

# Liftlab Forecasting / Case Study

Lead Product Designer / Igor Leygerman

# What is Liftlab / Intro

## Full-funnel Intelligent Marketing

**LiftLab is a unified marketing measurement and analytics platform. It provides software and services to help brands measure ad incrementality, optimize advertising spend, and forecast revenue across different marketing channels.**

# What is Liftlab

## Continued

### Agile Marketing Mix Modeling

Stop funding saturated channels because average ROAS still looks healthy. LiftLab maps exactly where each channel's returns flatten, so the next dollar goes where it actually compounds.

### Full-Funnel Budget Planning

One model. One forecast range. Constraints both Marketing and Finance set before the optimizer runs, so the budget meeting becomes a decision, not a negotiation.

### Scenario Planning and Forecasting

Your January plan was right. Markets moved. Run Conserve, Maintain, and Accelerate simulations against live response curves, so you know what to do before Monday's budget call.

### Budget Insights, Analytics and AI Suggestions

Markets shift mid-campaign. LiftLab's PlatformSense and Miles AI detects efficiency changes daily and tells you exactly where to move spend before the window closes.

# What is Forecasting?

## What is a Marketing Forecast?

**Marketing forecasting is the process of using historical data, market trends, market data, and performance metrics to predict future outcomes. It replaces guesswork with a data-driven approach, helping teams estimate future sales, lead generation, and revenue so they can optimize budgets and set realistic goals.**

# What is Forecasting?

## What is a Marketing Forecast? Continued

### Constraint-Aware Modeling

Lock in pre-committed spend, channel caps, and minimum brand thresholds, so every budget scenario the model returns is one your media buyers can actually execute.

### Forecast Ranges & Trade-Offs

Generate Conserve, Maintain, or Accelerate scenarios, each forecasted as a range built on your AMM's response curves, not historical averages. The exact trade-off between short-term efficiency and long-term brand equity is quantified at every budget boundary before you commit.

### Actionable Guardrails

Attach monitoring triggers directly to your chosen budget scenario, conversion rate floors, efficiency caps, and reported iROAS and iCAC signals, so your team knows exactly when a plan is drifting from target, before it breaks.

### Promotion-Aware Planning

Enter planned promotions, sales events, discount windows, and seasonal pushes for your scenario timeframe and see how your commercial calendar shifts the optimal media spend recommendation. Plan your media around your promotions, not separately from them.

# What is Forecasting?

## What is a Marketing Forecast? Continued

### AMM Feeds the Scenario Engine

The Scenario Planner ingests your AMM's response curves and marginal ROI signals directly, so every planning cycle is grounded in econometric evidence rather than assumptions built outside the model.

### Define Goals & Constraints

Input your target KPI, commercial constraints, and forward-looking media price projections before any scenario runs. Override projections to stress-test different cost environments.

### Build & Compare Scenarios

Generate, Conserve, Maintain, and Accelerate simultaneously, each with its own forecast range and mROAS trade-off visible at every allocation boundary, so the decision is made on evidence, not confidence.

### Lock the Plan & Set Guardrails

Publish your chosen scenario with explicit guardrails, maximum reallocation percentages, and stop-loss thresholds to create a clear operating contract between Marketing and Finance.

# Marketing Terminology

## Important Marketing Terms and Abbr.

### **CAC**

Customer Acquisition Cost

### **ROAS**

Return on Ad Spend

### **ROI**

Return on Investment

### **iROAS**

Incremental Return on Ad Spend

### **mROAS**

Marginal Return on Ad Spend

### **Auction Dynamics**

How much ads cost real-time

### **Media Mix**

Entire Budget Plan

### **Full Funnel**

Every stage of users journey, from initial brand discovery to post-purchase retention.

### **CPM**

Cost Per Mille

### **CTR**

Click-Through Rate

### **AMM**

Agile Marketing Mix Modeling

### **Baseline**

The normal level of performance if you were to change nothing.

# Who I worked with

## Intro



**Igor Leygerman**

Lead Product Designer



**Bala Kandula**

CPO



**Nitin Kumar**

CTO



**Justin Mettel**

Customer Success  
Manager



**Dirk Beyer**

Chief Data Scientist



**Jon Lorenzini**

Chief Marketing  
Science Officer

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## Engineers

Front-End Team (6)

## Engineers

Back-End Team (6)

## Engineers

Data Science (3)

## Customer Success

Customer Success Team

# Who I work with

## Continued

### Customer Success

Customer Success was one of the first teams I partnered with after joining, as I wanted to gain a deeper understanding of our users, their goals, and any existing forecasting-related documentation.

### Product

I worked closely with Product to help define requirements, map user flows and journeys, identify edge cases and key scenarios, and align on delivery timelines.

### Stakeholders

I kept stakeholders informed and engaged throughout the entire process, from project kickoff through the initial launch, including review sessions, testing sessions, and feedback discussions.

### Engineering

I collaborated closely with front-end, back-end, and data science engineers to understand current capabilities, existing systems, and future opportunities, enabling me to design the most scalable and effective experience possible for our users.

# Project Overview / Problem

## Problem Intro

**Why are our clients not using  
our internal Marketing Budget  
Forecasting tool?**

# Project Overview / Problem

## Problem Continued

### **Users not using internal Forecasting Tool**

According to user research, interviews, and product analytics data, fewer than half of our users were actively using the internal Forecasting tool.

### **Users are dropping off mid Forecast creation**

Due to limited functionality and a fragmented user experience, many users dropped off shortly after beginning the forecast creation process.

### **Users are “Afraid” of using Forecasting**

New team members and even experienced daily users were hesitant to use the Forecasting tool due to uncertainty around its impact on company budgets and real-time data.

### **Users are unaware that Forecasting exists**

Because the Forecasting tab lacked meaningful information, clear value, and core functionality, many users had limited awareness or understanding of the Forecasting feature and its purpose.

# Project Overview / Solutions

## Solutions Intro

**Design an entirely new  
Forecasting user experience;  
adding new functionality and  
a new design system.**

# Project Overview / Solutions

## Solutions Continued

### **New Dashboard Experience**

Introducing a redesigned Forecasting dashboard interface and experience, providing users with clear visibility into actionable future data and analytics.

### **New Forecast Results Experience**

A fully redesigned Forecasting results experience and interface, improving scalability and accessibility while empowering users to configure and override their entire media plan directly within Forecasting.

### **New Advanced Settings Experience**

The previous user experience and interface made it difficult for users to fully edit, configure, and customize Forecast settings before running new forecasts or scenario simulations.

### **New Custom Scenario Experience**

The previous user experience required users to edit their default marketing budget and media mix settings to create new scenarios, leading to confusion and hesitation due to concerns about modifying critical data.

# My Responsibilities

## Intro

### Product End to End Design and User Exp.

I led the end-to-end design process for this project, from user research and testing through to final visual design and implementation.

### Feature Requirements

Partnered with Product and leadership to define new features, enhance existing functionality, and explore future product opportunities.

### Visual and Functionality QA

Collaborated with cross-functional internal teams to implement and test UI features and functionality.

### Final Deliverables and Documentation

Designed and delivered final visual designs for the initial (v1) release and subsequent v2 updates.

# My Responsibilities

## Continued

### Design Systems

After finalizing the v1 Forecasting design and user experience, I collaborated closely with engineering to begin implementation and internal testing of the new Forecasting UI.

### Measuring Success / Post Launch

In collaboration with Product and Customer Success, I helped gather and document post-launch user feedback and data to support ongoing iteration and improvement.

### Designing for the Future of Forecasting

Throughout the project, I ensured the UI was designed to scale for future forecasting capabilities, including features such as Miles AI and Smart Intelligence Recommendations (confidence scoring).

# My Process

## Intro

### User Interviews, Research and Documentation

I worked closely with Customer Success and Product to conduct client interviews and questionnaires, helping to understand user goals, tasks, pain points, and needs.

### Existing Inventory Documentation

Given that this was one of my first projects and I was still becoming familiar with the product, I conducted extensive internal research to understand the existing Forecasting system, its design rationale, and the capabilities of the data being collected.

### Competitive Analysis and Market Research

There are thousands of marketing analytics, forecasting, and insights tools in this space, so I focused on identifying and evaluating both direct and indirect competitors to better understand the market landscape.

### Documentation and Next Steps

Based on the research and interviews conducted, I collaborated with Product and Customer Success to document findings, define key insights, and identify next steps.

# My Process

## Continued

### User Personas and User Flows

Collaborating with Product leadership, I helped define user personas, map user flows, and outline end-to-end use cases.

### Wireframes with AI Exploration

My approach to this project began with wireframes, given the data-heavy nature of the experience and its multiple potential flows. This allowed me to establish and validate as much of the UI structure as possible early in the design phase.

### Prototypes

I developed several prototypes covering forecasting navigation, key use cases, and potential future AI-driven features and implementations.

### User Testing and Documentation

Using the prototypes, I conducted user testing with internal teams and existing clients, then documented and presented the findings to the broader team.

# My Process

## Continued

### Design Systems and Documentation

In parallel with the Forecasting work, I also began developing a new design system and visual language for the broader Liftlab product ecosystem.

### Updates, Iterations and Feedback

Throughout the project, I maintained regular check-ins with Product, stakeholders, Customer Success, and Engineering to review designs and prototypes and incorporate feedback.

### Team Meetings and Check-ins

As part of the process, I held regular syncs throughout the week to share design updates and gather feedback, alongside additional sessions where engineering presented prototypes.

# Challenges

## Intro

### **New Design System**

In parallel with the Forecasting work-stream, this project also involved building and implementing a new design system.

### **Long-Term Project**

This project consists of multiple phases, from an initial redesign with added functionality to full AI Copilot implementation. As a result, I ensured the UI was designed to be scalable and extensible for future iterations.

### **Unknown AI Impacts**

With the introduction of MilesAI into our product ecosystem, we explored how the AI copilot would interact within the forecasting experience, including its behavior, capabilities, and level of control.

### **Data UI Impacts**

Forecasting relies heavily on a client's media mix and initial configuration established during onboarding. The updated experience allows users to override this data directly within Forecasting, introducing new requirements such as warnings and alerts to ensure clarity and prevent unintended changes.

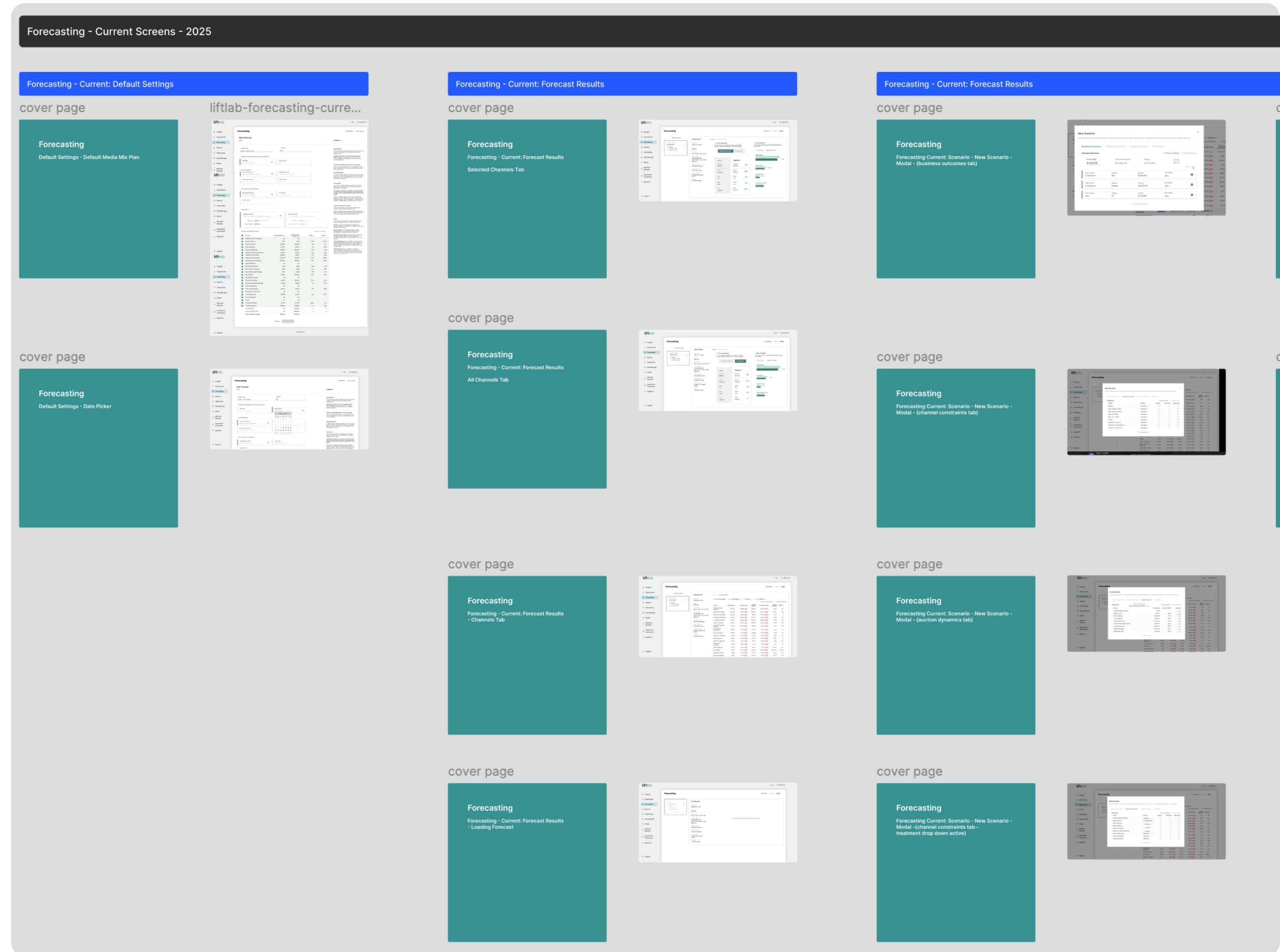
# Process Views / Screens

Research, User Flows, Prototypes, Components

## Forecast Inventory

# Existing Forecasting Experience Inventory

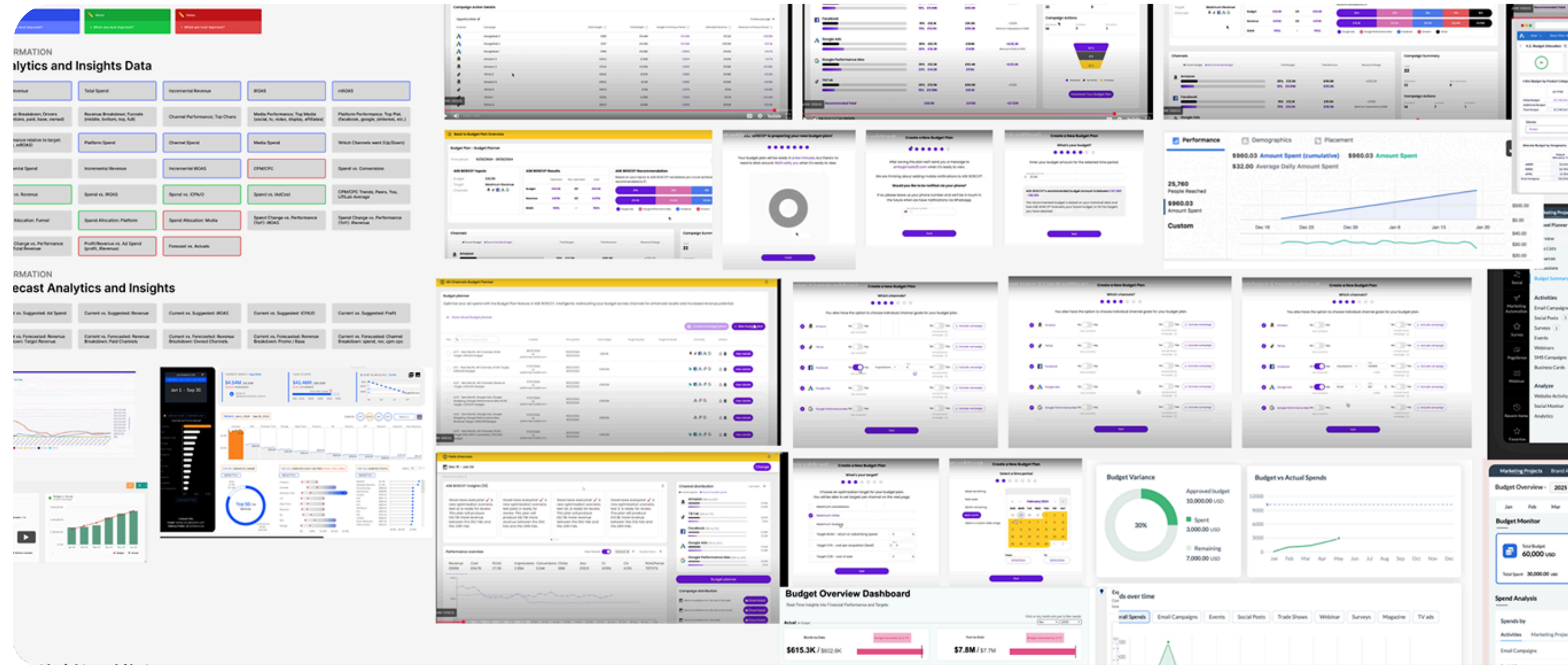
Taking screenshots of all screens and possible states that originally existed in forecasting



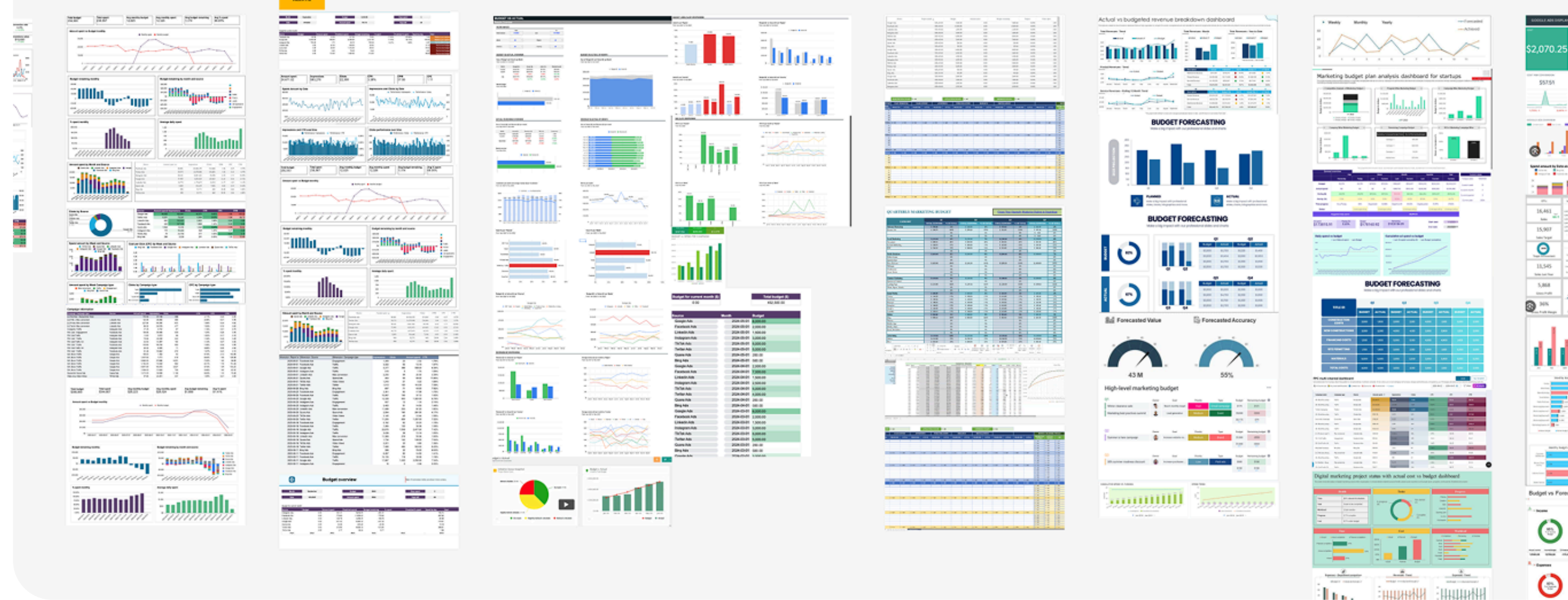
## Forecast Competitive Analysis

# Competitor and Market Research

User Types, User Flows and Primary Goals



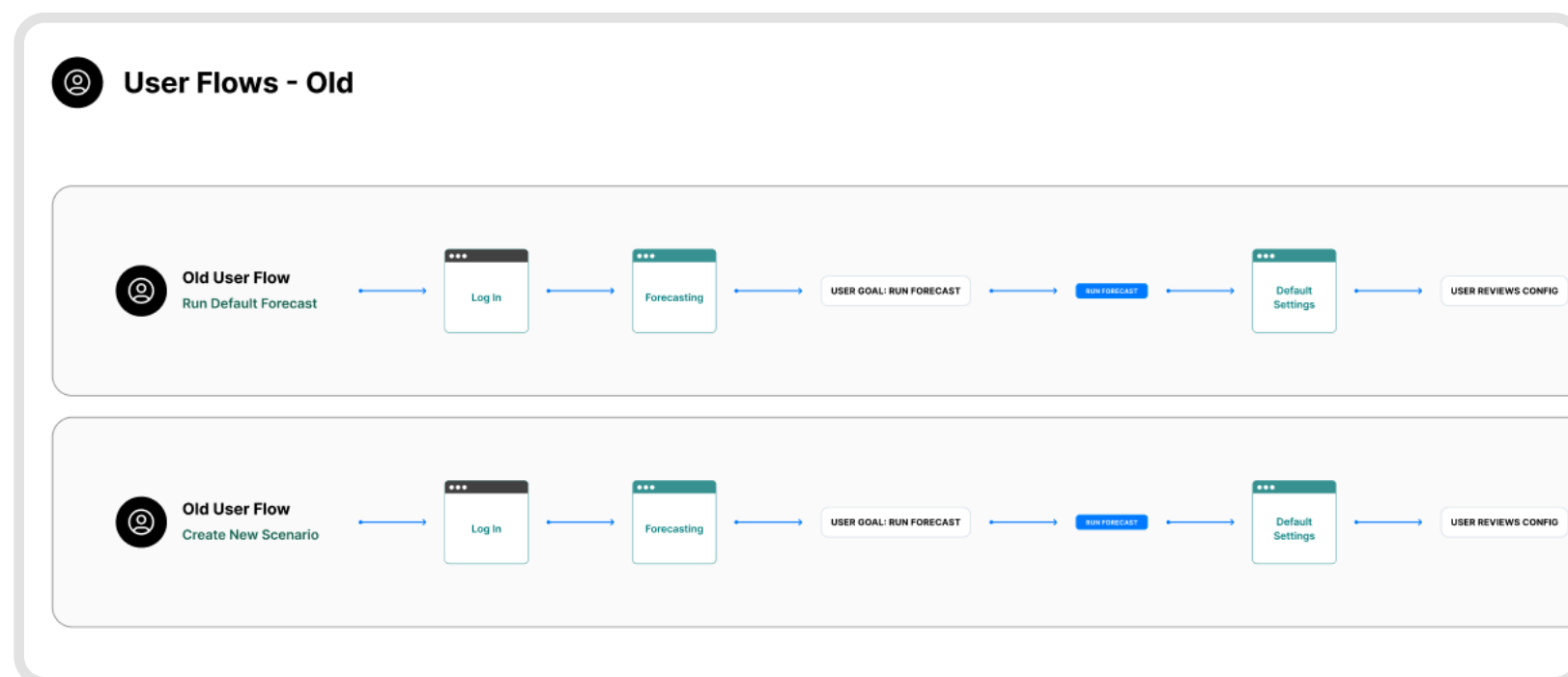
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[https://www.google.com/spreadsheets/d/14YYEcy1tGHLFjGfubpejmZvfO5JnBD8\\_GgVodHYfp3Y/template/preview?originpath=%2Fgoogle-sheets-marketing-dashboard-](https://www.google.com/spreadsheets/d/14YYEcy1tGHLFjGfubpejmZvfO5JnBD8_GgVodHYfp3Y/template/preview?originpath=%2Fgoogle-sheets-marketing-dashboard-)



## Forecast User Research

# User Flows and Personas

### User Types, User Flows and Primary Goals

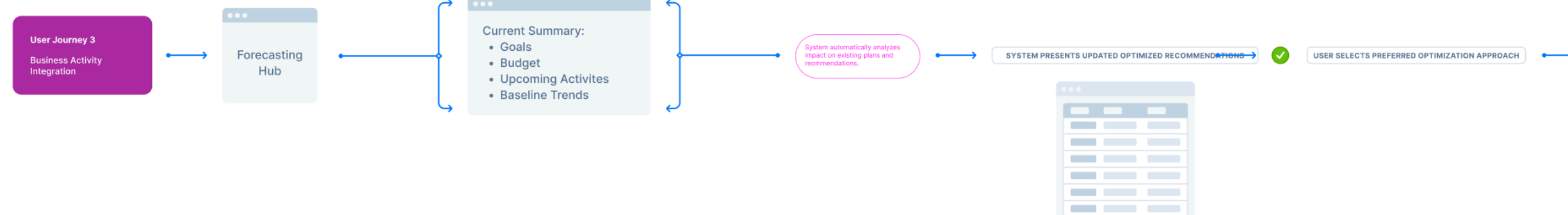
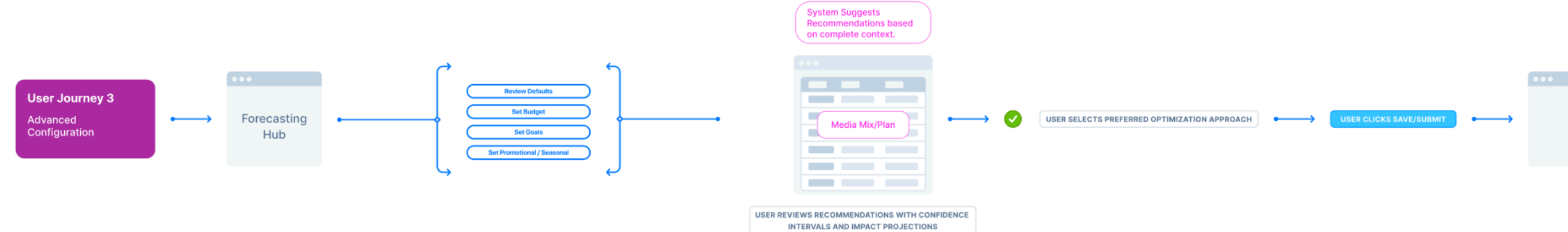
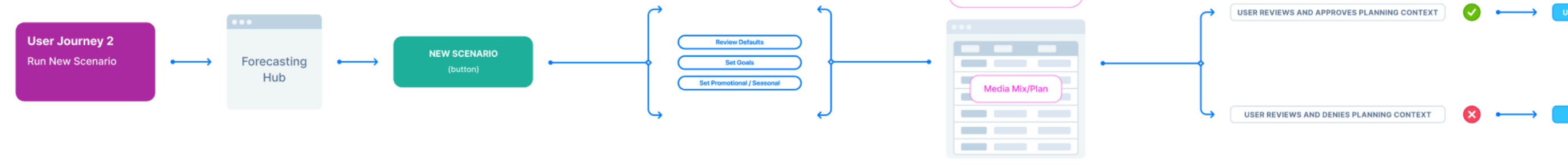
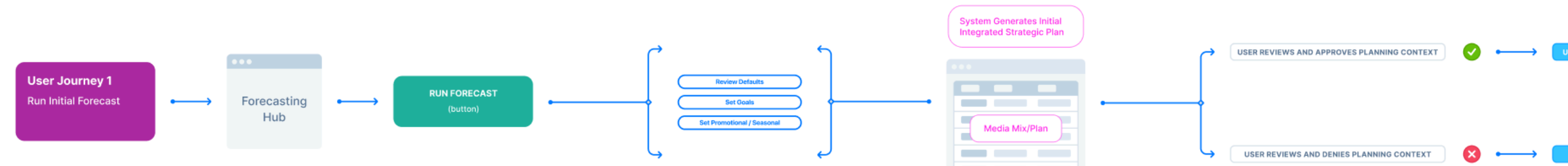
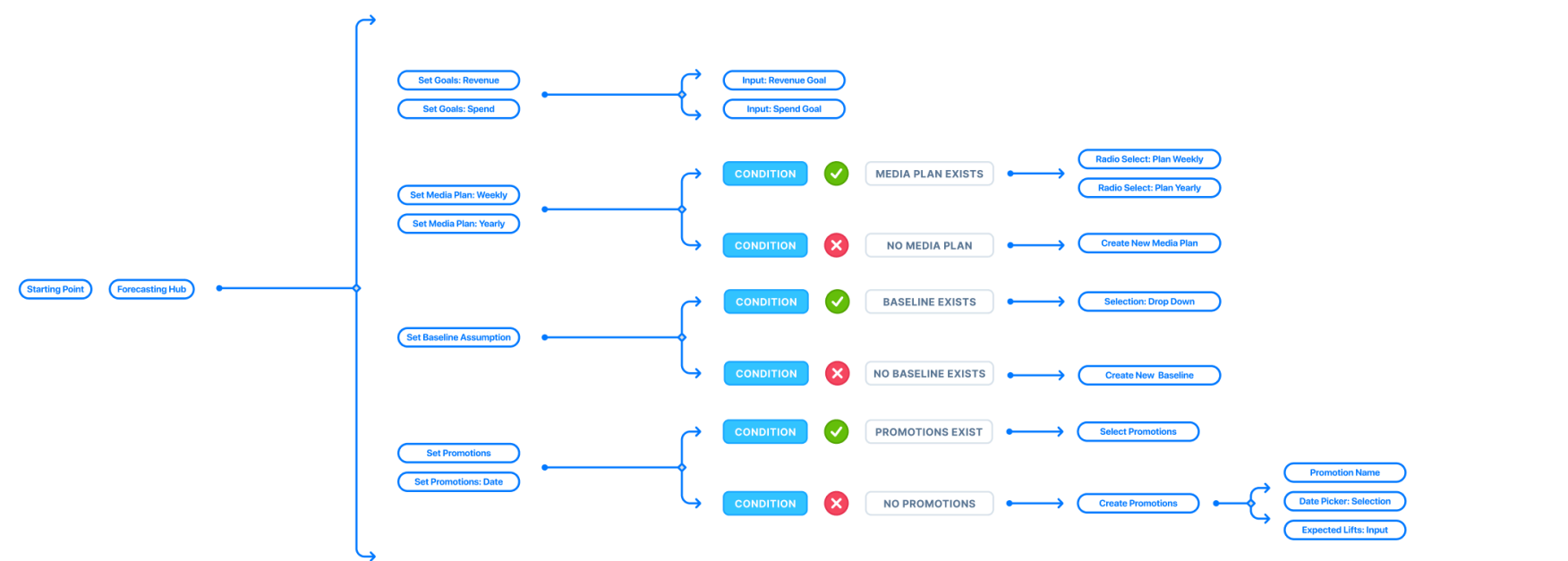
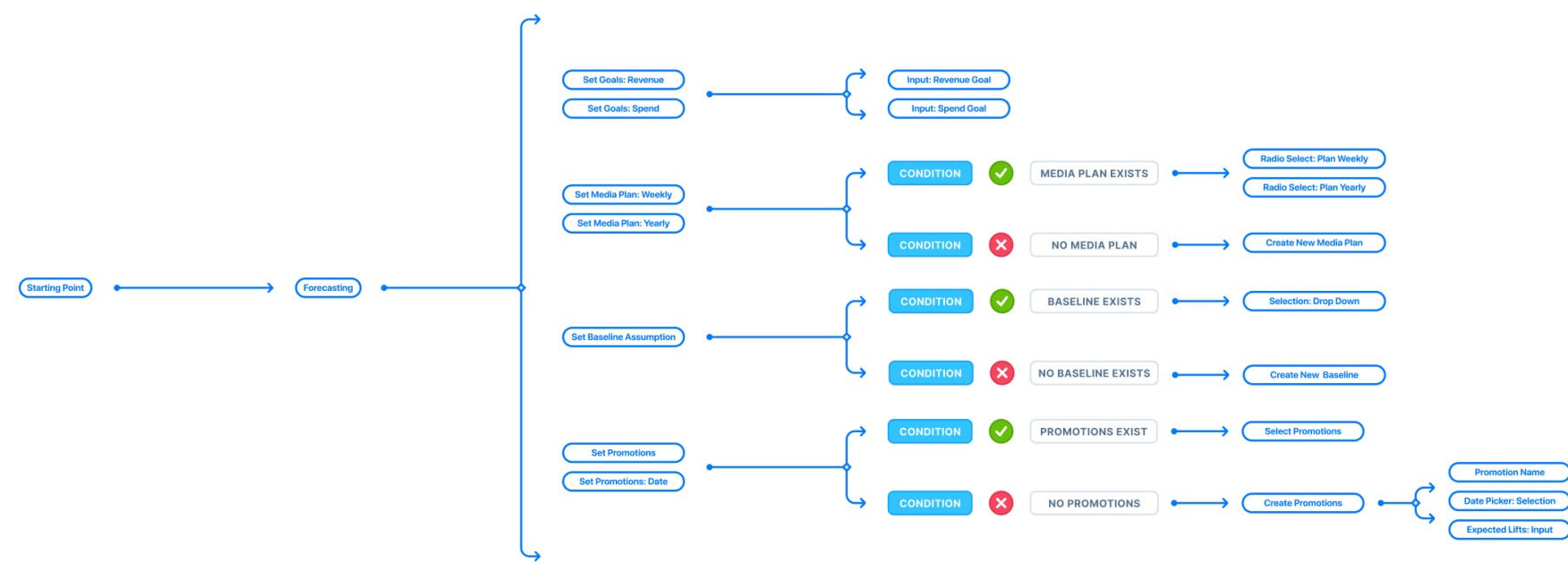


<p><b>User Type A</b></p> <ul style="list-style-type: none"> <li>Chief Marketing Officer (CMO)</li> <li>Marketing Manager</li> <li>Director of Marketing Operations.</li> </ul> <p>Responsible for both long-term brand equity and meeting this quarter's revenue targets. Collets and analyzes real-time insights to optimize performance spend before CAC (Customer Acquisition Cost) increases.</p> <p>Reports to: Leadership, CFO, CEO/The Board</p>	<p><b>Goals</b></p> <ul style="list-style-type: none"> <li>Long Term Brand Equity</li> <li>Revenue Targets</li> <li>Lower CAC (Customer Acquisition Costs)</li> <li>Identify and Define Strategy</li> <li>Hitting Forecasting Goals and Targets</li> </ul>	<p><b>User Type B</b></p> <ul style="list-style-type: none"> <li>Financial Marketing Analyst</li> <li>Marketing Data Analyst</li> <li>Marketing Budget Analyst</li> <li>Marketing Budget Coordinator</li> </ul> <p>Responsible for marketing channel and tactic budgeting, monitoring signals and adjusting budgets. Adjusting and monitoring Marketing Channel Media Mixes.</p> <p>Reports to: CMO, Manager, Director</p>	<p><b>Goals</b></p> <ul style="list-style-type: none"> <li>Marketing Media Mix Channel Strategy</li> <li>Tactical Budgeting</li> <li>Current, Past and Forecast Data Analysis</li> <li>Monitoring and Tracking Signals</li> <li>Adjusting Marketing Budget Strategy</li> <li>Forecast Marketing Promotions</li> <li>Forecast Marketing Quarters</li> <li>Channel Strategy</li> </ul>
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# Forecast User Research

# User Flows and Personas

## User Types, User Flows and Primary Goals





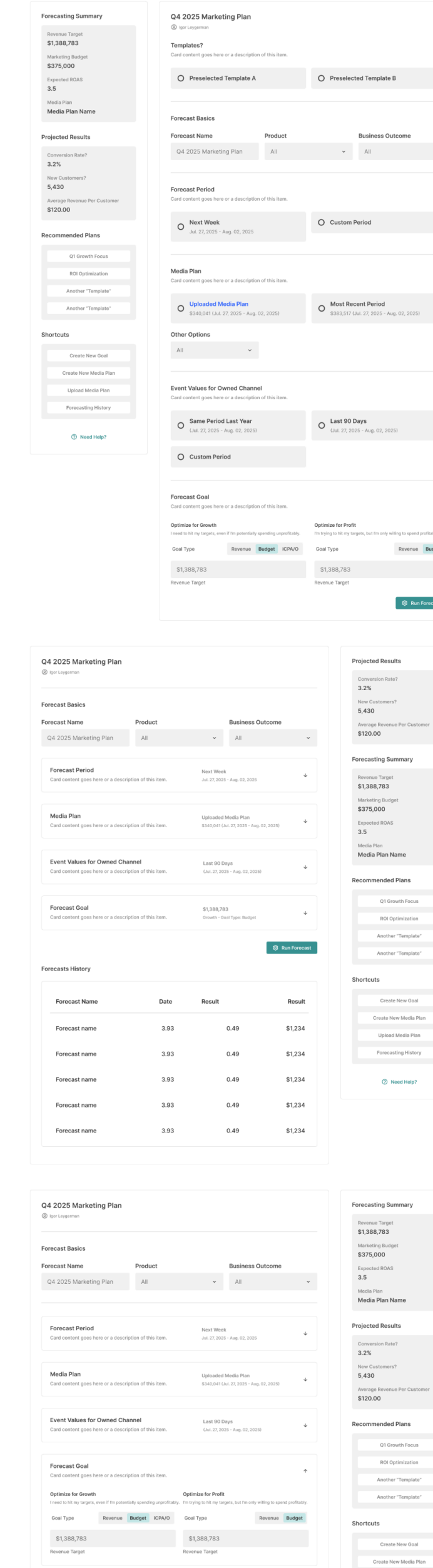
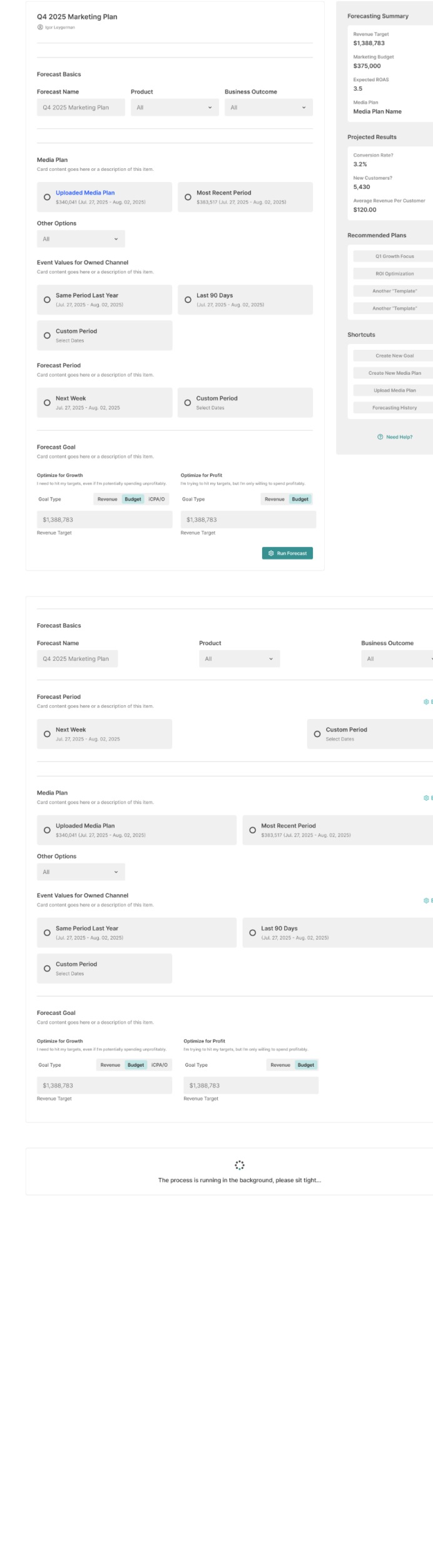
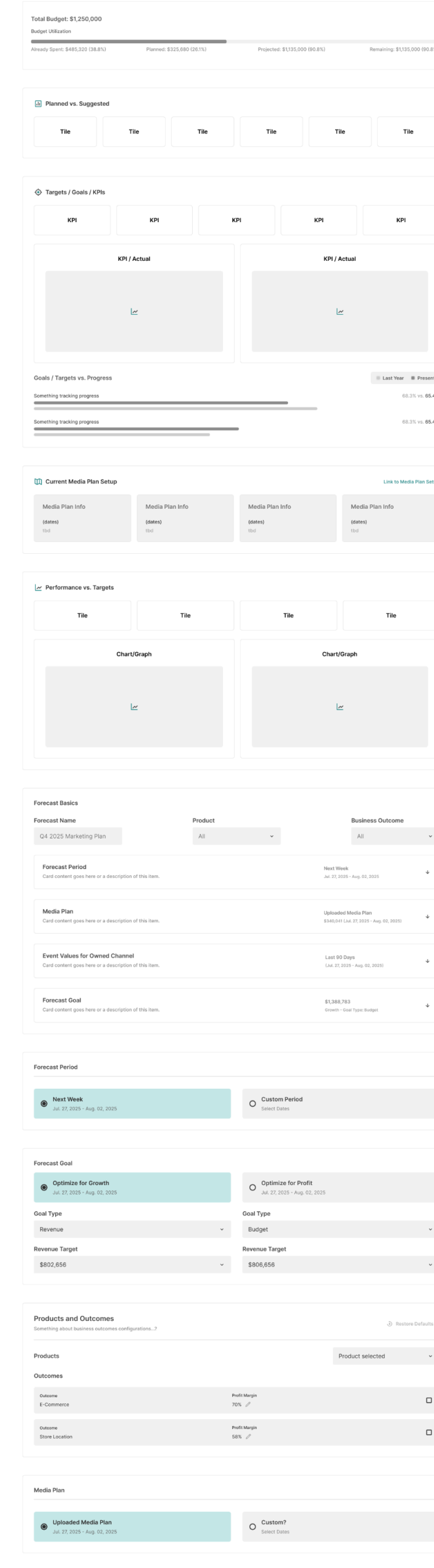
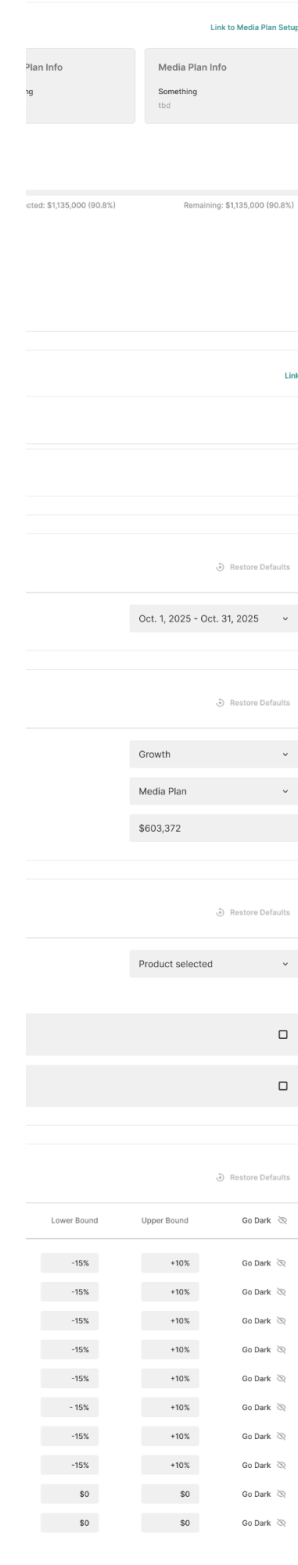
# Forecast Wireframes

# Wireframe Components

## Auto Layout Building Blocks

# Used auto-layout building blocks to help assemble quick templates and speed up iteration.

These components and templates helped with initial ideation, iteration and concept designs.



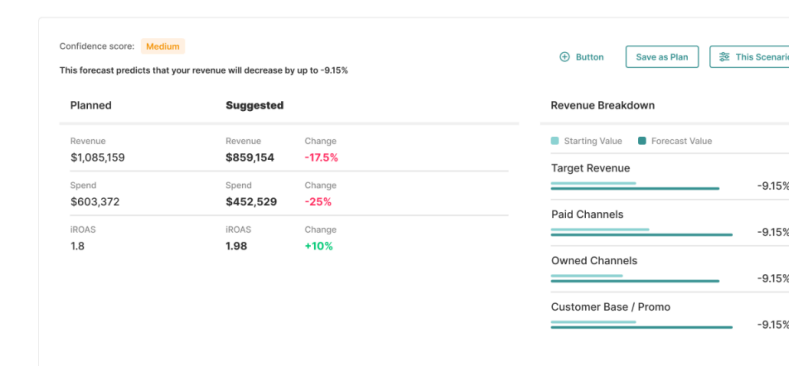
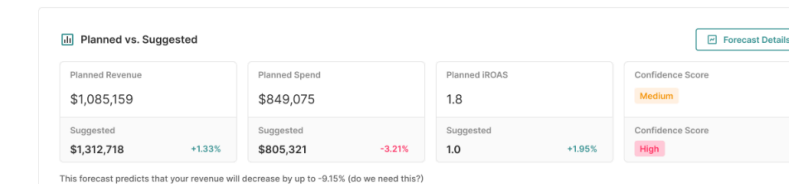
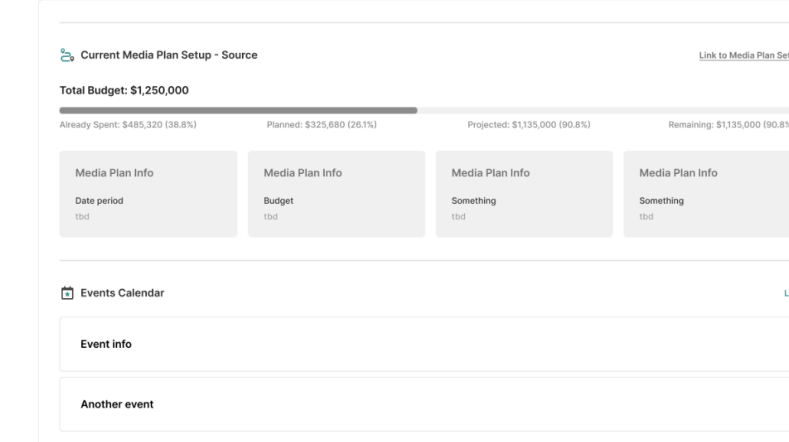
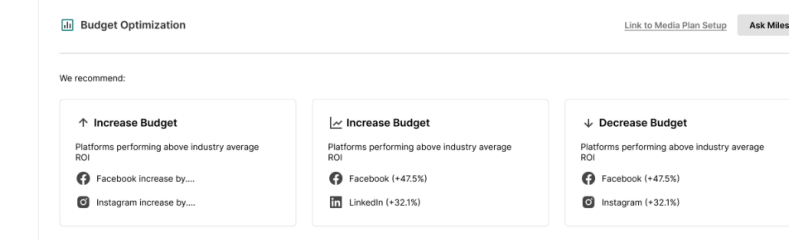
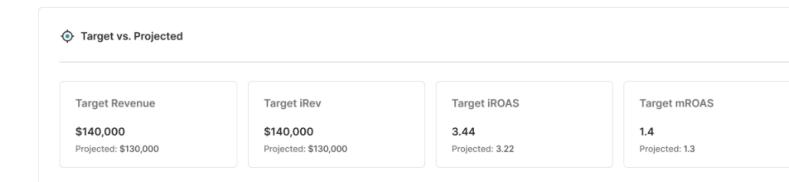
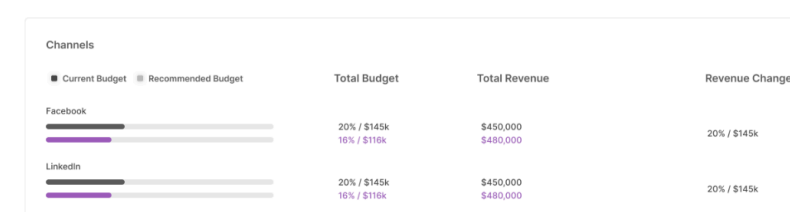
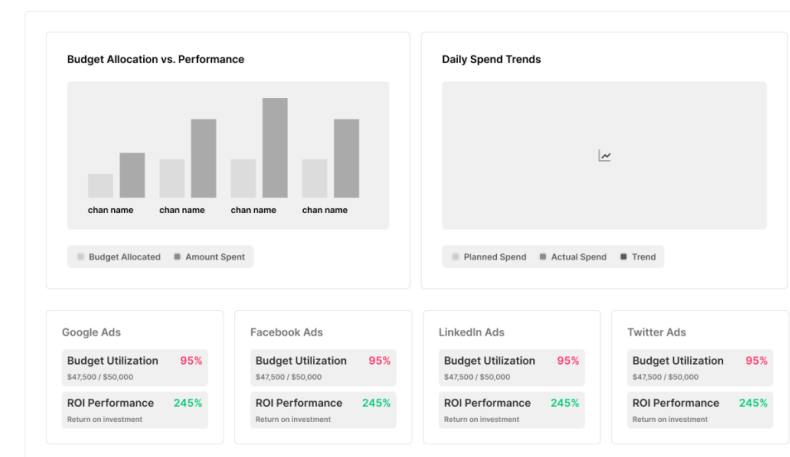
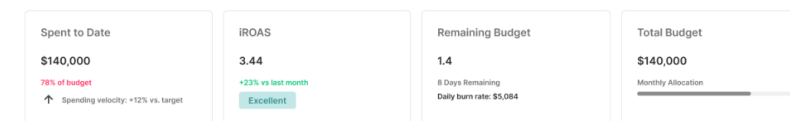
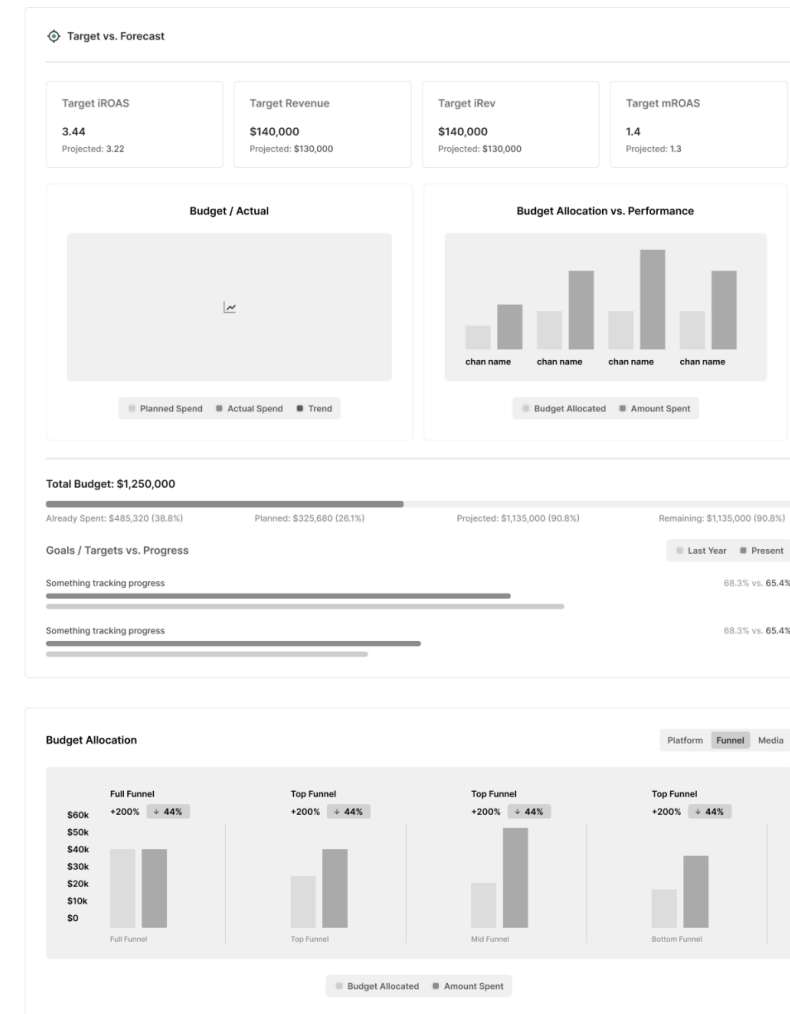
## Forecast Wireframes

# Wireframe Components

## Auto Layout Building Blocks Continued

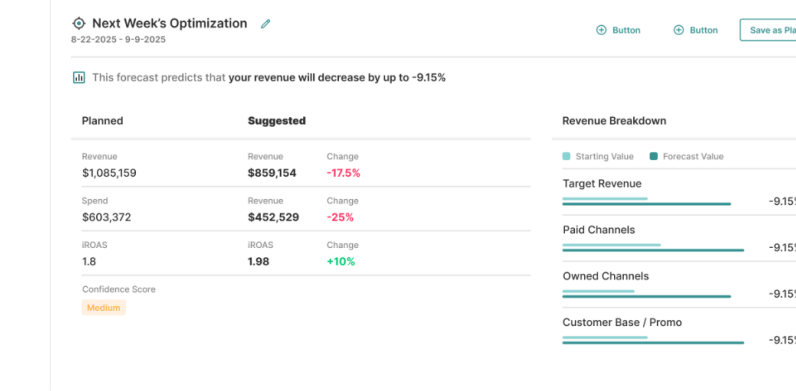
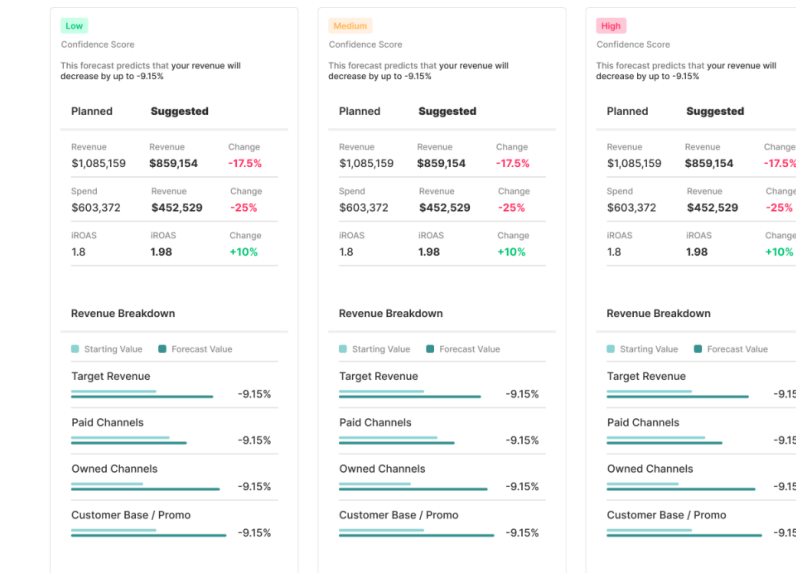
Used auto-layout building blocks to help assemble quick templates and speed up iteration.

These components and templates helped with initial ideation, iteration and concept designs.



**Channels**

Channel	Starting Spend	Forecast Spend	Starting Revenue	Forecast Revenue	Starting CPM/CPC	Forecast CPM/CPC
Affiliates	\$50,969	\$378,921	7.29	3.93	0.49	3.41
Bing - Shopping - Brand	\$3,718	\$16,784	4.86	3.77	1.40	17.45
Bing - Shopping - Generic	\$4,337	\$14,349	3.30	2.43	0.68	1.7
Bing - Text - Brand	\$8,737	\$42,536	5.00	4.03	1.25	3.39
Bing - Text - Generic	\$16,810	\$70,053	4.58	3.01	1.30	12.88
CTV V2	\$69,385	\$467,913	7.34	3.12	4.33	0.59
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
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Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28
Digital Audio - Direct V2	\$32,403	\$144,436	4.69	2.28	15.28	2.28



# New Forecast Dashboard

Wireframes

## Forecast Wireframes

# Dashboard Home

## Overview Insights - Spend and Revenue Performance Insights

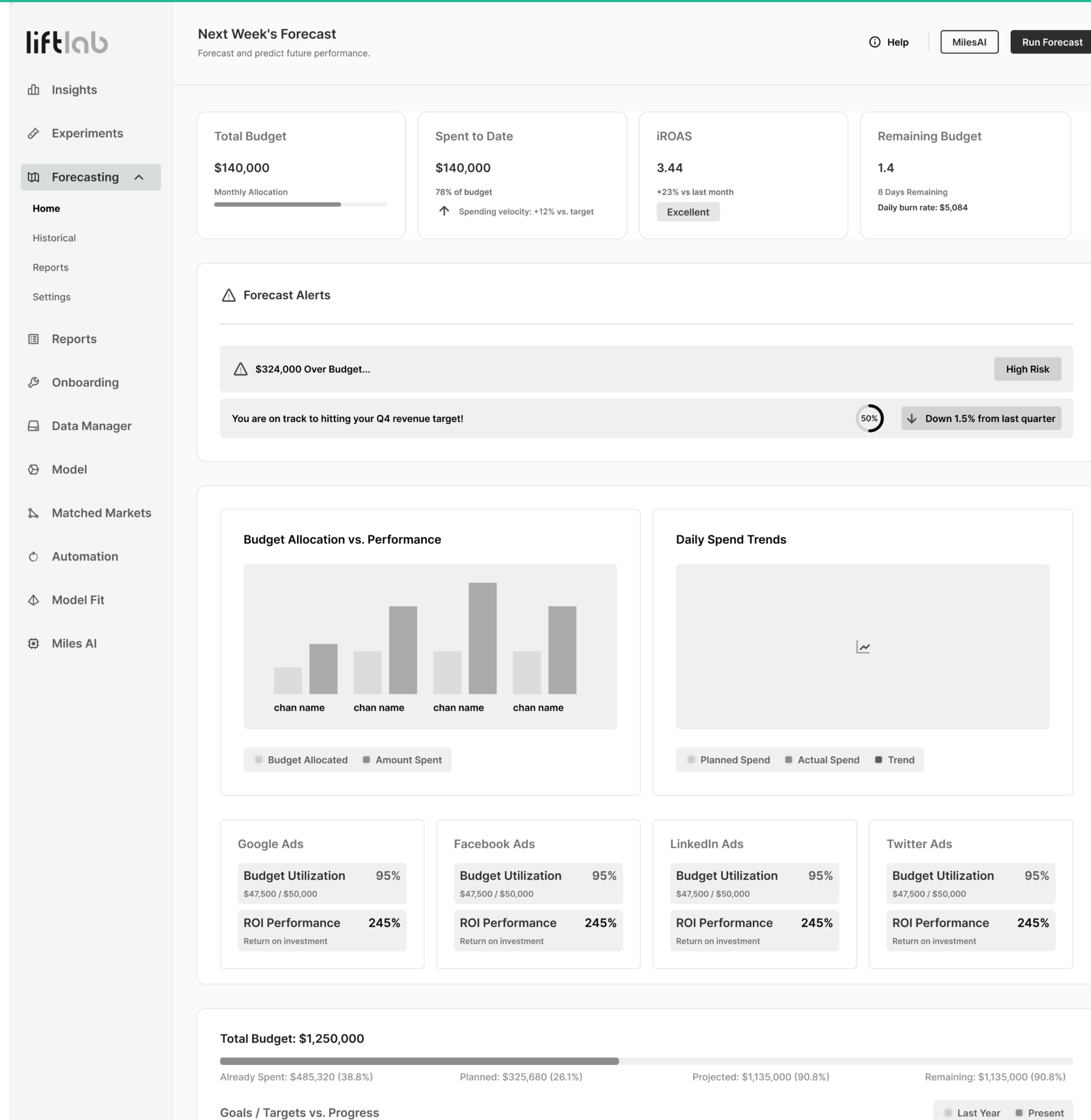
Key metrics such as forecasted spend, profit, revenue, and other critical analytics are surfaced directly on the new Forecasting homepage dashboard.

## Planned vs Suggested and Media Mix Insights

An at-a-glance view of planned versus suggested marketing budget, along with projected spend and profit.

## Forecasted Revenue Breakdown

Instant overview and insights into the media mix budget's forecasted revenue breakdown by channel and/or funnel.



## Forecast Wireframes

# Dashboard Home

## Forecasting Alerts and Warnings

Forecast alerts and warning systems designed to inform better decisions for marketing teams such as overspending or missing data.

## Total Budget Allocation

Granular breakdown of the budget allocation per channel, platform and funnel.

## Digital Ad Spend Budget Spend vs. ROI

Breakdown of the marketing budget media mix social media platform budget utilization vs. ROI (Return on Investment)

The screenshot shows the LiftLab forecasting dashboard. On the left is a navigation sidebar with the LiftLab logo and menu items: Insights, Experiments, Forecasting (active), Home, Historical, Reports, Settings, Reports, Onboarding, Data Manager, Model, Matched Markets, Automation, Model Fit, and Miles AI. The main content area is titled 'Next Week's Forecast' and includes a 'Help' link, 'MilesAI' button, and 'Run Forecast' button. Below this is a 'Current Media Plan Setup - Source' section with a 'Link to Media Plan Setup' button. It displays a 'Total Budget: \$1,250,000' and a progress bar showing 'Already Spent: \$485,320 (38.8%)', 'Planned: \$325,680 (26.1%)', 'Projected: \$1,135,000 (90.8%)', and 'Remaining: \$1,135,000 (90.8%)'. Below the bar are four filter cards: 'Date period' (March 2026 - June 2026), 'Quarterly Budget' (\$0.00), 'Funnels' (All), and 'Platforms' (All). The next section is 'Budget Optimization' with a 'Link to Media Plan Setup' and 'Ask Miles' button. It features three recommendation cards: 'Increase Budget' (up arrow), 'Increase Budget' (line graph), and 'Decrease Budget' (down arrow), each with details on platforms performing above industry average ROI and specific platform recommendations like Facebook (+47.5%) and LinkedIn (+32.1%). The final section is 'Target vs. Forecast' with four KPI cards: Target Revenue (\$140,000, Projected: \$130,000), Target iRev (\$140,000, Projected: \$130,000), Target iROAS (3.44, Projected: 3.22), and Target mROAS (1.4, Projected: 1.3). At the bottom are two charts: 'Budget / Actual' (a line chart placeholder) and 'Budget Allocation vs. Performance' (a bar chart showing performance across four channels).

## Forecast Wireframes

# Dashboard Home

## Budget Allocation Insights

Full-funnel budget allocation breakdown, insights and analytics.

## Advanced Media Mix Adjustment Recommendations

Data insights, external data, client data, and AI insights help the forecasting dashboard provide powerful suggestions and recommendations.

- Matched Markets
- Automation
- Model Fit
- Miles AI

- LiftLab
- Igor L
- Support
- Settings
- Collapse

Recommendations

**↑ Increase Budget**

Platforms performing above industry average ROI

- Facebook increase by...
- Instagram increase by...

**↔ Increase Budget**

Platforms performing above industry average ROI

- Facebook (+47.5%)
- LinkedIn (+32.1%)

**↓ Decrease Budget**

Platforms performing above industry average ROI

- Facebook (+47.5%)
- Instagram (+32.1%)

**Target vs. Forecast**

<b>Target Revenue</b> \$140,000 <small>Projected: \$130,000</small>	<b>Target iRev</b> \$140,000 <small>Projected: \$130,000</small>	<b>Target iROAS</b> 3.44 <small>Projected: 3.22</small>	<b>Target mROAS</b> 1.4 <small>Projected: 1.3</small>
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**Budget / Actual**

Planned Spend | Actual Spend | Trend

**Budget Allocation vs. Performance**

Budget Allocated | Amount Spent

**Budget Allocation** Platform | Funnel | Media

Funnel Stage	Budget Allocated	Amount Spent	Variance
Full Funnel	\$40k	\$40k	+200% ↓ 44%
Top Funnel	\$25k	\$40k	+200% ↓ 44%
Mid Funnel	\$20k	\$50k	+200% ↓ 44%
Bottom Funnel	\$15k	\$35k	+200% ↓ 44%

Budget Allocated | Amount Spent

## Forecast Wireframes

# Dashboard Home

## Overview Tiles and Multiple Forecasts

There were multiple iterations of the Forecasting landing page and results experience. These wireframes explore a dashboard layout featuring overview tiles above forecast results, with additional suggested forecasts displayed below.

liftlab

Insights

Experiments

Forecasting

Home

Historical

Reports

Settings

Reports

Onboarding

Data Manager

Model

Matched Markets

Automation

Model Fit

Miles AI

### Next Week's Forecast

Forecast and predict future performance.

Help

MilesAI

Run Forecast

#### Planned vs. Suggested

Forecast Details

Planned Revenue <b>\$1,085,159</b>	Planned Spend <b>\$849,075</b>	Planned iROAS <b>1.8</b>	Confidence Score Medium
Suggested <b>\$1,312,718</b> +1.33%	Suggested <b>\$805,321</b> -3.21%	Suggested <b>1.0</b> +1.95%	Confidence Score High

This forecast predicts that your revenue will decrease by up to -9.15% (do we need this?)

#### Q4 2026 Marketing Plan

Apr. 1, 2026 - May. 31, 2026

Save as Plan

This forecast predicts that your revenue will decrease by up to -9.15%

Planned	Suggested	Change	Revenue Breakdown
Revenue <b>\$1,085,159</b>	Revenue <b>\$859,154</b>	-17.5%	Starting Value   Forecast Value
Spend <b>\$603,372</b>	Revenue <b>\$452,529</b>	-25%	Target Revenue -9.15%
iROAS <b>1.8</b>	iROAS <b>1.98</b>	+10%	Paid Channels -9.15%
Confidence Score Medium			Owned Channels -9.15%
			Customer Base / Promo -9.15%

Low

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

#### Planned Suggested

Revenue <b>\$1,085,159</b>	Revenue <b>\$859,154</b>	Change -17.5%
Spend <b>\$603,372</b>	Revenue <b>\$452,529</b>	Change -25%
iROAS <b>1.8</b>	iROAS <b>1.98</b>	Change +10%

Medium

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

#### Planned Suggested

Revenue <b>\$1,085,159</b>	Revenue <b>\$859,154</b>	Change -17.5%
Spend <b>\$603,372</b>	Revenue <b>\$452,529</b>	Change -25%
iROAS <b>1.8</b>	iROAS <b>1.98</b>	Change +10%

High

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

#### Planned Suggested

Revenue <b>\$1,085,159</b>	Revenue <b>\$859,154</b>	Change -17.5%
Spend <b>\$603,372</b>	Revenue <b>\$452,529</b>	Change -25%
iROAS <b>1.8</b>	iROAS <b>1.98</b>	Change +10%

## Forecast Wireframes

# Forecast Dashboard - Wireframe Iterations

### Primary Forecast and Suggested Forecasts

There were several iterations of the Forecasting landing page and results experience. These wireframes explore a view showing an active forecast with suggested additional scenarios below for users to test and compare.



- Insights
- Experiments
- Forecasting
- Home
- Historical
- Reports
- Settings
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

#### Next Week's Forecast

Forecast and predict future performance.

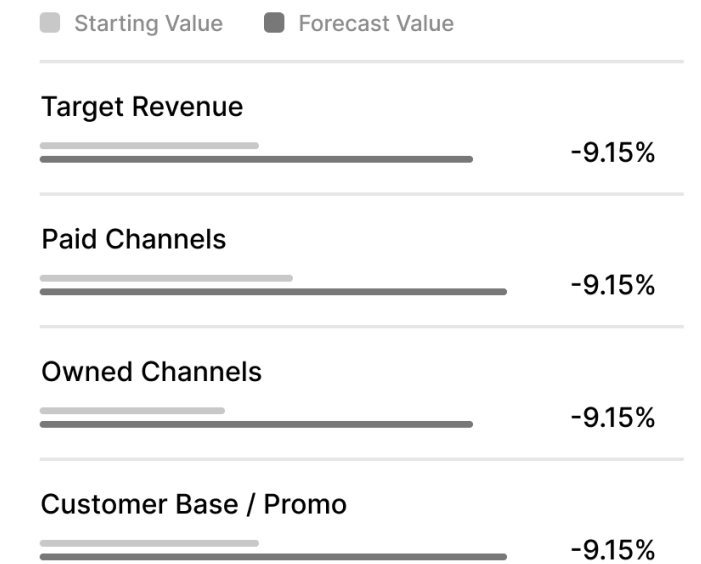
#### Q4 2026 Marketing Plan

Apr. 1, 2026 - May. 31, 2026

This forecast predicts that your revenue will decrease by up to -9.15%

Planned	Suggested	
Revenue \$1,085,159	Revenue \$859,154	Change -17.5%
Spend \$603,372	Revenue \$452,529	Change -25%
iROAS 1.8	iROAS 1.98	Change +10%
Confidence Score Medium		

#### Revenue Breakdown



#### Low

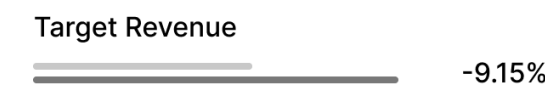
Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned	Suggested	
Revenue \$1,085,159	Revenue \$859,154	Change -17.5%
Spend \$603,372	Revenue \$452,529	Change -25%
iROAS 1.8	iROAS 1.98	Change +10%

#### Revenue Breakdown

Starting Value Forecast Value



Owned Channels

#### Medium

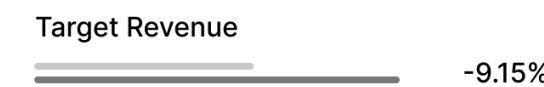
Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned	Suggested	
Revenue \$1,085,159	Revenue \$859,154	Change -17.5%
Spend \$603,372	Revenue \$452,529	Change -25%
iROAS 1.8	iROAS 1.98	Change +10%

#### Revenue Breakdown

Starting Value Forecast Value



Owned Channels

#### High

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned	Suggested	
Revenue \$1,085,159	Revenue \$859,154	Change -17.5%
Spend \$603,372	Revenue \$452,529	Change -25%
iROAS 1.8	iROAS 1.98	Change +10%

#### Revenue Breakdown

Starting Value Forecast Value



Owned Channels

## Forecast Wireframes

# Forecast Dashboard - Wireframe Iterations

## Suggested Forecasts Only Iteration

This view was an idea that had 3 different forecast scenarios shown to users at once and they can select which scenario they want to test and analyze.

**liftlab**

- Insights
- Experiments
- Forecasting
- Home
- Historical
- Reports
- Settings
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

**Next Week's Forecast**  
Forecast and predict future performance.

Help MilesAI

**Q4 2026 Marketing Plan**  
Apr. 1, 2026 - May. 31, 2026

Scenario

**Low**

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned		Suggested		
Revenue		Revenue		Change
	\$1,085,159		\$859,154	-17.5%
Spend		Revenue		Change
	\$603,372		\$452,529	-25%
iROAS		iROAS		Change
	1.8		1.98	+10%

**Revenue Breakdown**

Starting Value Forecast Value

Target Revenue -9.15%

Paid Channels -9.15%

Owned Channels -9.15%

Customer Base / Promo -9.15%

**Medium**

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned		Suggested		
Revenue		Revenue		Change
	\$1,085,159		\$859,154	-17.5%
Spend		Revenue		Change
	\$603,372		\$452,529	-25%
iROAS		iROAS		Change
	1.8		1.98	+10%

**Revenue Breakdown**

Starting Value Forecast Value

Target Revenue -9.15%

Paid Channels -9.15%

Owned Channels -9.15%

Customer Base / Promo -9.15%

**High**

Confidence Score

This forecast predicts that your revenue will decrease by up to -9.15%

Planned		Suggested		
Revenue		Revenue		Change
	\$1,085,159		\$859,154	-17.5%
Spend		Revenue		Change
	\$603,372		\$452,529	-25%
iROAS		iROAS		Change
	1.8		1.98	+10%

**Revenue Breakdown**

Starting Value Forecast Value

Target Revenue -9.15%

Paid Channels -9.15%

Owned Channels -9.15%

Customer Base / Promo -9.15%

LiftLab

Igor L

## Forecast Wireframes

# Forecast Dashboard - Wireframe Iterations

## Forecast Results and Controls

There were several iterations of the Forecasting landing page and results experience. These wireframes present a simplified dashboard view of a forecast result without overview tiles.



Insights

Experiments

Forecasting ^

Home

Historical

Reports

Settings

Reports

Onboarding

Data Manager

Model

Matched Markets

Automation

Model Fit

Miles AI

LiftLab

Igor L

### Next Week's Forecast

Forecast and predict future performance.

Help

MilesAI

#### Q4 2026 Marketing Plan

Advanced

Run Forecast

Last Ran:

Mar. 03, 2026 - Mar. 09, 2026 - 4:44PM

This forecast predicts that your revenue will decrease by up to -9.15%

Save as Plan

Channel Breakdown

All Channels

Selected Channels

#### Configuration

Optimization Period

Mar. 03, 2026 - Mar. 09, 2026

Strategy

Optimize for Growth

Spend

Custom

Run Scenario

Advanced

#### Planned

Revenue

\$1,085,159

Spend

\$603,372

iROAS

1.8

#### Suggested

Revenue

\$859,154

Revenue

\$452,529

iROAS

1.98

Confidence Score

Medium

Change

-17.5%

Change

-25%

Change

+10%

#### Revenue Breakdown

Starting Value



Forecast Value



Target Revenue



-9.15%

Paid Channels



-9.15%

Owned Channels



-9.15%

Customer Base / Promo



-9.15%

Forecast Period

Mar. 03, 2026 - Mar. 09, 2026

Analysis Goal

Optimize for Growth

Revenue Target?

\$802,653

# New Forecast Results

Wireframes

## Forecast Wireframes

# Forecast Results

### Forecast Results Design - Defaults

Forecast results re-design and refresh with updated functionality such as the ability to view advanced settings and override your current media mix plan / marketing budget strategy.

### Override Default Media Mix

Users are now empowered with the ability to override their entire marketing budget media mix, strategy and plan from Forecasting.

### Advanced Media Mix Settings Visibility

Direct visibility into the entire marketing budget media mix/ plan configuration.

**liftlab**

- Insights
- Experiments
- Forecasting**
- Home
- Historical
- Reports
- Settings
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

**Next Week's Forecast** Help MilesAI Run Forecast

Forecast and predict future performance.

Mar. 1, 2026 - 3:22 PM EST  
New Scenario 2

Target Revenue  
**\$875,000.00**

Confidence Score: Low

**Default Plan** View Settings Save as Plan

**Q4 2026 Marketing Plan** Last Ran: Mar. 03, 2026 - Mar. 09, 2026 3:45 AM

This forecast predicts that your revenue will decrease by up to -9.15% Channel Breakdown All Channels Selected Channels

Starting	Suggested	Change
Ad Spend \$603,372	Ad Spend \$452,529	Change -25%
Revenue \$1,085,159	Revenue \$859,154	Change -17.5%
iROAS 1.8	iROAS 1.98	Change +10%
iCPA/O 63.02	iCPA/O 57.31	Change -9.1%
Profit \$156,239	Profit \$174,079	Change +11.4%

**Revenue Breakdown**

Starting Value Forecast Value

Target Revenue -9.15%

Paid Channels -9.15%

Owned Channels -9.15%

Customer Base / Promo -9.15%

Forecast Period  
**Jul. 27, 2025 - Aug. 02, 2025**

Analysis Goal  
**Optimize for Growth**

Revenue  
**\$802,653**

Starting Media Plan  
**Uploaded Plan**  
(Mar. 03, 2026 - Mar. 09, 2026)  
(\$603,372)

Business Outcomes  
**All Business Outcomes**

Channels to Optimize  
**31 Channel Constraint(s) Applied**

## Forecast Wireframes

# Forecast Results - Multiple Scenario Support

## Multi-Scenario Support

Users can run multiple scenarios without affecting their existing default settings, and can choose to apply any scenario to override their default media mix.

The screenshot displays the LiftLab forecasting dashboard. On the left is a navigation sidebar with options like Insights, Experiments, Forecasting, Home, Historical, Reports, Settings, Reports, Onboarding, Data Manager, Model, Matched Markets, Automation, Model Fit, and Miles AI. The main content area is titled 'Next Week's Forecast' and shows three scenario cards, each with a target revenue of \$875,000.00 and a confidence score (Low, Medium, High). Below this is a 'Default Plan' section for 'Q4 2026 Marketing Plan' with a 'View Settings' and 'Save as Plan' button. A summary message states: 'This forecast predicts that your revenue will decrease by up to -9.15%'. A table compares 'Starting' and 'Suggested' values for Ad Spend, Revenue, iROAS, iCPA/O, and Profit. To the right, a 'Revenue Breakdown' section shows horizontal bar charts for Target Revenue, Paid Channels, Owned Channels, and Customer Base / Promo, all indicating a -9.15% change. At the bottom, a summary grid shows: Forecast Period (Jul. 27, 2025 - Aug. 02, 2025), Analysis Goal (Optimize for Growth), Revenue (\$802,653), Starting Media Plan (Uploaded Plan), Business Outcomes (All Business Outcomes), and Channels to Optimize (31 Channel Constraint(s) Applied).

## Forecast Wireframes

# Forecast Results - Wireframe Iterations

## Settings and Forecast Combination

These early iterations explored combining existing default settings screens into the Forecasting landing page, allowing users to configure and run forecasts directly from the entry point.



Insights

Experiments

Forecasting ^

Home

Historical

Reports

Settings

Reports

Onboarding

Data Manager

Model

Matched Markets

Automation

Model Fit

Miles AI

LiftLab

Igor L

### Next Week's Forecast

Forecast and predict future performance.

Help

MilesAI

Q4 2026 Marketing Plan

Advanced

Run Forecast

Last Ran:

Mar. 03, 2026 - Mar. 09, 2026 - 4:44PM

#### Channel Constraints

Configure

Forecast Name	Product	Business Outcome
Q4 2026 Marketing Plan	All	All
Forecast Name Q4 2026 Marketing Plan	Next Week Mar. 03, 2026 - Mar. 09, 2026	Media Plan Uploaded Media Plan Mar. 03, 2026 - Mar. 09, 2026
Optimized for Growth	Goal Type Revenue	Revenue Target \$802,653

#### Channel Constraints

Something about channel constraint configurations...?

Configure

Channel Min Bound Growth	Channel Max Bound Revenue	Channel Spend \$409,175
-----------------------------	------------------------------	----------------------------

#### Auction Dynamics

Something about auction dynamics configurations...?

Configure

CPM Target \$0.11	CPC Target \$0.24	Reference Period Mar. 03, 2026 - Mar. 09, 2026
----------------------	----------------------	---

#### Custom & Events/Holidays.. Header

Something about custom events configurations...?

Configure

Time Period Mar. 03, 2026 - Mar. 09, 2026
--

# New Forecast Advanced Settings

Wireframes

## Forecast Wireframes

# Forecast Advanced Settings

## Combined View / Controls of Advanced Budget Plan Configuration Settings

The previous forecasting experience did not have any access to an advanced settings screens until the user had already ran a forecast first. Blocking the user from running new scenarios. The new advanced settings screens enabled users to have full control over future forecast and running random scenario testing.

**liftlab**

- Insights
- Experiments
- Forecasting ^
- Home
- Historical
- Reports
- Settings**
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

### Advanced Settings

Help
Cancel
Save and Run

These are your current Media Mix Configurations.

**Caution** You are editing your default settings. New Scenario

#### Forecast Defaults

Forecast Name: Q4 2026 Marketing Plan

Date Period: Mar. 03, 2026 - Mar. 09, 2026

#### Spend Strategy

Strategy: Growth

Spend Source: Media Plan

Total Spend \$: \$5,409,012

#### Products and Outcomes

Products: Growth

Outcome: E-Commerce	Profit Margin: 70%	✕
Outcome: Store Location	Profit Margin: 58%	✕

#### Channel Management (58)

Channel List	Constraints	Constant	Lower Bound	Upper Bound	Go Dark
Ad Results Media Prospecting	Bounded	\$0	\$0	\$0	Go Dark

## Forecast Wireframes

# Forecast Advanced Settings

## Combined View / Controls of Advanced Budget Plan Configuration Settings

The previous forecasting experience did not have any access to an advanced settings screens until the user had already ran a forecast first. Blocking the user from running new scenarios. The new advanced settings screens enabled users to have full control over future forecast and running random scenario testing.



- Insights
- Experiments
- Forecasting**
- Home
- Historical
- Reports
- Settings**
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

### Advanced Settings

These are your current Media Mix Configurations.

Help Cancel Save and Run

#### Auction Dynamics (84)

Restore Defaults Last 30 Days

Channel List	Starting Spend	Starting CPM/CPC	Adjustment
Ad Results Media Prospecting	\$372.31	\$9.52	\$0
Affiliate Marketing	\$372.31	\$9.52	\$0
Criteo Prospecting	\$372.31	\$9.52	\$0
Criteo Retargeting	\$372.31	\$9.52	\$0
Facebook Prospecting	\$372.31	\$9.52	\$0
Facebook Prospecting Awareness	\$372.31	\$9.52	\$0
Facebook Reactivation	\$372.31	\$9.52	\$0
Facebook Retargeting	\$372.31	\$9.52	\$0
Facebook Something	\$372.31	\$9.52	\$0
Facebook Something Else	\$372.31	\$9.52	\$0

Show All

#### Marketing Events (2)

Restore Defaults Add Promotion All

Promotion	Dates
Name	Mar. 03, 2026 - Mar. 09, 2026
Name	Mar. 03, 2026 - Mar. 09, 2026

#### Owned Channels

Restore Defaults

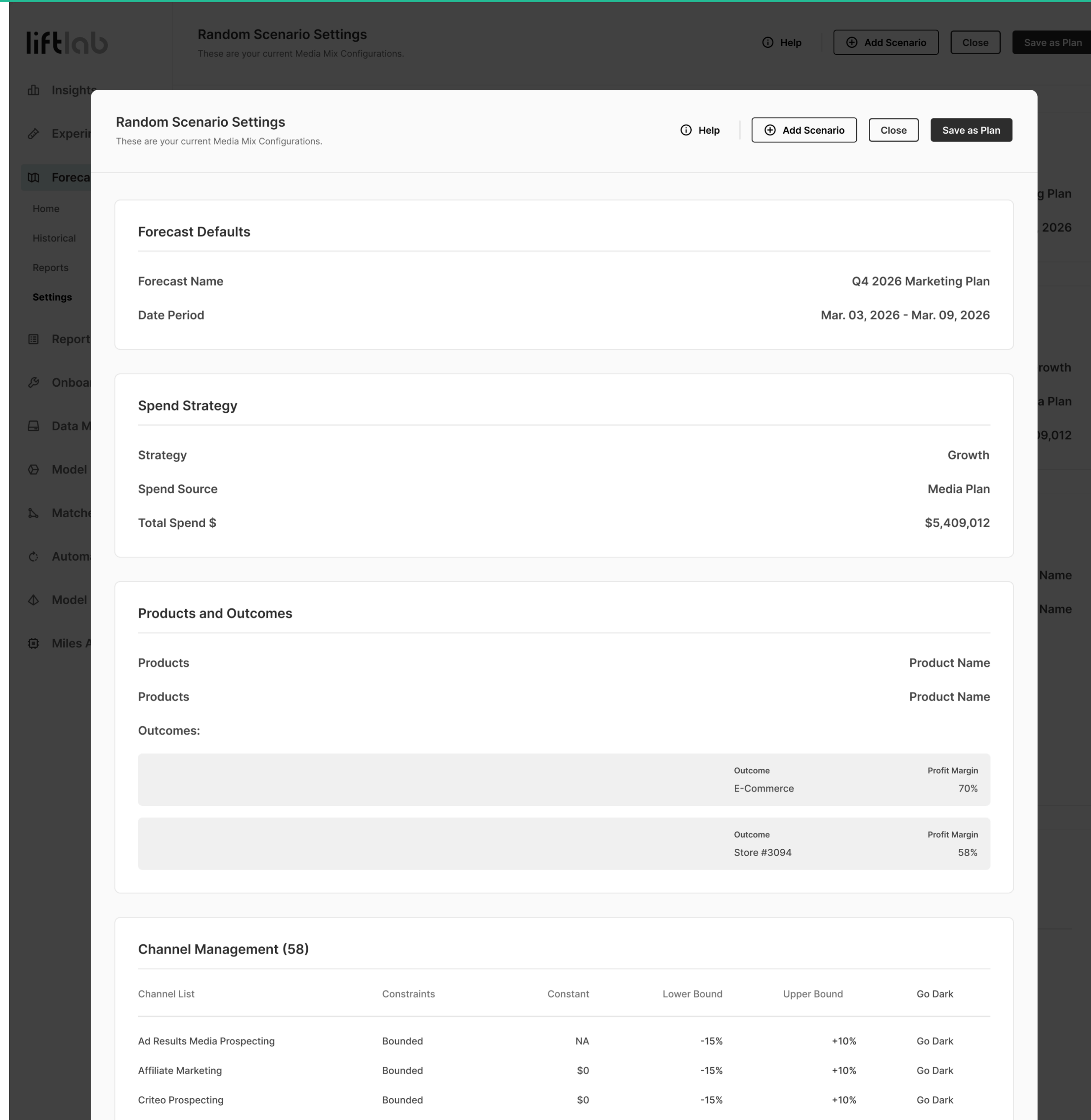
Time Period Same Period Last Year

## Forecast Wireframes

# Forecast Advanced Settings - View Only

## Combined View / Controls of Advanced Budget Plan Configuration Settings in View Only Mode

The previous forecasting experience did not have any access to an advanced settings screens in a view only mode to empower the user to have visibility into what budget configuration is set up for which ever scenario they are creating or viewing.



# New Forecast Default Settings

Wireframes

## Forecast Wireframes

# Forecast Default Settings

### Redesign and functionality introduction; Advanced Settings Link.

The previous Forecasting experience did not provide access to advanced settings from the default forecast creation screen, limiting users' ability to test and simulate upcoming promotions and marketing events, as well as broader budget scenarios.



- Insights
- Experiments
- Forecasting** ^
- Home
- Historical
- Reports
- Settings**
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

#### Run New Forecast

Forecast and predict future performance.

Help | Advanced Settings | Cancel | Run Forecast

#### Forecast Details

Forecast Name

Enter Name

Product

All

#### Forecast Period

Next Week

Mar. 03, 2026 - Mar. 09, 2026

Next Month

Mar. 03, 2026 - Mar. 09, 2026

Custom Period

Select Dates

#### Starting Media Mix

Most Recent

Mar. 03, 2026 - Mar. 09, 2026

Same Period Last Year

Mar. 03, 2026 - Mar. 09, 2026

Media Plan

Mar. 03, 2026 - Mar. 09, 2026

Custom

Select Dates

#### Event Values for Owned Channel

Uploaded Media Plan

Mar. 03, 2026 - Mar. 09, 2026

Last 90 Days

Select Dates

Same Period Last Year

Mar. 03, 2026 - Mar. 09, 2026

#### Forecast Goal

## Forecast Wireframes

# Forecast Default Settings

### Redesign and functionality introduction; Advanced Settings Link.

The previous Forecasting experience did not provide access to advanced settings from the default forecast creation screen, limiting users' ability to test and simulate upcoming promotions and marketing events, as well as broader budget scenarios.

- Reports
- Settings**
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI
- LiftLab
- Igor L
- Support
- Settings
- Collapse

#### Forecast Period

**Next Week**  
Mar. 03, 2026 - Mar. 09, 2026

**Next Month**  
Mar. 03, 2026 - Mar. 09, 2026

**Custom Period**  
Select Dates

#### Starting Media Mix

**Most Recent**  
Mar. 03, 2026 - Mar. 09, 2026

**Same Period Last Year**  
Mar. 03, 2026 - Mar. 09, 2026

**Media Plan**  
Mar. 03, 2026 - Mar. 09, 2026

**Custom**  
Select Dates

#### Event Values for Owned Channel

**Uploaded Media Plan**  
Mar. 03, 2026 - Mar. 09, 2026

**Last 90 Days**  
Select Dates

**Same Period Last Year**  
Mar. 03, 2026 - Mar. 09, 2026

#### Forecast Goal

**Optimize for Growth**  
Mar. 03, 2026 - Mar. 09, 2026

**Optimize for Profit**  
Mar. 03, 2026 - Mar. 09, 2026

**Goal Type** Budget **Revenue** iCPA/O

**Revenue Target** ⓘ

Max: \$X,XXX.XX (2x original)

**Goal Type** Revenue **Budget**

**Revenue Target** ⓘ

Max: \$X,XXX.XX (2x original)

# New Forecast Modals

Wireframes

## Forecast Wireframes

# New Forecast Modal Selection Options

## New Functionality and Screen Additions

The previous Forecasting experience did not allow users to choose between running a forecast with default configurations, making slight adjustments, or creating entirely new scenarios. The new modal flow introduced a clear branching path, enabling users to create and test scenarios without modifying their default settings.

The screenshot displays the LiftLab Forecasting dashboard. A modal dialog titled "Run Forecast" is open, allowing users to select a forecast type. The background shows the "Next Week's Forecast" section with a "Planned Revenue" of \$1,085,159 and a "Suggested" revenue of \$1,312,718 (+1.33%). Below this is a table comparing "Planned" and "Suggested" values for Spend, Revenue, and iROAS. To the right, there are "Confidence Score" indicators (Medium and High) and a "Revenue Breakdown" section with horizontal bars for Target Revenue, Paid Channels, Owned Channels, and Customer Base / Promo.

**Forecasting**  
AI-powered budget forecasting and analyzation.

**Next Week's Forecast**  
Forecast Last Refreshed: March 3, 3:49 PM EST

**Run Forecast**

Select Forecast Type

- New Scenario  
Create a new forecast scenario with different configurations.
- Current Media Plan  
Use your current Media Plan to run an updated forecast.

Cancel Continue

Planned	Suggested	Change
Spend \$1,085,159	Spend \$859,154	-17.5%
Revenue \$603,372	Revenue \$452,529	+14%
iROAS 1.8	iROAS 1.98	+10%

Target Revenue -9.15%

Paid Channels -6.21%

Owned Channels -4.03%

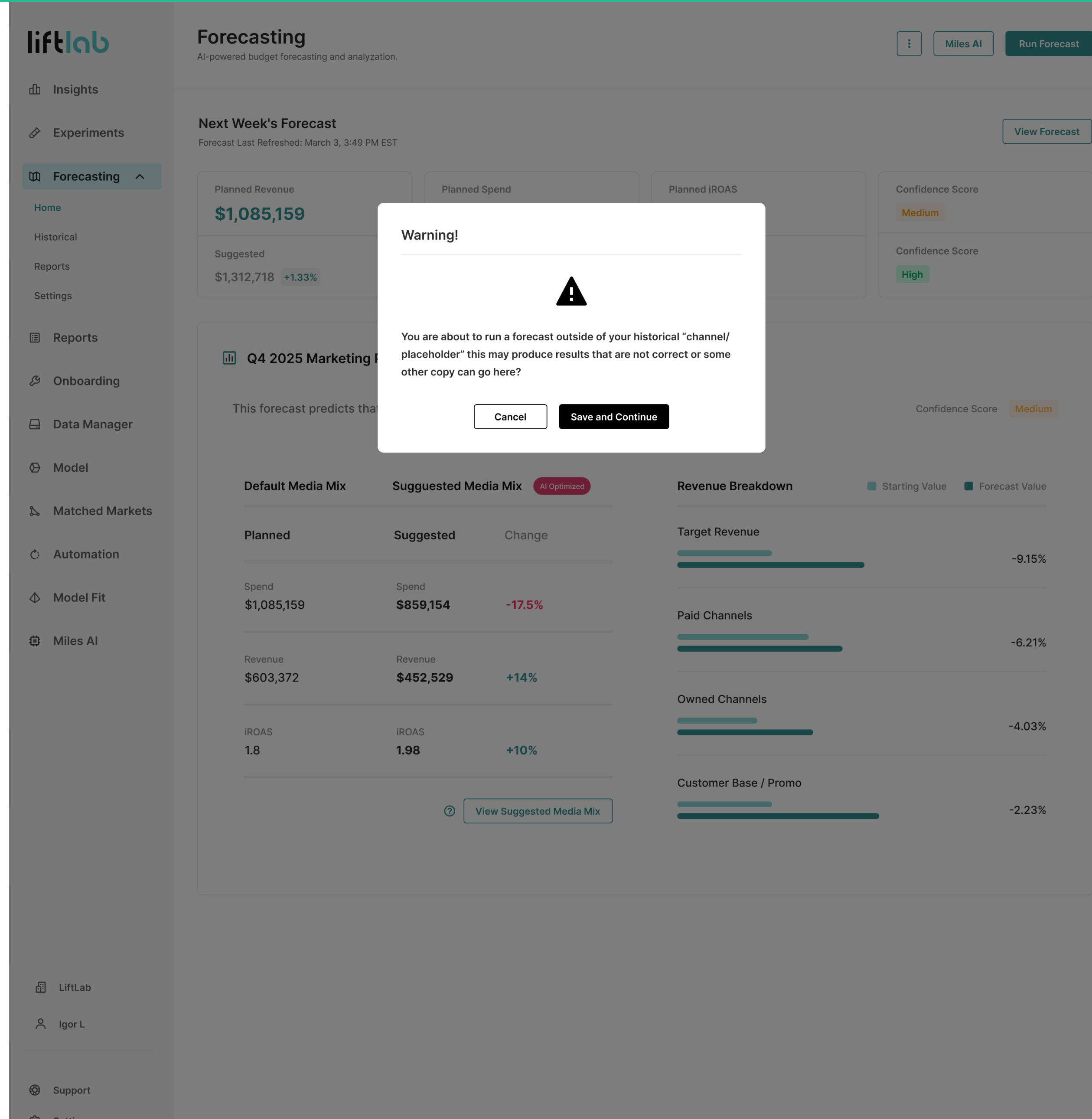
Customer Base / Promo -2.23%

## Forecast Wireframes

# New Forecast Modal Warnings and Alerts

## New Functionality and Screen Additions

The previous forecasting experience did not have any warnings, alerts or guard rails for users to make sure users aren't accidentally overriding default configurations.




# Final Designs / Deliverables

Final Designs, Documentation, Prototype and Design  
System Components



## Final Designs

# Forecast Results with Multiple Scenarios



- Insights
- Experiments
- Forecasting
- Home**
- Historical
- Reports
- Settings
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

**Next Week's Forecast - Q4 2026 Marketing Plan**

Forecast and predict future performance.

[Help](#)
[Add Scenario](#)
[Run Forecast](#)

Mar. 1, 2026 - 3:22 PM EST

**Q4 2026 Marketing Plan**

Target Revenue

**\$750,000.00**

Mar. 1, 2026 - 3:22 PM EST

**New Scenario 2**

Target Revenue

**\$875,000.00**

Mar. 1, 2026 - 3:22 PM EST

**New Scenario 3**

Target Revenue

**\$900,000.00**

**Q4 2026 Marketing Plan**

Oct. 01, 2026 - Dec. 31, 2026

[Save as Plan](#)

This forecast predicts that your revenue will decrease by up to **-3.25%**

Default Media Mix		Suggested Media Mix	
Planned	Suggested	Change	
Spend	\$1,085,159	\$859,154	<b>-17.5%</b>
Revenue	\$603,372	\$452,529	<b>+14%</b>
iROAS	1.8	1.98	<b>+10%</b>

[View Suggested Media Mix](#)

**Revenue Breakdown**

Starting Value (light blue) | Forecast Value (dark blue)

- Target Revenue: **-9.15%**
- Paid Channels: **-6.21%**
- Owned Channels: **-4.03%**
- Customer Base / Promo: **-2.23%**

Analysis Goal

Optimize for Growth

[This Scenario](#)

Revenue

\$802,656

Forecast Period

Mar. 03, 2026 - Mar. 09, 2026

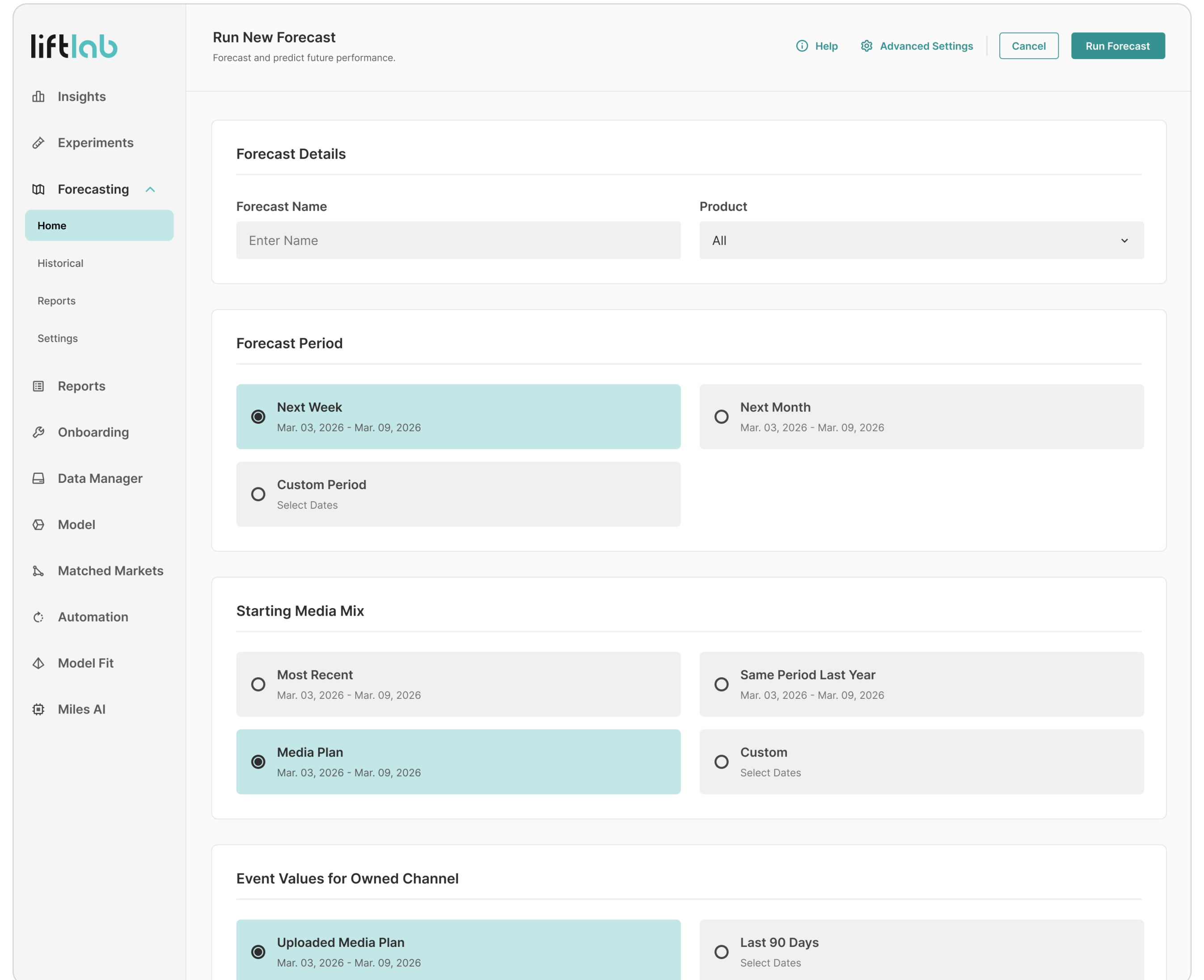
Starting Media Mix

Uploaded Media Mix

Mar. 03, 2026 - Mar. 09, 2026 (\$603,372)

## Final Designs

# Forecast Default Settings with Default Media Mix



## Final Designs

# Forecast Advanced Settings with Default Media Mix

**liftlab**

- Insights
- Experiments
- Forecasting
- Home**
- Historical
- Reports
- Settings
- Reports
- Onboarding
- Data Manager
- Model
- Matched Markets
- Automation
- Model Fit
- Miles AI

### Advanced Settings - Media Mix

These are your current Media Mix Configurations.

Help | Cancel | Save and Run

#### Forecast Defaults

Forecast Name: Q4 2026 Marketing Plan

Date Period: Mar. 03, 2026 - Mar. 09, 2026

#### Spend Strategy

Strategy: Growth

Spend Source: Media Plan

Total Spend \$: \$5,409,012

#### Products and Outcomes

Products	Profit Margin	
Outcome E-Commerce	70%	<input type="checkbox"/>
Outcome Store Location	58%	<input type="checkbox"/>

#### Channel Management (58)

## Final Designs

# Forecast Advanced Settings with Default Media Mix Continued

### Auction Dynamics (84)

Restore Defaults Last 30 Days

Channel List	Starting Spend	Starting CPM/CPC	Adjustment
Ad Results Media Prospecting	\$372.31	\$9.52	\$0
Affiliate Marketing	\$372.31	\$9.52	\$0
Criteo Prospecting	\$372.31	\$9.52	\$0
Cirteo Retargeting	\$372.31	\$9.52	\$0
Facebook Prospecting	\$372.31	\$9.52	\$0
Facebook Prospecting Awareness	\$372.31	\$9.52	\$0
Facebook Reactivation	\$372.31	\$9.52	\$0
Facebook Retargeting	\$372.31	\$9.52	\$0
Facebook Something	\$372.31	\$9.52	\$0
Facebook Something Else	\$372.31	\$9.52	\$0

Show All

### Marketing Events (2)

Restore Defaults Add Promotion All

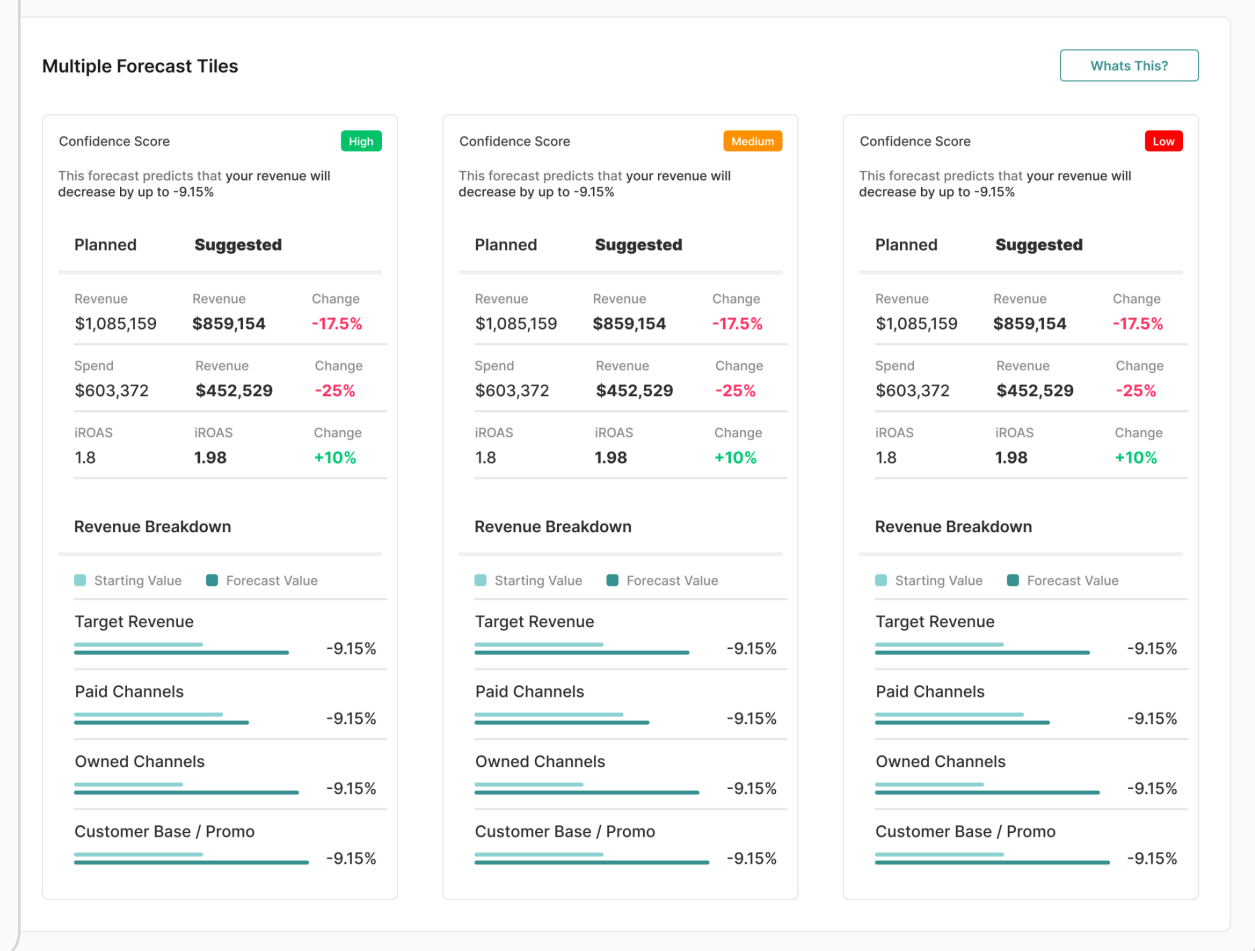
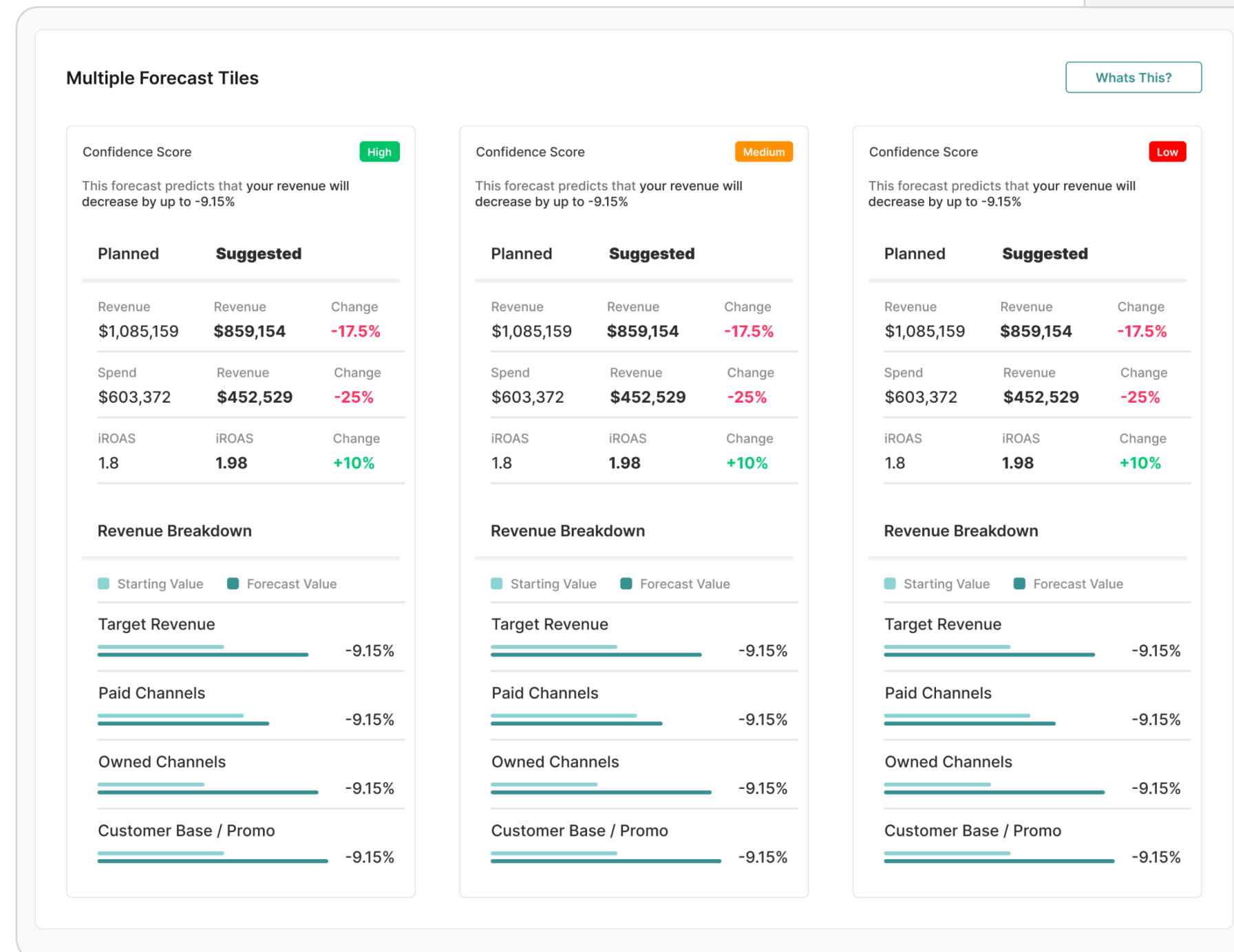
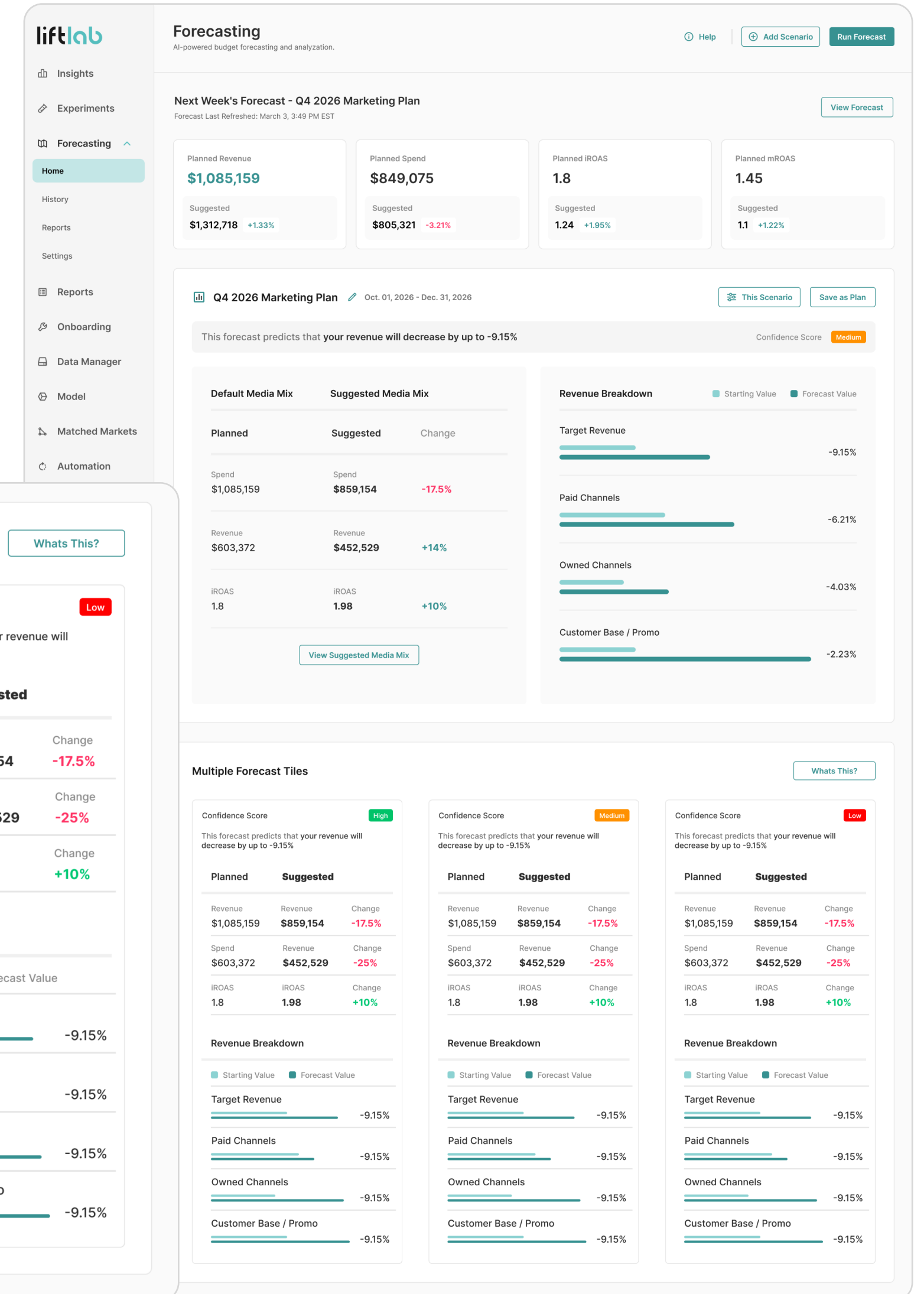
Promotion	Dates
Name	Mar. 03, 2026 - Mar. 09, 2026
Name	Mar. 03, 2026 - Mar. 09, 2026

### Owned Channels

Restore Defaults

## Final Designs

# Future Dashboard Designs with Multi-Forecast Support



## Deliverables

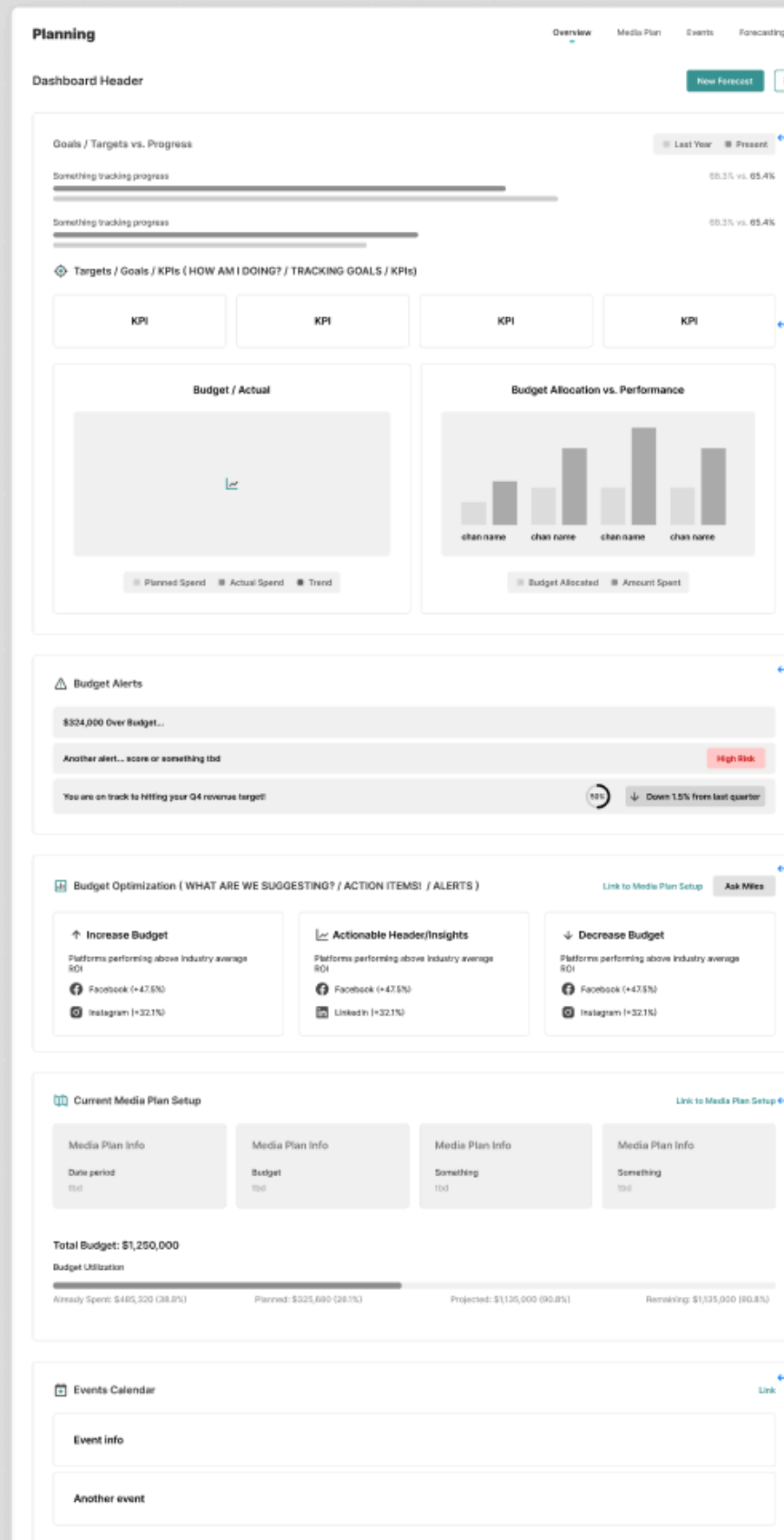
# Documented and Annotated Wireframes

Annotated Wireframes and Final Designs Along with a Documented Design System

liftlab - section - forecasting - dashboard wires - version 1

Forecasting - Dashboard Wireframes - Iteration 1A - March 2026

PAGE Forecast Dashboard Layout A - Data Version 1



SECTION Alerts, Warnings

SECTION KPIs/Targets/Overview Tiles

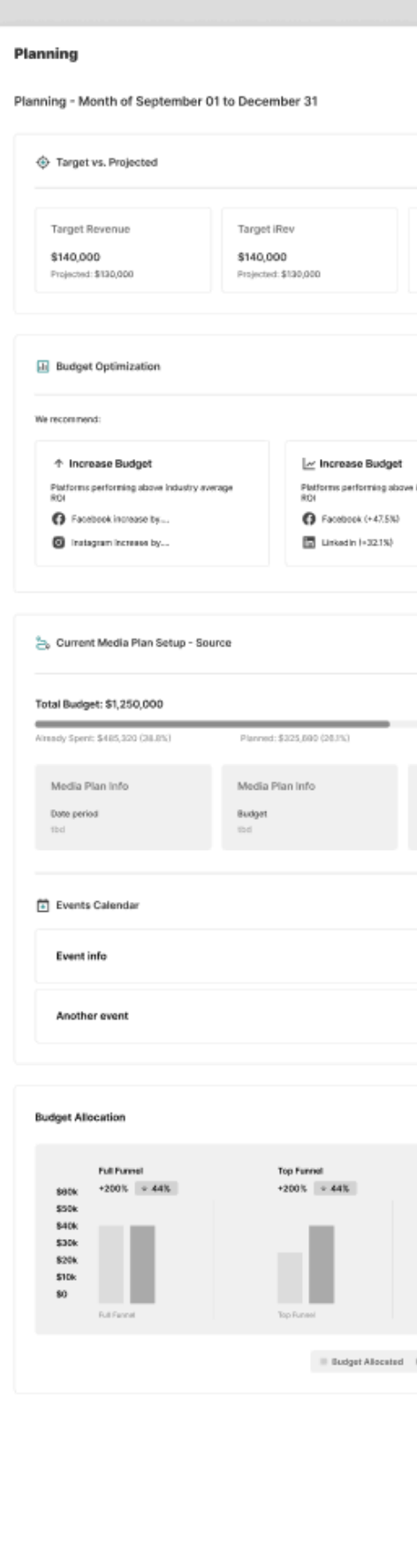
SECTION Budget Alerts

SECTION Budget Optimization / Suggestions

SECTION Current Media Plan

SECTION Events, Promotions, etc.

PAGE Forecast Dashboard Layout B



## Deliverables

# Final Design Documentation

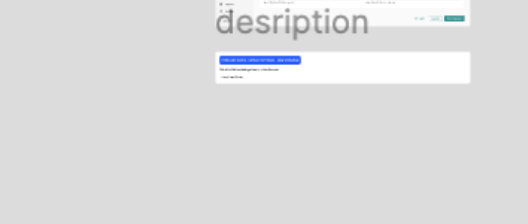
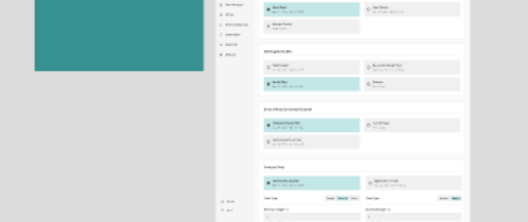
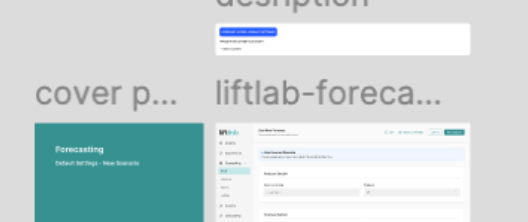
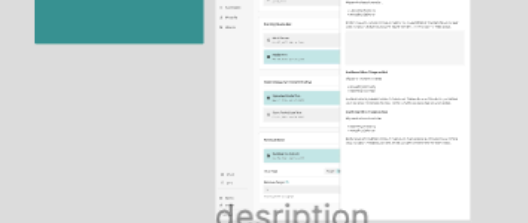
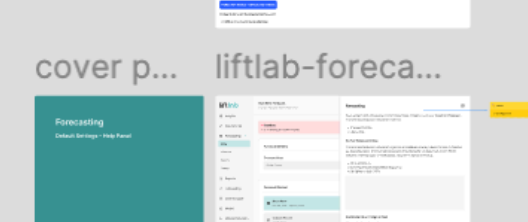
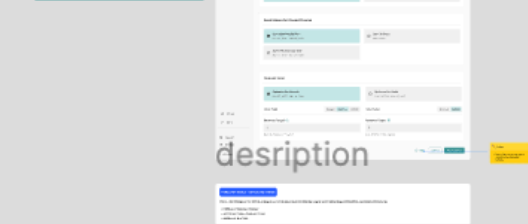
Annotated Final Designs

canvas description

FINALS LiftLab - Forecasting 2026

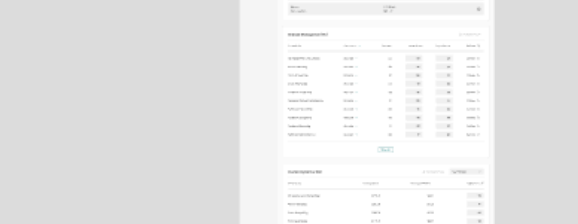
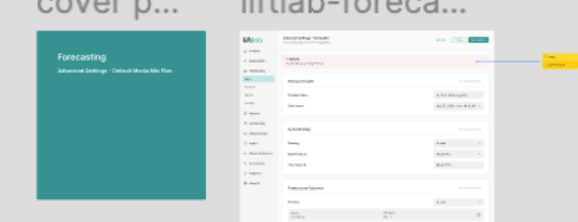
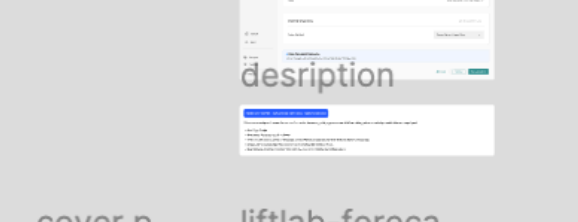
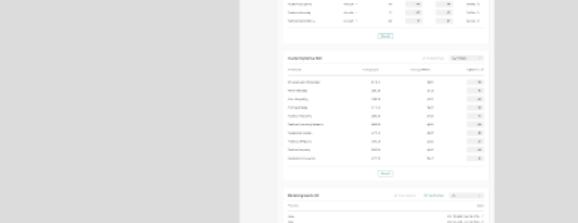
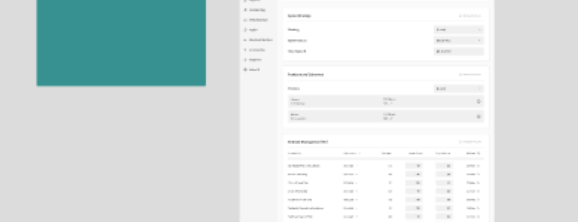
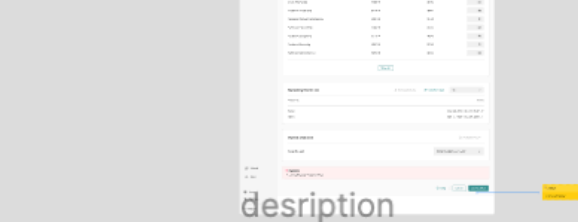
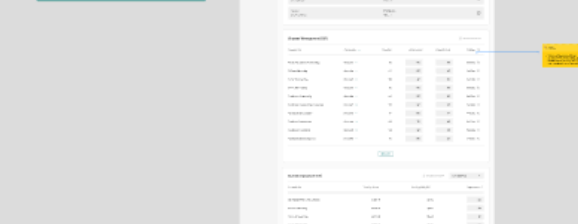
canvas description

FINALS Forecasting - Default Settings



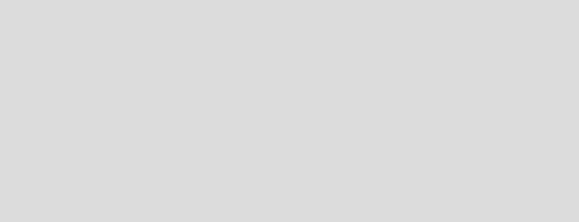
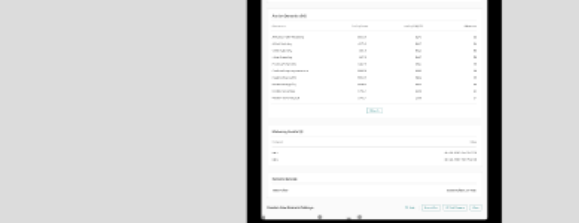
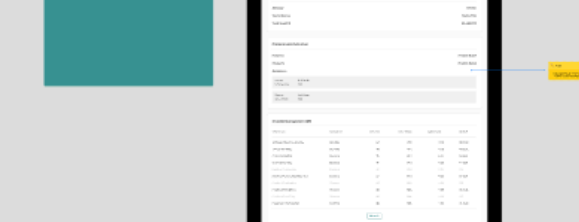
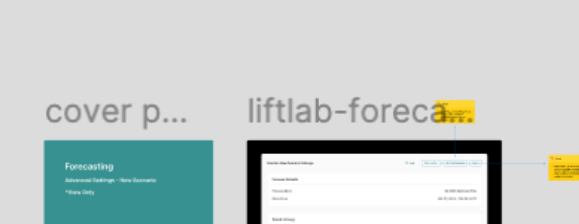
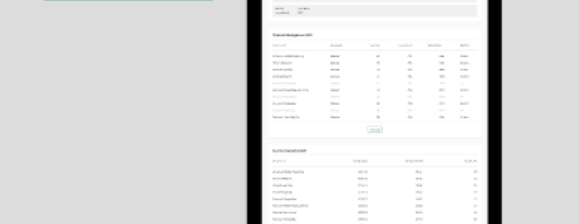
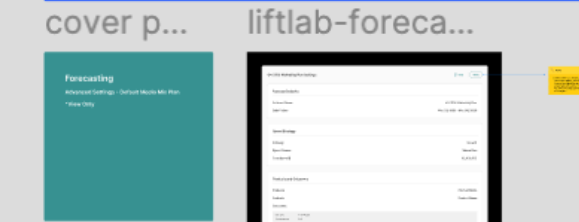
canvas description

FINALS Forecasting - Advanced Settings



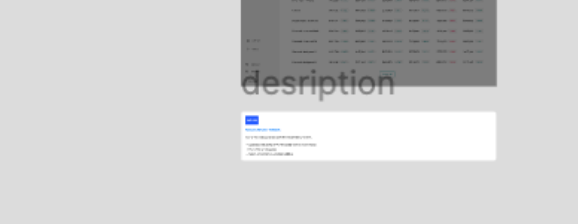
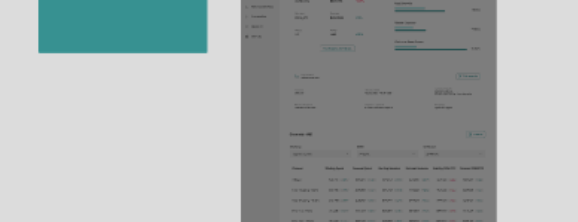
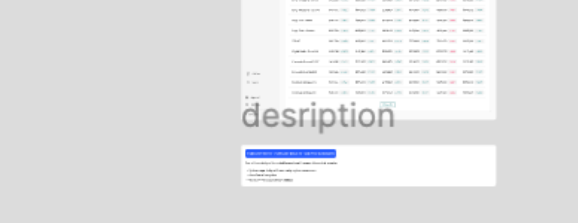
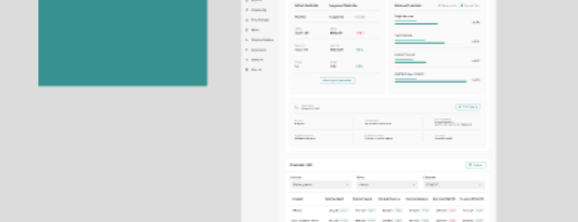
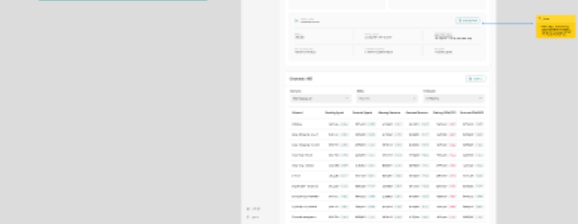
canvas description

FINALS Forecasting - Advanced Settings - View Only



canvas description

FINALS Forecasting - Forecast Results

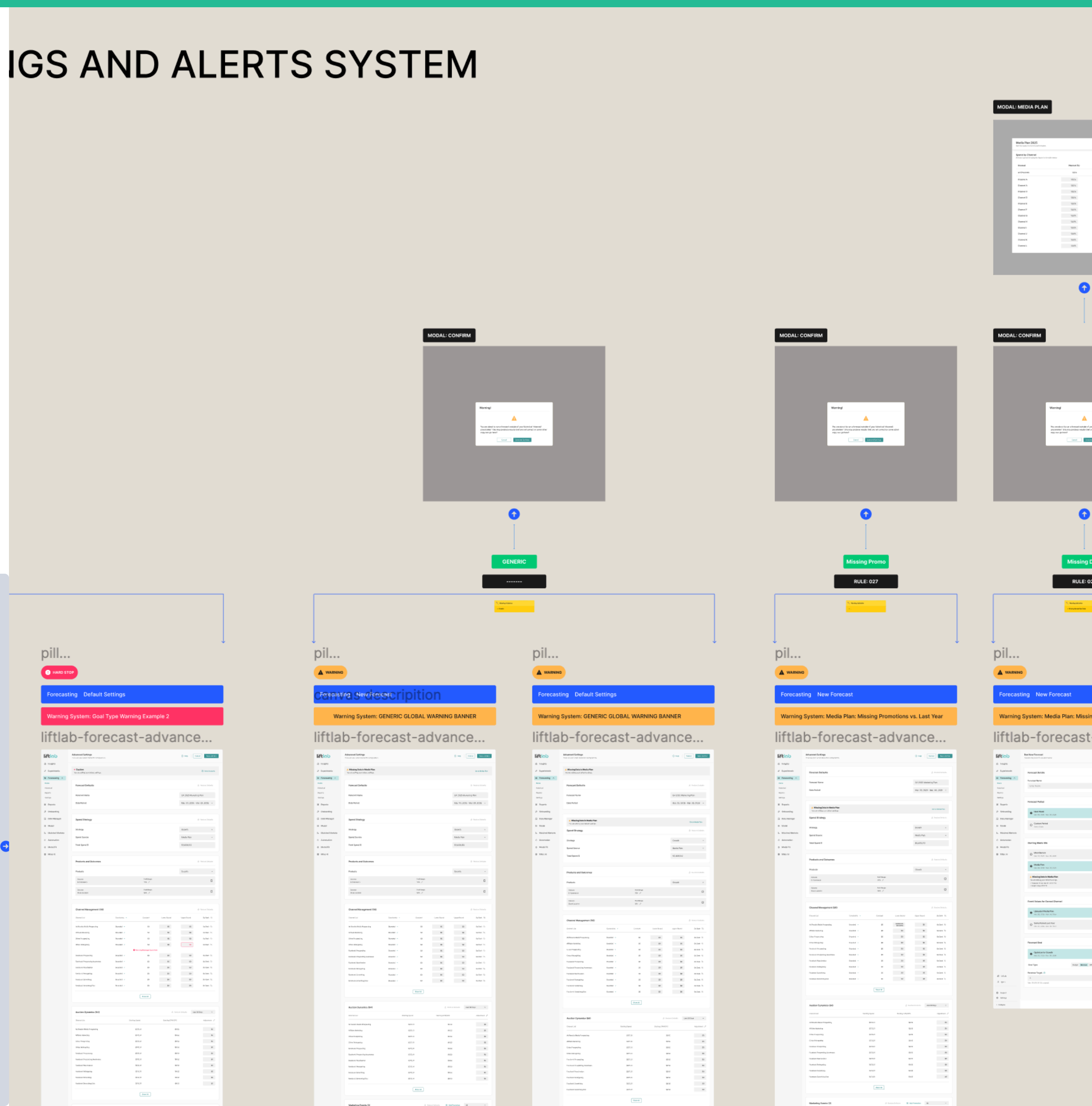


## Deliverables

# User Flows, Warning Systems, Alert Cases

Annotated Warning System User Flows, Use Cases and Journeys

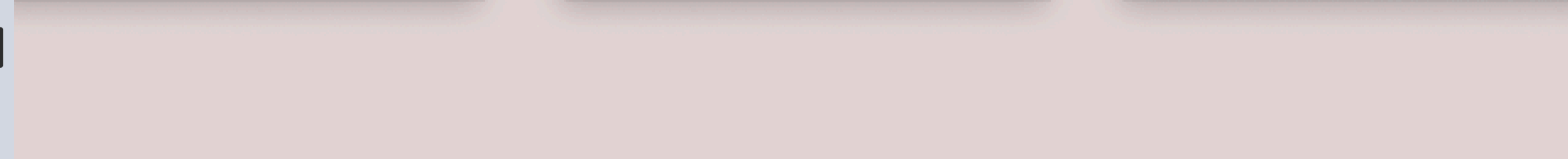
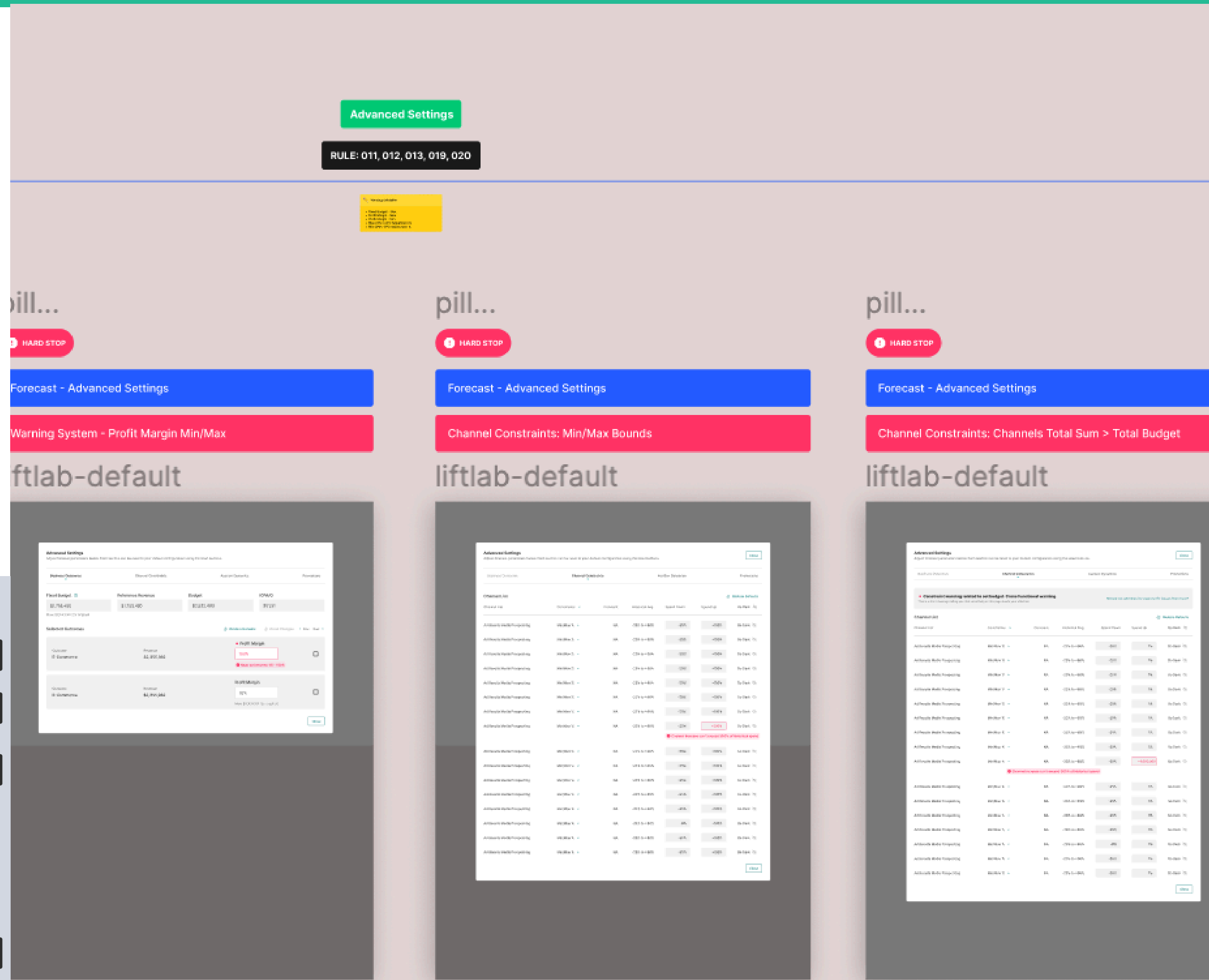
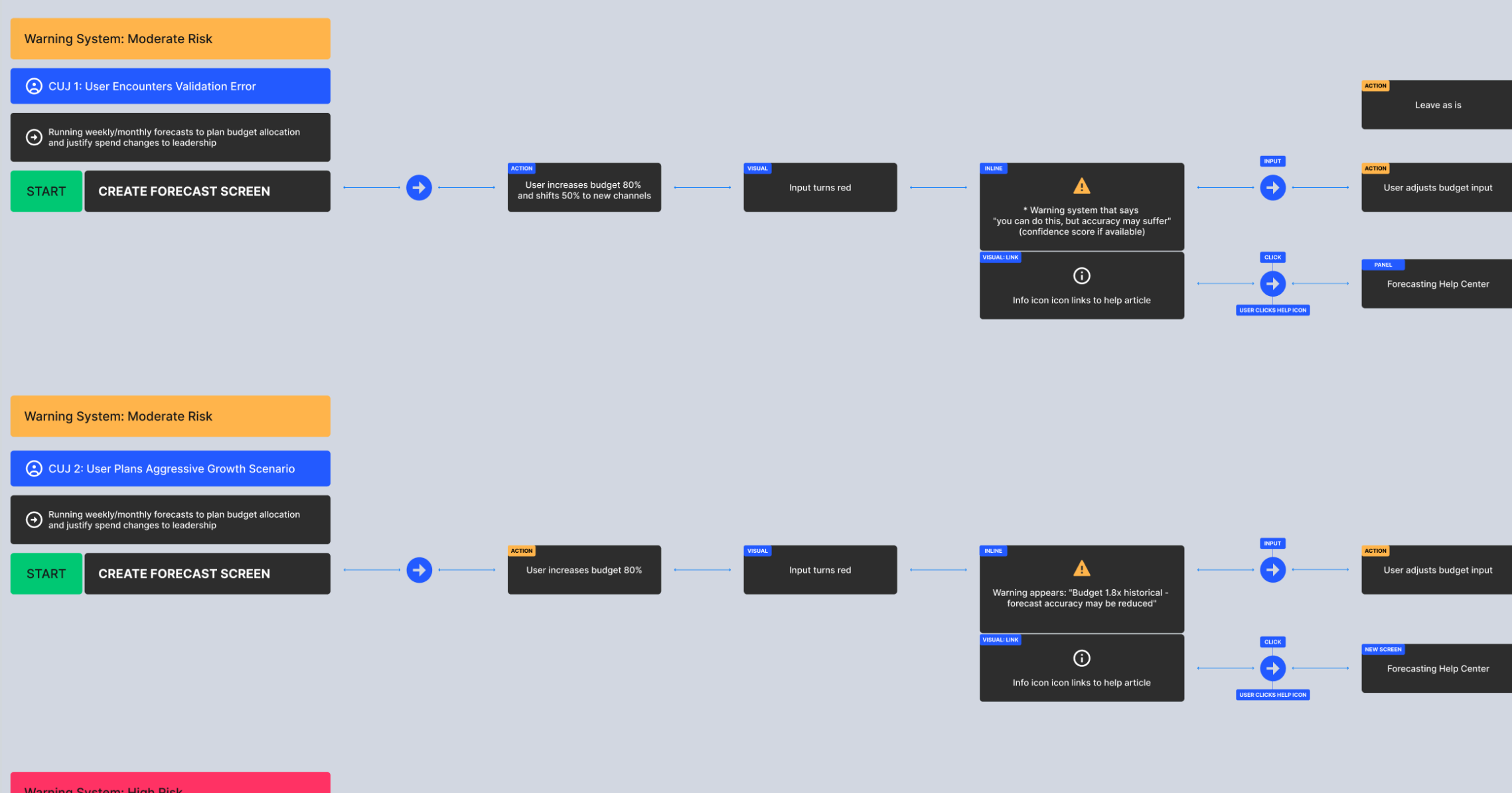
## WARNING SYSTEMS AND ALERTS SYSTEM



## Deliverables

# User Flows, Warning Systems, Alert Cases

### Annotated Warning System User Flows, Use Cases and Journeys



## Deliverables

# Design System Documentation

Design system elements, components, templates, pages and timeline.

Liftlab Design System -2026 .XLSX

File Edit View Insert Format Data Tools Help

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A1 | fx MOLECULES

Table2	MOLECULES	CORE	CATEGORY	STATUS	FIGMA LAUNCHED	GITHUB CODE	FINALIZED	PROGRESS	STATES/TYPES/OPTIONS	DOCUMENTATION
2	Action Group	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
3	Button Group	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
4	Cards	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
5	Choice List	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
6	Headers	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
7	Titles	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
8	Dividers	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
9	Drop Down Menus	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
10	Empty States	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
11	Filter Tags	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
12	Inline Error	Yes	Molecules	Design	No	Yes	No	Review		In Progress
13	Banner	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
14	Notifications	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
15	Pagination	Yes	Molecules	Design	No	No	No	QA		In Progress
16	Select Groups	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done
17	Search Form	Yes	Molecules	Design	Yes	Yes	Yes	Finalized		Done

Liftlab Design System -2026 .XLSX

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A1 | fx PAGES

Table4	PAGES	CORE	CATEGORY	STATUS	FIGMA LAUNCHED	APP CATEGORY
5	- Compare	Yes		Review	Yes	Yes
6	- ROI Dash	Yes		Review	Yes	Yes
7	- Benchmarking	Yes		Review	Yes	Yes
8	- Curve Viewer	Yes		Code	Yes	Yes
9						
10						
11	<b>Experiments</b>		Pages	Finalized		
12	- Learn More	Yes		Review	Yes	
13	- Add Experiment	Yes		Review	Yes	
14	- New Experiment	Yes		Design	Yes	Yes
15	- Show Me How	Yes		Design	Yes	Yes
16						
17						
18	<b>Forecasting</b>		Pages	No	Yes	Standard User
19	- Forecasting History	Yes		No	Yes	Yes
20	- Default Setup	Yes		No	Yes	Yes
21	- New Forecast	Yes		No	Yes	Yes
22	- Goals	Yes		Yes	Yes	Yes
23	- Media Plan	Yes		Yes	Yes	Yes
24	- Media Plan Edit	Yes		Yes	Yes	Yes

Atoms Molecules Organisms Templates Pages Roadmap

# Post Launch / Measuring Success

User feedback, next steps and what I learned

## Pandora

# Success Stories

Pandora used forecasting scenario planning and Revenue-focused strategies with LiftLab, reallocating just 2% of its budget to achieve a 9.5% increase in revenue and a 12.4% boost in profitability.

- Enhanced decision-making with real-time optimization and mROAS insights
- Improved profitability by 12.4% with scenario-based adjustments
- Achieved a 9.5% increase in revenue through targeted reallocations



“LiftLab’s platform has been instrumental in helping us bridge the gap between long-term strategic goals and the need for frequent and short-term optimization. Their tools allow us to respond dynamically to market conditions while ensuring that our marketing strategy remains intact.”

**Kasper Madsen** · Pandora, Global Paid Media Analytics Manager

## Cinemark

# Success Stories

Cinemark increased customer engagement by 20% through advanced forecasting analytics and scenario planning strategies.

- Used Forecasting to move from 7 to Media 13 channels
- Maximized iROAS through marketing spend, closing the gap between marketing & finance
- Using Forecast Multi-Scenario Optimization for Quarterly Budget Reporting



“LiftLab was the only vendor that offered this, along with a way to combine the MMM results with the findings from our ongoing testing. We can now optimize our budget by shifting spend to channels with higher marginal profitability, resulting in top-level improvements to spend efficiency as well.”

**Jeff Rosenfeld** · SVP of Digital and Customer Experience

Intuit

# Success Stories

## Forecast-Led Planning Delivers 19% Revenue Lift

- Increased Revenue Using Forecast Scenario Planning
- Maximized ROAS through marketing spend, closing the gap between marketing & finance
- Using Forecast Multi-Scenario Optimization for Quarterly Budget Reporting



“Liftlab’s forecasting solution gave us the confidence to make significant changes to our media mix. Our business results proved we made the right choice.”

**Stephanie Pierce** · Quicken, Director of Growth Marketing

# What's Next / Next Steps

Miles AI, Multi-Forecasting, Warnings and Alerts

# What's Next?

## Warnings and Alert Systems

The previous Forecasting experience lacked warnings, alerts, and other guardrails for users and teams. These safeguards are currently in progress and are being implemented and tested.

## Miles AI Co-Pilot Implementation

MilesAI is already implemented in certain areas of the Liftlab platform, with Forecasting representing the next phase. This will provide users with a context-aware AI copilot and forecast generation capabilities.

## Multi-Forecast Experiments

The long-term goal of Forecasting is to evolve into a proactive budget optimization tool, enabling users to select from multiple forecast plans and adopt them as their primary media mix strategy.

## Design System Implementation

With the introduction of the new design system, including updated components and visual elements, there remains ongoing work to further expand and fully implement it across the product.

# What's Next?

## Forecast Confidence Scoring

This is a new addition to the Forecasting user interface and is currently being tested to evaluate its value, clarity, and impact on recommendation reliability.

## Mobile and Responsiveness

While there is currently limited demand for mobile and tablet support across some product features, the new Forecasting experience has led to an increase in requests for mobile-optimized views.

## Save for Later / Templates

We are currently exploring and testing the ability to save scenario configurations as templates, enabling reuse and team-wide sharing.

# What I Learned / Key Takeaways

Users don't always know what they want, need, or will find valuable until it's shown to them. Avoid assumptions and prioritize asking and validating with users.

## AI Requests

Users have been actively inquiring about the MilesAI integration and its capabilities, indicating strong engagement with the current AI copilot testing phase.

## AI Education

Although interest in AI is increasing, we've observed that many users are still unfamiliar with how to effectively leverage it to its full potential.

## Testing Often

At Liftlab, we've conducted in-depth user testing using highly detailed prototypes, resulting in valuable product improvements and enhancements.

# Future / MilesAI

Future Ideas and Concepts for Next Phases of Forecasting and Miles AI

## Future

# MilesAI Dashboard Integration

Add Miles AI Panel(s) to the entire dashboard and insights experience.

**Miles Marketing Intelligence AI**

Tuesday, March 24 2026

**Q2 2026**  
14 Days Left in the current quarter!

Generate Report

**Miles AI Sentiment Analysis**  
Real-time brand perception across enterprise channels.

- Positive: 68%
- Neutral: 24%
- Negative: 8%

LinkedIn Enterprise Features  
"The new automation capabilities are exactly what our ops team needed."  
+142 mentions.

**Q4 2026 Marketing Budget** [Media Plan](#)

Q4 2026 Budget	Spent	Remaning
\$325,000	\$140,000	\$185,000

**Q4 2026 Marketing Revenue** [Forecast](#)

Q4 2026 Revenue	Target Goal
\$325,000	44% / 100%

**Spend vs. Revenue** [Monthly](#)

- Actual Revenue
- Budget Allocated

**Miles AI Neural Feed** LIVE

- Budget Shift Executed** (2m ago)  
Shifted +\$4,500 from Search (Non-Brand) to IG Reels based on predictive ROAS spike.
- Audience Expanded** (2m ago)  
Shifted +\$4,500 from Search (Non-Brand) to IG Reels based on predictive ROAS spike.
- Market Movement Detected** (2m ago)  
Asset cycle set "Cyber Q3-Q4" showing a 12% increase. Auto-pause enabled. Future.
- Daily Audit Complete** (2m ago)

**AI Risk Assesment**

- Q4 Event Costs**  
Projected 15% overrun on venue logistics based on current vendor contracts.

**Marketing Intelligence AI**

Overview | Inspect | Details | Compare | ROI Dashboard | Curved

Generate Q4 Facebook Channel ABC Spend R

Would you like a report for all Facebook channels or a specific channel?

Specific: Facebook Channel ABC Spend R

No Problem!, Generating Report

Based on historical performance and current market saturation, shifting 15% (\$12 from Paid Social to Influencer Marketing yields a net positive projection for Q3.

Projected ROAS: 3.8x +1.33%

Blended CAC: \$42.50 +1.33%

Apply to Q4 Plan | Compare with Q2

What channel is using majority of my 2026 Q3 budget?

What channel is using majority of my 2026 Q2 budget?

User is writing a question and selected this text|

Future

# MilesAI Dashboard Integration

Add Miles AI Panel(s) to the entire dashboard and insights experience.

The screenshot displays the Miles Marketing Intelligence AI dashboard with the following components:

- Navigation:** Overview (selected), Inspect, Details, Compare, ROI Dashboard, Curve View.
- Miles AI Neural Feed (LIVE):**
  - Budget Shift Executed (2m ago):** Shifted +\$4,500 from Search (Non-Brand) to IG Reels based on predictive ROAS spike.
  - Audience Expanded (2m ago):** Shifted +\$4,500 from Search (Non-Brand) to IG Reels based on predictive ROAS spike.
  - Market Movement Detected (2m ago):** Asset cycle set "Cyber Q3-Q4" showing a 12% increase. Auto-pause enabled. Future.
  - Daily Audit Complete (2m ago):**
- AI Risk Assessment:**
  - Q4 Event Costs:** Projected 15% overrun on venue logistics based on current vendor contracts.
  - Q3 Event Costs:** Projected 15% overrun on venue logistics based on current vendor contracts.
- Active Campaigns (View All):**
  - Projected INS Launch: 85%
  - Q4 B2B Lead Gen: 62%
  - Marketing Campaign A3: 56%
- Marketing Intelligence AI (Miles AI):**
  - Buttons: "Generate Q4 Facebook Channel ABC Spend Report" (Me - 3:30PM EST), "Specific: Facebook Channel ABC Spend Report" (Me - 3:30PM EST), "No Problem!, Generating Report" (Miles AI - 3:30PM EST).
  - Text: "Would you like a report for all Facebook channels or a specific channel?" (Miles AI - 3:30PM EST)
  - Text: "Based on historical performance and current market saturation, shifting 15% (\$120k) from Paid Social to Influencer Marketing yields a net positive projection for Q3." (Miles AI - 3:30PM EST)
  - Metrics: Projected ROAS 3.8x +1.33%, Blended CAC \$42.50 +1.33%
  - Buttons: "Apply to Q4 Plan", "Compare with Q2" (Miles AI - 3:30PM EST)
  - Input: "What channel is using majority of my 2026 Q3 budget?" (Accept)
  - Input: "What channel is using majority of my 2026 Q2 budget?" (Accept)
  - Text: "User is writing a question and selected this text!"
- Spend vs. Revenue (Monthly):** Bar chart showing Actual Revenue (pink) and Budget Allocated (teal) from Jan to Jun.
- Channel Performance (View):**

Channel	Allocation	ROA
LinkedIn ABM	\$1.2M	4.2
Facebook Ads	\$850K	3.8
Google Search	\$1.2M	1.5
Google AD3	\$1.5M	2.5
- Q4 2026 Marketing Budget (Media P):**

Q4 2026 Budget	Spent	Remaining
\$325,000	\$140,000	\$185,000
- Q4 2026 Marketing Revenue (Forec):**

Q4 2026 Revenue	Target Goal

# Future

# Mobile UI

## Mobile Dashboard and Insights Concepts

**Marketing Intelligence AI** Miles AI

Generate Q4 Facebook Channel ABC Spend Report Me - 3:30PM EST

Would you like a report for all Facebook channels or a specific channel? Miles AI - 3:30PM EST

Specific: Facebook Channel ABC Spend Report Me - 3:30PM EST

No Problem!, Generating Report Miles AI - 3:30PM EST

Based on historical performance and current market saturation, shifting 15% (\$120k) from Paid Social to Influencer Marketing yields a net positive projection for Q3.

Projected ROAS 3.8x +1.33% | Blended CAC \$42.50 +1.33%

Apply to Q4 Plan | Compare with Q2 Miles AI - 3:30PM EST

What channel is using majority of my 2026 Q3 budget? ✓

What channel is using majority of my 2026 Q3 budget? ✓

More Suggestions...

User is writing a question and selected this text

**Tuesday, April 24 2026**

14 Days Generate Report

Left in the current quarter!

**Overview** This Week | Month | Quarter

Total Revenue **\$1,085,159** +1.33% From Q3 2026

Total Spend **\$325,000** -3.21% From Q3 2026

Incremental Revenue **\$3.06m** -3.21% From Q3 2026

iROAS **1.45** +1.33% From Q3 2026

**Marketing Intelligence AI** Miles AI

Ask me anything about your budget...

Attach | Voice | History 50/1,500

**Quick Actions**  
Create New Media Plans or Generate Reports Quickly!

Media Mix | Generate Reports

**Quick Actions**  
Create New Media Plans or Generate Reports Quickly!

Media Mix | Generate Reports

**Q4 2026 Marketing Budget** Media Plan

Q4 2026 Budget	Spent	Remaining Budget
<b>\$325,000</b>	<b>\$140,000</b>	<b>\$185,000</b>

**Q4 2026 Marketing Revenue** Forecasting

Target Revenue	Target Profit	Target Goal %
<b>\$325,000</b>	<b>\$140,000</b>	<b>44% / 100%</b>

**Top Performing Channels** View All

- Facebook Channel ABC Ads **38%**
- Google Ads - Channel 1AZ3 **27%**
- Google Ads - Channel 1AD4 **20%**
- Paid Search **15%**

# Thank You / Contact

igorleygerman@gmail.com | <https://igorswork.com>