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The Perfectionist's Guide to Ad Operations

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Imagine you lead an ad ops team at your organization.

(If you do already, this will be easy). You arrive at work to find a slew of trafficking requests that have come to you via email, excel, or shared docs, or maybe even a sticky note strategically placed on your computer screen.

You're handed a report of all the campaigns that are currently under- or over-delivering, with a strong admonition that your top clients need to be kept happy. Your traffickers complain that their queues are too long, and your list of makegoods seems to grow no matter how many times you tell your teams to double check inventory availability.

You are not alone.

Digital advertising is incredibly complex. According to the IAB, the average number of line items per order has increased by 46% in the past two years, while the number of production systems is growing almost as quickly, up over 40%. Clients want highly targeted campaigns turned around quickly, and they want to see tangible results.

Consequently, the majority of today's media operations are haphazard and reactive, which leads to high error rates, needless makegoods, and lost revenue. This is unfortunate and unnecessary.

Every organization is unique, but companies that are able to maintain profitable ad ops have one thing in common: an established and well-documented campaign process that provides their talented ad ops managers a framework for success.

In this guide, we give you our formula for building a successful ad ops process, starting with the campaign launch.

Let's get started.

Part 1:
The Campaign Launch

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Step 1:
Receive Request

A well-managed system for gathering and tracking client requests is the foundation for a strong ad ops workflow. If you can't organize your requests, the process breaks before it even begins.

Use a program to standardize and automate the process to ensure that no requests go unanswered, and that all information is properly gathered from the outset. **If you don't have a program, use a person.** Make sure you have a single defined method of case entry, and a dedicated case manager whose **only job** is to collect, check, and organize orders for ticketing.

Step 2:
Ticket Request

Having a predefined and organized process for ticketing is vital. It has to be logical, consistent, and easy for your traffickers to access and understand. Any confusion about ownership or client needs will plague a campaign, leading to errors and greatly increasing its chances for under-delivery. We use a proprietary system that automatically sorts and tickets requests, but as long as your process is organized, it can be done using anything from Outlook to sticky notes. (Please don't use sticky notes.)

For best results, prioritize your requests by the following parameters:

COMPLEXITY
CLIENT EXPECTATIONS/SLA
ESTIMATED TURNAROUND TIME

There are two ways to assign requests. Choose the one that works best for you:

By Client Account

This ensures clearly defined roles and communication channels. When your ops managers are responsible for a specific client's needs, rather than just general trafficking, it instills a sense of ownership and accountability.

By System

Some companies have employees that are very experienced in specific ad servers, so it can be more efficient to divide a single client's IO among multiple traffickers based on their knowledge and server skill level.

Step 3:
Inventory Availability Check

Let's assume at least that your salespeople are always selling inventory that exists. (If you're not sure that's the case, talk to us about a different solution.) However, just because the inventory was there when it was sold, doesn't mean that your campaign is guaranteed to deliver without issue. Before you launch anything, you need to double check to make sure the availability hasn't changed.

Be sure to check your campaign's inventory against things like:

- Makegoods stealing inventory
- Traffic changes
- Optimized campaigns overlapping on inventory
- Site redesigns

Be thorough. Do the hard work now to avoid unwanted issues later.

Step 4:
Pre-QA

Before trafficking a single line, put your teams through a strict Pre-QA Checklist, to establish that nothing thus far has slipped through the cracks. This ensures that valuable hours will not be wasted later with unnecessary exchanges between sales, planning and ad ops.

SAMPLE PRE-QA QUESTIONS

- ☐ Is the agreed-upon order template present?
- ☐ Are all mandatory fields in the template/insertion order filled in correctly?
- ☐ Do creatives sizes match the template and nominal TG spec?
- ☐ Is the file size under the limit specified in the Trafficking Guidelines?
- ☐ Are all backup GIFs provided (only if flash)?
- ☐ Are other creatives attached?
- ☐ Does the URL click through properly?

Our traffickers do not move on to step 5 unless all Pre-QA boxes are checked off. Yours shouldn't either.

Step 5: Trafficking

Because every client has a different business process and there are a variety of ad server options, this is where process can get in its own way – if you're not careful. The solution is to create custom documentation for each of your clients, outlining trafficking guidelines and technical requirements for every step in the campaign process. It should be a living, breathing document, because when the process changes (it will, we promise) the document should too.

A separate custom document should define relationship expectations for each client, detailing your shared line of communication and highlighting roles, responsibilities and expectations.

These documents ensure that when you inevitably lose traffickers from your team, as is the way of the world, the client-specific knowledge they hold is not lost with them.

HERE'S A TIP: Even the best systems can be undermined by an unexpected influx in orders to traffic. You need to be able to provide immediate support if one team gets slammed with requests, which happens all the time in our line of work. Scalability is vital for effective resource allocation. Use these documents to cross-train your teams on all client accounts (even though they are focused and accountable to their own) so that they can quickly transition when backup is needed.

Step 6: QA

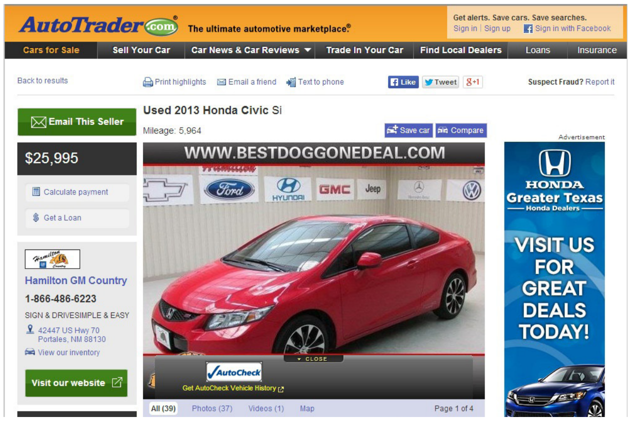
At this point in the process, all line items are now in the server, but have not yet gone live. Before that happens, the real QA list has to be completely checked off. This seems like an obvious step, but the problem many publishers have is that they are not asking the right questions. Over the years we have developed an extensive checklist that offers maximized efficiency and minimized errors.

DOWNLOAD OUR QA CHECKLIST

info.operative.com/adopsQA

Step 7:
Screenshots

The bane of every trafficker's existence. Just kidding (kind of). As targeting gets more complex, and viewability keys up as a measurement standard, screenshots become increasingly important to clients. In order to maintain consistency and accountability, traffickers should each be responsible for pulling screenshots for their respective accounts (with the all-hands-on-deck mentality activated if one client needs a lot done quickly).



Important tricks of the trade for creating successful screenshots include:

- Pulling from multiple geos, not just local ones
- Pulling on over- or under-pacing lines
- Pulling on a variety of browsers, devices and apps
- Pulling for specific targeting (by creating a proxy)

If you're having difficulty with screenshots, tell us! We know it's hard to do, but we have our ways, and we are happy to share them with you.

Step 8:
Reporting & Reconciliation

Don't waste your time pulling reports. Set up automated reports in the ad server or ad business management system based on primary and 3rd party delivery. We use a proprietary software solution in conjunction with AdJuster to automatically compare line items, but Excel spreadsheets can also be used if you have the time, patience and diligence to manually associate thousands of lines without human error.

This is the final safety net to catch any remnant issues so that they can be immediately corrected.

Part 2:
Campaign Management & Optimization

Step 1 | Analyze Reports

Step 2 | Monitor & Manage Campaigns

Step 3 | Determine Client KPIs

Step 4 | Optimize Campaigns

Step 5 | Client Reporting

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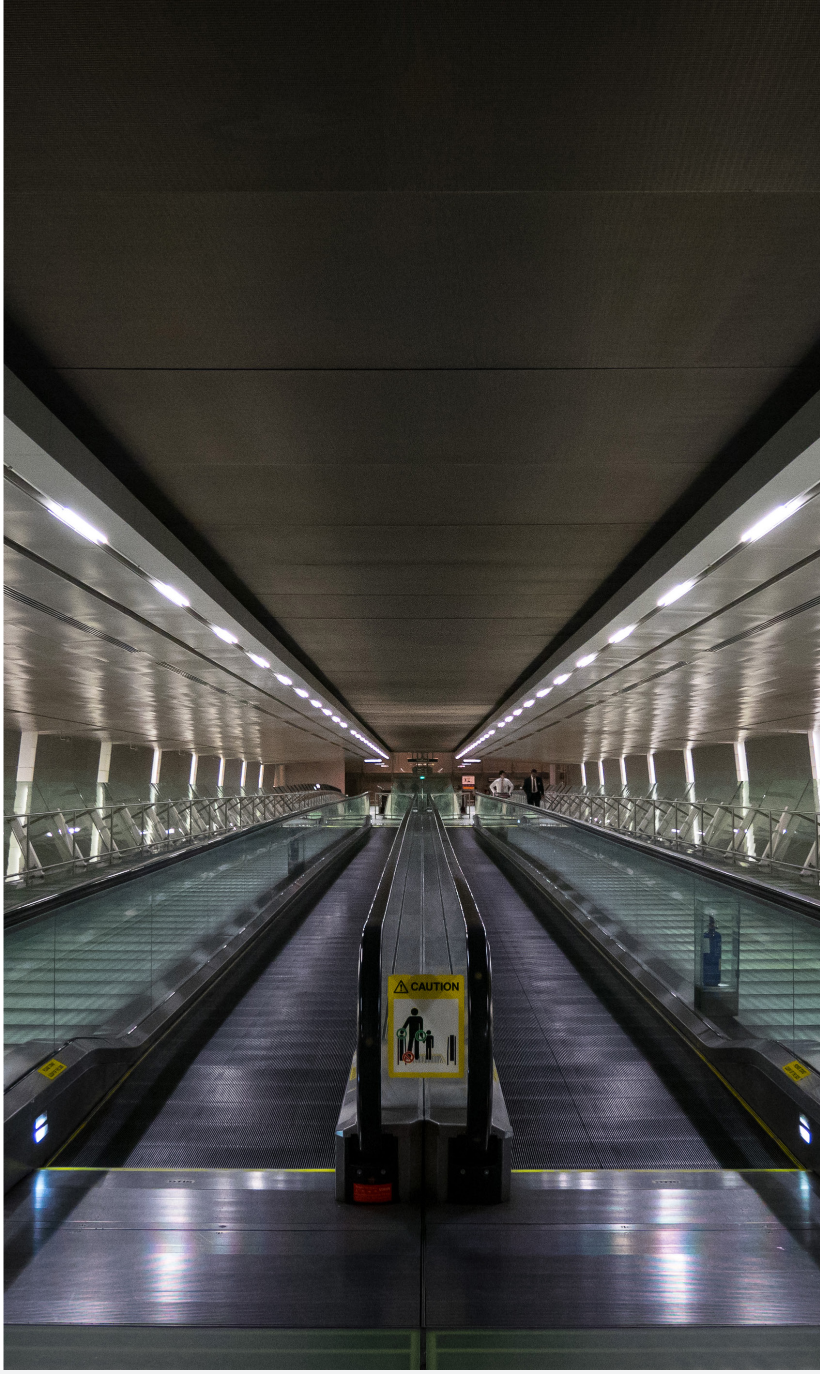
Your campaigns have launched smoothly and without error.

We congratulate you. Now it's time to monitor those campaigns, ensure that they deliver as promised, and most importantly, optimize.

Nobody ever said that managing hundreds of campaigns across dozens of systems is easy. We're not saying that either. In fact, guaranteeing successful delivery across all of your campaigns is so difficult and cumbersome, that publishers who simply hit their impression goals are often at a significant advantage over those that don't. But we're here to help you find the time to do more, to be proactive, to dig deeper and deliver better.

If you have implemented some or all of the tips from Part 1, that's a good start. Now you are ready to really maximize your team's potential.

It's not magic. Just a few simple steps that can help your team to stay better organized and focused on what really matters - helping your clients. These tips for campaign management and optimization will help you not only retain happy clients but also collect more revenue.



Before You Start

Campaign management is all about knowing what you're working with. You have to be familiar with all of your products so that you can manage simultaneous campaigns that share inventory. Before you can start working on campaign performance, you need understand the configurations your servers, and how to stack rank campaigns based on priority, while ensuring that no client account is sacrificed.

Keep that in mind as we move through Part 2.

Step 1:
Analyze Reports

You have already set your ad server and/or ad business management system to deliver automated reports (per the last step in Part 1). Now is the time to compare those reports to your booked goals. (Tip: you can include the book goal as a metric in your reports, to save yourself from having to go back and forth between the reports and the IO.)

There are four types of reports you should reference on a daily basis:

DELIVERY	PACING	INVENTORY	3RD PARTY
Lifetime history of impressions	*Campaign health compared to IO*	*Remaining available*	*Discrepancy reports*

From these reports, you need to calculate the probability that you will hit your goals. You'll be able to see exactly where each campaign stands as of that moment.

The best way to do this by using an automated system -- we use AdJuster -- or a service to flag potential issues. You can do it manually in spreadsheets, but that's how things slip through the cracks and end up harming your business. Our general rule: stay out of Excel.

Armed with all of this knowledge, you want to set up an action plan to run a successful campaign. The first step is simply making sure that there are no critical business issues with the campaign. We aren't perfect either - errors occur. Give your team the chance to catch any potential issues before your client does. We double-QA, pull screenshots, and pull reports. It's a lot of work - but it's worth it!

Step 2:
Monitor & Manage Campaigns

Assuming that your reports call for campaign adjustments, (if they don't, you can skip to step 4, and please send us your contact info so that we can send you a celebratory ecard), find a way to prioritize which campaigns deserve your closest attention. Try filtering based on client spend or by end date.

This is where your knowledge of server rankings and client KPIs comes in handy. You should also pull out that document we created in Part 1, with the clearly defined yield management protocols and client trafficking processes.

You know what you have to work with, you know what your client wants, now you have to make it happen.

Depending on the technology that you're using to serve these campaigns, know the options that you have available for managing over- or under-delivering campaigns. Each case is going to be specific, depending on which KPI you are looking to boost. Of course, even if you feel it will give your client better performance, get their consent first.

Here are a few levers that we use to adjust campaigns:

a) Extend Campaign Dates (The When): Keep the campaign running until it hits its goal. *(Be sure to check with your client before choosing this option, as their deadlines may be stricter than yours.)*

b) Boost Pacing Priority (The How Often): Give it a higher priority than other campaigns OR lower the frequency cap, if there is one. *(When dealing with priority, you must ensure that lines from other campaigns with the same targeting will not be sacrificed. Be cautious of overdoing it, and remember your server and inventory confines.)*

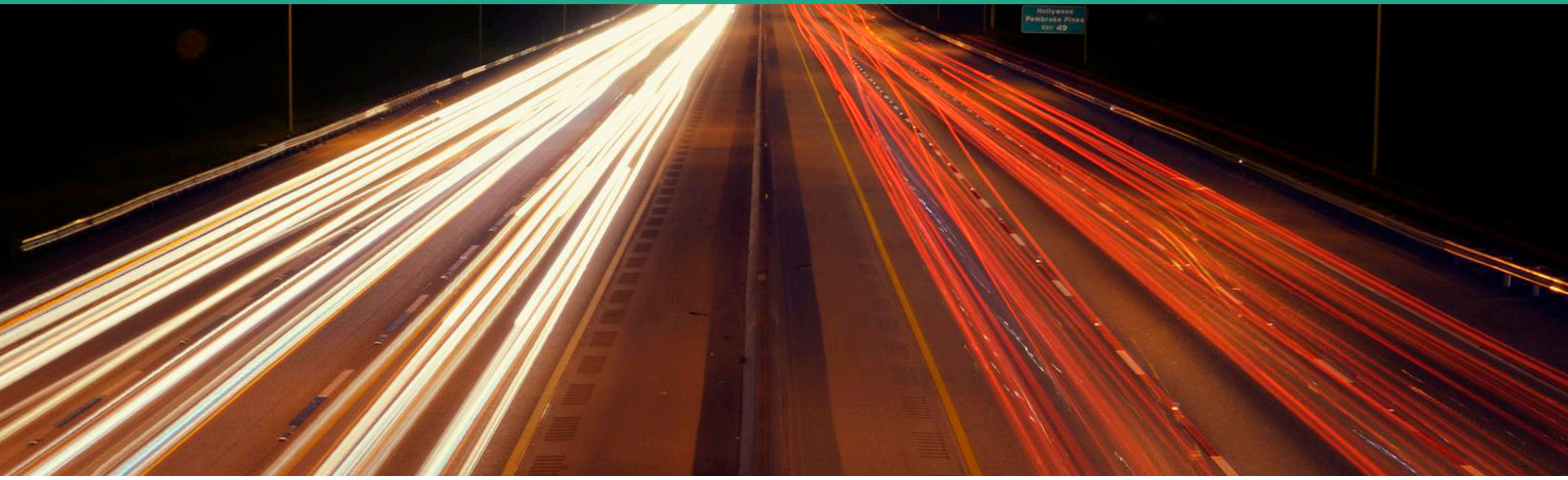
c) Reallocate Impressions (The Where): Move the impressions to a higher-performing area of the site, maintaining the same end date and overall impression goal. *(Make sure that this is within your contracted deal.)*

When managing campaigns, sometimes you have to rob Peter to pay Paul. Just make sure that the transaction is well-documented and that any stolen inventory is reallocated as soon as possible.

Step 3:
Determine Client KPIs

What's most important to your client? Hint: It's not getting 100,000 impressions. Why are they running the campaign with you? Who are their key demographics? Are they looking to spread brand awareness or drive actions? Understanding a client's goals can lead to innovative solutions and potential upsells. Be a strategist, not just the execution arm of someone else's ideas.

If your client doesn't know what's most important to them, advise them. You're the expert. Offering knowledge instills trust and mutual respect, and the conversation will allow you to learn more about your client's business needs so that you can continue to offer value in the future.



Step 4:
Optimize Campaigns

Everything up until now has been about mitigating risk, meeting contractual goals, and correcting performance. These are short-term fixes, they're not about longevity of relationships. Premium ad operations are in high demand – simply meeting an impression goal is not sufficient for maintaining profitable partnerships with brands. Optimization is no longer a 'nice to have', it's a 'need to have.'

Make a list of your client's high value metrics, such as:

- Audience Delivery
- Conversion
- Clickthrough
- Video Completion

Then, look at actions that can be used to increase those metrics, and reallocate based on where you are getting best performance. For example, are certain creatives performing better? Would it make sense to switch from rotational to sequential ads? Check traffic-shaping audience patterns - is there a higher clickthrough or video completion rate on the homepage in the afternoon? Once you know this, you can reallocate creatives and impressions based on your client's desired metrics.

Step 5:
Create Client Reports

Now that you have completed a fully optimized campaign, it's time to show your client the proof. Whether you were able to optimize or not, you need to make sure you provide a full campaign delivery report for your advertisers at the end of each campaign and at the end of each month. Brands don't just want to hear that their campaigns delivered in full, you need to provide them with information that proves the value of their investment. Your reports should include clicks, conversions, creative usage, timing, etc. Give your clients clear insight into how the campaign worked well and how it can be done even better next time. Always keep them coming back for more.

> Only 20 percent of campaign-processing time is spent on activities that directly improve performance... The remaining 80 percent is devoted to heavily manual low- or no-value tasks.
>
> \- Boston Consultant Group Study, *Cutting Complexity, Adding Value*

Why We Created This Ad Ops Guide

When companies tell us they can't figure out why their ad operations are unprofitable, we ask them what their daily workflow is like. The answers we hear range from "I don't know," to "We don't have one," to "It depends who screams the loudest."

Our goal is to help you run a more profitable advertising business. We believe that starts by implementing a standardized and strategic process for operations.

Operative has been in the business of ad operations for 14 years. We have witnessed the ongoing transition from print to digital, the exponential growth of ad servers and delivery systems, and the continued increase in product complexity. Our teams traffic over 150,000 lines per month – we have no choice but to come up with the most efficient workflow while maintaining the high quality standards that our premier clients have come to expect from us.

Operative trafficking teams follow every single one of these steps on a daily basis and, as a result, our average accuracy rate is currently holding strong at 99.9%. And our campaigns are launched with unbeatable turnaround times, leaving plenty of hours in the week for campaign management.

Our teams have perfected the process, and now we're offering it to you.

Taking The First Step Towards Profitable Ad Ops

It takes a group effort to start putting these steps into place. No one person can make an organizational impact without creating buy-in across their entire team. These steps are focused on doing things simply, and doing things right. Ultimately, it requires a cultural shift away from tolerating underperformance.

At Operative, we never tolerate underperformance. That's why the world's top publishers and agencies partner with us.

We hope that this guide will lead you down a path to premium ad operations. If you find you don't have the bandwidth to execute it all on your own, feel free to give us a call.

About Operative

Since 2001, Operative Media, Inc. has developed software and services that help publishers, agencies, networks, and broadcasters simplify the business of advertising. Media companies rely on Operative to sell, traffic, and bill premium ad inventory, increasing revenue and decreasing overhead. Operative's client base, which controls over 20 percent of the global ad market, features NBCUniversal, Wall Street Journal, Comcast, Clear Channel, BuzzFeed, and Schibsted Media.

Want to learn more about how Operative can help you run a more profitable advertising business? Let's talk.

Email us at info@operative.com or visit operative.com for more information.