



EFFECTIVE CAMPAIGN STRATEGY



STANDARDIZED KNOWLEDGE

STUDY GUIDE

DIGITAL MEDIA BUYING & PLANNING



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AGENCIES AND MEDIA BUYERS**

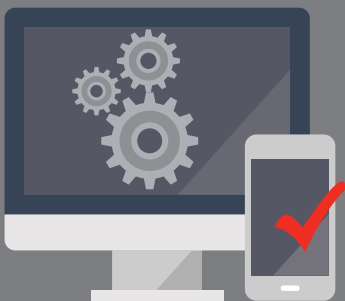
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300+ LEADING DIGITAL COMPANIES HAVE COMMITTED THEIR TEAMS TO THE PROGRAM INCLUDING



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1 | INTRODUCTION

Digital media buyers and planners are savvy, organized, and creative individuals who understand how to grow with the evolving digital landscape. They are in charge of planning, negotiating, and buying advertisement placements. Also known as inventory, these advertisement placements are bought around the specific product being marketed as well as the campaign goals and target audience. They do this by understanding the ways in which the digital world functions. They understand how marketing affects individuals, and are able to optimize campaign performance throughout the entirety of its lifecycle.

The [IAB Digital Buying and Planning Certification](#) (DBPC) leads the industry standard for digital media buyer and planner professionals. Individuals who complete the certification process have successfully demonstrated their expertise in the area of digital media buying and planning, and are committed to ensuring that the highest standards of professionalism and ethical practice are upheld in the industry.

The purpose of this study guide is to educate candidates about the DBPC exam they must complete in order to obtain their certification in digital media buying and planning. It contains useful information about the exam such as how it is structured and how the questions are formatted. It also provides more information about the core digital media buying and planning knowledge that candidates must possess in order to be successful in their certification endeavor.

This study guide contains sample exam questions complete with a detailed answer guide to help acquaint candidates with question style and identify priority topics to review as they prepare for the exam. It contains useful information about exam and question format, requisite core digital media knowledge, and specialized content areas that will be tested.

IAB staff has also developed a [candidate handbook](#) in order to describe all aspects of the certification process and assist candidates in preparation for the exam. The handbook contains an overview of exam content, eligibility criteria, information on registering for the exam, guidelines for taking the exam, relevant policies and requirements, and links to the application and other relevant information. The [candidate handbook](#) can be downloaded from the IAB Certification [website](#).



How to Use This Guide

Because the exam is designed to test the knowledge and skills of experienced digital media buyers and planners, the content contained within it is quite extensive. This study guide provides you with a brief overview of each content area, followed by links to additional sources on the web for you to review. We encourage you to first review the overview of a section and the corresponding links to determine what you know well and what areas you need to study deeper before printing everything out.

If you are newer to digital media and require additional help in preparing for the exam, IAB and some training vendors offer digital media education and exam preparation courses. For more information, contact IAB at certification@iab.com or visit our [Study Resources](#) page.



2 | ABOUT THE EXAM

Exam Format

The IAB Digital Buying and Planning Certification exam consists of 100 multiple-choice questions, of which 80 are scored and 20 are “pre-tested” questions used for statistical purposes and are *not* scored. Please note that you will not know which questions are scored and which are not, and you will also not receive feedback on the pre-tested questions. Your score is derived solely from the 80 multiple choice questions that are scored.

You have a total of two hours to complete the exam. Note that this includes five minutes of time spent to agree to the nondisclosure agreement for the DBPC examination. Thereafter, you will have 1 hour and 55 minutes to take the exam. You are permitted to take a restroom break; however your break time counts in the 1 hour and 55 minutes allotted to test.

It is the policy of IAB to develop examinations utilizing a psychometrically valid process. The examination was developed by subject-matter experts under the guidance of psychometricians (experts in measurement and test development) and is designed to measure the knowledge, skills, and abilities required to perform competently as a digital media planner and buyer. The exam questions were written and edited by subject matter experts working with test development experts.

Scoring

Candidates will receive their final result at the test center, which will designate their pass status. The passing point—or the score you need to achieve in order to pass—was also determined utilizing valid psychometric procedures. The exam was built to be scored on a pass/fail basis, to assess whether an individual possesses a minimum level of knowledge, capabilities, and skills deemed necessary to successfully perform the digital media duties of a digital media planning and buying professional. IAB follows best practices in all of its test development activities and has a high degree of confidence that only those who meet the competency requirements pass the examination.

Detailed raw and/or percentage scores will not be provided, since the exam was developed for diagnostic, rather than comparative, purposes. Successful candidates will be notified that they have passed and will be mailed a printed certificate and further instruction on proper use of the credential process. Candidates who fail will receive a diagnostic report of their overall performance on each content area of the exam. This information is provided so candidates can see their areas of greatest weakness, and prepare themselves to retake the exam.

Exam Content

Skilled and successful digital media buyers and planners will have a fundamental understanding of the following six areas covered within the exam:

1. **Collaborating on Campaign Briefs.** When creating a successful and effective media campaign, it's important that everyone on the team shares the same vision. This is why campaign briefs are so important. Campaign briefs outline and define objectives and goals, and help everyone work towards the same overall goal. Successful digital media planners and buyers will understand how to create concise briefs in conjunction with the rest of their team and possess the ability to do so well.
2. **Creating Media Strategies.** No two digital media campaigns are 100 percent alike. They evolve to fit the specific needs of the brand or product in question, and should be built as independent entities according to the goals at hand. Digital media planners and buyers will be tasked with creating the appropriate media strategies specific to individual campaigns. They will be responsible for conducting campaign research activities and defining media mix allocation as well as collaborating with creative agencies in order to design a data strategy and measurement plan. Finally, after all of the above has been completed, digital media buyers and planners develop strategic recommendations for a brand.
3. **Developing Digital Media Plans.** The digital world is huge and highly nuanced, with almost innumerable different strategies and channels that the experienced and knowledgeable digital media buyer and planner will be able to deftly maneuver. In doing so, they will create a plan that will effectively increase brand awareness, encourage and cultivate leads, and eventually usher said leads through the buying and planning process.
4. **Executing Campaigns.** Even the most carefully organized digital media plan can go awry if it isn't managed correctly. Digital media planners and buyers must understand how the execution process works in order to help ensure success for their clients. To do this, they must be knowledgeable in the negotiation process with vendor terms and conditions as well as the IO process. The capability to actually kick off the campaign, manage the trafficking, tagging, and reporting processes, and verify campaign launch are all essential skills and knowledge for the successful digital media buyer and planner.
5. **Managing Campaigns.** Once the campaign has been successfully launched, it must be closely managed in order to detect and correct any issues that might arise as early as possible. Digital media buyers and planners will understand how to analyze and optimize a campaign, troubleshoot any campaign issues that might develop, and manage the



flowchart process. Just as importantly, they'll also understand the finer points of managing digital media finances.

6. **Educating Stakeholders.** In today's business landscape, it's important to keep everyone, including stakeholders, informed about the digital media process. Successful digital media buyers and planners will understand how to create ad hoc reporting, construct industry POVs, and set up media days.

The blueprint on the next page shows what content areas will be tested, as well as their approximate weighting on the exam.



Exam Blueprint

Content Area	Duties and Tasks	# Items on Exam	Weight
A	Collaborating on Campaign Briefs:	13.0	16.25%
A.01	Establish Plan Parameters	3.0	3.75%
A.02	Develop Media Objectives	3.0	3.75%
A.03	Establish Buying Guidelines	3.0	3.75%
A.04	Establish Available Assets	2.0	2.50%
A.05	Construct Planning Timeline	2.0	2.50%
B	Creating Media Strategies:	15.0	18.75%
B.01	Conduct Campaign Research Activities	2.0	2.50%
B.02	Define Media Mix Allocation	3.0	3.75%
B.03	Collaborate with Creative Agencies	2.0	2.50%
B.04	Design Data Strategy and Measurement Plan	4.0	5.00%
B.05	Develop Strategic Recommendation for Brand	4.0	5.00%
C	Developing Digital Media Plans:	15.0	18.75%
C.01	Manage RFP Process	4.0	5.00%
C.02	Evaluate and Negotiate Media Proposals	5.0	6.25%
C.03	Forecast Media Returns	3.0	3.75%
C.04	Finalize Media Plan	3.0	3.75%
D	Executing Campaigns:	17.0	21.25%
D.01	Negotiate Vendor Terms and Conditions	2.0	2.50%
D.02	Manage IO Process	3.0	3.75%
D.03	Kick-off Campaign	2.0	2.50%
D.04	Manage Trafficking and Tagging Process	4.0	5.00%
D.05	Manage Reporting Process	4.0	5.00%
D.06	Verify Campaign Launch	2.0	2.50%
E	Managing Campaigns:	16.0	20.00%
E.01	Analyze and Optimize Campaign	5.0	6.25%
E.02	Troubleshoot Campaign	4.0	5.00%
E.03	Manage Flowchart Process	2.0	2.50%
E.04	Managing Digital Media Finances	5.0	6.25%
F	Educating Stakeholders:	4.0	5.00%
F.01	Create Ad Hoc Reporting	1	1.25%
F.02	Construct Industry POVs	2	2.50%
F.03	Setup Media Days	1	1.25%
Total		80	100%



In this study guide, each major content area (A, B, C, D, E, and F above) is reviewed with both a topic summary and provision of sample questions for each area. In the explanatory narrative within each subheading, you will find some key words and phrases in **bold type**. These indicate steps necessary to accomplish a specific task. Wherever possible, this document also provides the necessary knowledge, skills, abilities, and attributes required to conduct a specific task.

The organization of this study guide is designed to help you prepare for the exam. Take an orderly approach and complete the guide methodically and steadily. Do not become discouraged by the size or the information included. Take your time and work through each section without worrying about the remaining sections.



3 | CORE DIGITAL MEDIA BUYER AND PLANNER KNOWLEDGE

The best starting point for studying for the DBPC exam is to ensure that you understand the specialized knowledge, skills, abilities, and various tools, equipment, and resources that are commonly used by successful digital media planners and buyers. Some test questions may specifically assess your familiarity with these core knowledge items, and all test questions have been written assuming that you already have a command of them.

Specialized Knowledge

The specialized knowledge digital media buyers and planners possess covers multiple functions within a campaign. Accordingly, digital media buyer and planner professionals can operate within many different levels on a campaign. You should be prepared to demonstrate an understanding of any of the following specialized knowledge items while you take the certification exam. You will not be permitted to bring along any kind of “cheat sheet” defining the following items into the testing center.

The tables below illustrate the specialized knowledge areas that you will be utilizing as a digital media buyer and planner. As you can see, they are quite diverse and cover an immense amount of ground. We suggest that you spend time familiarizing yourself with the table as a whole, but focus most of your attention upon any items that seem particularly foreign to you rather than memorizing the exact definition of every item included. Remember, this study guide contains an immense amount of information. Be careful to break up that information into smaller, orderly pieces in order to avoid becoming overwhelmed and discouraged.

Knowledge Required of Digital Media Planners and Buyers

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
Industry best practices	Industry data sources
Industry jargon	Industry knowledge



Specialized 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
Skillssets 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

Digital media buying and planning requires a specific skillset that is vital to success. You should understand the following skills and abilities before taking the exam.

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 must familiarize themselves with the following tools, equipment, and resources as they are vital to successful completion of many routine tasks. Just as with the specialized knowledge table above, the following tables contain an abundance of information. Do not be frustrated if it takes more time than you anticipated to understand the different tools and their uses. Break the information up into as many different segments as necessary and study them diligently.

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, viewability)
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



Tools, Equipment, and Resources

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
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	



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
Squad

Analytics Tools
Ad Server
Adobe Analytics
Adometry
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

Selected Definitions

- A. *Ad Verification Best Practices*: This refers to the service of determining the appropriate execution of internet campaigns. Please click the hyperlink for more in-depth descriptions of the guidelines.
- B. *Agency Corporate Contracts or Rate Cards*: Rate cards are documents that list the descriptions and prices for various advertising options offered by a given media outlet. Be aware that negotiation is an important part of the contracting process, and rate cards tend to list the highest amount that one should pay – not the fair price.
- C. *Audience Behavior*: This refers to the importance of understanding your target audience's behavior when it comes to how they consume information and brands. This helps in the creation of effective internet campaigns.
- D. *Basic Marketing Fundamentals*: As a digital media planner and buyer, it's important to understand the basics when it comes to digital marketing. This includes things like brand identification, brand consistency, search marketing, content optimization, outreach via social media, and sales leads conversions. Stick to the basics when developing your campaign, and you'll have a much easier time meeting various expectations and deadlines.
- E. *Brand Expectations*: It's important to understand what a brand expects when they hire a digital media buyer and planner. Brand expectations refers to what the brand expects to happen as a result of hiring you and building a comprehensive online campaign. You need to understand what these expectations are in order to meet (or perhaps revise) them.
- F. *Brand Guidelines*: These are a set of rules that describe how the brand in question works. This includes things like the brand's vision, personality, history, and key values.
- G. *Brand History*: Also known as a brand story, brand histories help relate the brand in question to consumers. What motivates the brand in question, and why did they start their business in the first place? The answers to these questions are important when it comes to building a successful, relatable campaign.
- H. *Brand Responsiveness*: Brand responsiveness refers to how quickly a brand responds to inquiries or feedback. Note that these inquiries might come from customers *or* your team. It's important to understand what you're working with as far as brand responsiveness goes in order to plan ahead and build communication techniques accordingly.
- I. *Brand Safety Best Practices*: Brand safety refers to the dangers of blind buying and ad networks. Remember that your brand probably doesn't want to associate with certain advertising or news environments, even if they are related to the brand's industry. An airline, for example, probably doesn't want to have their image or name associated with a plane crash in any context, including their advertisement being seen alongside the news article.
- J. *Brand Verticals*: Vertical brands – also known as vertical marketing – target a more specific customer set than horizontal marketing. Instead of looking to interest a wide



- variety of consumers, for example, vertical marketing will focus on a specific subset or niche rather than branching out.
- K. *Brand's or Agency's Existing Contracts*: You need to be aware of and sensitive to any existing contracts a brand or agency might have when you're working with them. This might dictate the vendors used, for example, when there's a contract in place that overrides your preferences.
 - L. *Creative Agency Scope*: This refers to the scope of the creative agency work in question, and is typically determined when setting plan parameters.
 - M. *Creative Responsibilities*: It's important to set specific responsibilities for each role within the campaign creation and execution process. What exactly are your creative responsibilities, and what will be handled by someone else, be it someone the brand hires or a different member of your team? Don't leave this aspect of the campaign process to chance.
 - N. *Digital Ad Pricing Models*: There are a number of different pricing models available when it comes to digital advertising. The selected option will have budgetary consequences and constraints to follow, so it's important to understand the different options (cost per click, cost per engagement, cost per mile, cost per action, etc.) before making a decision.
 - O. *Historical Performance*: How have campaigns for the brand in question gone in the past? The historical performance is particularly important because it gives the digital media buyer and planner a guideline about how campaigns have historically performed, and perhaps what aspects can be tweaked to ensure a more successful performance.
 - P. *Legal Regulatory Restrictions*: As with anything in life, digital marketing has a number of regulations and restrictions of which the successful digital media planner and buyer will be aware and to which they will adhere. Failing to do so can have serious consequences for your client as well as yourself.
 - Q. *Media Capabilities*: Just as it's important to understand the brand's expectations, it is necessary to be reasonable about the potential capabilities of the media in question. Some expectations are just not reasonable given the performance and reach of the particular form of media in question.
 - R. *Media Landscape*: This refers to the current means of communication that tends to a large number of people. It's important to understand the current media landscape and plan your campaign accordingly.
 - S. *Media Timelines*: This refers to the process that advertising undergoes once it reaches the media. When can you expect to see results on certain websites? When do advertisements "refresh"? Understanding the media timeline will help answer those questions.
 - T. *Publisher Guidelines and Policies*: In addition to the brand guidelines, as well as the legal regulatory restrictions, it's important to understand what policies and guidelines your selected publisher(s) have set that you must follow.



- U. *Seasonality*: Not all marketing is appropriate for every season. Sometimes certain approaches will make more sense than others given the current advertising environment and, yes, even time of year. All of these things affect the way consumers behave and, therefore, have the potential to affect the way they receive your campaign.
- V. *Skillsets of Creative Development Team*: It's important to understand what exactly the creative development team is capable of. Do they have the skills necessary to accomplish the creative feats you need? If not, you'll need to either reconsider your strategy or look for additional creative support.
- W. *Stakeholder Timelines*: Investors often have their own opinions regarding campaign timelines and when results should start rolling in. Understanding stakeholder timelines can help you avoid unnecessary strife and develop strategies to manage stakeholders' expectations.
- X. *Standard and Custom Creative Development Turnaround Times*: This refers to how long it takes the creative team to complete custom and standard work. These timelines can impact your campaign deadlines if you're not careful, so make sure you understand how long you should expect to wait.
- Y. *The Brand Competitive Set*: Competitive sets refer to the principal group of competitors that a brand faces. Being aware of this competition is important when planning an effective marketing campaign.

4 | COLLABORATING ON CAMPAIGN BRIEFS

When everyone on a digital media team understands the big picture, the process tends to run smoothly. This is part of the reason why campaign briefs are so important. Digital media planners and buyers must be able to determine this overarching goal, interpret that picture for themselves and their team members, and establish a digital media strategy around it. This is done via the construction of campaign briefs – documents that contain the guidelines and parameters governing the project. These help ensure that everyone stays on track and works to create a cohesive and effective campaign.

Topic Review

Establish Plan Parameters

Before a digital media strategy can be created to benefit a specific brand, the digital media buyer and planner must first work to establish the plan parameters surrounding a specific campaign. Throughout this process, there are six different steps that the savvy and effective digital media buyer and planner will complete.



Figure 1 Six Steps for Establishing Plan Parameters



The successful digital media buyer and planner will ensure that they fully understand the vision and goals of the brand in question. They will work with brand representatives to obtain and discuss business objectives. This will help them make sure they understand why they're building the strategy in the first place. The next step in the process is confirming campaign timing and then aligning with the brand on both the target audience as well as the target region. All three of these items, but especially the latter two, can greatly impact successful strategies. Finally, the digital media buyer and planner will align with the brand about budget parameters and work to establish a savings methodology and goal.

Knowledge

- A. Brand History
- B. Media Landscape
- C. Other Brand In-Market Activity
- D. Seasonality
- E. Typical and Historical Media Objectives

Skills, Abilities, and Attributes

- A. Collaboration Skills
- B. Communication Skills
- C. Consultative Skills
- D. Listening Skills
- E. Negotiating Skills
- F. Project Management Skills

Tools

- A. Brand Brief

Develop Media Objectives

After creating a brand brief, digital media planners and buyers must next work on developing media objectives. This a chance to assess the business objectives provided by the brand and determine whether or not they are feasible. It's also a chance to work directly with the SME themselves to determine appropriate media objectives if the provided objectives are not reasonable, or to confirm said objectives with brand representatives one more time. This allows digital media buyers and planners to begin working on creating a media objective based upon the aforementioned business objectives. They present their resulting proposed media objectives to the brand and, upon gaining approval, move forward to the next part of the process.

Knowledge

- A. Audience Behavior
- B. Basic Marketing Fundamentals
- C. Brand Verticals



- D. Campaign Parameters
- E. Historical Performance
- F. Media Capabilities (i.e., what media is capable of achieving)

Skills, Abilities, and Attributes

- A. Articulate
- B. Basic Business Acumen
- C. Collaboration Skills
- D. Creativity
- E. Problem Solving Skills

Tools, Equipment, and Resources

- A. Brand Brief
- B. Brand First Party Data
- C. Past Campaign Performance
- D. Previous Brand Briefs
- E. SMEs

Establish Buying Guidelines

The next part of the process is to ensure that appropriate buying guidelines are established. This helps keep business running smoothly, and ensures that digital media buyers and planners understand whether or not there are any prior commitments or company guidelines to which they must adhere to throughout the buying process. The 11 steps contained in the establishing buying guidelines process follows.

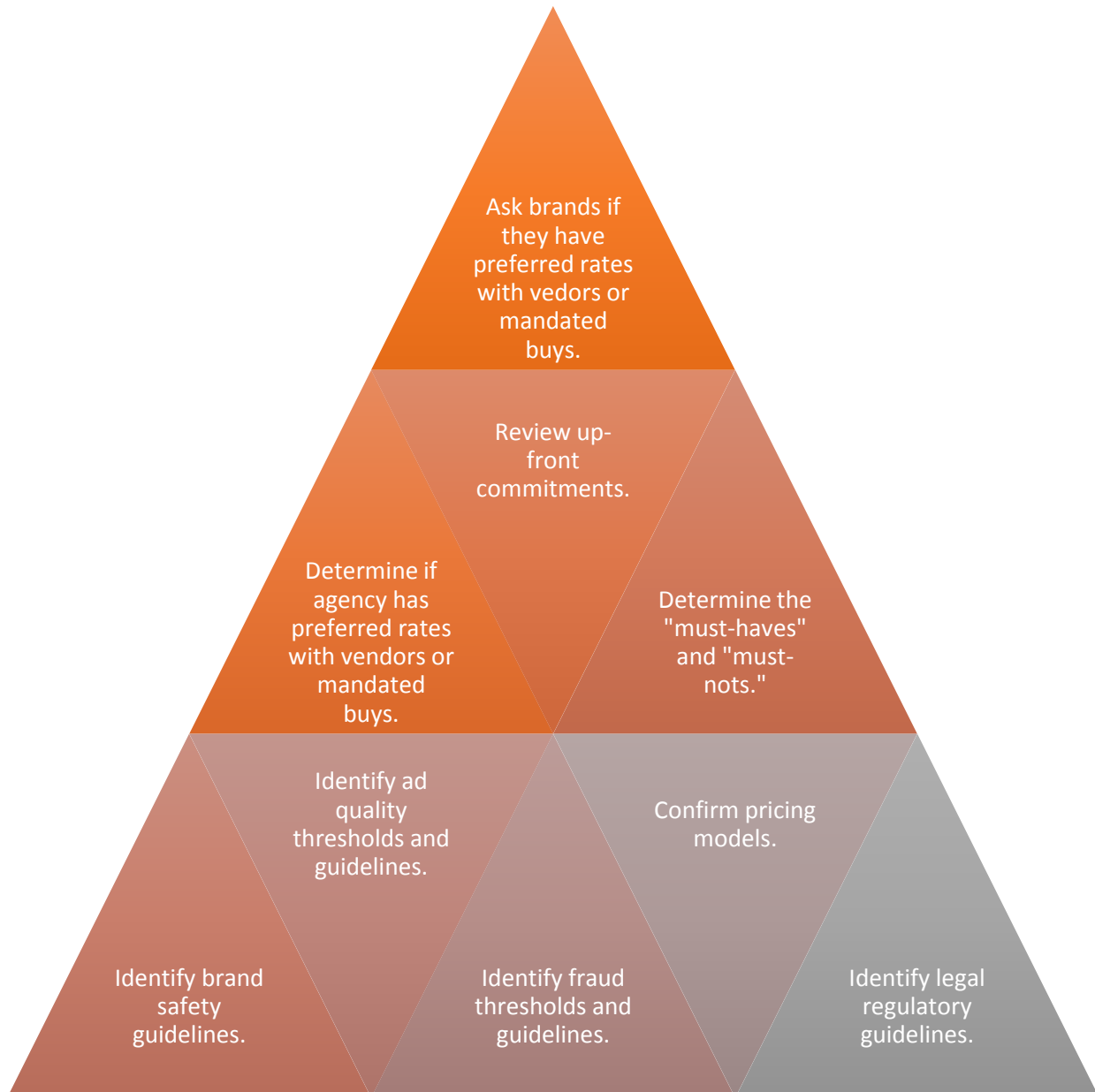


Figure 2 Establish Buying Guidelines

Knowledge

- A. Ad Verification Best Practices
- B. Brand Safety Best Practices
- C. Brand's or Agency's Existing Contracts
- D. Digital Ad Pricing Models

- E. Legal Regulatory Restrictions
- F. The Brand Competitive Set
- G. The Brand's Historical Context

Skills, Abilities, and Attributes

- A. Analytical
- B. Attention to Detail
- C. Communication Skills
- D. Proactive
- E. Resourceful

Tools, Equipment, and Resources

- A. Agency Corporate Contracts or Rate Cards
- B. Brand Brief
- C. Brand's Legal Team
- D. Competitive Research Tools (e.g., Ad Intel, Kantar, Moat)
- E. [IAB Standards](#)
- F. Industry Benchmarks (e.g., [ad verification](#), viewability)
- G. Regulatory Standards

Confirm Available Assets

Before the digital media strategy creation process can truly begin, it's important to determine what assets the digital media buyer and planner has at their disposal. This means verifying things like current and potential creative assets, as well as the delivery timeline. This is an important process that allows the digital media buyer and planner a chance to become familiar with the brand's current creative team and determine what they can bring to the table.

Some of the more specific things the digital media buyer and planner will do include:

- A. Collaborating with creative agency and brand team.
- B. Determining if there are existing creative assets.
- C. Determining if there will be new creative assets.
- D. Determining if creative tests are going to be implemented.
- E. Obtaining admin rights for brand pages or profiles.
- F. Reviewing any existing assets to be used.

Knowledge

- A. Brand Guidelines
- B. Creative Agency Scope
- C. Creative Responsibilities
- D. Publisher Guidelines and Policies
- E. Skillsets of Creative Development Team



- F. Standard and Custom Creative Development Turnaround Times
- G. Standard Creative Sizes and Specs

Skills, Abilities, and Attributes

- A. Attention to Detail
- B. Collaboration Skills
- C. Communication Skills
- D. Patience
- E. Persistence
- F. Project Management Skills

Tools, Equipment, and Resources

- A. Brand Guidelines
- B. IAB Standards
- C. Publisher Guidelines and Policies
- D. SMEs
- E. Spec Sheet

Construct Planning Timeline

In the digital world, everything moves fast. That means that everything else, including marketing campaigns, has to be just as quick and perfectly timed in order to keep up and attract attention. That's why constructing a planning timeline is probably one of the most important parts of the entire campaign brief creation process. At this stage, a smart digital media buyer and planner will take the time to do the following:

1. Determine the delivery date for strategy presentation.
2. Determine internal check points (progress reports).
3. Align stakeholder schedules and duties.
4. Determine dates for brand approvals.
5. Determine RFP process timeline.
6. Confirm launch date.
7. Confirm tech implementation timeline.

This is the point where the digital media buyer and planner determines the timeline of the project. This includes personal progress reports that will help keep them on track and in control of the project. Something else to keep in mind is that digital media buyers and planners aren't only responsible for keeping their team on track and informed. They are responsible for doing the same for the brand stakeholders, too, as well as any other teams and departments that are involved in the digital media process.

Knowledge



- A. Brand Expectations
- B. Brand Responsiveness
- C. Media Timelines
- D. Stakeholder Timelines

Skills, Abilities, and Attributes

- A. Ability to Manage Stakeholder Expectations
- B. Collaboration Skills
- C. Project Management Skills

Tools, Equipment, and Resources

- A. Brand Brief
- B. Spreadsheet Software

Sample Questions: Collaborating on Campaign Briefs

Correct answers for these sample questions are provided on the next page.

Question 1

These six steps are part of what process?

- Obtain business objectives from brand.
 - Confirm campaign timing.
 - Align on target audience.
 - Align on target region.
 - Align on budget parameters.
 - Establish savings methodology & goals.
-
- a. Establishing plan parameters
 - b. Creating a brand vision
 - c. Selecting a creative team
 - d. Confirming available assets

Question 2

It is important to _____ the brand's overall vision for a campaign.

- a. Ignore
- b. Reject
- c. Understand
- d. Neglect

Answers

Question 1

These six steps are part of what process?

- Obtain business objectives from brand.
 - Confirm campaign timing.
 - Align on target audience.
 - Align on target region.
 - Align on budget parameters.
 - Establish savings methodology & goals.
- a. **Establishing plan parameters**
 - b. Creating brand vision
 - c. Selecting a creative team
 - d. Confirming available assets

Question 2

It is important to _____ the brand's overall vision for a campaign.

- a. Ignore
- b. Reject
- c. **Understand**
- d. Neglect

5 | CREATING MEDIA STRATEGIES

Once the campaign brief has been created, it's time for the digital media buyer and planner to start on the digital media strategy itself. There are five distinct phases to this stage of the digital media buying and planning process.

1. Conduct Campaign Research Activities
2. Define Media Mix Allocation
3. Collaborate with Creative Agencies
4. Design Data Strategy and Measurement Plan
5. Develop Strategic Recommendations for Brand

Topic Review

Performance Review and Optimization

Conducting campaign research is probably one of the most important activities that a digital media buyer and planner will do. Because the success of a campaign largely depends upon the targeted audience, region, and professional landscape of the brand in question, strategy developed for one brand might differ greatly from that developed from another brand. This holds true even if the two brands in question are very similar. Successful digital media buyers and planners will complete the following six research steps before they continue to the next phase of the digital strategy creation process.

Research the media landscape.

Research brand category landscape.

Research target audiences.

Review past campaign performance.

Review research and data provided by client.

Perform SWOT analysis.

Figure 3 Steps to Construct a Planning Timeline

It should be clear from the above that this is perhaps the most “research heavy” part of the digital media strategy creation process. It’s the last chance for the digital media buyer and planner to really get a feel for the market, the brand, and the elements that need to be present in the digital strategy in order to create and run a successful campaign.

Knowledge

- A. Available SMEs (e.g., media intelligence or forecasting, account analytics, programmatic)
- B. Industry Data Sources

Skills, Abilities, and Attributes

- A. Ability to Interpret Data
- B. Ability to Tell Stories with Data
- C. Ability to Use Data Sources
- D. Analytical
- E. Creativity
- F. Organizational Skills
- G. Research Skills

Tools, Engineering, and Resources

- A. Agency Research Department
- B. Analytics Tools
- C. Brand First Party Data
- D. Brand Health Trackers
- E. Brand Sales Reports
- F. Brand Segmentation
- G. In-Market Research Tools
- H. Media Buying Tools
- I. Post-Buy Reports
- J. SMEs
- K. Syndicated Research Tools

Define Media Mix Allocation

Media mix is a phrase that refers to the wide variety of advertising channels a company can utilize when communicating with its audience in the process of completing a campaign according to its media plan. A media mix tends to include television, radio, online, and print advertising efforts, and contains the total amount budgeted of advertising for a particular media plan or advertising campaign.

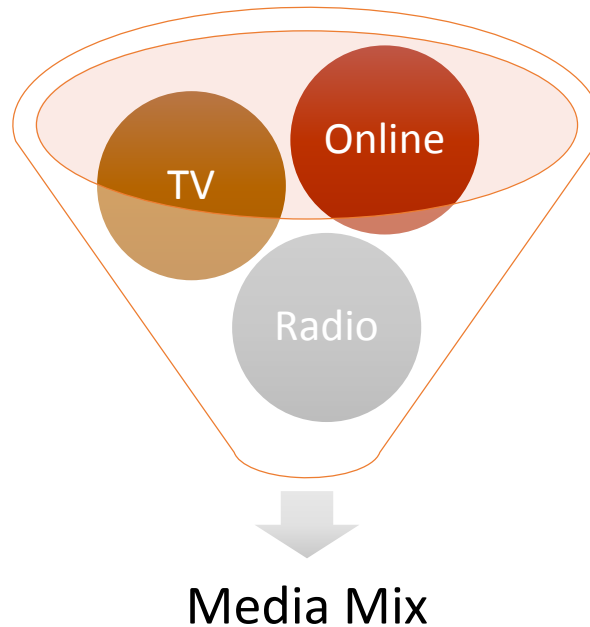


Figure 4 Media Mix

The media mix allocation refers to the amount of the advertising budget dedicated to each of the mix of media channels through which the brand will be communicating with customers.

Knowledge

- A. "Must-Haves" and "Must-Nots"
- B. Campaign Brief
- C. Media Capabilities (i.e., scalability)
- D. Media Math
- E. Strengths and Weakness of Media Types

Skills, Abilities, and Attributes

- A. Media Math Skills

Tools, Equipment, and Resources

- A. Historical MMA or ROI Reports
- B. Marketing Mixed Modeling Tools
- C. SMEs
- D. Spreadsheet Software

Collaborate with Creative Agencies

Once the media mix allocation has been defined, it's time for the digital media buyer and planner to begin to collaborate with various creative agencies. This will enable them to begin to pull

together content as well as sequencing, technology, and testing scenarios. All in all, the following will be determined through this collaboration.



Figure 5 Elements to keep in mind when collaborating with creative agencies.

Knowledge

- A. Creative Technology Capabilities
- B. Creative Testing Best Practices
- C. Licensing Guidelines
- D. Media Objectives
- E. Previous Creative Executions
- F. Roles and Responsibilities of Media and Creative Teams
- G. Statistical Tests (e.g., determining level of significance)

Skills, Abilities, and Attributes

- A. Ability to Compromise
- B. Communication Skills
- C. Coordination Skills
- D. Patience

Tools, Equipment, and Resources

- A. Brand Brief
- B. Brand Guidelines
- C. IAB Standards
- D. Relevant Creative Examples
- E. Spec Sheet

Design Data Strategy and Measurement Plan

A digital media strategy must have measurable elements that can be assessed to gain an understanding regarding the overall performance of the campaign. If these are absent, the successful elements of the strategy will be just as unknown as the unsuccessful, and future marketing campaigns will be in the dark when it comes to what works for this specific target audience and region (or, at least, what has worked in the past) and what doesn't. The design data strategy and measurement plan, therefore, is an important tool in the media strategy creation process as it allows digital media buyers and planners to set measurable key performance indicators (KPIs) in place in order to keep an eye on how everything is running. In this phase, the digital media buyer and planner does the following:

- A. Define campaign KPIs.
- 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 teams.
- H. Align on conversation windows with brand.
- I. Establish benchmarks for all KPIs.
- J. Establish reporting cadence.
- K. Creates Measurement plan.
- L. Creates data management work flow.

Knowledge

- A. A Brand's Owned Assets
- B. Ad Tech Data Work Flow
- C. Ad Technology
- D. Available Data Resources
- E. Benchmarks
- F. Brand Team's Reporting Expectations
- G. Creative Assets
- H. Historical Performance
- I. Industry Best Practices
- J. Media Objectives
- K. Path to Conversion
- L. Vendor Capabilities

Skills, Abilities, and Attributes

- A. Analytical Skills

- B. Attention to Detail
- C. Media Math Skills
- D. Organizational Skills

Tools, Equipment, and Resources

- A. Access to Brand's Site Map
- B. Analytics Tools
- C. Brand Brief
- D. Brand Data
- E. KPI Benchmarks
- F. Post Buy Report
- G. Reporting Template
- H. Research and Analytics Team

Develop Strategic Recommendations for the Brand

After all of the research and planning that has gone into the previous phases of this process, it's finally time to begin developing digital media strategy recommendations for the brand in question. This includes the following.

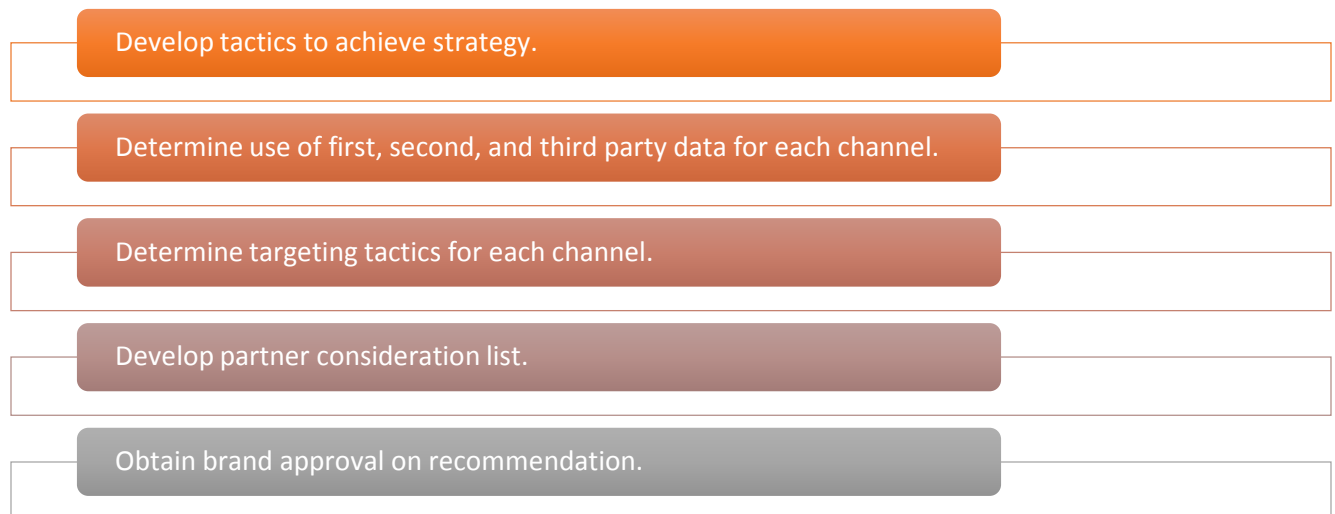


Figure 6 Steps to Developing Strategic Recommendations for Brand

Knowledge

- A. Available Partners
- B. Channel Capabilities
- C. Channel Mix
- D. Creative Assets
- E. Partner Capabilities
- F. Target Audience



G. The Flow of Data

Skills, Abilities, and Attributes

- A. Ability to Articulate
- B. Communication Skills
- C. Creativity
- D. Innovative
- E. Presentation Development Skills

Tools, Equipment, and Resources

- A. Brand Brief
- B. Internal POVs and Case Studies
- C. Media Kits
- D. Presentation Software
- E. Syndicated Research Tools
- F. Vendor Knowledge Base

Sample Questions: Creating Media Strategies

Correct answers for these sample questions are provided on the next page.

Question 1

Brands use media mix to _____.

- a. Avoid different channels of media.
- b. Communicate with their customers.
- c. Communicate with their stakeholders.

Question 2

The following five steps are part of what process?

- Develop tactics to achieve strategy.
 - Determine use of first, second, and third party data for each channel.
 - Determine targeting tactics for each channel.
 - Develop partner consideration list.
 - Obtain brand approval on recommendation.
- a. Designing data strategy and measurement plans.
 - b. Determining an element's KPI.
 - c. Developing strategic recommendations.

Answers

Question 1

Brands use media mix to _____.

- a. Avoid different channels of media.
- b. Communicate with their customers.**
- c. Communicate with their stakeholders.

Question 2

The following five steps are part of what process?

- Develop tactics to achieve strategy.
 - Determine use of first, second, and third party data for each channel.
 - Determine targeting tactics for each channel.
 - Develop partner consideration list.
 - Obtain brand approval on recommendation.
-
- a. Designing data strategy and measurement plans.
 - b. Determining an element's KPI.
 - c. Developing strategic recommendations.**

6 | DEVELOPING DIGITAL MEDIA PLANS

Once the digital media buyer and planner have taken the time to create media strategies and discuss them with the brand, it's time to start developing digital media plans. There are four different stages to this phase.

1. Manage RFP Process
2. Evaluate and Negotiate Media Proposals
3. Forecast Media Returns
4. Finalize Media Plan

Topic Review

Manage RFP Process

A digital media buyer and planner must be adept with the Request for Proposal (RFP) process in order to keep the digital media strategy plans running smoothly. There are several things that the savvy digital media buyer and planner will keep in mind during this process, including:

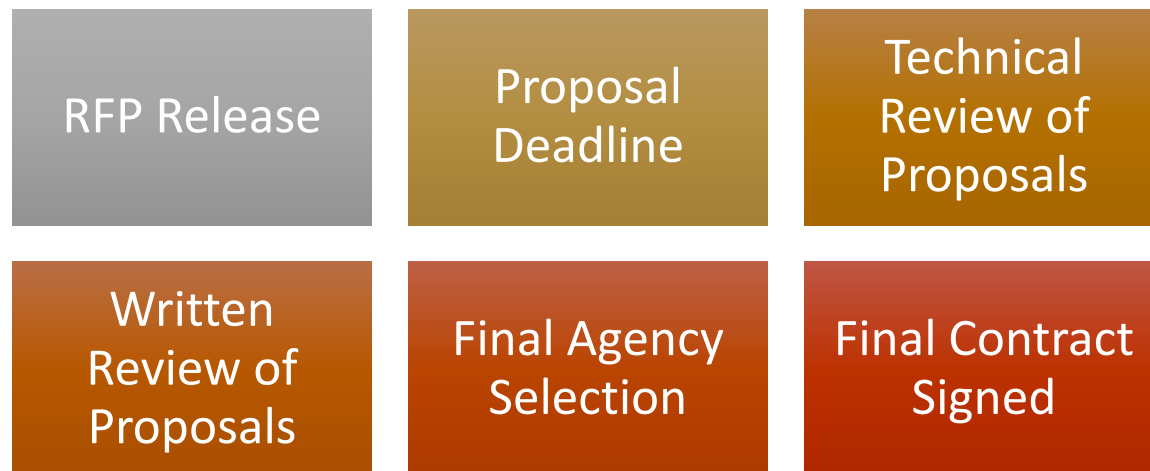


Figure 7 Managing the RFP Process

As you can see, the digital media buyer and planner needs to keep the overall RFP process in mind, from the initial release to the final signed contract. It's important to keep the brand's needs and wants in mind when selecting vendors, and to review all proposals carefully before accepting, discarding, or making changes to them.



Knowledge

- A. Acceptance Of Third Party Tags And Technology
- B. Ad Verification Guidelines And Thresholds
- C. Available Partners In The Marketplace
- D. Campaign Parameters
- E. Non-Starters
- F. Organizational Mandates That Need To Be Included In RFP
- G. Project Timeline

Skills, Abilities, and Attributes

- A. Ability To Be Articulate
- B. Ability To Multi-Task
- C. Communication Skills
- D. Project Management
- E. Responsive
- F. Trustworthiness

Tools, Equipment, and Resources

- A. Media Research Tools (E.G., ComScore)
- B. RFP Software (E.G., Idesk)
- C. RFP Templates
- D. Vendor Databases

Evaluate and Negotiate Media Proposals

Eliciting proposals is not the most challenging part of the digital media plan development process. Once the proposals start rolling in, successful digital media buyers and planners will be careful to closely evaluate them. They will do this with their brand's needs and goals in mind, and be sure to negotiate the best terms possible for their brand. This includes checking for things like execution feasibility and vendor availability and flexibility when it comes to things like the use of ad technology. Experienced digital media buyers and planners will also understand the importance of staying within their client's budget, and will do everything in their power to research current pricing benchmarks and secure the best price available for them.

Knowledge

- A. Brand Savings Goals
- B. Campaign Goals
- C. Campaign Parameters
- D. Creative Assets
- E. Execution Feasibility
- F. Existing Rate Cards
- G. Industry Jargon



- H. Marketplace Conditions
- I. Pricing Benchmarks
- J. Specific Terms And Conditions
- K. Technological Capabilities
- L. Vendor Acceptance Of Ad Technology
- M. Vendor Flexibility

Skills, Abilities, and Attributes

- A. Ability To Multi-Task
- B. Attention To Detail
- C. Basic Business Acumen
- D. Critical Thinking
- E. Objective
- F. Open-Minded
- G. Organizational Skills
- H. Realistic
- I. Reasonable
- J. Tactfulness

Tools, Equipment, and Resources

- A. Internal POVs and Case Studies
- B. Other Agency Experiences
- C. Previous Media Plans
- D. SMEs
- E. Syndicated Research Tools
- F. Vendor Database
- G. Vendor Reputation

Forecast Media Returns

No marketing budget is infinite. It's important, therefore, that digital media buyers and planners take the time to evaluate their media plan and attempt to accurately predict the return on their client's investment. This involves going over the potential returns of the digital media campaign and looking at things like:

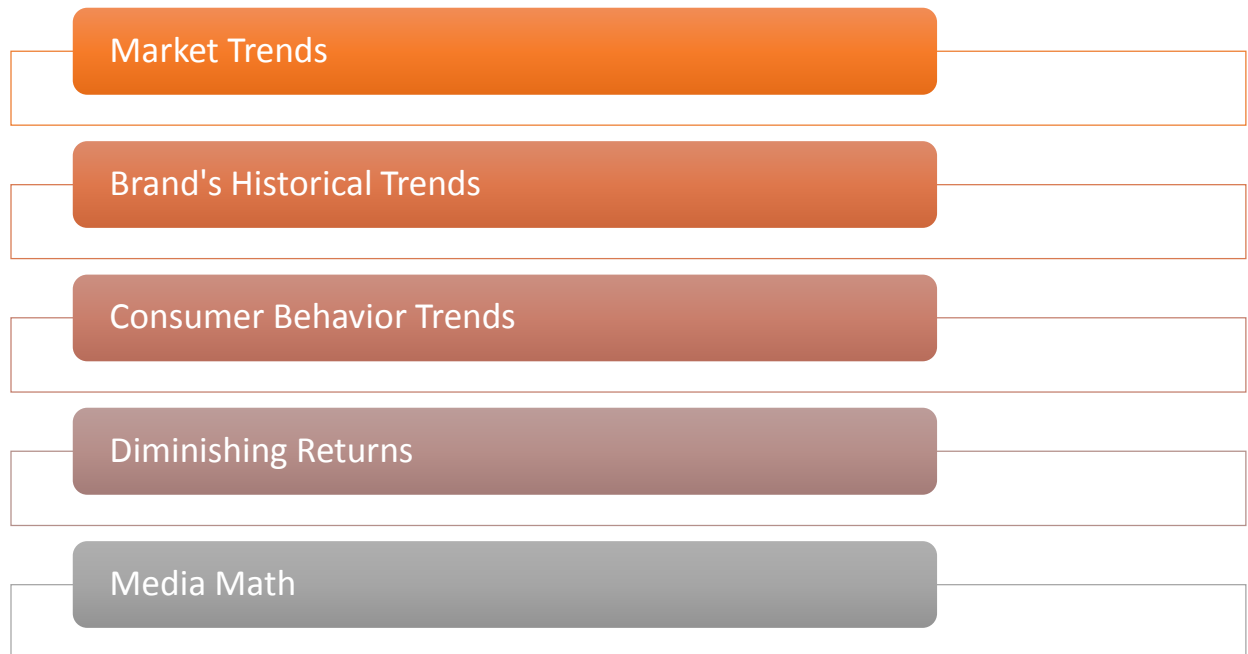


Figure 8 Elements included in determining investment return.

Knowledge

- A. Available Reach Within Each Channel
- B. Brand's Business Trends
- C. Brand's Promotional Calendar
- D. Category Trends
- E. Consumer Behavior Trends
- F. Diminishing Returns
- G. Historical Performance Of Past Campaigns
- H. Knowledge Of The Path To Purchase
- I. Media Math
- J. Performance Benchmarks

Skills, Abilities, and Attributes

- A. Analytical
- B. Attention To Detail

Tools, Equipment, and Resources

- A. Brand Sales Data
- B. Data Sources
- C. Keyword List
- D. SMEs

Finalize Media Plans

Once you've gone through the proposal and vendor selection process, as well as gone through the trouble to forecast likely returns on your brand's investments, it's time to take a final look at your media plans. The successful digital media buyer and planner will go over everything one last time to ensure that all necessary elements are there, and the plans are poised to bring success and results to the brand in question. This means having a clear understanding of things like the fee structure, the finance process of the brand in question, and even the most minute details in the media plan.

Knowledge

- A. Agency Fee Structure
- B. Brand's Finance Process
- C. Creative Best Practices
- D. Media Math
- E. Media Plan Details
- F. Non-Working Media Costs (E.G., Ad Serving Fees, DMP Costs)
- G. Organizational Finance Processes
- H. Stakeholder Expectations
- I. Target Audience

Skills, Abilities, and Attributes

- A. Basic Business Acumen
- B. Communication Skills
- C. Presentation Skills
- D. Spreadsheet Software Skills
- E. Storytelling Skills
- F. Writing Skills

Tools, Equipment, and Resources

- A. Authorization Software
- B. Channel SMEs
- C. Internal And Brand's Finance Department
- D. Media Flowchart Software
- E. Media Flowchart Template
- F. Media Plan Template



Sample Questions

Correct answers for these sample questions are provided on the next page.

Question 1

All of the following are part of managing the RFP process except:

- a. RFP Release
- b. Mixed Media Selection
- c. Proposal Deadline
- d. Final Agency Selection

Question 2

When forecasting media returns, it's important to look at:

- a. Market Trends
- b. Print Media Trends
- c. Visual vs. Written Media



Answers

Question 1

All of the following are part of managing the RFP process except:

- a. RFP Release
- b. Mixed Media Selection**
- c. Proposal Deadline
- d. Final Agency Selection

Question 2

When forecasting media returns, it's important to look at:

- a. Market Trends**
- b. Print Media Trends
- c. Visual vs. Written Media

7 | EXECUTING CAMPAIGNS

There are six specific phases to executing campaigns.

1. Negotiate Vendor Terms and Conditions
2. Manage IO Process
3. Kick-Off Campaign
4. Manage Trafficking and Tagging Process
5. Manage Reporting Process
6. Verify Campaign Launch

Topic Review

Negotiate Vendor Terms and Conditions

Successful digital media buyers and planners understand that sometimes the best contract is the one hard-won after hours of negotiation. As a digital media buyer and planner, you need to have the ability and willingness to approach vendor terms and conditions with a keen eye. Look over the contracts carefully and think about your client's needs and wants. Do these terms help them succeed and best achieve their marketing goals? You should have a firm understanding of digital media terms and conditions, and of what's "typical" versus what is possible through negotiation. Strive to promote the following through your negotiations.

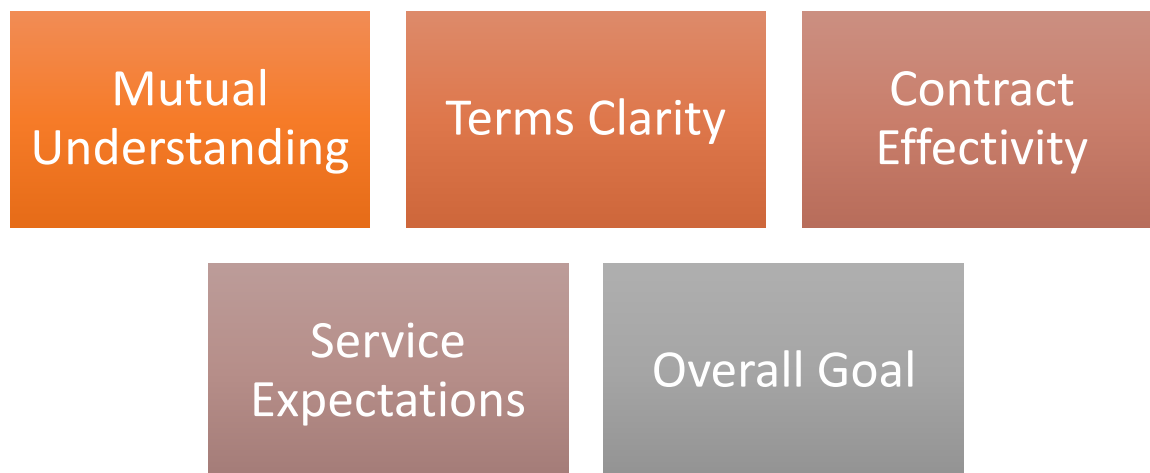


Figure 9 Negotiating Vendor Terms and Conditions

Knowledge



- A. Best Practices In Digital Media Terms And Conditions
- B. Brand's Terms And Conditions
- C. [IAB's Terms And Conditions](#)
- D. Vendor's Terms And Conditions

Skills, Abilities, and Attributes

- A. Attention To Detail
- B. Basic Business Acumen
- C. Negotiating Skills
- D. Patience

Tools, Equipment, and Resources

- A. Finance Team
- B. [IAB Terms And Conditions](#)
- C. Internal Terms And Conditions
- D. Legal Team
- E. Regulatory Standards

Manage IO Process

While some might argue that the insertion order (IO) digital media purchasing process is on its way out, the savvy digital media buyer and planner will have a good grasp on how to manipulate the process. You should understand the following in order to ensure you have a handle on the basic IO process.

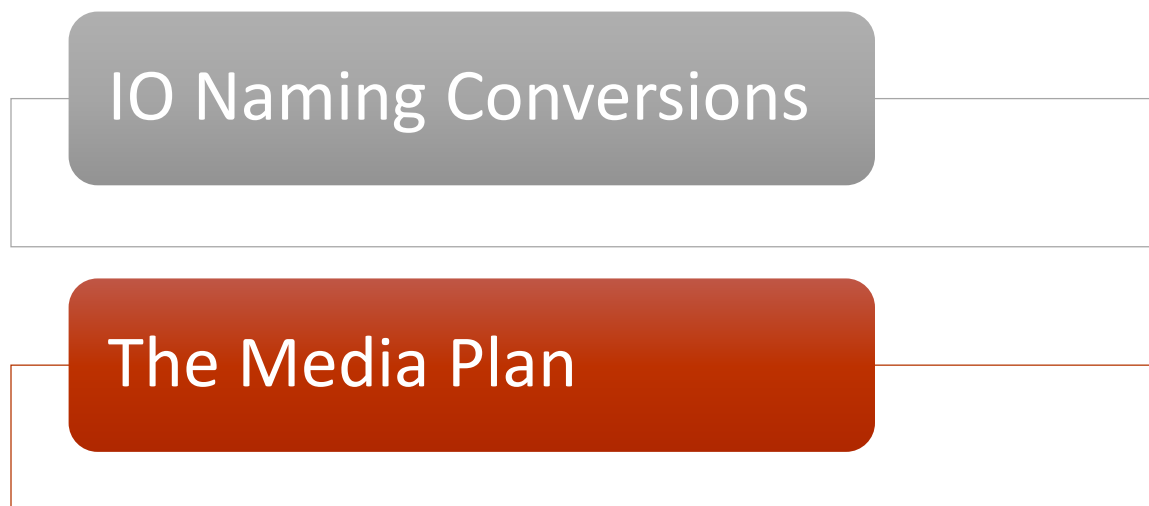


Figure 10 IO process basics.

Knowledge

- A. IO Naming Conventions
- B. IO Software System
- C. The Media Plan

Skills, Abilities, and Attributes

- A. Attention To Detail
- B. Time Management Skills

Tools, Equipment, and Resources

- A. IO Software System
- B. Media Plan
- C. Naming Convention Document
- D. Vendor Contact Information

Kick-Off Campaign

Finally, after all of your hard work and preparation, it's time to kick off the campaign. Don't get ahead of yourself, though! Now is not the time to charge blindly forward. As with any stage in the digital media buying and planning process, kicking off the campaign requires paying attention to certain elements in order to ensure success. It is vital that the digital media buyer and planner pay attention to the defined goals and timeline specific to their campaign. They should also have a call to action plan as well as a lead nurturing plan – after all, it doesn't do any good to generate more potential leads if you can't turn them into sales and keep them interested.

Knowledge

- A. Ad Formats
- B. Ad Serving
- C. Ad Tracking
- D. Ad Types
- E. How The Media Ecosystem Functions
- F. Media Plan
- G. The Flow Of Data
- H. Typical Production Timelines

Skills, Abilities, and Attributes

- A. Account Management Skills
- B. Communication Skills
- C. Multi-Tasking Skills
- D. Project Management Skills
- E. Time Management Skills



Tools, Equipment, and Resources

- A. Creative Examples
- B. Media Plan
- C. Production Timelines
- D. Vendor Spec Sheet

Manage Trafficking and Tagging Process

Just like failing to plan for success with lead generation before launching the campaign, not understanding how to manage trafficking and tagging can render all of the efforts of even the best digital media buyer and planner useless. You must ensure that the brand in question has sufficient hardware and experience to handle increased traffic load. In fact, plan for the best/worst case scenario and ensure that the website can handle even the most viral of campaigns. You should also understand how to efficiently use media tags in the campaign as well as when and where to place them.

Knowledge

- A. Ad Servers
- B. Bid Landscapes
- C. Campaign Parameters
- D. KPIs
- E. Licensing
- F. Media Placements
- G. Roles And Responsibilities Of Teams
- H. Site Map
- I. Tag Functionality
- J. The Brand Data Architecture
- K. The Trafficking Process

Skills, Abilities, and Attributes

- A. Ability To Manage Stakeholder Expectations
- B. Accountability
- C. Attention To Detail
- D. Common Sense
- E. Communication Skills
- F. Efficiency
- G. Project Management Skills
- H. Time Management Skills

Tools, Equipment, and Resources

- A. Ad Ops Team
- B. Ad Serving Platform (E.G., Double Click)
- C. Ad Verification Tools



- D. Analytics Tools
- E. Buying Platforms
- F. Creative Assets
- G. Site Map
- H. Tagging Strategy
- I. Traffic Sheet

Manage Reporting Process

The digital media buyer and planner's work does not end once the campaign is launched. They must also collect a variety of available data and organize it in comprehensible ways. That means understanding how to compile readable reports—the ability to turn raw data into a more narrative-driven text. The efficient digital media buyer and planner will understand how to interpret various metrics and benchmarks, and how to apply these to the campaign parameters in order to create usable, meaningful reports.

Knowledge

- A. Ad Technology
- B. Available Metrics
- C. Campaign Parameters
- D. Data Architecture
- E. Data Sources
- F. Industry Benchmarks
- G. KPIs
- H. Media Math
- I. Roles And Responsibilities Of Teams
- J. Stakeholder Expectations
- K. The Media Plans

Skills, Abilities, and Attributes

- A. Analytical Thinking Skills
- B. Attention To Detail
- C. Data Visualization Skills
- D. Spreadsheet Software Skills
- E. Storytelling Skills

Tools, Equipment, and Resources

- A. Ad Ops Team
- B. Ad Technology
- C. Analytics Teams
- D. Analytics Tools
- E. Brand Data



- F. Media Buying Platforms
- G. Reporting Templates
- H. SMEs
- I. Spreadsheet Software
- J. Third Party Partners

Verify Campaign Launch

A successful digital media buyer and planner understands that they need to independently verify their campaign has successfully launched. Things happen, processes can fail, and certain decisions might not end up being the most effective. For this reason, it's important to take a look at the available data and files to ensure that the campaign is taking off as intended.

Knowledge

- A. Creative Assignments
- B. How To Pull A Delivery Report
- C. Media Buying Platforms
- D. Media Math
- E. QA Checklist
- F. The Media Plan
- G. Utilized Ad Technology

Skills, Abilities, and Attributes

- A. Ability To Multi-Task
- B. Analytical
- C. Attention To Detail
- D. Communication Skills
- E. Organization Skills
- F. Presentation Skills
- G. Proactive

Tools, Equipment, and Resources

- A. Ad Ops Team
- B. Ad Server
- C. Media Buying Platform
- D. Presentation Software
- E. Screen Capture Tool
- F. Vendors



Sample Questions

Correct answers for these sample questions are provided on the next page.

Question 1

When negotiating, it's important to keep all of the following in mind except:

- a. Contract Effectivity
- b. Service Expectations
- c. Overall Brand Goal
- d. Vendor Preference

Question 2

The IO Process includes all of the following except:

- a. The Media Plan
- b. IO Software System
- c. IO Naming Conversions
- d. IO Financial Datasheet



Answers

Question 1

When negotiating, it's important to keep all of the following in mind except:

- a. Contract Effectivity
- b. Service Expectations
- c. Overall Brand Goal
- d. **Vendor Preference**

Question 2

The IO Process includes all of the following except:

- a. The Media Plan
- b. IO Software System
- c. IO Naming Conversions
- d. **IO Financial Datasheet**

8 | MANAGING CAMPAIGNS

There are four distinct phases to follow when it comes to managing campaigns.

1. Analyze and Optimize Campaign
2. Troubleshoot Campaign
3. Manage Flowchart Process
4. Managing Digital Media Finances

Topic Review

Analyze and Optimize Campaign

Experienced digital media buyers and planners understand that it's important to keep tabs on a campaign once it has launched. They'll be available to monitor how a campaign is progressing and make changes on the fly to help refine and optimize it. This is an incredible advantage of digital media campaigns, where digital media buyers and planners have the ability to assess the performance of a campaign using a wealth of tools, and take steps to enhance it for the target audience. There are a few key areas to assess when analyzing and optimizing digital media campaigns.



Figure 11 Optimize and analyze digital media campaigns.

Knowledge

- A. Biddable Landscape
- B. Brand Benchmarks
- C. Data Strategy



- D. Industry Benchmarks
- E. KPIs
- F. Media Math
- G. Media Platforms
- H. Regulatory Compliance Standards
- I. Saleable Media
- J. Terms And Conditions
- K. The Media Plan

Skills, Abilities, and Attributes

- A. Ability To Interpret Data
- B. Analytical Thinking Skills
- C. Attention To Detail
- D. Basic Business Acumen
- E. Communication Skills
- F. Consistency
- G. Data Visualization Skills
- H. Ethical
- I. Negotiation Skills
- J. Presentation Skills
- K. Spreadsheet Software Skills

Tools, Equipment, and Resources

- A. Analytics Tools
- B. Media Buying Platform
- C. Reporting Template
- D. Reporting Tools
- E. SMEs
- F. Spreadsheet Software

Troubleshoot Campaign

Sometimes, despite the best efforts of everyone involved, digital media campaigns just don't work out the way they were supposed to. The numbers just aren't adding up, and the brand isn't seeing the kind of return they anticipated. When this happens, it's up to the digital media buyer and planner to take the time to troubleshoot the campaign. Perhaps they missed something in their original research and need to revisit historical campaign context in the market, for example, and take another look at plan parameters. Effective digital media buyers and planners will also understand when to escalate an issue and when to let it go.

Knowledge

- A. Ad Serving Verification Systems



- B. Data Strategy
- C. Historical Campaign Context
- D. Media Buying Platform
- E. Plan Parameters
- F. When To Escalate A Problem

Skills, Abilities, and Attributes

- A. Ability To Build Relationships
- B. Ability To Identify Inaccuracies In Data
- C. Attention To Detail
- D. Basic Business Acumen
- E. Coordination Skills
- F. Flexibility
- G. Level-Headed
- H. Prioritization Skills
- I. Proactive
- J. Problem Solving Skills

Tools, Equipment, and Resources

- A. Ad Ops Team
- B. Ad Servers
- C. Ad Verification Platforms
- D. DMP
- E. Media Buying Platforms
- F. Research Team
- G. SMEs
- H. Tag Verification Software
- I. Vendors

Manage Flowchart Process

Flowchart process allows digital media buyers and planners to recognize relationships between major parts of the campaign. This is especially useful for particularly complex campaigns that are composed of a wide variety of different elements that might have intricate relationships not easily captured by other data management processes. Flowcharts have a number of advantages, including:

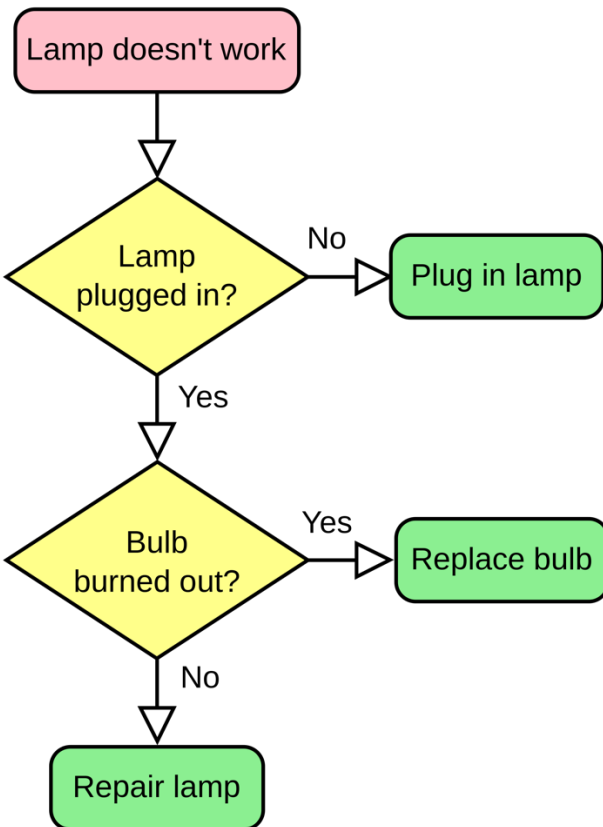
Clarifying a Process

Portraying Information Using Text & Symbols

Simplifying Relationships for the Reader

Figure 12 Advantages of Flowcharts.

You can see an example of a flowchart below.



Source: <https://en.wikipedia.org/wiki/Flowchart>

Knowledge

- A. Brand's Finance Rules
- B. Changes To The Media Plan
- C. Media Math
- D. The Media Plan

Skills, Abilities, and Attributes

- A. Accurate
- B. Attention To Detail
- C. Communication Skills
- D. Data Visualization Skills
- E. Proactive
- F. Reactive
- G. Spreadsheet Software Skills

Tools, Equipment, and Resources

- A. Ad Server
- B. Delivery Report
- C. Flowchart Software

D. Spreadsheet Software

Managing Digital Media Finances

Finally, digital media buyers and planners must have a good understanding about how to manage finances. A brand's budget is important, and underutilizing it can be just as detrimental as spending too much. With this in mind, the successful digital media buyer and planner will carefully assess areas like accounting, brand billing terms, buying models, and media math in order to ensure that the budget is used to the fullest while staying within its set parameters.

Knowledge

- A. Accounting
- B. Agency Billing Processes
- C. Brand Billing Terms
- D. Brand's Billing Processes
- E. Buying Models
- F. Contractual Agreements
- G. Media Math
- H. Non-Working Media Rates
- I. Savings Methodology And Goals
- J. The Brand's Fiscal Calendar
- K. The Media Plan

Skills, Abilities, and Attributes

- A. Ability To Meet Deadlines
- B. Accuracy
- C. Attention To Detail
- D. Basic Math Skills
- E. Communication Skills
- F. Problem Solving Skills
- G. Spreadsheet Software Skill

Tools, Equipment, and Resources

- A. Accounting Sheet
- B. Analytics Tools
- C. Billing And Finance Teams
- D. Billing Software
- E. Billing Template
- F. Media Buying Platform
- G. Media Planning Flowcharts
- H. Vendor Invoices



Sample Questions

Correct answers for these sample questions are provided on the next page.

Question 1

Brand benchmarks, KPIs, and the media plan are all important to which of the following processes?

- a. Troubleshooting the Campaign
- b. Optimizing the Campaign
- c. Managing the Flowchart Process
- d. Managing Digital Media Finances

Question 2

Flowcharts help users do all of the following except:

- a. Simplify Complicated Processes
- b. Portray Information Using Text and Symbols
- c. Provide an In-Depth Explanation with Lots of Text



Answers

Question 1

Brand benchmarks, KPIs, and the media plan are all important to which of the following processes?

- a. Troubleshooting the Campaign
- b. Optimizing the Campaign**
- c. Managing the Flowchart Process
- d. Managing Digital Media Finances

Question 2

Flowcharts help users do all of the following except:

- a. Simplify Complicated Processes
- b. Portray Information Using Text and Symbols
- c. Provide an In-Depth Explanation with Lots of Text**

9 | EDUCATING STAKEHOLDERS

There are three distinct stages to follow when it comes to educating stakeholders.

1. Create Ad Hoc Reporting
2. Construct Industry POVs
3. Set up Media Days

Topic Review

Create Ad Hoc Reporting

When it comes to digital media buying and planning, you'll spend a lot of time looking at the big picture. Sometimes, however, it's important to be able to focus on a specific issue at hand without worrying about broader implications. This is where ad hoc reporting comes in. Ad hoc reporting is designed to be used with a single issue in order to provide meaningful and contextual information about said issue without attempting to tie in broader elements. This is helpful if you're looking into a specific problem or attempting to generate more detailed reports of a single area.

Knowledge

- A. Brand's Goals
- B. Budget Tracking Systems
- C. Buying System
- D. Competitive Sets
- E. Data Architecture
- F. Industry Standards
- G. Media Math
- H. Media Plans
- I. Reporting Tools
- J. The Tech Stack

Skills, Abilities, and Attributes

- A. Ability To Manage Stakeholder Expectations
- B. Ability To Prioritize
- C. Analytical
- D. Attention To Detail
- E. Basic Business Acumen
- F. Communication Skills
- G. Data Visualization Skills
- H. Flexibility
- I. Organizational Skills

J. Time Management Skills

Tools, Equipment, and Resources

- A. Analytics Tools
- B. Billing Software
- C. Flowcharts
- D. Media Buying Platforms
- E. Media Plan
- F. Reporting Templates
- G. Reporting Tools
- H. SMEs
- I. Spreadsheet Software
- J. Syndicated Research Tools

Construct Industry POVs

Another tool that's particularly useful when it comes to educating stakeholders is the industry POV. Point of view (POV) reports are used to help investors understand the target market and how it will be accessed by different marketing options. This is helpful when attempting to explain why a particular marketing strategy would be more useful than others, and can really help break down the complex and often jargon-heavy reports that accompany proposals. To create the best industry POV possible, it's important to consider:

The Industry
in Question

The Brand's
Expectations

Third Party
Research

The Target
Audience

Figure 13 Industry POV considerations.



Knowledge

- A. Audience For POVs
- B. Brand's Expectations
- C. The Industry
- D. Third Party Research Tools

Skills, Abilities, and Attributes

- A. Basic Business Acumen
- B. Communication Skills
- C. Critical Thinking
- D. Objectivity
- E. Research Skills
- F. Technical Writing Skills

Tools, Equipment, and Resources

- A. Case Studies
- B. Historical Reports
- C. Internal Vendor Database
- D. POV Template
- E. Search Engine
- F. SMEs
- G. Third Party Research Tools
- H. Trade Publications

Set Up Media Days

One of the final, but most important, resources to use when educating stakeholders is the use of media days. The successful digital media planner and buyer will use media days to help illustrate a campaign's performance and explain the reasons for its success to the stakeholders in question. It's a great opportunity for everyone to understand exactly where, how, and why a particular campaign is working (or not).

Knowledge

- A. Brand's Expectations
- B. Logistical Constraints
- C. Media Day Subjects
- D. Stakeholder Schedules
- E. Vendors

Skills, Abilities, and Attributes

- A. Attention To Detail
- B. Client Management Skills



- C. Communication Skills
- D. Event Management Skills
- E. Leadership Skills
- F. Multi-Tasking Skills
- G. Organization Skills
- H. Time Management Skills

Tools, Equipment, and Resources

- A. IT Support
- B. Media Kits
- C. Meeting Space
- D. Office Services
- E. Presentations
- F. Spreadsheet Software



Sample Questions

Correct answers for these sample questions are provided on the next page.

Question 1

The following should all be taken into consideration when constructing industry POVs except:

- a. Brand Expectation
- b. Target Audience
- c. Third Party Research
- d. Personal Opinion

Question 2

Media days are useful when it comes to:

- a. Educating Stakeholders
- b. Constructing an Industry POV
- c. Boosting IO Buying
- d. Creating an Ad Hoc Report



Answers

Question 1

The following should all be taken into consideration when constructing industry POVs except:

- a. Brand Expectation
- b. Target Audience
- c. Third Party Research
- d. **Personal Opinion**

Question 2

Media days are useful when it comes to:

- a. **Educating Stakeholders**
- b. Constructing an Industry POV
- c. Boosting IO Buying
- d. Creating an Ad Hoc Report