DIGITAL ADVERTISING DIRECT SOLD SELLER WORKFLOW

This document has been developed by Beeler.Tech in partnership with the digital advertising community

intent, audience, use

The intention of this document is to document the general workflow process for publisher direct sold deals, with an eye toward **best practice.** Giving the industry a commonly accepted process and shared language to discuss the existing processes.

From this first version, we can work toward future versions which will include more details. This document will never be a blueprint as no two publishers will have identical processes. But operational processes should be more similar than different. Shared processes also allow us to work together to improve efficiency in those processes to the benefit of all of our organizations.

Additionally, this framework gives us a starting point for defining:

- Role standardization for various responsibilities with an eye toward more consistent titles, as this consistency makes hiring easier and salary analysis more accurate across the board.
- Understanding of costs and fulfillment allows us to make more informed decisions about process optimization, automation, and proper staffing.

phases

The high-level process has two primary phases, pre-sale and post-sale. Within each of those two phases there are a variety of ways that organizations think and assign responsibilities across the various teams. We have defined nine distinct stages.

The goal is to be granular enough to break apart where functions or roles change, but general enough to cover the primary phases and stages for all teams and individual contributors . The size and staffing of your organization will dictate how many people or teams are involved in the overall process.

PRE-SALE			POST-SALE					
Product Development	Proposal	IO	Campaign Kickoff	Creative Delivery	Trafficking	Delivery/ Optimization	Reporting/ Analysis	Billing

pre-sale

Pre-sale includes all steps prior to the full execution of an IO. There are three phases of the pre-sale process: Product Development, Proposal, IO.

PRE-SALE
- Product Development
- Proposal
- IO

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product development

The product development phase of the pre-sales process is largely about defining your digital products from size, placement, targeting and data use. In addition, product development is about establishing the business and sales rules for your overall catalog.

Product development should be driven by data analysis and market demand, bringing your current and potential clients the products that best meet their goals while delivering maximum revenue and efficiency for your organization. Ideas for new offerings can come from internal teams or from the buy-side; and in general, it is a **best practice** to include their ideas.

Now is the time to do a product feasibility exercise to determine how exactly the product will work both on-site and in actual fulfillment at the scale that you have forecasted to sell this product.

This stage is wholly or largely handled by the product team or the person with product responsibilities (Product Manager, Director of Product). This is not to say that the product team is not involved later in the process; they are, but that this first stage is an important part of any organization's product research and development. The product team or resources typically work closely with the ad solutions (aka Ad Tech, Advanced Advertising) and analytics team or resources.

Tactics that happen during this stage:

- Develop product catalog and business rules
- Product taxonomy
- QA of new products
- Specs development

The pricing process typically starts here but may or may not be handled by this team at this time.

proposal

During this stage, the buy-side may have submitted an RFP (request for proposal) or sales may proactively want to submit a proposal on behalf of a brand or advertiser for an upcoming campaign.

This stage is often handled by, or driven by, a sales support team. These teams have a variety of titles and responsibilities in our industry, but most often are client-facing and handle both pre- and post-sale non-operational functions. Some example titles include Integrated Sales Planners, Account Managers, Sales Enablement, Account Executive, Media Planners, Client Service Associates (CSAs), and Sales Strategists.

Tactics that happen during this stage:

- Creation of a proposal and/or media plan.
- Pull the creative specs for products being proposed and include with proposal; not everyone supplies specs at this point, but it is a **best practice** to do so.
- Creation of a marketing presentation; not all proposals require a presentatio, and another team may be involved in the creation of the presentation.
- Determine what numbers will be used for billing; it is a **best practice** to establish billing numbers at this phase, so products can be priced appropriately.
- Pull available inventory for products being proposed.
- Calculate pricing for products being proposed.
- Gather applicable approvals: products, inventory, pricing.
- Where required by the agency, put the proposal in the agency's format.
- Deliver proposal/media plan to AE or whomever is talking with the buyer.
- **BUY-SIDE STEPS:** buyer review, negotiation, and approval of proposal.

If a proposal requires any custom products or features, there are additional steps, considerations, and typically other teams involved. Custom can mean a variety of different things; for example:

- An existing product customized in some way, e.g. different targeting, addition of a data aspect.
- A group of products packaged together in a way to make them a custom package.
- A wholly new and unique product that is not part of the standard product catalog.

As a general **best practice**, new product offerings, should be fully or largely developed and vetted internally, so they can be easily included into a proposal. Brand new ideas, while exciting, can be a challenge during the proposal phase as typically a RFP has a fairly quick turnaround, and that puts the publisher in a bit of a bind to respond in a timely manner. The publisher needs to vet the custom idea for feasibility and ensure full consideration of all aspects that can impact implementation, third-party costs, and reconciliation to ensure a seamless delivery.

Considerations and potential steps for a custom proposal:

- Ideation, feasibility, development
  - Not all organizations will completely build out a custom product at the proposal stage.
  - Some organizations will choose the 'build if sold' route to ensure development time is not spent on unsold proposals.
  - As noted above, it is important to consider all potential aspects of the product that can impact profitability or buyer satisfaction. Many times, unaddressed details come up after IO execution, which can lead to confusion, frustration, or less profit than was originally planned. A **best practice** is to resolve all of those details in this phase whenever possible, and determine vendor or vendor type needed, if applicable.
- Assess traffic acquisition requirements
- Working with other teams for aspects of the custom program, e.g. product, pricing, editorial, social, marketing, etc.

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IO

Once the proposal has been negotiated and approved, it moves to the IO stage for full execution. The IO process can be simple or complex depending on a number of factors:

- Who will generate the IO?
- Whose Ts&Cs will be used?
- Have the Ts&Cs been previously negotiated between the parties?
- Are there one or more additional contracts involved?

Tactics that happen during this stage:

- Determine who will create the IO.
- IO creation may be done a few ways:
  - In-house using internal systems, delivered to the buyer.
  - Internally using the agency system.
  - The buying team handles.
- Determine whose Ts&Cs will be used.
- Who does that internal review of Ts&Cs (terms and conditions) varies by organization and often it is multiple teams that could include sales, sales support, legal, finance, contract team, or AdOps team.
  - As a **best practice**, the internal Ts&Cs review process should be clearly defined.
  - Feedback is consolidated and delivered to the buyer for review.
- Determine if another contract is required, such as a MSA or SOW/addendum.
  - Confirm contacts for all aspects of the campaign, such as an event, etc.
- Execute IO.
  - Who executes the IO, and other applicable contracts, varies by organization.
  - As a **best practice**, the approved parties for contract execution should be clearly defined.
- Once the IO is fully executed, the IO should be processed. That could include a number potential steps and approvals:
  - CRM: move from proposal to IO;
  - OMS: move from proposal to IO;
  - Removal of any existing reservations;
  - Making sure all inventory has been booked, in whatever systems it is managed in;
  - Making sure the executed pricing is reflected in applicable systems; and
  - Note that any or all of these steps could require approvals.
- BUY-SIDE STEPS: Review IO and Ts&Cs, negotiate, sign IO.

post-sale

Post-sale includes all steps after the full execution of an IO. There are six stages of the post-sale phase: Campaign Kickoff, Creative Delivery, Trafficking, Delivery/Optimization, Reporting/Analysis, and Billing. The last three are not linear and happen as many times as are necessary throughout the life of the campaign.

campaign kickoff

Campaign kickoff could be a very informal process for a standard campaign with an existing client, where the internal team reviews and understands each of the campaign requirements, and approvals are easily given. A more formal kickoff generally requires a meeting with the internal teams and various buyer teams to review all parameters and proceed with executing the campaign.

The steps here are **best practice** regardless of what type of campaign is at play.

Tactics that happen during this stage:

- Review campaign timelines.
- Request creative assets and share specs.
    - Ideally the buyer has received these during the proposal phase, but if they have not submitted all creative assets, now is the time to request in full.
    - This step may be handled by sales support, sales themselves, customer success, or AdOps.
- Review campaign requirements such as block lists, viewability, IVT, etc.
- Determine if 3P creative services will be used by the buyer and if so, which one.
    - Agency ad server, verification, etc.
    - Request 3P reporting access, as applicable.
    - As a **best practice**, 3P reporting access would be received soon thereafter. In practice, access may not be received until later in the process.
- Where applicable, request activity pixels from the buyer, e.g., floodlight.
- Identify what screenshot/tearsheets are required and when.
- Identify buyer reporting requirements, for example timing, format, what should be included, who it should be delivered to, etc. Anything outside of organization norms should be reviewed with impacted parties, e.g., AdOps, analytics, etc.
- If the campaign is custom or includes unique aspects or products, reviewing the details of the campaign execution, so everyone is on the same page is important at this stage.
- Where applicable, discuss where approvals are needed and the required campaign turnaround time.

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Campaign Kickoff Goal

There should be no new requirements at this point in the process. All campaign requirements should have been vetted during the proposal stage. In practice, this is a common step where requirements are uncovered. Those requirements can impact all aspects of a campaign from timing to ROI. Publishers and buyers should work closely together to vet all requirements prior to execution.

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creative delivery

Once creative assets are received from the buyer, the publisher has processes they follow to ensure completeness and campaign accuracy.

Tactics that happen during this stage:

- BUY-SIDE STEPS: submit creative assets, which could include campaign creative, campaign ad tags, and creative assets for custom units.
- Review creative assets for completeness and adherence to specs.
  - AdOps most often handles this step.
- Where the publisher is using a 3P creative vendor:
  - Supply complete and in-spec assets to the vendor. AdOps generally handles this step.
  - Receive creative tags.
  - Internal review and approval. Teams involved in approval will vary based on organization, and profile of the campaign.
  - External review and approval. Typically, any ad built by anyone except the buyer will require buyer approval.
- Where applicable, post to the test environment for QA and approval.
  - For most ads, this will be handled by AdOps.
  - See considerations for custom programs, below.
  - Approvals required will vary by organization, products, and other considerations.
    - Best practice is to have a clearly outlined approval process for standard products, defining which product needs to be approved by whom.
- BUY-SIDE STEPS: review and approve, where applicable.

Considerations and potential steps for a custom campaign:

- Where a custom product or campaign is being developed, the campaign will need to be built out. This may or may not have been done previously, as many organizations go the "build if sold" route. The teams involved may be: AdOps, sales support, product, engineering, design, or audience acquisition, editorial.
  - The product could include not only ads, but custom content, event(s), research, etc.
  - Selling organizations should have identified what teams or persons need to be involved for what type of products.
  - For anything outside of the most straightforward of campaigns, a **best practice** is to include someone from project management or have someone act as a project manager for custom campaigns. Having a project manager will help move the campaign forward efficiently, while also keeping everyone, internally and externally, abreast of the status.

trafficking

Once the creative is in and approved, it's time to set up the campaign in the ad server with the complete targeting. This step is handled by AdOps.

Tactics that happen during this stage:

- Traffic creative with targeting in the ad server. Ensure that any targeting aspects that were tested during the Creative Delivery stage are duplicated for the live campaign.
- QA of ad server setup.
  - Things to consider as part of the QA process: correct creative/tags, correct targeting, visual of creative, frequency, data use, and data collection.
  - QA requirements will vary by organization. As a **best practice**, an organization should have a well-defined QA process by product, 3P vendor, etc. to ensure consistent results across all resources.
  - Troubleshoot as needed.
- If applicable, live site QA post launch.
  - Again, QA requirements will vary by organization. As a **best practice**, an organization should have a well-defined QA process by product, 3P vendor, etc., to ensure consistent results across all environments.
  - Troubleshoot as needed.
- Notification of live site launch, where applicable.
  - Notification of launch will vary by organization, but should but should be a consistent process across team members
- Generate screenshots/tearsheets, as needed.

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delivery and optimization

Delivery and optimization include a variety of steps that are not linear, but fall into this general categorization. Many of these steps will be repeated multiple times over the course of a campaign flight.

Tactics that happen during this stage:

- Gain access to 3P reporting, if not received previously. This should be a one-time process.
- Monitor delivery and pacing. This step is most often handled by AdOps.
- Discrepancy monitoring. This step is most often handled by AdOps.
  - The most common discrepancies to monitor are ad server impressions and clicks, and verification metrics of viewability and IVT.
  - This step is especially important if billing on anything besides 1P numbers.
- Optimize delivery in the ad server. This is handled by AdOps.
- Recommend optimizations that require contract revisions.
  - This may include changes to the overall value of the IO, it could also include CPM changes, or changes to products booked.
  - This could be handled by AdOps, sales support, or an analytics team, working with the buyer.
- If traffic acquisition is needed for a campaign, whether having been known at the outset or identified during the campaign, there are two primary approaches:
  - Internal: house ads, recirculation, site updates; and
  - External: traffic from outside parties.
- Troubleshooting
  - When troubleshooting and unexpected behavior is uncovered, the team should then investigate further to define and resolve the issue.
  - Most often this will start with AdOps, but could involve an escalation team, engineering, and analytics.

reporting and analysis

Reporting and analysis include a variety of steps that are not linear, but fall into this category. Many of these steps will be repeated multiple times over the course of a campaign flight.

Tactics that happen during this stage:

- Establish automated reporting for the buyer, if applicable; a one-time process.
- Campaign impression and click reporting. Often handled by sales support, but can vary by organization.
- Campaign viewability reporting. Especially important if the campaign has viewability requirements.
- Measurement of delivery success by campaign, which should translate to the success of inventory forecasting.
- Measurement of audience insights: who was engaged, who was reached, etc.
- Brand lift study execution and analysis of results.

Not related to specific campaigns, but in support of future campaigns, a selling organization should measure and monitor:

- Viewability by placement and in aggregate.
- Measurement of delivery success looking at campaigns in aggregate. This can provide valuable insight into your forecasting and sales processes. If utilized, can allow you to adjust forecast methodology or sales process to improve delivery in future campaigns.
- Creation of benchmarks: clicks, fraud, viewability, email open rate, and click-through rate among others.

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billing

Many campaigns will go through the billing process multiple times. The process may repeat monthly, but campaigns could have another billing schedule. The primary team is the finance or accounting team, but they need support from the operations team for performance data and campaign specifics.

As a **best practice**, publishers should identify timelines around the steps of the billing process.

Tactics that happen during this stage:

- Identify placements to be billed.
- Obtain billing performance data. Typically provided by the AdOps or analytics team.
- Perform reconciliation. May need support from sales support or AdOps for discrepancies.
- Generate invoices.
- Resolve disputes with buyers. May need support from sales support or ad ops for discrepancies.

considerations to the direct sale process

While the process outlined above doesn't delve into the tools used, the direct sales process has always been very people- and process-heavy. It is highly recommended to use tools and partners to optimize your process..

Self-Serve

There are self-serve tools that can complement this process and offer both your buyers and your internal teams the ability to access information or processes themselves. This empowers the users to do what they want to do, when they want to do it.

Automation

There are opportunities for automation that can replace the manual processes that people may be doing today, making them both faster and less error-prone. Not every automation can replace 100% of the manual process, but even partial automation can free up your team from manual work which allows them to support your organization in a higher-value capacity.

Outsourcing or Staff Augmentation

There are organizations that can augment your team. While hiring has never been easy, now it takes longer to fill roles, and when you fill those roles, you may not be able to find candidates with the experience you need.

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