



Project Portfolio



Introduction/Brand

Cooper-Smith Advertising was on a mission to adapt Artificial Intelligence (AI) solutions in response to the changing technology landscape, and to remain competitive in the data-driven advertising and marketing industry. This was amplified by a Fortune 100 client's demands for granular information and immediate access to data insights. The volume and sophistication of their requests required us to assimilate data from many disparate sources, which could take days or weeks. We knew that effective process solutions would have immediate value in relieving team pressure and enhancing client satisfaction. Thus, agency senior leadership decided to significantly invest in developing a proprietary media intelligence tool, fueled by AI. A three-person internal task force was appointed to lead the initiative and begin the process of evaluating technology development vendors. The team included Michael Jacob, Holly Goldstein Becher and Chris Noonan.

Our process began with department Discovery sessions that were designed to gain insights regarding client and team pain points, and fuel our discussions on potential solutions using AI technology. It became clear very quickly that automated solutions and process improvements were foundational to address immediate client and team needs and pain points, prior to the development of custom AI tools. In addition, we learned that improvements were needed to more effectively manage and clean the data. The positive is that these preliminary steps had immediate value in relieving team pressure and enhancing client satisfaction.

Twelve months later, we had built a marketing intelligence tool, we named **Coop AI**, as a personification of the Cooper-Smith agency brand. **Coop AI** is a custom built, secure, private model of Azure OpenAI, that efficiently integrates disparate data sources, delivering powerful analytics and robust insights.

We demonstrated the tool's capabilities to clients and prospects, eventually expanding **Coop AI** into a flexible solution that integrates data, automates workflows, and supports agile, real-time decision-making across any organization. We also had several client requests to help them incorporate AI into their businesses beyond marketing. Cooper-Smith continued to pivot, forming a close partnership with our development partner, Whitelabel, and began offering agent development and AI consulting services to solve specific operational problems and streamline workflows. To accommodate this shift into offering additional technology solutions, we developed a new tagline, Advanced Intelligence Solutions, which better communicated the enhanced service offerings.



Advanced Intelligence Solutions



Proprietary Marketing Intelligence Tool

Real-time, secure access to data empowers agile, fact-based decisions across teams. **Coop AI** delivers forward-thinking strategies with adaptive planning and budget optimization to fuel growth. The model includes AI agents for advanced time-series data analysis, driving performance optimization, forecasting, and budget decisions.

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

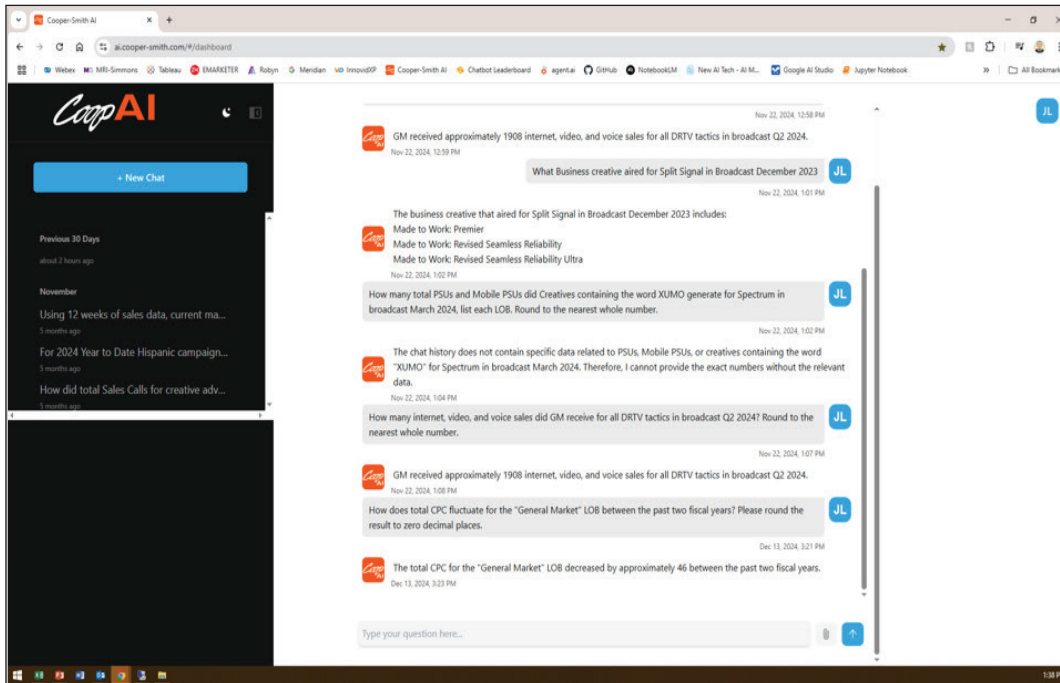
AGENTS

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

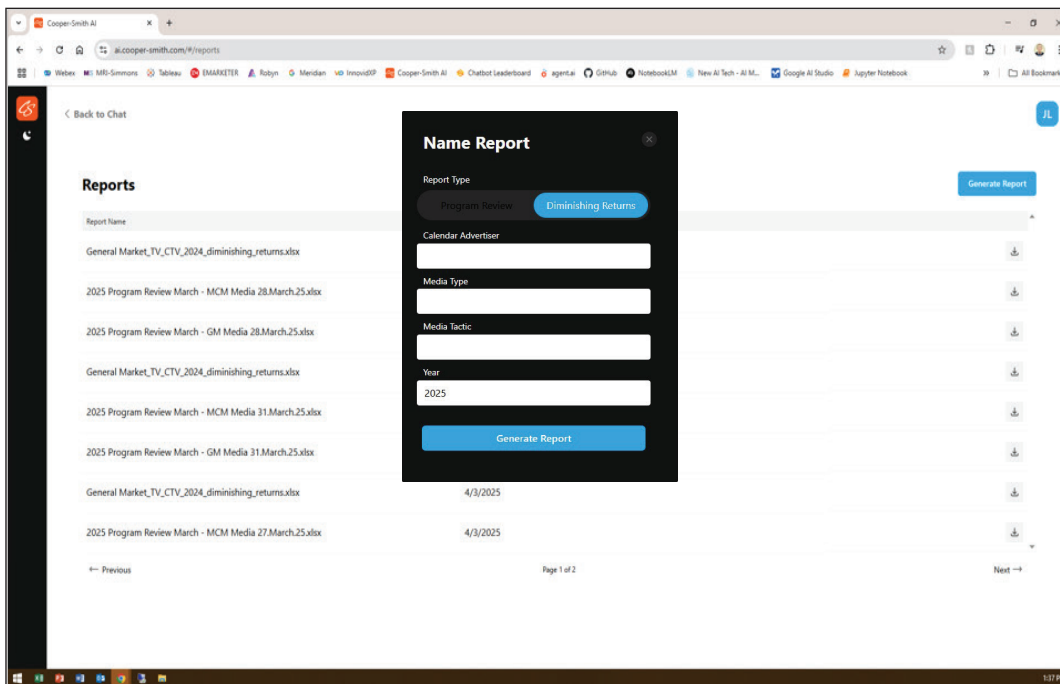
- Strategy & Planning Agents
- Performance & Optimization Agents
- Reporting & Insights Agents
- Custom Solutions Agents

User Interface

Coop AI is a custom built, secure, private model that accesses an enterprise-grade Large Language Model (LLM), Azure OpenAI. This foundation, combined with proprietary agents and client unique data, unlocks new levels of analytical intelligence.



LLM-powered chatbot interface



Agent Interface

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. Custom Agents (Elly the Estimator and Marketing Performance) were also developed for clients and are featured as case studies.



Perform +

Media Analyst

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



Predict +

Budget Strategist

Forecasts demand and identifies diminishing returns. Reveals where media spend starts to under-deliver, helping you allocate dollars for maximum marginal gains.



Impact +

ROI Maximizer

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



Segment +

Audience Master

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



Data Ingestion

All data, whether 1st, 2nd, or 3rd party, can be securely ingested, aligned, and curated to power:

- Predictive modeling and market simulations
- LLM training for industry-specific insights
- Automated decisions and optimization engines

AI Integrated Workflows

	1 st Party Data	2 nd Party Data	3 rd Party Data
	<i>Privately owned, high value data collected directly by your business</i>	<i>Data shared with you from trusted partners (their 1st-party data)</i>	<i>Aggregated data purchased or licensed from external providers</i>
Examples	• Customer interactions (web/app behavior, purchases, campaign engagement) • CRM records, loyalty data, sales systems • Operational plans, internal forecasts, business documents	• Shared shopper or transaction data from retail or platform partners • Media or marketing data licensed through business relationships • Co-op marketing data or collaborative analytics projects	• Demographic, income, and location data (e.g., Nielsen, Experian) • Psychographics, lifestyle indicators, or industry trend reports • Market-level activity data used for competitive benchmarking
Benefits	• Highest accuracy and relevance • Secure and customizable for your needs • Ideal for training AI models, forecasting behavior, and automating decisions	• Partnership-driven insights • Adds context and scale to your internal data • Enables joint modeling and targeting strategies	• Broad market visibility • Accelerates trend analysis, LTV modeling, and whitespace detection • Fast deployment, scalable across use cases

Marketing Materials

As Cooper-Smith Advertising became more invested in marketing **Coop AI** services, a decision was made to attend a national trade show to test market our model and agentic offerings. We developed a brochure, case studies, trade show booth, conference specific support materials and a video introduction of the model. All elements were created in a 6-week compressed time frame. The conference was very successful, yielding a significant amount of awareness and qualified leads.

Brochure outside

AGENTIC SOLUTIONS

COOP AI PRE-BUILT AGENTS

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AGENTIC SOLUTIONS

CUSTOM AGENTS

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

Artificial Intelligence (AI) continues to evolve and has revolutionized all businesses. If you are striving to increase efficiency, gain meaningful insights from disparate data sources, or simply want to build value that differentiates your company, let's connect.

Let's Connect.
1-800-215-8812
connect@cooper-smith.com

CooperSmith
ADVANCED INTELLIGENCE SOLUTIONS

Brochure inside



Business cards

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ADVANCED INTELLIGENCE SOLUTIONS

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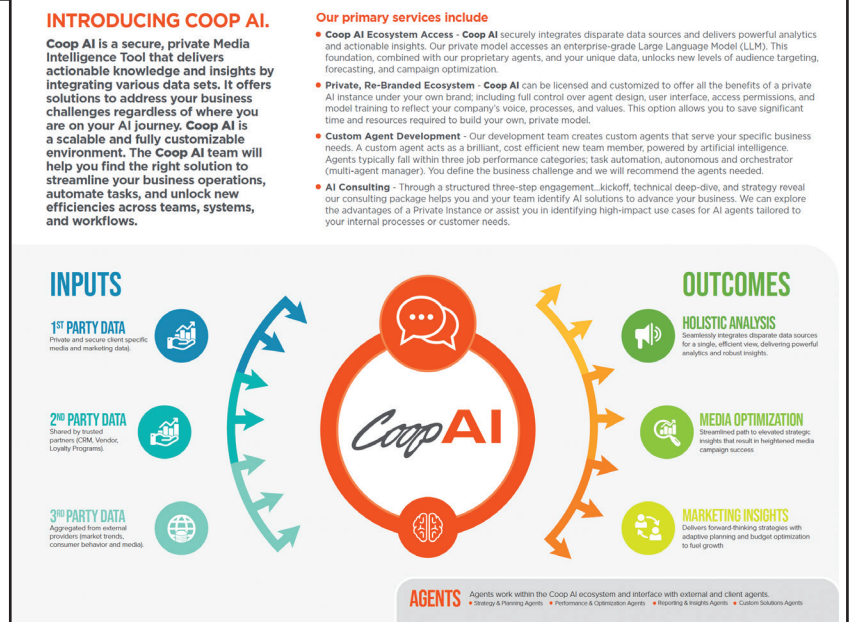
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Case Study: Elly the Estimator



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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.

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.

*Confidential Case Study - Internal Use Only

Case Study: Media Performance

Coop AIPerform+Cooper Smith
ADVANCED INTELLIGENCE SOLUTIONS

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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.

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.

*Confidential Case Study - Internal Use Only

Trade Show Material





OUR MODEL

A robust AI platform, purpose built to transform fragmented data into meaningful, actionable intelligence.

COOP AI AGENTS

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Predict

Impact

Segment

Media Analyst

Budget Strategist

ROI Maximizer

Audience Master

CUSTOM AGENTS

Custom agents developed and trained specifically to meet the needs of each business we serve.

Advanced Intelligence Solutions

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Side banners

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