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DIGITAL MEDIA BUYING & PLANNING
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STANDARDIZED KNOWLEDGE

EXAM BLUEPRINT

DIGITAL MEDIA BUYING & PLANNING • MAY 2016

iab. CERTIFICATION PROGRAM

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As a media and advertising professional today, not only do you need to stay current on the latest trends, tools, measurement tactics, and technologies, but you need to prove your knowledge and credibility to clients, employers, and peers.

IAB Certification programs establish and measure the baseline digital industry knowledge required for digital advertising professionals. Created by industry subject matter experts and a leading test development company, the certification programs are managed by an independent Certification Commission.

1ST PROGRAM IN DIGITAL ADVERTISING ACCREDITED BY

ANSI
American National Standards Institute

RECENT IAB SALES CERTIFICATION HOLDERS*

91% would recommend IAB Digital Media Sales Certification to a colleague in advertising media sales

86% said the program expanded their working knowledge of digital media

*Source IAB Certification Sales Certification Survey Jan 2016

AGENCIES AND MEDIA BUYERS**

84% prefer to work with a media sales person who understands analytics, campaign management and performance metrics in digital media

81% of agencies and media buyers prefer to work with a media sales person who stays educated in digital media regularly

**Source IAB Certification Agency Survey Dec 2014

300+ LEADING DIGITAL COMPANIES HAVE COMMITTED THEIR TEAMS TO THE PROGRAM INCLUDING
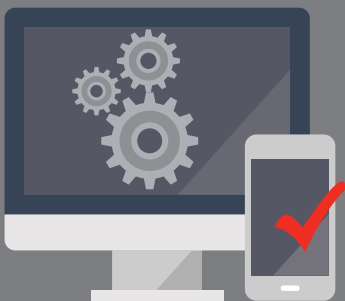
Aol.

Google

theorem

Triad Retail Media
turn shoppers into buyers

Bloomberg MEDIA

PANDORA

Time Inc.

CNÉ
CONDÉ NAST ENTERTAINMENT

The New York Times

Time Warner Cable Media
That's how.®

YAHOO!

Exam Blueprint for Digital Media Buyers and Planners Certification

Content Area	Duties and Tasks	# Items on Exam	Weight
A	**Collaborating on Campaign Briefs**	**13.0**	**16.25%**
1	Establish Plan Parameters	3.0	3.75%
2	Develop Media Objectives	3.0	3.75%
3	Establish Buying Guidelines	3.0	3.75%
4	Confirm Available Assets	2.0	2.50%
5	Construct Planning Timeline	2.0	2.50%
B	**Creating Media Strategies**	**15.0**	**18.75%**
1	Conduct Campaign Research Activities	2.0	2.50%
2	Define Media Mix Allocation	3.0	3.75%
3	Collaborate with Creative Agencies	2.0	2.50%
4	Design Data Strategy and Measurement Plan	4.0	5.00%
5	Develop Strategic Recommendation for Brand	4.0	5.00%
C	**Developing Digital Media Plans**	**15.0**	**18.75%**
1	Manage RFP Process	4.0	5.00%
2	Evaluate and Negotiate Media Proposals	5.0	6.25%
3	Forecast Media Returns	3.0	3.75%
4	Finalize Media Plan	3.0	3.75%
D	**Executing Campaigns**	**17.0**	**21.25%**
1	Negotiate Vendor Terms and Conditions	2.0	2.50%
2	Manage IO Process	3.0	3.75%
3	Kick-off Campaign	2.0	2.50%
4	Manage Trafficking and Tagging Process	4.0	5.00%
5	Manage Reporting Process	4.0	5.00%
6	Verify Campaign Launch	2.0	2.50%
E	**Managing Campaigns**	**16.0**	**20.00%**
1	Analyze and Optimize Campaign	5.0	6.25%
2	Troubleshoot Campaign	4.0	5.00%
3	Manage Flowchart Process	2.0	2.50%
4	Managing Digital Media Finances	5.0	6.25%
F	**Educating Stakeholders**	**4.0**	**5.00%**
1	Create Ad Hoc Reporting	1	1.25%
2	Construct Industry POVs	2	2.50%
3	Setup Media Days	1	1.25
	Total	80	100%

Knowledge Required of Digital Media Buyers and Planners

Specialized Knowledge	
Acceptance of third party tags and technology	Accounting
Ad formats	Ad servers
Ad serving verification systems	Ad tech data work flow
Ad technology	Ad tracking
Ad types	Ad verification best practices
Agency billing processes	Agency fee structure
Audience behavior	Audience for POVs
Available data resources	Available metrics
Available partners in the marketplace	Available reach within each channel
Available SMEs (e.g., media intelligence or forecasting, account analytics, programmatic)	Basic marketing fundamentals
Benchmarks	Best practices in digital media terms and conditions
Biddable landscape	Brand benchmarks
Brand billing terms	Brand competitive set
Brand data architecture	Brand expectations
Brand guidelines	Brand history
Brand responsiveness	Brand safety best practices
Brand savings goals	Brand team's reporting expectations
Brand verticals	Brand's billing processes
Brand's business trends	Brand's finance process
Brand's finance rules	Brand's fiscal calendar
Brand's goals	Brand's or agency's existing contracts
Brand's owned assets	Brand's promotional calendar
Brand's terms and conditions	Budget tracking systems
Buying models	Buying system
Campaign brief	Campaign goals
Campaign parameters	Category trends
Changes to the media plan	Channel capabilities
Channel mix	Competitive sets
Consumer behavior trends	Contractual agreements
Creative agency scope	Creative assets
Creative assignments	Creative best practices
Creative responsibilities	Creative technology capabilities
Creative testing best practices	Data architecture
Data sources	Data strategy
Digital ad pricing models	Diminishing returns
Execution feasibility	Existing rate cards
Flow of data	Historical campaign context
Historical performance of past campaigns	How to pull a delivery report
IAB's terms and conditions	Industry benchmarks

Knowledge Required of Digital Media Buyers and Planners

Specialized Knowledge	
Industry best practices	Industry data sources
Industry jargon	Industry knowledge
Industry standards	IO naming conventions
IO software system	KPIs
Legal regulatory restrictions	Licensing
Licensing guidelines	Logistical constraints
Marketplace conditions	Media buying platforms
Media capabilities (i.e., what media is capable of achieving or scalability)	Media day subjects
media ecosystem function	Media landscape
Media math	Media objectives
Media placements	Media plans
Media platforms	Media timelines
Must-haves and must-nots	Non-starters
Non-working media costs (e.g., ad serving fees, DMP costs)	Non-working media rates
Organizational finance processes	Organizational mandates that need to be included in RFP
Other brand in-market activity	Partner capabilities
Path to conversion	Path to purchase
Performance benchmarks	Plan parameters
Previous creative executions	Pricing benchmarks
Project timeline	Publisher guidelines and policies
QA checklist	Regulatory compliance standards
Reporting tools	Roles and responsibilities of teams
Savings methodology and goals	Scalable media
Seasonality	Site map
Skillsets of creative development team	Stakeholder expectations
Stakeholder schedules	Stakeholder timelines
Standard and custom creative development turnaround times	Standard creative sizes and specs
Statistical tests (e.g., determining level of significance)	Strengths and weakness of media types
Tag functionality	Target audience
Tech stack	Technological capabilities
Terms and conditions	Third party research tools
Trafficking process	Typical and historical media objectives
Typical production timelines	Utilized ad technology
Vendor acceptance of ad technology	Vendor capabilities
Vendor flexibility	Vendors
Vendor's terms and conditions	When to escalate a problem

Skills and Abilities Required of Digital Media Buyers and Planners

Skills and Abilities	
ability to articulate	ability to compromise
ability to identify inaccuracies in data	ability to manage stakeholder expectations
ability to meet deadlines	ability to tell stories with data
ability to use data sources	account management skills
accountability	accuracy
analytical thinking	attention to detail
basic business acumen	basic math skills
client management skills	collaboration skills
common sense	communication
consistency	consultative skills
coordination skills	creativity
critical thinking	data interpretation
data visualization skills	efficient
ethical	event management skills
flexibility	innovative
leadership	listening skills
media math skills	multi-tasking
negotiation skills	objectivity
open-minded	organization skills
patience	persistence
presentation skills	prioritizing
proactive	problem solving skills
project management	reactive
realistic	reasonable
relationship building	research skills
resourceful	responsive
spreadsheet software skills	storytelling skills
tactfulness	technical writing skills
time management skills	trustworthiness
writing skills	

Tools, Equipment, and Resources Digital Media Buyers and Planners

Tools, Equipment, and Resources	
access to brand's site map	accounting sheet
ad ops team	ad servers
ad serving platform (e.g., double click)	ad technology
ad verification platforms	ad verification tools
agency corporate contracts or rate cards	agency research department
analytics teams	analytics tools
authorization software	billing and finance teams
billing software	billing template
brand brief	brand data
brand first party data	brand guidelines
brand health trackers	brand sales data
brand sales reports	brand segmentation
brand's legal team	buying platforms
case studies	channel SMEs
competitive research tools (e.g., ad intel, kantar, moat)	creative assets
creative examples	data sources
delivery report	DMP
finance team	flowchart software
flowcharts	historical MMA or ROI reports
historical reports	IAB standards
IAB terms and conditions	industry benchmarks (e.g., ad verification, viewabilty)
in-market research tools	internal and brand's finance department
internal POVs and case studies	internal terms and conditions
internal vendor database	IO software system
IT support	keyword list
KPI benchmarks	legal team
marketing mixed modeling tools	media buying platform
media buying tools	media flowchart software
media flowchart template	media kits
media plan	media plan template
media planning flowcharts	media research tools (e.g., comScore)
meeting space	naming convention document
office services	other agency experiences
past campaign performance	post-buy reports
POV template	presentation software
presentations	previous brand briefs
previous media plans	production timelines
publisher guidelines and policies	regulatory standards

Tools, Equipment, and Resources Digital Media Buyers and Planners

Tools, Equipment, and Resources	
relevant creative examples	reporting templates
reporting tools	research and analytics team
research team	RFP software (e.g., iDesk)
RFP templates	screen capture tool
search engine	site map
SMEs	spec sheet
spreadsheet software	syndicated research tools
tag verification software	tagging strategy
third party partners	third party research tools
trade publications	traffic sheet
vendor contact information	vendor databases
vendor invoices	vendor knowledge base
vendor reputation	vendor spec sheet
vendors	

Resources and Other Data Considerations of Digital Media Buyers and Planners

Ad Verification Tools
Ad Yapper
Adometry
C3 Metrics
comScore VCE
DCM
Double Verify
IAS
Moat
Nielsen DAR
Telemetry
White Ops

Syndicated Research Tools
Ad Intel
compete.com
comScore
eMarketer
Forrester
Google Trends
Kantar
Moat
MRI
Nielsen
Social Listening Tools

In-Market Research Tools
Brand Health Tracker
comScore
Google Surveys
Insight Express
Milward Brown
Moat
Nielsen
Placed
Social Listening Tools
Sqad

Analytics Tools
Ad Server
Adobe Analytics
Adometery
Business Intelligence Software
Convertro
DMP
Google Analytics
Milward Brown
Mobile Measurement Platforms
SEM Rush
Social Listening Tools
SpyFu
Visual IQ

Media Buying Platforms
DSP
FMP
PMD
Search Engines
SEM Platform

Channels
content
display
native
search
social
video

Tools, Equipment, and Resources Digital Media Buyers and Planners

SMEs
ad ops
analytics
comms planning
content
creative
data
finance
legal
market intelligence
marketing sciences
mobile
multi-cultural
operations
PR
procurement teams
programmatic
research
sales
search
social
video

Detailed Content Outline

			Duties, Tasks, and Steps	Knowledge	Skills, Abilities, and Attributes	Tools, Equipment, and Resources
A			**Collaborating on Campaign Briefs**			
	1		Establish Plan Parameters			
		a	Obtain business objectives from brand	• brand history • media landscape • other brand in-market activity • seasonality • typical and historical media objectives	• collaboration skills • communication skills • consultative skills • listening skills • negotiating skills • project management skills	• brand brief
		b	Confirm campaign timing			
		c	Align on target audience			
		d	Align on target region			
		e	Align on budget parameters			
		f	Establish savings methodology and goals			
	2		Develop Media Objectives			
		a	Determine whether or not business objective is feasible	• audience behavior • basic marketing fundamentals • brand verticals • campaign parameters • historical performance • media capabilities (i.e., what media is capable of achieving)	• articulate • basic business acumen • collaboration skills • creativity • problem solving skills	• brand brief • brand first party data • past campaign performance • previous brand briefs • SMEs
		b	Collaborate with SMEs to determine media objective			
		c	Set media objective based on business objectives			
		d	Gain approval on proposed media objectives			
	3		Establish Buying Guidelines			
		a	Ask brand if they have preferred rates with vendors or mandated buys	• ad verification best practices • brand safety best practices • brand's or agency's existing contracts • digital ad pricing models • legal regulatory restrictions • the brand competitive set • the brand's historical context	• analytical • attention to detail • communication skills • proactive • resourceful	• agency corporate contracts or rate cards • brand brief • brand's legal team • competitive research tools (e.g., ad intel, kantar, moat) • IAB standards • industry benchmark
		b	Determine if agency has preferred rates with vendors or mandated buys			
		c	Review up-front commitments			
		d	Determine the "must-haves" and "must-nots"			
		e	Identify brand safety guidelines			
		f	Identify ad quality guidelines			
		g	Identify fraud thresholds and guidelines			
		h	Identify viewability thresholds and guidelines			
		i	Confirm pricing models			
		j	Identify legal regulatory guidelines			

Detailed Content Outline

		k	Determine competitive separation requirements			• s (e.g., ad verification, viewabilty) • regulatory standards
	4		Confirm Available Assets			
		a	Collaborate with creative agency and brand team	• brand guidelines • creative agency scope • creative responsibilities • publisher guidelines and policies • skillsets of creative development team • standard and custom creative development turnaround times • standard creative sizes and specs	• attention to detail • collaboration skills • communication skills • patience • persistence • project management skills	• brand guidelines • IAB standards • publisher guidelines and policies • SMEs • spec sheet
		b	Determine if there are existing creative assets			
		c	Determine if there will be new creative assets			
		d	Determine timeline of delivery of assets with brand team and agency			
		e	Determine if creative tests are going to be implemented			
		f	Obtain admin rights for brand pages or profiles			
		g	Review any existing assets to be used			
	5		Construct Planning Timeline			
		a	Determine delivery date for strategy presentation	• brand expectations • brand responsiveness • media timelines • stakeholder timelines	• ability to manage stakeholder expectations • collaboration skills • project management skills	• brand brief • spreadsheet software
		b	Determine internal check points (progress reports)			
		c	Align stakeholder schedules and duties			
		d	Determine dates for brand approvals			
		e	Determine RFP process timeline			
		f	Confirm launch date			
		g	Confirm tech implementation timeline			
B			**Creating Media Strategies**			
	1		Conduct Campaign Research Activities			
		a	Research media landscape	• available SMEs (e.g., media intelligence or forecasting, account analytics, programmatic) • industry data sources	• ability to interpret data • ability to tell stories with data • ability to use data sources • analytical • creativity	• agency research department • analytics tools • brand first party data
		b	Research brand category landscape			
		c	Research target audiences			
		d	Review past campaign performance			
		e	Review research and data provided by client			
		f	Perform SWOT analysis			

					• organizational skills • research skills	• brand health trackers • brand sales reports • brand segmentation • in-market research tools • media buying tools • post-buy reports • SMEs • syndicated research tools
	2		Define Media Mix Allocation			
		a	Leverage data from research phase	• "must-haves" and "must-nots" • campaign brief • media capabilities (i.e., scalability) • media math • strengths and weakness of media types	• media math skills	• historical MMA or ROI reports • marketing mixed modeling tools • SMEs • spreadsheet software
		b	Run scenarios in channel allocation tools			
		c	Develop recommended media mix scenarios			
		d	Consult with SMEs			
		e	Align with brand on media mix			
	3		Collaborate with Creative Agencies			
		a	Communicate media mix to creative agencies	• creative technology capabilities • creative testing best practices • licensing guidelines • media objectives • previous creative executions • roles and responsibilities of media and creative teams • statistical tests (e.g., determining level of significance)	• ability to compromise • communication skills • coordination skills • patience	• brand brief • brand guidelines • IAB standards • relevant creative examples • spec sheet
		b	Align on creative sequencing			
		c	Collaborate on custom content with stakeholders			
		d	Determine creative technology			
		e	Align on creative testing scenarios			
		f	Provide tentative specs			
		g	Consult with creative agency on delivery restrictions			

	4		Design Data Strategy and Measurement Plan			
		a	Define campaign KPIs	• a brand's owned assets • ad tech data work flow • ad technology • available data resources • benchmarks • brand team's reporting expectations • creative assets • historical performance • industry best practices • media objectives • path to conversion • vendor capabilities	• analytical skills • attention to detail • media math skills • organizational skills	• access to brand's site map • analytics tools • brand brief • brand data • KPI benchmarks • post buy report • reporting template • research and analytics team
		b	Define channel KPIs			
		c	Define creative KPIs			
		d	Define vendor KPIs			
		e	Create tagging strategy			
		f	Determine measurement tools and partners used to measure KPIs			
		g	Consult with strategy and analytics team			
		h	Align on conversion windows with brand			
		i	Establish benchmarks for all KPIs			
		j	Establish reporting cadence			
		k	Create measurement plan			
		l	Create data management work flow			
	5		Develop Strategic Recommendation for Brand			
		a	Develop tactics to achieve strategy	• available partners • channel capabilities • channel mix • creative assets • partner capabilities • target audience • the flow of data	• ability to articulate • communication skills • creativity • innovative • presentation development skills	• brand brief • internal POVs and case studies • media kits • presentation software • syndicated research tools • vendor knowledge base
		b	Determine use of first, second, and third party data for each channel			
		c	Determine targeting tactics (e.g., behavioral, contextual) for each channel			
		d	Develop partner consideration list			
		e	Obtain brand approval on recommendation			
C			**Developing Digital Media Plans**			
	1		Manage RFP Process			
		a	Create RFP	• acceptance of third party tags and technology • ad verification guidelines and thresholds • available partners in the marketplace • campaign parameters	• ability to be articulate • ability to multi-task • communication skills • project management • responsive	• media research tools (e.g., comScore) • RFP software (e.g., iDesk) • RFP templates
		b	Establish vendor consideration criteria			
		c	Pull media research			
		d	Create a list of vendors that meet criteria			
		e	Review existing vendor partners for historical performance			

Detailed Content Outline

	f	Obtain media kits from potential vendors	• non-starters • organizational mandates that need to be included in RFP • project timeline	• trustworthiness	• vendor databases
	g	Obtain signed NDAs from vendors			
	h	Send RFP			
	i	Meet with vendors to answer RFP questions			
	j	Receive proposals			
2		Evaluate and Negotiate Media Proposals			
	a	Centralize vendor proposals	• brand savings goals • campaign goals • campaign parameters • creative assets • execution feasibility • existing rate cards • industry jargon • marketplace conditions • pricing benchmarks • specific terms and conditions • technological capabilities • vendor acceptance of ad technology • vendor flexibility	• ability to multi-task • attention to detail • basic business acumen • critical thinking • objective • open-minded • organization skills • realistic • reasonable • tactfulness	• internal POVs and case studies • other agency experiences • previous media plans • SMEs • syndicated research tools • vendor database • vendor reputation
	b	Read vendor proposals			
	c	Create proposal scorecards			
	d	Compare new proposals to previous proposals			
	e	Provide feedback to vendors			
	f	Request revised proposal			
	g	Validate vendor claims in proposal			
3		Forecast Media Returns			
	a	Identify available reach potential	• available reach within each channel • brand's business trends • brand's promotional calendar • category trends • consumer behavior trends • diminishing returns • historical performance of past campaigns • knowledge of the path to purchase • media math • performance benchmarks	• analytical • attention to detail	• brand sales data • data sources • keyword list • SMEs
	b	Calculate the effects of seasonality and events			
	c	Incorporate performance expectations of benchmarks			
	d	Collect data from relative environmental factors (e.g., brand's trends, category trends)			

Detailed Content Outline

	4		Finalize Media Plan			
		a	Finalize partners, targeting, and placements	• agency fee structure • brand's finance process • creative best practices • media math • media plan details • non-working media costs (e.g., ad serving fees, DMP costs) • organizational finance processes • stakeholder expectations • target audience	• basic business acumen • communication skills • presentation skills • spreadsheet software skills • storytelling skills • writing skill	• authorization software • channel SMEs • internal and brand's finance department • media flowchart software • media flowchart template • media plan template • publisher guidelines • spreadsheet software
		b	Allocate budget across partners			
		c	Actualize channel allocation			
		d	Summarize media plan			
		e	Create flowchart			
		f	Present finalized media plan			
		g	Obtain authorization to buy			
		h	Create keyword list and copy			
		i	Account for all non-working media fees			
D			**Executing Campaigns**			
	1		Negotiate Vendor Terms and Conditions			
		a	Confirm vendor will accept standard terms and conditions	• best practices in digital media terms and conditions • brand's terms and conditions • IAB's terms and conditions • vendor's terms and conditions	• attention to detail • basic business acumen • negotiating skills • patience	• finance team • IAB terms and conditions • internal terms and conditions • legal team • regulatory standards
		b	Determine if the vendor has special terms and conditions with agency			
		c	Determine if the brand has special terms and conditions			
		d	Reconcile any non-standard clauses or special terms and conditions			
		e	Obtain legal approval			
		f	Obtain finance approval			
	2		Manage IO Process			
		a	Notify vendor of approval	• IO naming conventions • IO software system • the media plan	• attention to detail • time management skills	• IO software system • media plan • naming convention document
		b	Complete naming convention document			
		c	Create the IO			
		d	Issue the IO			
		e	Confirm acceptance of the IO			
		f	Finalize IO			

		g	Create media buying advertiser account for self-serve media			• vendor contact information
	3		Kick-off Campaign			
		a	Schedule kick-off calls with vendors	• ad formats • ad serving • ad tracking • ad types • how the media ecosystem functions • media plan • the flow of data • typical production timelines	• account management skills • communication skills • multi-tasking skills • project management skills • time management skills	• creative examples • media plan • production timelines • vendor spec sheet
		b	Schedule kick-off call with brand team			
		c	Schedule kick-off call with creative agency			
		d	Schedule kick-off call with third party technology partners			
		e	Schedule kick-off call with SMEs			
		f	Build creative spec document			
		g	Develop kick-off call agenda			
		h	Develop custom content with partners			
	4		Manage Trafficking and Tagging Process			
		a	Create and upload traffic/bulk sheet	• ad servers • bid landscapes • campaign parameters • KPIs • licensing • media placements • roles and responsibilities of teams • site map • tag functionality • the brand data architecture • the trafficking process	• ability to manage stakeholder expectations • accountability • attention to detail • common sense • communication skills • efficient • project management skills • time management skills	• ad ops team • ad serving platform (e.g., double click) • ad verification tools • analytics tools • buying platforms • creative assets • site map • tagging strategy • traffic sheet
		b	Obtain creative assets			
		c	Setup and implement third party tracking tags			
		d	Setup and implement site tags			
		e	Setup and implement media tags			
		f	Implement technical parameters			
		g	Implement brand safety parameters			
		h	Perform QA process			
		i	Ensure tags are issued to vendors or brand			
		j	Confirm tags are received and implemented			
	5		Manage Reporting Process			
		a	Develop budget tracker	• ad technology • available metrics • campaign parameters • data architecture • data sources	• analytical thinking skills • attention to detail	• ad ops team • ad technology
		b	Grant third party access to vendors and brand team			
		c	Create reporting template			
		d	Setup automated reports			

		e	Setup API feeds with SMEs	• industry benchmarks • KPIs • media math • roles and responsibilities of teams • stakeholder expectations • the media plans	• data visualization skills • spreadsheet software skills • storytelling skills	• analytics teams • analytics tools • brand data • media buying platforms • reporting templates • SMEs • spreadsheet software • third party partners
		f	Collaborate with analytics and research team			
		g	Establish custom reporting needs			
		h	Collaborate with vendors on unique reporting			
		i	Perform QA process for reporting			
		j	Meet with research partner			
		k	Obtain brand approval on survey components			
	6		Verify Campaign Launch			
		a	Confirm that vendors have assets to go live	• creative assignments • how to pull a delivery report • media buying platforms • media math • QA checklist • the media plan • utilized ad technology	• ability to multi-task • analytical • attention to detail • communication skills • organization skills • presentation skills • proactive	• ad ops team • ad server • media buying platform • presentation software • screen capture tool • vendors
		b	Pull delivery report			
		c	Compile screenshots			
		d	Confirm launch with partners			
		e	Confirm launch with brand team			
		f	Verify campaigns are active			
		g	Perform post-launch QA activities			
E			**Managing Campaigns**			
	1		Analyze and Optimize Campaign			
		a	Pull campaign reports from relevant platforms	• biddable landscape • brand benchmarks • data strategy • industry benchmarks • KPIs • media math • media platforms • regulatory compliance standards • saleable media • terms and conditions • the media plan	• ability to interpret data • analytical thinking skills • attention to detail • basic business acumen • communication skills • consistency • data visualization skills • ethical • negotiation skills • presentation skills	• analytics tools • media buying platform • reporting template • reporting tools • SMEs • spreadsheet software
		b	Evaluate campaign delivery against expected results			
		c	Evaluate campaign performance against expected results			
		d	Determine areas for optimization			
		e	Communicate with partners			
		f	Present optimization recommendations to brand team			
		g	Convey actionable insights to brand team			
		h	Implement approved optimization			
		i	Present incremental opportunities			
		j	Provide report to brand team			

Detailed Content Outline

					• spreadsheet software skills	
2		Troubleshoot Campaign				
	a	Identify media buying problem	• ad serving verification systems	• ability to build relationships	• ad ops team
	b	Ensure KPI is being tracked	• data strategy	• ability to identify inaccuracies in data	• ad servers
	c	Consult with SMEs	• historical campaign context	• attention to detail	• ad verification platforms
	d	Review IO for inaccuracies	• media buying platform	• basic business acumen	• DMP
	e	Review ad server	• plan parameters	• coordination skills	• media buying platforms
	f	Compare data sources	• when to escalate a problem	• flexibility	• research team
	g	Review ads in live environments		• level-headed	• SMEs
	h	Ensure ad verification thresholds are being upheld		• prioritization skills	• tag verification software
	i	Verify vendors are abiding buy plan parameters		• proactive	• vendors
	j	Ensure vendors are pacing media correctly		• problem solving skills	
3		Manage Flowchart Process				
	a	Create flowchart	• brand's finance rules	• accurate	• ad server
	b	Identify changes to media plan	• changes to the media plan	• attention to detail	• delivery report
	c	Update flowchart	• media math	• communication skills	• flowchart software
	d	Send updated flowchart to brand team	• the media plan	• data visualization skills	• spreadsheet software
				• proactive	
				• reactive	
				• spreadsheet software skills	
4		Managing Digital Media Finances				
	a	Pull delivery reports	• accounting	• ability to meet deadlines	• accounting sheet
	b	Provide accounting estimates to brand's team	• agency billing processes	• accuracy	• analytics tools
	c	Actualize monthly spend	• brand billing terms	• attention to detail	• billing and finance teams
	d	Manage invoices with vendors	• brand's billing processes	• basic math skills	• billing software
	e	Approve brand billing	• buying models	• communication skills	• billing template
	f	Issue firm flex reports	• contractual agreements	• problem solving skills	
	g	Issue savings tracker reports	• media math	• spreadsheet software skills	
	h	Resolve discrepancies	• non-working media rates		
	i	Reallocate credits			
	j	Participate in audit exercises			

				• savings methodology and goals • the brand's fiscal calendar • the media plan			• media buying platform • media planning flowcharts • vendor invoices
F			**Educating Stakeholders**			
	1		Create Ad Hoc Reporting			
		a	Create annual spend reports	• brand's goals • budget tracking systems • buying system • competitive sets • data architecture • industry standards • media math • media plans • reporting tools • the tech stack	• ability to manage stakeholder expectations • ability to prioritize • analytical • attention to detail • basic business acumen • communication skills • data visualization skills • flexibility • organization skills • time management skills	• analytics tools • billing software • flowcharts • media buying platforms • media plan • reporting templates • reporting tools • SMEs • spreadsheet software • syndicated research tools
		b	Create forecasting reports			
		c	Create spend pacing reports for each partner			
		d	Complete internal tracking reports			
		e	Create spend by media channel reports			
		f	Create budget scenarios			
		g	Provide raw data			
		h	Provide troubleshooting reports			
		i	Provide ad hoc creative reporting			
		j	Create trend reports			
		k	Create competitive analysis reports			
	2		Construct Industry POVs			
		a	Set evaluation criteria	• audience for POVs • brand's expectations • the industry • third party research tools	• basic business acumen • communication skills • critical thinking • objectivity • research skills • technical writing skills	• case studies • historical reports • internal vendor database • POV template • search engine • SMEs • third party research tools
		b	Identify consideration set			
		c	Determine objective of POV			
		d	Obtain media kits or materials			
		e	Consult with SMEs and other colleagues			
		f	Create product, vendor, solutions score card			
		g	Perform third party research			
		h	Write POV document			
		i	Gain internal alignment with key stakeholders			

						• trade publications
	3		Setup Media Days			
		a	Determine subject for media day	• brand's expectations • logistical constraints • media day subjects • stakeholder schedules • vendors	• attention to detail • client management skills • communication skills • event management skills • leadership skills • multi-tasking skills • organization skills • time management skills	• IT support • media kits • meeting space • office services • presentations • spreadsheet software
		b	Determine agenda for media day			
		c	Determine objective of media day			
		d	Determine attendees for media day			
		e	Collaborate with partners on content			
		f	Brief partners on objective of media day			
		g	Coordinate with brand on media day			
		h	Facilitate logistics of media day			
		i	Execute and manage media day			
		j	Create wrap-up report of media day			

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