Solution Guide
MARKETING .06

Paid Search

Find it online: smartsheet.com/marketing-solutions/paid-search
About Paid Search

Being great at Paid Search means building a solid search advertising plan and then relentlessly tracking ADWords, A/B Test results, conversation rates and your budget. Smartsheet’s solution for Paid Search helps you get started with managing all these moving parts while at the same time is flexible enough to fit into your process.

Drive accountability and transparency with your team and clients and ultimately maximize conversion rates.

Stay aligned with business goals
Keep the PPC team aligned with business goals while keeping business owners informed about progress and changes.

Never miss a beat
With 100s of recurring activities like checking bids, validating test results and ensuring spending is in check, it’s easy to miss a beat. Smartsheet keeps you on track.

Maximize ROI on your search dollars
Ensure your Search Dollars are being put to the best use by making sure KPIs like ‘spend vs. budget’ or ‘cost-per-conversion’ are monitored constantly and visible to the entire team.
Who should use this guide?

Whether you’re a digital marketing professional, agency or consultancy involved in PPC (pay-per-click), you’re in the right place.

Common roles/titles who will benefit from this solution include:

- Digital Marketing Director
- Digital Marketing Manager
- Marketing Director
- Marketing Manager
- Paid Search Marketer / Specialist
- Account Executive / Director
- Client Services Director

What You’ll Learn

This guide is designed to show you how you can build and deliver a world-class Paid Search strategy using Smartsheet. We have a wealth of specific how-to resources in our Help Center, so the focus of this guide is:

1. An overview of the solution
2. A tour of the individual sheets
3. How to get going
4. Helpful resources and cheat sheets
Components

1. PLAN
   - PPC Plan & Priority Tracker
   - Keep the PPC team aligned with business goals and management informed about progress and changes.

2. MANAGE
   - PPC Operations Guide
   - A/B Test Tracker
   - AD Words Tracker
   - Track your AD groups, stay on top of recurring operational tasks and track all the tests you are running.

3. REPORT
   - PPC Spend & Performance Dashboard
   - On a monthly basis, track spend against PPC budget and Cost per Conversion for every channel. Ensures you are making the most of your Search dollars.
A great Paid Search plan keeps the PPC team aligned with business goals and business owners informed about progress and changes. The PPC Plan & Priority Tracker gives visibility into what the search team is working on and what their priorities are.

- Use hierarchy to organize initiatives into high level PPC categories.
- Expand and collapse for additional details like campaign goals and KPIs.
- Easily share the sheet with business stakeholders so that everyone is aligned on priorities and status.
- Improve coordination and visibility by tracking next steps and campaign status in the sheet.
- Get notified when important activities get completed.
AdWords Tracker

Track all changes to your AdWords account over time in one central location. Record the reasons why you made changes and setup reminders to periodically review key campaigns and ad groups. Keeps you organized and sane, especially if you have a large AdWords account, and ultimately helps you optimize your Paid Search program.

- Visually communicate the overall status of the campaign or Ad Group with RYG icons.
- Track different combinations of Ad extensions.
- Attach ad copy and keyword reports to maintain record and make it easily available to business stakeholders.
- Get automatically notified when its time to check bids, targeting and creatives for your campaigns.
A/B Test Tracker

‘Always be testing’ – that’s the mantra of the best search engine marketers. Use Smartsheet’s A/B test tracker to constantly manage and review the tests you have in progress. Get automatic reminders when a test is ending and you need to start looking at results. Save all test results as attachments so that there is a record of every test run.

- Attach test results, screenshots, landing page designs for each test.
- Brief description of the hypothesis being tested and the business impact of the results.
- Show progress of the test in a visual way using a library of symbols.
- Document test results and easily share with business stakeholders.
- Get automatically notified when a test comes to an end so that you can go into your analytics tool and pull results.
Every day looks different for the paid search marketer. One day you are analyzing landing page test results, and brainstorming new test ideas. Another day you are optimizing bids and adding negative keywords because your spend is out of control on a particular ad group. Managing all these moving parts is a challenge especially if you are dealing with a large account.

A. Use hierarchy to organize recurring tasks into daily, weekly, monthly and quarterly categories.

B. Have discussions with colleagues directly in the sheet. Reduce email volume. Also ensures historical record for new team members.

C. Enforce accountability and discipline by having a notification go out to the team lead when important activities get done.

D. Get automated alerts when weekly / monthly / quarterly activities become due.
**PPC Spend & Performance Dashboard**

As a paid search marketer, AdWords is likely a top priority; but you also need to watch other platforms, such as Bing Ads, Facebook Ads, LinkedIn Ads and Twitter. The PPC Spend & Performance tracker summarizes performance in a single sheet which everyone can access. After adding all your channels, track performance using engine cost data and your own conversion data.

### Track spend for all your platforms.

**A** Easily roll this information up to an aggregate view.

### Use formulas to track how you are doing against targets for spend and conversion.

**B** Use formulas to track how you are doing against targets for spend and conversion.

### Easily share the sheet with business stakeholders to give them visibility into your KPIs.

**C** Easily share the sheet with business stakeholders to give them visibility into your KPIs.

### Ask questions about spend. Answer questions raised by your business stakeholders from within the Sheet.

**D** Ask questions about spend. Answer questions raised by your business stakeholders from within the Sheet.

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### Table: PPC Spend & Performance Tracker

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<td><strong>Actual Spend by Channel</strong></td>
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<tr>
<td><strong>Actual Conversions / Budgeted Conversions</strong></td>
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Jump-Start Your Paid Search Operation with Smartsheet

- **Read through the solution guide**
  You've had an overview of the solution – now try Smartsheet for yourself.

- **Sign up or log in to Smartsheet**
  Sign up at [smartsheet.com/marketing-solutions/paid-search](http://smartsheet.com/marketing-solutions/paid-search)
  You can also use this with your existing account by logging in.

- **Open the Getting Started Sheet**
  Once you’re in Smartsheet, click on the “Getting Started” sheet in the pane on the right. This sheet will orient you to everything you need to start working in Smartsheet.

- **Customize the sheet**
  The sample data and structure is only there to help you get going. You can type over things, insert or delete rows or columns, rename columns, change column types etc.

- **Start working and sharing**
  To open another sheet in the solution, simply return to the home tab, select the folder, and then the sheet. You can invite others to collaborate by clicking the sharing tab on the bottom of the sheet.
### Other Recommended Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td><strong>Delete sheets you don’t need</strong></td>
<td>Deleting a sheet is easy! You can learn how to <a href="#">here</a>.</td>
</tr>
<tr>
<td><strong>Build your own sheet</strong></td>
<td>We know you have unique needs – that’s why we built Smartsheet. Click the + tab at the top of the sheet so you can build your own solution from a blank sheet.</td>
</tr>
<tr>
<td><strong>Use the “cheat sheets” in this guide</strong></td>
<td>To help you get the most out of Smartsheet, we’ve included cheat sheets for formulas and shortcuts at the end of this guide.</td>
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</tbody>
</table>
Have questions or want to learn more about Smartsheet?

**Smartsheet Help Center**  -  help.smartsheet.com
   Everything you need to help you get the most out of Smartsheet.

**Smartsheet Community**  -  community.smartsheet.com
   Ask questions, share best practices, and get help.

**Submit your question**  -  solutions@smartsheet.com
   Want personalized help? Our design and services teams have you covered!

**Send us your feedback**  -  help.smartsheet.com/customer/portal/emails/new
   Share your thoughts or suggestions about Smartsheet or our Solutions.

**Plans and Pricing**  -  smartsheet.com/pricing
   Enjoy your 30-day free trial.
Smartsheet Cheat Sheet

Keyboard Shortcuts

**Basics**

- **F2** / **Fn + F2**: Enters edit mode on selected cell
- **Ctrl + S**: Saves all unsaved information
- **Ctrl + Z**: Undo the previous action since last save
- **Ctrl + Y**: Redo the previous action since last save
- **Ins**: Inserts a row above the selected row.

To insert multiple rows at once, press **Shift** and select multiple row headers, then click **Ins**.

**Formatting**

- **Ctrl + Enter (or) Alt + Enter**: Inserts a carriage return or line break in Text Number cells. In order to see the carriage returns in the sheet, apply wrap formatting to the cell by clicking the **Wrap** icon in the left toolbar.
- **Ctrl + K**: Indents Primary Column only
- **Ctrl + M**: Outdents Primary Column only
- **Ctrl + I**: Italic
- **Ctrl + B**: Bold
- **Ctrl + U**: Underline

**NOTE**: Mac users should use **Cmd** instead of **Ctrl** unless otherwise noted.
**Formulas**

- **Ctrl + L x 1**: Inserts $ before column name (horizontal cell reference lock).
- **Ctrl + L x 2**: Inserts $ after column name (vertical cell reference lock).
- **Ctrl + L x 3**: Inserts $’s around column name (full cell reference lock).

**Date Column Cells**

- **t**: Inserts today’s date.
- **+**: Enters date x days from today.
- **-**: Enters date x days before today.
- **mon / tue / wed / etc**: Inserts date of the current week’s Monday, Tuesday, Wednesday, etc.
- **yes**: Inserts yesterday’s date.
- **tom**: Inserts tomorrow’s date.
- **next week**: Inserts date seven days from today.
- **last week**: Inserts date from seven days ago.
- **Dec 15 / Jan 3 / etc**: Inserts date of string entered.

**Additional**

- **Ctrl + G**: Displays the Open a Sheet form.
- **Ctrl + Home**: Takes you to the first cell of the row you are currently on.
- **Ctrl + End**: Takes you to the last cell of the row you are currently on.
- **Pg Up**: Moves you up in your sheet.
- **Pg Dn**: Moves you down in your sheet.
- **Space**: Displays or removes a checked box, star or flag in the selected cell. Learn more about checkbox, star and flag columns in our Column Types article.
Smartsheet Cheat Sheet
Formulas

**Numeric Formulas**

**SUM():** Adds selected values, or a range of cells.

Example: =SUM(Cost1: Cost5)
Result: 1125.75

**AVG():** Averages selected values, or a range of cells.

Example: =AVG(Cost1: Cost5)
Result: 225.15

**MAX():** Returns the highest numeric value, or latest date.

Example: =MAX(Cost1: Cost5)
Result: 425.75

**MIN():** Returns the lowest numeric value, or earliest date.

Example: =MIN(Cost1: Cost5)
Result: 100

**INT():** Returns the integer portion of a given number.

Example: =INT(Cost5)
Result: 425

**ROUND():** Rounds a given number to the desired # of digits.

Syntax: ROUND(cell1, #_of_digits)
Example: =ROUND(Cost5, 1)
Result: 425.8

**ABS():** Returns the absolute value of a given number.

Example: =ABS(-85)
Result: 85

**COUNT():** Counts non-blank cells in a given range.

Example: =COUNT([Task Name]:[Task Name])
Result: 5

**LEN():** Returns the number of characters (length) in a given cell.

Example: =LEN([Task Name]5)
Result: 6

NOTE: Formatting/currency values aren’t included.
Dates have a length of 5.
Logic Formulas

**IF():** Performs a logical test. One value is returned if the test is true, a different value is returned otherwise.

- **Syntax:** `IF(logical_test, value_if_true, value_if_false)`
- **Example:** `=IF([Due Date]1 > [Due Date]2, "Date 1 is Larger", "Date 2 is Larger")`
- **Result:** Date 2 is Larger

**ISBLANK():** Used within an IF formula to test if a cell is blank.

- **Example:** `=IF(ISBLANK([Task Name]1), "Cell is blank", "Cell isn’t blank")`
- **Result:** Cell isn’t blank

**ISTEXT():** used within an IF formula to test if a cell contains text (and not checkboxes, dates, numbers, etc).

- **Example:** `=IF(ISTEXT([Due Date]1), "Cell is text", "Cell isn’t text")`
- **Result:** Cell isn’t text

**ISNUMBER():** Used within an IF formula to test if a cell contains a number (a value which is not text, date, or checkbox).

- **Example:** `=IF(ISNUMBER([Task Name]1), "Cell is a number", "Cell isn’t a number")`
- **Result:** Cell isn’t a number

**ISDATE():** Used in an IF formula to test if a cell contains a date.

- **Example:** `=IF(ISDATE([Due Date]1), "Cell is a date", "Cell isn’t a date")`
- **Result:** Cell is a date

**ISBOOLEAN():** Used in an IF formula to test if a cell contains a boolean value (check box, priority, star or flag).

- **Example:** `=IF(ISBOOLEAN(Done1), "Cell is a boolean", "Cell isn’t a boolean")`
- **Result:** Cell is a Boolean
**Logic Formulas (cont.)**

**AND():** Used within an IF formula. Evaluates if a set of logical expressions are True or False. If any expression is False it will evaluate as False.

Syntax: AND(boolean_expression1, boolean_expression2, boolean_expression3, ...)

Example: =IF(AND(Done1, Done2, Done3), “All Tasks Complete”, “Tasks Incomplete”)

Result: Tasks Incomplete

**NOT():** Used within an IF formula. Performs a logical NOT on the supplied boolean expression (or cell reference).

Syntax: NOT(Done1)

Example: =IF(NOT(Done1), “Task A Not Complete”, “Task A Complete”)

Result: Task A Complete

**OR():** Used within an IF formula. Performs a logical OR on the supplied boolean expression or cells. Returns true if any are true; otherwise returns false.

Syntax: OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3)

Example: =IF(OR([Due Date]1 > [Due Date]2, [Due Date]1 > [Due Date]3), “Due Date 1 isn’t the smallest”, “Due Date 1 is the smallest”)

Result: Due Date 1 is the smallest

**NESTED IF():** Performs multiple logical tests. Smartsheet reads the IF statements in the formula from left to right, displaying a value based on which one evaluates to true.

Syntax: IF(logical_test, value_if_true, IF(second_logical_test, value_if_true, value_if_all_false))

Example: =IF([Task Name]1 = “Task A”, “This is Task A”, IF([Task Name]1 = “Task B”, “This is Task B”, “Neither Task A nor Task B”))

Result: This is Task A
Additional Formulas and Help

**Formula Basics** - smartsheet.com/formula-basics
How to create a formula and reference cells, columns, and ranges in your sheet

**Text Formulas** - smartsheet.com/text-formulas
Find, Replace, capitalizing text, etc

**Date Formulas** - smartsheet.com/formula-basics
TODAY() formula, calculating working days, creating dates, etc

**Advanced Formulas** - smartsheet.com/date-formulas
Weighted average, prorate, countif, countifs, sumif, sumifs

**Using Hierarchy in Formulas** - smartsheet.com/using-hierarchy-in-formulas
How to reference child rows

**Formula Error Messages** - smartsheet.com/formula-error-messages
What they mean, and how to troubleshoot