
The Ideal Campaign Workflow: Bringing Best Practices to Life

Agency: RFP Stage

- Be clear about flexibility and deadlines on the RFP
- Make sure the client understands deadlines concerning creative decisions, media go-live dates, need for credit applications, etc
- Educate clients on rich media – costs, negotiation process, and overall effect on budget

Publisher: RFP Stage

- Before submitting proposal
 - Ensure that credit limits reviewed and credit checks have been done
 - Establish and approve pricing with necessary department(s)
 - Verify that there is adequate inventory
 - Verify that requested product features will be available
 - Ensure that legal has approved marketing concept, and we have proper right clearance
- Ensure third-party ad server compatibility
- Clarify which ad server will be used for billing
- Confirm who pays rich media fees
- Clarify late creative policy

Agency: Insertion Order Stage

- Accurate details are extremely important and should mirror agreed upon proposal details
 - IO should include detail on each placement – size, flight date, impression amounts, site & rich media vendors
 - Billing language should be detailed – Explicit pacing needs, actual v. planned billing, reconciliation expectations
 - All delivery requirements
 - All targeting details, by placement
- All changes to IO should be noted on the master media plan

Publisher: Insertion Order Stage

- When finalizing agency IO into ad serving system
 - Descriptions on placements should be clear to ensure confusion when Invoice is sent to agency
 - If there is any data collection component, appropriate data agreement should be signed
 - Loop in legal for any sweepstakes/ contest rules and regulations
- Concise billing information must be double checked
 - Pacing, installments, & rich media fees
- Outside sales must approve final IO
- Controls must be in place to check on IO terms and placement details being properly input into order and ad serving systems
- Establish and maintain direct communication between ad trafficker & agency ad operation to ensure that everything is in synch between two systems

Agency: Creative Delivery Stage

- Use IAB's Creative Spec Database to avoid generating unusable creative
 - Automatically generates Lowest Common Denominator specs for all possible ad sizes
- Designate a project lead for each campaign to manage multiple parties
 - If project management position does not exist separately, ensure that someone is responsible for coordinating overall campaign delivery and billing
- All creative needs to go through the quality assurance process at both agency and publisher – especially mid-campaign changes
 - Notify publisher when making a creative change and allow for publisher-side QA process
- Targeting should only be done at publisher to minimize discrepancies

Publisher: Creative Delivery Stage

- Populate IAB creative spec database with most current specifications
- Test all creative fully before go-live
- Adhere to late creative policies

Agency: Campaign Delivery Stage

- Clearly identify which tags go with each placement on the IO
- Deliver creative assets to publisher five days prior to go live date
- Post-launch test within one business day of initial campaign launch
- Use publisher system to monitor and compare numbers during campaign run when available

Publisher: Campaign Delivery Stage

- Check IO against current order entry prior to campaign launch
- Use a one-to-one relationship for third-party tags and first-party placement
- QA third-party/ rich media campaigns
- Post-launch test within one day of initial campaign launch
- Manually monitor third-party numbers on all important campaigns to identify discrepancies before invoicing occurs
 - Need access to 3rd party ad server
 - Single sign-on access to all campaigns would be ideal
- Open publisher partners' ad serving numbers to agencies
- Require signed change documentation on all material changes (money, impression numbers, etc)
- Carefully review change order entry to ensure it matches change documentation

Agency: Billing Stage

- Maintain finance professionals who specialize in interactive issues-discrepancies, system issues, resolution possibilities
- Enable cross-departmental communication; centralize communication and project management
 - Meet at least once a month to go over all open invoices
- Maintain a master reconciliation spreadsheet system to tracks all campaigns
- Ensure that Accounts Payable has access to all the insertion orders, change orders, cancellations
- Send the publisher third-party numbers at the end of every month and ensure that publisher has logins to third-party systems for all campaigns
- Ask for invoices by both email and hard copy

Publisher: Billing Stage

- Enable cross-departmental communication; centralize communication and project management
 - Meet at least once a month to go over all open invoices
- Train all employees dealing with interactive campaigns to understand issues specific to interactive media and billing
- Include placement-level information in the invoice
 - Placement descriptions, sizes, planned vs. delivered vs. billed impressions, etc
 - Use the IAB Standard dataset for IOs and Invoices on all invoices
- Invoice amount should be based on actual delivered impression counts and should not exceed contracted monthly/periodic amount
- Open receivables more than 60 days overdue should be monitored closely, with actions/penalties communicated to sales teams
- Directory of Agency billing contacts or eMail addresses would be ideal!