



Advanced Intelligence Solutions for Marketers

JUNE 19, 2025

CooperSmith
ADVANCED INTELLIGENCE SOLUTIONS

Introduction

Are you are striving to increase efficiency, deliver more meaningful insights to clients, and build value that differentiates your company?

*Artificial Intelligence (AI) has revolutionized the marketing industry. Agencies and corporate marketers alike must deliver better results, faster. Old methods are out. Efficient and effective is in, and ever-evolving. **Coop AI** offers solutions to address your business challenges regardless of where you are on your AI journey.*

What is Coop AI?

Custom built to serve our clients, **Coop AI** is now available to the marketplace.



A proprietary Media Intelligence Tool, powered by AI.

- **Coop AI** is a custom built, secure, private model of Azure OpenAI, that efficiently integrates disparate data sources, delivering powerful analytics and robust insights.
- Real-time, secure access to data empowers agile, fact-based decisions across teams.
- Delivers forward-thinking strategies with adaptive planning and budget optimization to fuel growth.
- Includes AI agents for advanced time-series data analysis, driving performance optimization, forecasting, and budget decisions.

Our team can also build custom agents to solve your specific business challenges, and enhance your team's efficiency and performance.

Introducing Coop AI

OUR MODEL

Coop AI is a secure, private Media Intelligence Tool that delivers actionable knowledge and insights by integrating various data sets.

INPUTS

1ST PARTY DATA

Private and secure client specific media and marketing data).



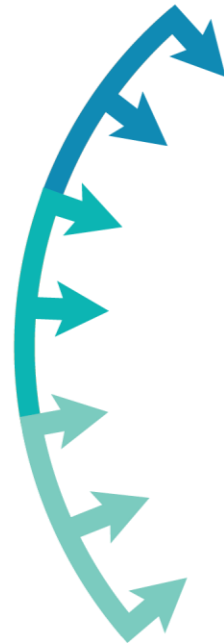
2ND PARTY DATA

Shared by trusted partners (CRM, Vendor, Loyalty Programs).



3RD PARTY DATA

Aggregated from external providers (market trends, consumer behavior and media).



OUTCOMES

HOLISTIC ANALYSIS

Seamlessly integrates disparate data sources for a single, efficient view, delivering powerful analytics and robust insights.



MEDIA OPTIMIZATION

Streamlined path to elevated strategic insights that result in heightened media campaign success



MARKETING INSIGHTS

Delivers forward-thinking strategies with adaptive planning and budget optimization to fuel growth



AGENTS

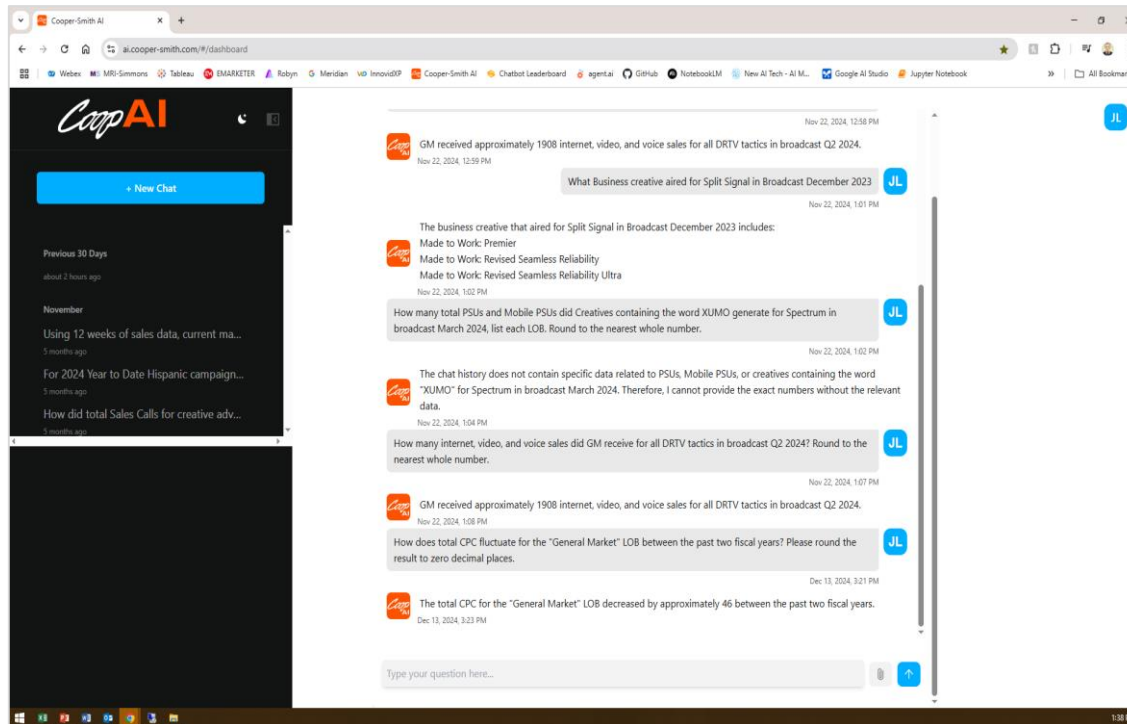
Agents work within the Coop AI ecosystem and interface with external and client agents.

- Strategy & Planning Agents
- Performance & Optimization Agents
- Reporting & Insights Agents
- Custom Solutions Agents

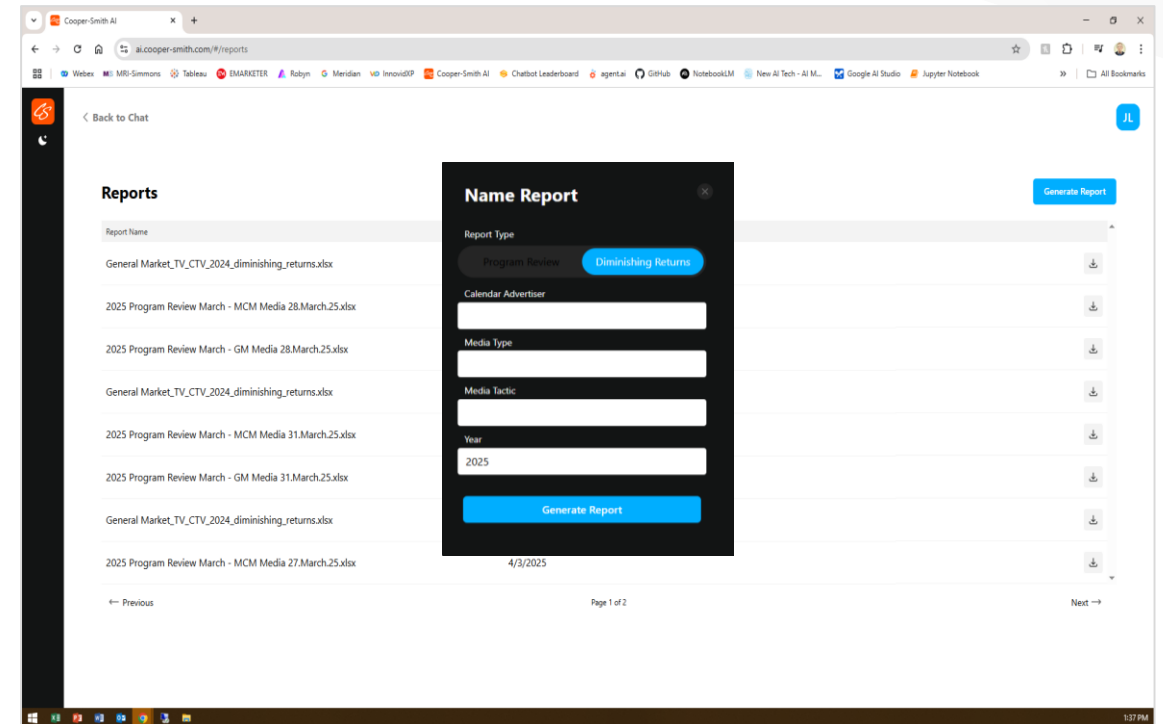
Coop AI Elements: an LLM-powered chatbot and AI agents.

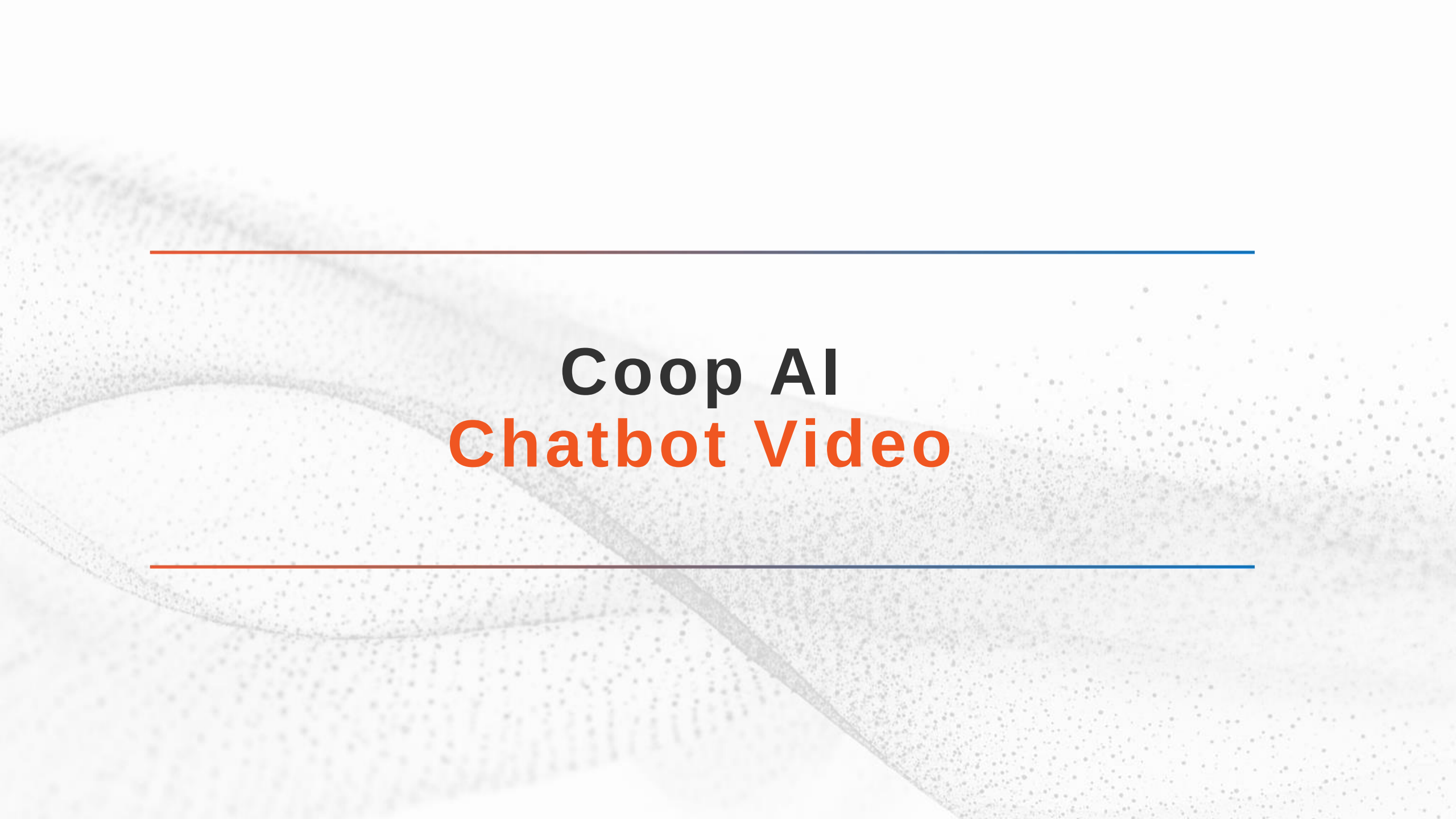
Our private model accesses an enterprise-grade Large Language Model (LLM). This foundation, combined with our proprietary agents and your unique data, unlocks new levels of audience targeting, forecasting, and campaign optimization.

Coop AI: LLM-powered chatbot



Coop AI: AI Agents





Coop AI **Chatbot Video**

Data Integration

1st, 2nd, or 3rd party data sets are curated specifically for use in applications, modeling or AI workflows.

	1 st Party Data	2 nd Party Data	3 rd Party Data
What it is	• Private and secure client specific data • Data you collect directly from customers	• Partner-shared data from another company's 1st-party assets	• Purchased or licensed aggregated data from external providers
Examples	• Web/app behavior and actions • Sales/Purchase activity • Campaign response data • Marketing Plan data	• CRM data • Loyalty/shopper data • Media/marketing data and segments shared with advertisers	• Nielsen audience data • Experian "Home Mover" files • Location, income, psychographics data
Use Cases	• Feed into usage, purchase and behavior models • Power LTV predictions • Fine-tune media mix models	• Enrich audience profiles • Fuel joint targeting or MMM	• Speed up marketing decisions • Train LLMs on market trends • Model competitive 'whitespace'
Benefits	• Most accurate • Customizable • Privacy-safe	• High relevance • Partnership-driven • Rich context	• Scalable • Fast to deploy • Broad coverage



Coop AI **Pre-Built Agents**

Agents of Coop AI

Built for your business. Trained in your world. Working for you.

Inside **Coop AI** lives a growing team of **custom AI agents** — intelligent digital workers trained specifically to meet the needs of each business we serve.

- **Coop AI** agents are smart, efficient, well-trained problem solvers, created to enhance your productivity, and streamline your business processes.
- Agents can be custom branded for your business, and will seamlessly integrate with your human work force, empowering them to use their time and talent more effectively.

A **Coop AI** agent is like adding a brilliant new team member — without hiring, training, or burnout. **Coop AI** agents are created for you, and powered by artificial intelligence.

Coop AI: Marketing Agents



Inside **Coop AI** lives a growing team of pre-built, marketing focused AI agents for advanced time-series data analysis, driving performance optimization, forecasting, and budget decisions.



Media Analyst

Turns weekly media data into clear executive briefs. Flags underperformance, highlights ROI shifts, and spots new opportunities, freeing up time for strategic action.



Budget Strategist

Forecasts demand and identifies diminishing returns. Reveals where media spend starts to underdeliver, helping you allocate dollars for maximum marginal gain.



ROI Maximizer

Quantifies the real business impact of added spend. Shows which channels deliver the biggest lift per dollar, translating insights into board-ready growth decisions.



Audience Master

Reveals impactful audience traits and attributes by analyzing demographic, behavioral, and media data-automating persona creation and enabling precise, data-driven campaigns.



Media Performance Review Case Study



MEDIA PERFORMANCE AGENT

Client: Fortune 100 Telecommunications Provider

Situation

Each month, the Marketing Analytics team creates and delivers Media Performance Reviews for three key business units. These reports roll up campaign performance at both the tactic and creative level and must include consistent, accurate data across multiple tactics and 10+ media metrics from spend to acquisition (sales, leads).

Task

Automating and streamlining the generation of these reports to reduce manual workload, ensure timely delivery, and increase accuracy across multi-channel media tactics and over 50+ creative units. Previously, the process took analysts 2-3 days per Line of Business (LOB) due to fragmented and unmatched data sources and inconsistent formatting.



Media Performance Review Case Study



Action

Automated workflows that ingested raw performance data from disparate systems (e.g., TV attribution platforms, call center logs, and acquisition databases), applied logic to harmonize metric definitions across channels, and categorized each row by tactic and designed creative hierarchy. Custom rules built to resolve data conflicts, impute missing values and apply business logic like attribution to acquisition. Excel dashboards were populated and formatted for each LOB using standardized templates, flagging anomalies that exceeded $\pm 15\%$ variance by month and year.

Result

The custom developed agent, Perform+, reduced the human analyst workload by over 60%, cutting report production time from 24 hours to under 15 minutes per LOB. In the first three months post-implementation, 97% of reports were delivered on or ahead of schedule with zero escalations for data quality issues. Anomaly flagging system also helped surface a ~\$175K overspend on a low-performing tactic, which was reallocated to more efficient creative units, increasing acquisition and sales efficiency by 18% in the next cycle.



Coop AI **Custom Agents**

Custom Agents

.....

The **Coop AI** team will help you find the right solution to streamline your business operations, automate tasks, and unlock new efficiencies across teams, systems, and workflows.

We can build agents to solve your unique business challenges.

The agents we build are smart, efficient, well-trained problem solvers, created to enhance your productivity, and streamline your business processes.

Task Automation Agent- Replaces repetitive, rules-based tasks with efficient, reliable automation.

Autonomous Agent- Acts independently within a defined scope, learns from interaction/data, and adapts behavior over time.

Orchestrator/Multi-Agent Manager- Coordinates multiple specialized agents, applies strategic logic, and adapts workflows based on goals or data.

How can custom agents help your business?

We begin with a Discovery conversation to learn more about your specific pain points or areas where you would like to improve efficiency. Agents can be created to work in the following areas:

- HR & onboarding
- Research & reporting
- Client service & support
- Order/Inventory management
- Compliance & documentation
- Or anything else you can dream up

If your team does it more than once — we can build an agent to handle it.

The future is now. Accelerate your business with Coop AI.



Custom Agent Case Study



Elly the Estimator Agent

Client: National Custom Label Manufacturer

Situation

The client's estimating department was responsible for quoting hundreds of custom label jobs each month. Each request required detailed calculations based on variables like label dimensions, substrates, ink colors, finishing methods, and order quantity. Estimators often relied on manual spreadsheets and institutional knowledge to determine pricing, resulting in inconsistent quote accuracy, long turnaround times, and missed upsell opportunities.

Task

Designing a scalable solution to automate and standardize the estimating process. The goal was to reduce dependency on manual inputs, accelerate quote delivery, and improve profit predictability across varying job types and production methods.



Custom Agent Case Study



Action

An agent, Elly the Estimator, was developed to process incoming job specs, calculate material and labor costs using real-time pricing models, and output ready-to-send quotes with adjustable profit margins. Logic was built to account for press setup time, die cutting, varnish applications, and multi-run efficiency scenarios. The agent also provided comparative pricing for alternative materials and production paths to help sales teams offer cost-saving or premium options to customers. Built-in validations flagged incomplete inputs and suggested values based on prior estimates.

Result

While Elly the Estimator agent is still in active production rollout, early feedback and testing suggest strong potential to significantly reduce quote turnaround time—from an average of 2 business days to under 4 hours. The solution is expected to increase estimate consistency, improve margin control, and support incremental sales opportunities by surfacing cost-saving alternatives. Once fully implemented, the agent aims to enable the team to handle higher quote volume with greater accuracy, freeing senior estimators to focus on complex or high-value opportunities.



Coop AI **Agents Video**

The background features a light gray, wavy, ribbon-like shape that flows from the left side towards the bottom right. This shape is filled with a fine, dense pattern of small dots. Two horizontal lines, one red and one blue, are positioned above and below the central text.

**Let's continue the
conversation.**

The background features a light gray, wavy, ribbon-like shape that flows from the left side towards the right. This shape is filled with a fine, dense pattern of small dots. Two horizontal lines, one red and one blue, are positioned above and below the word 'Appendix'.

Appendix

Primary Services Summary

Coop AI Ecosystem Access- Coop AI securely integrates disparate data sources and delivers powerful analytics and actionable insights. Our private model accesses an enterprise-grade Large Language Model (LLM). This foundation, combined with our proprietary agents, and your unique data, unlocks new levels of audience targeting, forecasting, and campaign optimization.

Private, Re-Branded Ecosystem- Coop AI can be licensed and customized to offer all the benefits of a private AI instance under your own brand; including full control over agent design, user interface, access permissions, and model training to reflect your company's voice, processes, and values. This option allows you to save significant time and resources required to build your own, private model.

Custom Agent Development- Our development team creates custom agents that serve your specific business needs. A custom agent acts as a brilliant, cost efficient new team member, powered by artificial intelligence. Agents typically fall within three job performance categories; task automation, autonomous and orchestrator (multi-agent manager). You define the business challenge and we will recommend the agents needed.

AI Consulting- Through a structured three-step engagement...kickoff, technical deep-dive, and strategy reveal our consulting package helps you and your team identify AI solutions to advance your business. We can explore the advantages of a Private Instance or assist you in identifying high-impact use cases for AI agents tailored to your internal processes or customer needs.

Development Timing & Cost Considerations



Identify the timeframe (stages) for onboarding a new client using the existing model.

- Discovery - Identify data sets and condition of data, establish client goals and success metrics, determine key contacts and data connectors. (this may lead to a consultation fee if Discovery extends beyond reasonable timeframe).
- Security/Tech/IT Set up - Not sure if this is part of Discovery or should be separate.
- Data Ingestion/Implementation - Assuming a specified number (or range) of data sources (3-6 months)
- Team Coop AI Training/Testing Period - This may overlap with the previous category if each source is ingested and tested in the same way done for Spectrum.
- Client Response Verification/Training - Client verifies responses, client prompt training.
- Ongoing maintenance - Troubleshooting, enhancements/optimizations, meetings, reporting, performance dashboard or review.

Are there any ways to expedite the ETL and Intent process? How do we integrate agents into this process?

Marketing a Private Instance *Benefits*

Why does my company need one?

Ideal for specialized tasks, business use, or confidential environments where data privacy, customization, or compliance is critical.

Data Privacy and Security

- With a private instance, a company can ensure that its data is not processed by external services, reducing the risk of unauthorized access or breaches. Azure AI services can be configured to process data within a company's private network, ensuring that sensitive data stays secure and complies with industry regulations
- Private models may integrate real-time or niche datasets, APIs, or tools specific to their environment

Customization

- A private instance provides more flexibility for customization of AI models and workflows. Companies can fine-tune pre-built models or build custom AI solutions tailored to their specific business needs, without being constrained by public, shared infrastructure

Data Compliance Requirements

- A private instance of Azure AI allows companies to maintain control over where data is stored and processed, ensuring compliance with legal requirements such as GDPR, HIPAA, or other regional data protection laws