B2B SaaS demand generation and recruitment firms advertising to prospective employer clients. Candidate advertising requires its own audience and exclusion definitions.

Before kickoff, provide the current audience and permitted identifiers, CRM lifecycle definitions, ICP and exclusions, ad-platform access and named CRM and media owners. Confirm minimum audience eligibility within the proposed record cap.

How we work together and fees

Hamid leads design, build and testing in Clay and your existing stack. Your Marketing and RevOps subject experts supply business context, review examples and validate results; system owners provide access and support connections. Agree participation for each stage before kickoff. The CRM remains authoritative for its assigned commercial fields.

Quote a fixed service fee after the readiness check and before kickoff. The client provides and pays for all required software, licenses, workspaces and usage, including Clay and connected tools. Software costs and any media spend are separate from service fees.

The client owns the workspace, connected accounts, relevant code, configuration, evidence mappings and operating records. Include practical operator instructions. Optional Clay or practical training, ongoing operation, campaign sending, media buying and additional plays require an agreed scope.

The build includes the relevant slice of GTM Ontology: the client's structured business knowledge base of ICP, playbooks, messaging, relevant competitor context and win/loss lessons. This sprint captures audience eligibility, exclusions and reviewed corrections. GTM Ontology is Traffic Architect's delivery approach, not a native Clay feature.

Acceptance checks

The media and CRM owners approve the reviewed membership and exclusion samples. Customer and open-opportunity test changes must produce the expected membership changes within a verified refresh window. Duplicate and failed updates have a tested recovery route. Record destination acknowledgement and available platform status; actual ad reach is measured separately. If the bounded audience cannot meet platform eligibility, offer a diagnostic or quote a larger cohort before committing a live build.

Agree quality thresholds from the baseline before release. Judge the delivered workflow and review results separately from later commercial outcomes.

Proposed pilot

Use the package limits above for historical replay and the initial live test. Deliver the workflow within the agreed build sprint, then observe the released cohort for 30 calendar days. The client operates that period unless support is contracted; commercial progression may take longer.

1. Audit the current audience and baseline. Record unique eligible records, usable identifiers, platform match reporting, refresh cadence and known lifecycle leakage.
2. Agree membership rules with Marketing and Sales. Define account fit, roles, territories, customer status and the exact stage changes that add or remove records.
3. Enrich only the missing identifiers or attributes needed for eligibility and activation. Preserve provenance and avoid paying repeatedly for records that are already sufficient.
4. Separate audience membership from suppression. Deduplicate at the appropriate person or account level and document exceptions such as expansion campaigns for existing customers.
5. Compare the proposed audience with the current one. Review samples of added, removed and unchanged records with the media owner, including ambiguous matches.
6. Connect the approved audience using the platform's supported method. Check observed delivery and update latency rather than assuming a successful workflow run means the ad platform applied the change.
7. Monitor freshness, failed updates and exclusion errors. Compare qualified demand with an appropriate control or comparable period, documenting changes to spend, creative and attribution.

Deliverables

The client receives an audience definition, source-to-destination mapping, membership and exclusion rules, an audience change report, a functioning refresh process, an exception queue and a measurement report. The handover names the person responsible for CRM changes and the person responsible for campaign activation.

The learning package adds a feedback queue, evaluation scorecard, approved change history and an operator review guide.

Discovery questions

- Which campaign audience is most expensive or time-consuming to maintain?
- How long do customers and open opportunities remain eligible after a CRM change?
- What does the platform actually expose about matching and delivered reach?
- Who can change audience rules, and who owns the ad account?
- Can we compare cohorts without changing creative, spend and qualification definitions at the same time?

What success means

Measure	Definition
Membership precision	Reviewed records that meet the audience criteria divided by records reviewed.
Identifier coverage	Eligible unique records with the required usable identifiers divided by the eligible cohort.
Platform match rate	The platform-reported matched audience relative to its accepted input, preserving that platform's definition and reporting limits.
Exclusion leakage	Ineligible records found in the active audience or delivery evidence, using the visibility the platform actually provides.
Refresh performance	Time between a qualifying CRM change and the observed audience update, plus failed or overdue updates.
Commercial outcome	Qualified demand, cost per qualified outcome and later opportunities, evaluated with spend and campaign changes recorded.

Upload acceptance, identity matching and actual ad reach are different measures. Do not add match counts from multiple platforms as unique people. Where a platform exposes only aggregate data, report the measurement limit rather than inventing person-level delivery precision.

Decision to expand

Expand when audience membership is reliable, exclusions update within the agreed window and the media team can use the result. Pause expansion when poor source data, small eligible audiences or unresolved platform errors make the improvement hard to measure.

Set targets after the audit. The first commercial case is usually less manual work and better audience control; improved pipeline must be measured separately. An increase in match rate alone does not establish better targeting or incremental revenue.

Published evidence and its limits

Clay's Northbeam case study describes ICP-based seed audiences, identifier matching and maintained exclusions. Its Figma case study describes replacing periodic audience exports with lifecycle-based updates that remove customers and open opportunities from acquisition targeting.

These vendor-published examples support the workflow pattern. Their results belong to those companies and are not Traffic Architect results or forecasts. Verify current platform support, eligibility, permissions, reporting and costs before commitment.

Proof to show

Show an anonymized audit of eligible, stale, excluded and unresolved records, followed by a tested refresh. Measure audience correctness and manual work separately from later qualified demand. The media owner retains control of spend, creative and campaign settings.

Self-learning with a human in the loop

Reviewed corrections and measured outcomes inform proposed improvements to this workflow. Test and approve a change before releasing it.

Learning updates rules, scoring, prompts and approved examples; it does not promise automatic model retraining or guaranteed uplift. Keep client feedback within its agreed data boundary.

What this offer learns

Decision area	Feedback captured	Approved refinement
Audience membership	Marketing reviews added, removed and unchanged records.	Refine role and account-fit rules against labelled membership decisions.
Exclusions and freshness	Ops records lifecycle leakage, stale records and failed refreshes.	Improve suppression mappings and refresh checks; keep permissions fixed.
Audience usefulness	Sales returns qualified outcomes; media owners report aggregate delivery.	Test segment changes with spend and creative held comparable; clicks alone do not define fit.

Review and release

1. Name a Marketing Ops owner and the media owner. Log record ID, source/version, decision, correction, reason, reviewer and time. Separate later outcomes from review labels.
2. Review the agreed sample during the build, covering accepted, rejected, unresolved and unselected records. Agree the client's observation cadence at handover. No response means unknown, not rejection.
3. Test a versioned change against baseline on examples withheld from tuning. Refresh evaluation samples; inspect errors, coverage and acceptance. Sparse feedback can justify no change.
4. The named owner approves a limited release. Monitor regressions and retain rollback. Preserve permissions, exclusions and human-controlled fields.

Delivery and evidence of improvement

Include a feedback queue, labelled examples, review guide, evaluation scorecard, change log and rollback procedure. Measure membership precision, exclusion leakage, refresh delays and review cost; report qualified-demand results separately from match rate. Record cohort size and version; association does not prove incremental revenue.

Example learning cycle: Reviewers find that a job-title rule admits many irrelevant roles. Test a revised role definition on unseen records, then compare a limited approved audience segment before wider activation.

The build includes one consolidated refinement round and one documented release or keep-the-baseline decision. After handover, the client runs the agreed observation and feedback reviews. Further engineering changes or managed operation require separately agreed support and capacity.

Related offers

Signup to sales can create lifecycle changes. US visitor activation requires separately eligible activation rules. Discovery call to CRM action provides reviewed account context. See the five-offer portfolio. Keep channel attribution explicit so a paid impression and sales handoff are not counted as independent acquisition of the same account.