# IAB DIGITAL AD OPERATIONS CERTIFICATION

**STUDY GUIDE**

**DECEMBER 2015**

# 1 | INTRODUCTION

An individual working in Digital Ad Operations works closely with advertisers and agencies to deliver exceptional customer service throughout the media buying lifecycle, to include creative management, launch confirmation, and pacing confirmation. This includes providing quality assurance, logging traffic, pulling campaign reports, entry of proposals, and reviewing the status of campaigns to optimize their performance, while assisting the Ad Sales, Marketing, and Product teams in formulating media plans.

This IAB Digital Ad Operations Certification (DAOC) is the highest industry credential for digital ad operations professionals. Individuals who earn the certification have demonstrated their knowledge and competency in the area of digital ad operations, and are dedicated to upholding high standards of ethical and professional practice in the industry. Individuals meeting eligibility requirements must pass a multiple-choice exam in order to qualify for certification and earn the DAOC designation.

The purpose of this study guide is to improve candidates' preparedness for taking the DAOC exam. It contains useful information about exam and question format, requisite specialized knowledge, and specific content areas that will be tested. Spread throughout the guide are 20 sample exam questions (with a detailed answer guide in Appendix B) to acquaint candidates with question style and identify priority topics to review as they prepare for the exam. The study guide also provides links to areas on the web which might provide useful in refreshing candidates' familiarity with specific knowledge, capabilities, and skills that may appear on the exam.

The 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 Digital Ad Operations page of the certification website, at http://www.iab.com/iab-ad-ops-certification-overview/.

# 2 | ABOUT THE EXAM

### EXAM FORMAT

The IAB Digital Ad Operations certification (DAOC) exam consists of 100 multiple-choice questions and you have two hours to take the exam. Eighty questions are scored, and 20 are pre-tested for statistical purposes, but not scored. You are scored only on the 80 exam questions and only correct answers are counted. You will not receive feedback on the pre-tested questions.

Your appointment at the testing lab is for two hours. You will have five minutes to agree to the nondisclosure agreement for the DAOC 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 the 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 person working in digital ad operations.

### SCORING

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 job of a digital ad operations professional. The 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.

Candidates will receive their score report at the test center, which will designate their pass/fail status. 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 provided instructions for completing the certification process. Candidates who fail will receive an assessment 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

Successful and knowledgeable individuals working in digital ad operations should have a fundamental understanding of these seven areas covered in the exam:

**Executing Campaign Launch.**  Ensuring a successful launch requires end-to-end operations management that starts well before a campaign goes live.  In the important planning stages, a digital ad operations professional helps to define campaign goals, identify execution strategy, and check inventory and availability against the desired targeting criteria.  As the campaign moves toward implementation, the role of the digital ad operations professionals involved in the campaign launch include: building the campaign strategy into an ad serving system based on the agreed upon order details; creating and implementing ad tags; and applying other marketing tags, like web beacons for advertiser site pages and any network tracking pixels.  At this phase, a digital ad operations professional minimizes potential for problems by performing a vendor quality assurance check, reviewing the media plan, aligning assets with the media plan, implementing creative assets, and performing pre-launch testing.  After all of this pre-launch work, a digital ad operations person is finally to launch and configure assets, verify a successful launch, develop campaign workflow, and implement creative separation.

**Managing Live Campaigns.**  Digital media offers greater opportunity for engagement, interactivity, targetability, measurability, and on-the-fly optimization than traditional media.  To ensure optimal performance, a digital ad operations professional performs ongoing quality assurance and optimization reviews for each live campaign throughout its lifecycle.  Actions include managing client expectations, assessing campaign performance through campaign reports, flagging and troubleshooting live issues, and optimizing campaigns. These operations support discrepancy investigations, media plan modification, and campaign wrap-up activities.  A digital ad operations professional is also responsible for client communications (especially related to analytic performance overviews), defining monitoring or alerting requirements, carrying out ongoing security checks, and monitoring fraudulent activity.

**Managing Emerging Technologies.**  Over the course of planning, executing, and overseeing live campaigns, a digital ad operations professional is often asked to consider and incorporate emerging technologies.  A successful ad operations person must evaluate the feasibility of specific technologies, research their industry adoption, evaluate their supportability, and conduct beta testing.  She often advises on product definition and new business development related to the adoption and usage of emerging technologies in future campaigns.

**Creating, Maintaining, and Documenting Product Offerings.**  To ensure the success of future campaigns, a digital ad operations professional often works to establish campaign metrics and contribute to pricing structure, products, and packaging of the company's advertising products. She provides product feedback to vendors and partners, logs and reports bugs, identifies and documents workarounds, and submits enhancement requests.  She evaluates success metrics, contributes to

product or feature sunset strategy, executes/implements custom solutions, and contributes to case studies related to specific advertising product offerings.

**Managing Incidents.**  Despite the best pre-launch planning and troubleshooting, unanticipated campaign delivery and reporting problems do sometimes arise, and it is the digital ad operations professional's job to manage them.  After performing initial diagnostics and identifying the severity of an incident, a digital ad operations person will communicate expectations, updates, and resolutions to internal and external clients.  She will also advise on business impact and resolutions, and create and supply a post-mortem analysis of the incident to all relevant parties.

**Inventory Management and Integrity.**  Campaign delivery incidents are less likely to arise if a sound inventory management system and strategy is in place from the start.  A digital ad operations professional may be tasked with helping to develop, construct, and maintain network architecture for inventory management.  On the publisher side, she helps determine monetization strategy for unsold inventory and a cost structure for third-party inventory acquisition.  The digital ad operations professional coordinates site tag implementation, the creation of a package and order system, and package forecasting.  She performs technical integrations, monitors third- and fourth-party interactions, and provides fiscal analysis of these relationships.

**Managing Client and Partner Relationships.**  Typically, several vendors and partners – such as resellers, aggregators, ad servers, and rich media technologies, just to name a few – sit between a publisher's website, an ad agency, and the advertiser.  A digital ad operations professional ensures successful campaign implementation by evaluating specific vendors against business needs, assessing the feasibility of these third-party relationships, and managing publisher and partner certifications.  Once a vendor is approved, the ad operations person on-boards the partner, performs necessary technical integrations, and develops a partner feedback loop and a client-specific workflow.

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

| | Content Areas | Percent of Exam |
|---|---|---|
| A | Executing Campaign Launch: | 28.75% |
| 1 | Define Campaign Goals | |
| 2 | Identify Execution Strategy | |
| 3 | Check Inventory and Availability | |
| 4 | Implement Conversion Tags on Advertiser's Site | |
| 5 | Enter Order Details | |
| 6 | Build a Creative Strategy | |
| 7 | Execute Creative Delivery from Agency Side | |
| 8 | Deliver Finalized Creative and/or Tags | |
| 9 | Perform Asset Intake | |
| 10 | Perform Vendor QA Check | |
| 11 | Review Media Plan | |
| 12 | Align Assets with the Media Plan | |
| 13 | Implement Creative Assets | |
| 14 | Perform Pre-Launch Testing | |
| 15 | Launch and Configure Assets | |
| 16 | Verify Successful Launch | |
| 17 | Develop Campaign Workflow | |
| 18 | Implement Competitive Separation | |
| B | Managing Live Campaign: | 25.00% |
| 1 | Manage Client Expectations | |
| 2 | Assess Campaign Performance | |
| 3 | Troubleshoot Live Issues | |
| 4 | Identify Opportunities to Optimize | |
| 5 | Optimize Campaign | |
| 6 | Provide Campaign Reporting | |
| 7 | Investigate Discrepancy | |
| 8 | Manage Client Communications | |
| 9 | Modify the Media Plan | |
| 10 | Perform Campaign Wrap-Up Activities | |
| 11 | Perform Analytic Overview | |
| 12 | Define Monitoring or Alerting Requirements | |
| 13 | Carryout Ongoing Security Checks | |
| 14 | Monitor Fraudulent Activity | |
| C | Managing Emerging Technologies: | 7.50% |
| 1 | Evaluate Feasibility of Emerging Technologies | |
| 2 | Research Industry Adoption of Emerging Technology | |
| 3 | Evaluate Supportability of Emerging Technology | |

| | | | |
|---|---|---|---|
| 4 | Conduct Beta Testing | |
| 5 | Advise on Product Definition | |
| 6 | Advise on New Business Development | |
| **D** | **Creating, Maintaining, and Documenting Product Offerings:** | **10.00%** |
| 1 | Establish Success Metrics | |
| 2 | Contribute to Pricing Structure, Products, and Packaging | |
| 3 | Provide Product Feedback to Vendors and Partners | |
| 4 | Document Bugs, Workarounds, and Enhancement Requirements | |
| 5 | Evaluate Success Metrics | |
| 6 | Contribute to Product or Feature Sunset Strategy | |
| 7 | Provide Custom Solutions | |
| 8 | Contribute to Case Studies | |
| **E** | **Managing Incidents:** | **7.50%** |
| 1 | Perform Initial Diagnostics | |
| 2 | Identify Incident Severity | |
| 3 | Communicate Expectations, Updates, and Resolutions to Internal and External Clients | |
| 4 | Advise on Business Impact and Client Resolutions | |
| 5 | Create and Supply Post-Mortems | |
| **F** | **Inventory Management and Integrity:** | **12.50%** |
| 1 | Develop and Construct Network Architecture | |
| 2 | Maintain Network Architecture | |
| 3 | Determine Monetization Strategy for Unsold Inventory | |
| 4 | Determine Cost Structure for 3rd Party Inventory Acquisition | |
| 5 | Coordinate Site Tag Implementation | |
| 6 | Create Package and Order System | |
| 7 | Provide Package Forecasting | |
| 8 | Perform Technical Integrations | |
| 9 | Monitor 3rd and 4th Party Interactions on Site | |
| 10 | Provide Fiscal Justifications | |
| **G** | **Managing Client and Partner Relationships:** | **8.75%** |
| 1 | Evaluate Vendors Against Business Needs | |
| 2 | Assess Feasibility of Client or Partner Relationships | |
| 3 | Manage Publisher and Partner Certifications | |
| 4 | Onboard Vendors | |
| 5 | Perform 3rd Party Technical Integrations | |
| 6 | Develop Client and Partner Feedback Loop | |
| 7 | Develop Client-Specific Workflow | |
| | Total | 100.00% |

In this study guide, each major content area (A, B, C, D, E, F, G above) is given its own heading, along with a topic review, topic summary, and sample questions for each area. In the explanatory narrative within each subheading, specific duties, tasks, and steps you need to know about will be called out in **bold type**.  Wherever possible, this document also provides the necessary knowledge, skills, abilities, and attributes required to conduct a specific task, as well as links to IAB and industry resources for reviewing them.

# 3 | SPECIALIZED KNOWLEDGE

Digital ad operations (aka "online ad operations", "online advertising operations", "online ad ops", "ad ops", and "ops") refers to processes and systems that support the sale and delivery of online advertising.  An individual working in digital ad operations manages the workflow processes and software systems that are used to sell, input, serve, target, and report on the performance of digital ads.  See http://www.admonsters.com/what-ad-operations for more information about the many roles and job functions that fall beneath this digital ad operations umbrella.

At a very high level, below is a simple depiction of the digital advertising workflow:



Source: http://www.iab.com/wp-content/uploads/2015/09/Workflow_Best_Practices.pdf. Please note that this flowchart, the *Workflow Best Practices* document, and other information found at http://www.iab.com/wp-content/uploads/2015/09/Workflow_Best_Practices.pdf is currently in the process of being updated to include programmatic transactions and other enhancements, so may not be an exhaustive view of digital adverting workflow.   Programmatic buying and selling of digital advertising inventory, including real-time bidding (RTB) has been growing over the past couple of years and has the potential to transform how we buy and sell ad inventory. While RTB has historically been associated with remnant inventory, this technology is now increasingly being applied to a wider range of inventory.
The latest information about programmatic and RTB can be found at http://www.iab.com/guidelines/programmatic-rtb/.

Regardless of where an ad ops professional works along the digital advertising supply chain, it is necessary for her to possess a broad base of knowledge about all of the other steps in the workflow. Effective ad operations people along this chain also typically share a common set of skills, abilities, attitudes, and resources to do their jobs.

The best starting point for studying for the DAOC exam is by reviewing these consolidated lists of specialized knowledge, skills, abilities, attitudes, and resources of successful individuals working in digital ad operations.  Some test questions may specifically assess your familiarity with these topics, and all test questions have been written assuming that you already have a command of them.

Subsequent sections of this Study Guide and the Detailed Content Outline in Appendix A map specific items against content areas of the exam.  In this section these items are consolidated for your convenience.

### SPECIALIZED KNOWLEDGE

You should be prepared to demonstrate a working knowledge of all of the following digital media themes while you take the certification exam.  The certification exam presumes that candidates can define and understand what is meant by the industry topics and terminology detailed here.

As a study resource for reviewing digital media terminology, the IAB has published a *Glossary of Interactive Terms*, which can be found at the following URL:
http://www.iab.net/wiki/index.php/Category:Glossary.

| Specialized Knowledge | |
|---|---|
| 3rd party identification tools | 3rd party vendors |
| A/B tests | Account cancellation processes |
| Ad blocker technologies | Ad formats |
| Ad platforms | Ad server capabilities |
| Ad server know-how | Ad server planning systems |
| Ad server prioritization logic | Ad specification exception processes |
| Ad tag types (e.g., iframe, javascript) | Ad unit sizes |
| Ad unit specs | Adoption processes |
| Advanced excel resources (how to make pivot tables, "vlookup", filtering, etc.) | Advertiser and agency details |
| Advertiser's available assets | Advertiser's data management platforms |
| Advertiser's data strategies | Advertiser's expectations |
| Advertiser's  IT  turnaround times | Advertiser's sites |
| Advertiser's site limitations or restrictions | Advertiser's wants |
| Age gating laws | Agency advertiser's expectations |
| Agency tags | Attribution models |
| Alt Tags | Audience attributes |
| Audience data metrics and delivery targeting | Audience protocol interfaces |
| Audience targeting (demo, geo, etc.) | Back-up images |
| Billing details | Blacklisting and whitelisting |
| Brand benchmarks | Bug reporting and tracking systems |
| Business and client impacts | Business ethics |
| Business goals | Business impact analysis |
| Business inefficiencies | Business KPIs |
| Business models | Business priorities |
| Business rules (e.g., competitive separation) | Business sensitivity |
| Business strategies | Buy- and sell-sides |
| Cache-busters | Campaign goals (e.g., direct response, branding, reach) |
| Campaign KPIs | Campaign performances |
| Campaign placements | Campaign volumes (number of impressions, clicks, etc.) |
| Certification statuses | Changes in advertiser's marketing strategy |
| Changes to the inventory | Click through URLs |
| ClickTags | Client brand identities |
| Client budgets | Client goals |
| Client KPIs | Client needs |
| Client objectives | Client preferences (how do clients prefer meetings, who to contact, etc.) |
| Client relationships | Client tiers |
| Client's preferred vendor partnerships | CMSs |

| Specialized Knowledge | |
|---|---|
| Codes (e.g., html, javascript) | Common contractual terms |
| Communication channels | Company business goals |
| Company business rules | Competitive intelligences |
| Competitive landscapes | Competitive separations |
| Competitive vendors' practices | Competitor offerings |
| Competitors | Compliance requirements |
| Compliance rules | Compositions and interactions of the end-point technical stacks (e.g., deployment platforms; APIs) |
| Contact points | Content monetization strategies |
| Contract terms and conditions | Contractual obligations |
| Conversion windows | Copyright laws |
| Cost models | Cost-benefit analysis versus relationship management |
| Creative asset requirements | Creative QA processes |
| Creative scheduling | Creative specs |
| Creative structuring options | CRMs (e.g., salesforce) |
| Current processes | Current products |
| Current sunset strategies | Data lookback windows |
| Data pass integrations | Data restrictions |
| Data structures and warehousing | Dayparting |
| Debugging processes | Debugging tools |
| Default Ads | Different reporting systems |
| Different types of creative assets | Discrepancy investigation processes |
| Documentation needs | Dynamic strategies |
| Effective communication styles | Emerging technologies |
| End protocols | End-point technical stacks |
| Escalation contacts | Escalation paths |
| Escalation procedures | Escalation processes |
| Exception processes | Exception rules |
| Exclusivities | Existing bugs and limitations |
| Expected behaviors | Expected outcomes |
| Experiment processes | External client notification processes |
| Feature enhancement processes | Feedback loops |
| Filtering | Finances |
| Financial influences | Firewalls |
| First party tag functionalities | Flexibility of the strategies |
| Flighting (campaign start and end dates) | Forecasting methodologies |
| Forecasting metrics | Forecasting systems |
| Fraudulent activities (e.g., bots, spiders, crawlers) | Frequency cap goals |
| Gap analyses | General inventory prioritization |
| Global events awareness | Growth opportunities |
| Historic bids | Historical performance for clients |

| Specialized Knowledge | |
|---|---|
| How 3rd parties are using data | How the processes can be divided (e.g., who has ownership) |
| How to advocate for operations | How to analyze training efficacy |
| How to communicate effectively | How to establish KPIs |
| How to find patterns | How to identify key metrics |
| How to interpret data | How to obtain screenshots |
| How to pull vendor reports | How to read IOs |
| How to setup campaigns (trafficking guidelines) | How to use bulk upload tools |
| How to use the internal and external knowledge bases | How to work with clients (business processing document) |
| How training fits into the bigger picture | How vendors source, store, compile, and share data |
| Impact assessment protocols | Industry benchmarks |
| Industry landscapes (i.e., lumascape) | Industry restrictions |
| Industry technological capabilities | Industry terminologies |
| Industry trends | Integration limitations |
| Integration of APIs (e.g., feeds) | Integration statuses |
| Interconnectivity of the ecosystems | Internal capabilities |
| Internal engineering team's SLAs | Internal marketing efforts |
| Internal pain points and limitations | International privacy laws |
| Internet protocol stacks | Inventory availabilities |
| Inventory landscapes or ecosystems | Inventory QAs |
| Invoicing details | Involved platforms and technologies |
| IOs | Lab specifications |
| Landing page URLs | Legal agreements |
| Legal processes | Liquidity of the marketplace (i.e., the value of the marketplace at any time) |
| LOE and evaluation processes | Log files |
| Macro insertions and functionalities | Make-good processes |
| Marketing goals | Marketing strategies |
| Measurement systems | Media math |
| Media plan details | Missing assets |
| Monitoring systems | MRC processes |
| Naming conventions | New product development processes |
| Non-guaranteed remnant strategies | Numbers of placements and ad units |
| OBA | Operational deployment processes |
| Operational expectations | Operational impacts |
| Operational workflows | Operations surrounding product |
| Opportunity assessment methodologies and techniques | Optimization techniques |
| Order management systems | Organizational impacts |
| Overall business strategies | Overarching client goals |
| Overhead impacts | Pacing |
| Package sunset processes | Packaging |

| Specialized Knowledge | |
|---|---|
| Page views and impressions | Pain points |
| Partner expectations | Partner site refresh calendars |
| Partner site turnaround times | Partner team requirements |
| Partnership statuses | Past issues |
| Placements | Platforms (mobile, online, etc.) |
| Presentation tools | Previous advertiser buys |
| Pricing models | Priorities |
| Privacy laws | Privacy restrictions |
| Private marketplaces | Product adoption forecasts |
| Product availabilities (e.g., whether or not something has been sunsetted) | Product backlogs |
| Product capabilities | Product catalogs |
| Product delivery timelines | Product dependencies |
| Product management systems | Product offerings (e.g., what value is the product giving) |
| Product or technology expected behaviors or functionalities | Product roadmaps |
| Product support technologies | Product timelines |
| Products (e.g., packages, ad units) | Profit and loss goals and metrics |
| Programmatic buying & selling | Project lifecycles |
| Project management processes | Project timelines |
| Publisher demographics | Publisher or vendor certification statuses |
| Publisher specs and restrictions | QA processes |
| Rate cards | Reporting capabilities in both servers |
| Reporting data analyses | Reporting expectations |
| Reporting goals | Reporting metrics |
| Reporting refresh cycles | Reporting systems |
| Research vendors | Reservation calendars |
| Reservation management practices or rules | Reserved inventories versus booked inventories |
| Resource allocation | Retargeting goals |
| Revenue models | Risk analysis |
| Rollback processes | Rotation percentages or weights |
| RTB | Safe-frame technologies |
| Saleability | Sales collateral |
| Sales pipeline (concurrent and upcoming sales) | Sales team assignments |
| Sales teams' abilities and/or technical savviness | Scalability |
| Script interpretations (e.g., flash, action script, css, javascript, html) | Seasonal factors |
| Server hierarchies (e.g., DFP, know what ad units are) | Service impacts |
| Service level agreements | Site analytics |
| Site and/or publisher specifications | Site contacts |
| Site restrictions | Site specifications |

| Specialized Knowledge | |
|---|---|
| Site structures | Site tagging management |
| Site tagging structures | Site tags |
| Site updates | SLAs |
| SMEs | SOPs |
| Special client relationships (e.g., preferred rates, discounts) | Specific metrics |
| Sponsorship areas | SSAE-16 processes |
| Stakeholders or key contributors | Standard procedures |
| Success indicators | Supplemental or complementary technologies |
| Supportability | System up and down times |
| Tag management systems | Tag structures management (e.g., serve macros) |
| Tagging capabilities | Tagging formats |
| Targeted audiences for training | Targeting |
| Targeting capabilities (e.g., audience, inventory) | Technical capabilities of partners |
| Technical documentations | Technical implementation guidelines |
| Technical integrations | Technical jargon |
| Technical proficiencies | Technical specifications |
| Technical standards | Technology or product evolution |
| Testing processes | The advertiser brand strategies |
| The advertiser's business models | The asset receipt processes |
| The audience's capabilities | The audience's learning styles |
| The audience's needs | The build strategies |
| The campaign timelines | The clients' needs or goals |
| The creative approval processes | The creative strategies |
| The delivery attribution model | The design processes |
| The industry | The marketing strategy |
| The parties involved in the campaign | The platforms on which the technology will be served |
| The purposes of training (e.g., training for accountability, training for the purpose of selling) | The RFP processes |
| The sales pipeline | The sales rights value chain |
| The targeted audiences | The testing environments |
| The topic with which you are training | The trafficking processes |
| The user experiences | Third party ad server capabilities |
| Third party ad server UIs | Third party ad servers |
| Third party tag functionalities | Ticketing systems |
| Tracking capabilities across devices | Tracking expectations |
| Tracking formats (e.g., pixels, beacons, click trackers) | Tracking parties |
| Tracking systems | Traffic fluctuations (e.g., world events, sporting events, deaths) |
| Training gaps | Training needs |
| Training techniques | Training tools |

| Specialized Knowledge | |
|---|---|
| Triage processes | Turnaround times |
| Underutilized capabilities | Unit testing |
| Update or creative schedules | User best practices as they relate to developing new technology |
| User experience best practices | Vendor and/or client locations and time zones |
| Vendor business operations | Vendor capabilities (creative or delivery experience) |
| Vendor contacts | Vendor expectations |
| Vendor file requirements | Vendor ramp-up times |
| Vendor rapport | Vendor requirements |
| Vendor selection process | Vendor support levels |
| Vendor tags | Vendor technical limitations |
| Vendor/publisher certification statuses | Verification incident reporting (e.g., double verify) |
| Verification services | Web beacons |
| Web design and technologies (e.g., HTML, JavaScript) | What the audiences are tasked with doing |
| Where to check for inventories | Whether or not the tracking vendor is approved |
| Workflow best practices | Workflow tools (e.g., Visio) |
| Yield management techniques | |

## SKILLS AND ABILITIES

The DAOC exam has been written for individuals who possess the skills and abilities required of digital ad operations, which are listed below. Note that some of the items are qualitative and unique to an individual's personality and style. All of these skills and abilities – both the qualitative and quantitative – have been identified as requirements for a successful ad operations professional.

| Skills and Abilities | |
|---|---|
| A good standing with internal business leaders | Ability to analyze profitability |
| Ability to anticipate problems and issues | Ability to anticipate problems and/or needs |
| Ability to build mental models | Ability to capture feedback |
| Ability to communicate clearly | Ability to communicate complex concepts in layman's terms |
| Ability to communicate in a timely manner | Ability to compare competitive sets |
| Ability to consider assets | Ability to delegate |
| Ability to deliver difficult messages | Ability to develop process flow |
| Ability to identify financial influences | Ability to interpret financial reports |
| Ability to interpret the forecast results | Ability to make quick assessments |
| Ability to manage up and/or down | Ability to materialize opportunities |
| Ability to multi-task | Ability to perform root-cause analysis |
| Ability to react quickly | Ability to read and interpret technical reports |
| Ability to read and understand agreements | Ability to recognize when inappropriate people are participating in training |

| Skills and Abilities | |
|---|---|
| Ability to represent information in different ways | Ability to resolve conflicts |
| Ability to respond quickly | Ability to say "no" |
| Ability to see through the code | Ability to stand your ground |
| Ability to take criticism | Ability to talk to clients at varying knowledge levels |
| Ability to think on your feet | Ability to train |
| Ability to translate business needs to marketable products | Ability to understand your audience |
| Ability to work in teams | Ability to work independently |
| Ability to work late hours | Ability to work long hours |
| Ability to work under pressure | Accountability |
| Accountable | Accurate |
| Adaptability | Advanced industry foresight |
| Advocacy skills | Analytical |
| Approachable | Articulate |
| Assertiveness | Attention to detail |
| Big-picture oriented | Business acumen |
| Charisma | Client-service oriented |
| Collaboration skills | Communication skills |
| Computer skills | Confidence |
| Conflict resolution skills | Consultative |
| Content mastery | Conviction |
| Cool under pressure | Creating thinking skills |
| Creative design awareness | Creative problem-solving |
| Creative thinking skills | Credible |
| Critical thinking skills | Customer service skills |
| Data presentation skills | Decision making skills |
| Deductive reasoning skills | Design skills |
| Detail-oriented | Does not make assumptions |
| Empathetic | Endurance |
| Ethical | Experienced |
| Financial skills | Firm |
| Flexible | Forecasting skills |
| Foresight | Friendly |
| Front-end web skills | Goal-oriented |
| Good judge of character | Good reading skills |
| Guidance skills | Humility |
| Independent | Innovative |
| Inquisitive | Insightful |
| Integrity | Intuitive |
| Investigative skills | Leadership skills |
| Marketing skills | Mathematics skills |
| Motivational | Negotiation skills |
| Non-failure adverse | Open-minded |

| Skills and Abilities | |
|---|---|
| Organization skills | Patient |
| Persistent | Personal restraint |
| Persuasive | Planning skills |
| Positive attitude | Prepared |
| Presentation skills | Prioritization skills |
| Proactive | Problem solving skills |
| Process-oriented | Project management skills |
| Public speaking skills | Punctual |
| Rationale | Reconciliation skills |
| Reliable | Research skills |
| Resource management skills | Resourceful |
| Responsible | Responsive |
| Risk assessment skills | Risk taker |
| Risk-management skills | Salesmanship |
| Script- or code-literate | Self-aware |
| Self-directed | Self-reliant |
| Sense of humor | Sense of ownership |
| Sense of urgency | Solution-oriented |
| Spontaneous | Storyteller |
| Tactful | Tech savvy |
| Technical writing skills | Thorough |
| Time management skills | Transparent |
| Troubleshooting skills | Unbiased |
| Vendor negotiation skills | Visualization skills |
| Willingness to help | Willingness to learn |

### ATTITUDES

You should also be aware that DAOC exam content is mindful of the following attitudes shared by successful ad operations professionals.

| Attitudes | |
|---|---|
| Detail-oriented | Persistent |
| Multi-tasker | Self-discipline |
| Customer-oriented | Friendly |
| Dependable | Goal-oriented |
| Manage stress/pressure | Helpful |
| Work efficiently (time) | Self-motivated |
| Accurate/Precise | Enthusiasm |
| Cooperative | Lack of prejudice (bias) |
| Team player | Positive attitude |
| Quality focused | Punctual |
| Work efficiently (resources) | Confident |
| Work in teams | Empathetic |

| Attitudes | |
|---|---|
| Adaptable/Flexible | Pride in job |
| Critical thinker | Respectful |
| Organized | Tactful |
| Responsible/accountable | Initiative |
| Analytic | Tolerant |
| Professional | Conscientious |
| Common sense | Courteous |
| Eager to learn new things | Creative |
| Honest | Compassionate |
| Integrity | Non-aggressive |
| Open-minded to change | Self-esteem |
| Patience | Sensitive to thoughts of others |
| Trustworthy | Caring |
| Focused | Free of substance abuse |
| Good time manager | Industrious |
| Ethical | Self-control |
| Good listener | Social skills |
| Meticulous | Neat |

### RESOURCES

Successful DAOC candidates should have a working knowledge of the following resources required of individuals working in digital ad operations. Note that the exam is software-agnostic, and you will not be tested on the inner-workings of a particular technology. However, you should be familiar with the general purpose of these resources, and familiarity with how they are used.  Also note that you will not be permitted to bring a calculator into the testing center, but you will have access to an electronic calculator on the computer on which you take your exam, should the need arise.

Again, please feel free to access the IAB's study resources for reviewing digital media terminology: a *Glossary of Interactive Terms* can be found at http://www.iab.net/wiki/index.php/Category:Glossary.

| Resources | |
|---|---|
| Access to ad server (e.g., server reports, forecasting tools) | Access to order management systems |
| Access to product managers | Account teams |
| Accounting teams | Ad platforms access |
| Ad servers | Ad servers or vendors data |
| Ad servers reporting | Advertiser brand teams |
| Advertiser IT teams | Advertiser UIs |
| Advertiser's sites | Analytics teams |
| APIs (e.g., CMS, vendor) | Audience reporting |
| Basic and emerging opportunities | Beta test partners |
| Blacklists and whitelists | Block lists |
| Budgets | Bug tracking systems |

| Resources | |
|---|---|
| Bug tracking tools (e.g., Jira) | Bulk upload tools (e.g., Mediaocean, MediaVisor) |
| Business analysts | Business development teams |
| Business management systems | Business requirements documents |
| Calculators | Calendars |
| Campaign checklists | Campaign QA templates |
| Camtasia | Capital |
| Chrome development tool | Client contacts |
| Coding templates | Collaboration tools |
| Company documents | Company templates |
| ComScore | Contact lists |
| Content management tools (CMSs) | Content release and sunset calendars |
| Cost-benefit analysis reports | Cost-modeling tools |
| CPM calculators | Creative checklists |
| Creative configuration templates | Creative contacts |
| Creative design tools | Creative matrixes |
| Creative optimization tools | Creative teams |
| Creative testing tools | CRMs |
| Current events | Data management platforms |
| Data management tools | Delivery reports |
| Devices (e.g., tablets, phones, desktop) | Diagnostics checklists |
| Email | Engineering teams |
| Escalation teams | Escalation templates |
| Excel | Executive reports |
| External notification systems | External support teams |
| Filter reports | Finance teams |
| Financial reporting | Financial tools |
| Fixed placement calendaring systems | Flash decompilers |
| Flowcharts | Focus groups |
| Forecasting systems | Forecasting tools |
| FTP access | Historical data |
| Historical resources and cost reports | Hosting servers |
| HR system reports | Incident reports |
| Industry competitive data sources (e.g., compete.com) | Instant messaging |
| Internal campaign teams | Internal meetings |
| Inventory management systems | Inventory reports |
| Investments | Job shadowing |
| Keynotes | Keynote monitoring systems |
| Knowledge base platforms and tools (e.g., confluence) | Lab filtering reports |
| Leadership teams | Legal agreements with vendors |
| Legal teams | LMSs |
| Log files | Managerial support |
| Marketing services teams | Marketing teams |
| Media plans | Media planner systems |

| Resources | |
|---|---|
| Media planning teams | Media teams |
| Monitoring systems | Network architecture systems |
| Network monitoring teams | Network operations teams |
| Order management systems | Page load performance tools |
| Performance dashboards | Performance reports |
| Period calendars | Post-mortem processes |
| Post-mortem templates | Presentation software |
| Product collateral | Product documentation |
| Product management systems | Product roadmaps |
| Product teams | Production worksheets |
| Productivity metrics | Project management tools |
| Project plans | Project teams |
| Proxy servers | Publisher teams |
| Publisher tests or demo pages (e.g., screenshot) | Publisher UIs |
| QA tools | Rate cards |
| Reconciliation tools (e.g., adjuster, c360) | Recording tools |
| Release notification protocols | Remote meeting tools |
| Reporting dashboards | Reporting UIS |
| Reservation management systems | Reservation templates |
| Revenue reporting | RFPs |
| RFP response templates | Risk reports |
| RTB market data | Sales pipeline |
| Sales teams | Screenshot tools |
| SDK access | SDKs |
| Seasonality reports | Security reports |
| Self-serve tools (e.g., Adslot) | Sell through reports |
| Server help sections | Service level agreements |
| Share points | Shared documents |
| Shared drives | Site analytics |
| Site analytics tools | Site and/or publisher contacts |
| Site monitoring tools | SLAs |
| SMEs | Snag-it |
| Social networks | SOPs |
| SOW | Sponsorships |
| Survey tools | Surveys |
| SWF decompilers | SWOT analysis |
| System securities (e.g., mediatrust) | Tag management tools |
| Tag QA tools | Tagging matrixes |
| TAMs | Tearsheets |
| Technical experts | Technical writers |
| Technological advancements | Technology teams |
| Terms and conditions | Testing environments |
| Testing tools | Third party reconciliation tools (e.g., Adjuster, C360) |

| Resources | |
|---|---|
| Ticketing systems (e.g., Jira, PLUS, Kayako) | Trafficking process documents |
| User agent switchers | Utilization trackers |
| Vendor contacts | Vendor management teams |
| Vendor meetings | Vendor product collateral (FAQs) |
| Vendor rate cards | Vendor reporting dashboards |
| Vendor reporting suites | Vendor reports |
| Vendor teams | Vendor technical documentation |
| Vendor technologies | Vendor UIs |
| Vendors | Verification and research reporting |
| Verification services (e.g., MediaTrust, DoubleVerify, Intergral) | Video test environments (e.g., Brightcove, FLV player) |
| Visio | Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool) |
| Web developers | Web conferencing tools (e.g., WebEx, GoToMeeting) |
| Web monitoring tools | Web sharing technologies |
| Websites | Word processing software |
| Workflow tools | Yield metrics |
| Yieldex | |

### ACRONYMS

Finally, it is important for candidates to be familiar with the following commonly-used acronyms in preparation for the DAOC exam.

| Acronym | Description |
|---|---|
| AAAA | American Association of Advertising Agencies |
| API | Application Programming Interface |
| AS | Action Script |
| ATF | Above The Fold |
| AV | Added Value |
| BT | Behavioral Targeting |
| BTF | Below The Fold |
| CDN | Content Delivery Network |
| COPPA | Child Online Privacy Protection Act |
| CMS | Content Management System |
| CPA | Cost Per Acquisition |
| CPC | Cost Per Click |
| CPE | Cost Per Engagement |
| CPM | Cost Per Thousand |

| Acronym | Description |
|---------|-------------|
| CPI | Cost Per Install |
| CPV | Cost Per View |
| CTA | Call To Action |
| CTR | Click Through Rate |
| CTP | Click To Play |
| DMA | Designated Market Area |
| DMP | Data Management Platforms |
| DR | Direct Response |
| DSP | Demand Side Platform |
| eCPM | Effective Cost Per Thousand |
| dCPM | Dynamic Cost Per Thousand |
| rCPM | Real Cost Per Thousand |
| FEP | Full Episode Player |
| FTP | File Transfer Protocol |
| GRP | Gross Rating Point |
| HTML | HyperText Markup Language |
| HTTP | Hyper Text Transfer Protocol |
| HTTPS | Hyper Text Transfer Protocol Secure |
| IAB | Interactive Advertising Bureau |
| IO | Insertion Order |
| IP | Internet Protocol |
| ISI | Important Scrolling Information |
| ISP | Internet Service Provider |
| KPI | Key Performance Indicator(s) |
| LDA | Legal Drinking Age |
| LFV | Long Form Video |
| LMS | Learning Management System |
| MRAID | Mobile Rich Media Ad Interface Definitions |
| MSA | Master Service Agreement |
| DOOH | Digital Out of Home |
| OBA | Online Behavioral Advertising |
| OOH | Out of Home |
| OPA | Online Publisher Ad |
| OVP | Online Video Platform |
| PII | Personally Identifiable Information |
| PO | Purchase Order |
| POP | Point Of Purchase |
| QA | Quality Assurance |
| RFI | Request For Information |
| RFP | Request For Proposal |
| ROAS | Return On Ad Spend |

| Acronym | Description |
| --- | --- |
| ROI | Return On Investment |
| RON | Run Of Network |
| ROS | Run Of Site |
| ROV | Run Of Vertical |
| RPM | Revenue Per Thousand |
| RSS | Real Simple Syndication |
| RTB | Real Time Bidding |
| SDK | Software Development Kit |
| SEM | Search Engine Marketing |
| SEO | Search Engine Optimization |
| SLA | Service Level Agreement |
| SME | Subject Matter Expert |
| SOP | Standard Operating Procedure |
| SOV | Share Of Voice |
| SOW | Statement Of Work |
| SSP | Supply Side Platform |
| SFV | Short Form Video |
| SRT | Search Retargeting |
| T&C | Terms and conditions |
| TRP | Target Rating Point |
| UGC | User Generated Content |
| UI | User Interface |
| VAST | Video Ad Serving Template |
| VMAP | Video Mobile Ad Player |
| VOD | Video On Demand |
| VPAID | Video Player Ad Interface Definition |
| WAP | Wireless Application Protocol |
| WWW | World Wide Web |
| XML | Extensible Mark-up Language |

# 4 | EXECUTING CAMPAIGN LAUNCH

Ensuring a successful launch requires end-to-end operations management that starts well before a campaign goes live.  In the important planning stages, a digital ad operations professional helps to define campaign goals, identify execution strategy, and check inventory and availability against the desired targeting criteria.  As the campaign moves toward implementation, the role of the digital ad operations professionals involved in the campaign launch include: building the campaign strategy into an ad serving system based on the agreed upon order details; creating and implementing ad tags; and applying other marketing tags, like web beacons for advertiser site pages and any network tracking pixels.  At this phase, a digital ad operations professional minimizes potential for problems by performing a vendor quality assurance check, reviewing the media plan, aligning assets with the media plan, implementing creative assets, and performing pre-launch testing.  After all of this pre-launch work, a digital ad operations person is finally to launch and configure assets, verify a successful launch, develop campaign workflow, and implement creative separation.

This section corresponds to Content Area A in the Detailed Content Outline found in Appendix A.  Of the 80 total graded items on the Certification exam, 23 questions (28.75%) will be devoted to topics outlined in this section.

## TOPIC REVIEW

### Campaign Review and Planning

Once a seller and buyer agree upon a desired campaign, their digital ad operations departments are called upon to manage end-to-end operations associated with its launch. The first step toward executing a successful campaign launch involves campaign review and planning.

First, an ad operations professional will review the insertion order (IO) in detail and identify all of the parties involved in the campaign, including any external vendors.  She then **defines campaign goals** based on the client's business model, needs, and objectives, and ensures that key performance metrics (KPI's) have been selected to complement the stated campaign goals along the marketing funnel.

For example, if a client seeks to use its advertising to drive online sales (a "low funnel activity), the marketer may select a direct response-oriented performance metric, driven by sales revenue or order volume.  If an advertiser wishes to pursue a branding strategy (a "high funnel" activity), campaign performance may be measured by a brand effectiveness study.   You can find a detailed discussion of marketing models, and how the purchase funnel has evolved over time, on the following page: marketing-made-simple.com/articles/purchase-funnel.htm#.UBdTB2H4ezI.

Next an individual working in digital ad operations will **identify the execution strategy**, based on the defined campaign goals.  This means reviewing the specified advertising platforms, formats, and units that have been specified in the IO.  It also means adhering to the negotiated set of terms & conditions that have been negotiated between the buyer and seller.  The 4A's and IAB have published a set of *Standard Terms and Conditions for Interactive Advertising for Media Buys One*

*Year or Less* which can be downloaded here: http://www.iab.com/guidelines/standard-terms-conditions-internet-advertising-media-buys-one-year-less/.

Digital advertising platforms are constantly evolving and an ad operations professional may manage campaigns on one, more, or all of them in their portfolio at a given time. Digital media platforms include the range of places where a consumer might be exposed to digital advertising, including:

- Desktop/PC media platforms
- Handheld media platforms
- Tablet media platforms
- Digital Out of Home (OOH)

There might also be elements of digital advertising within otherwise traditional media platforms, such as television, print, radio, and out of home (OOH).  To review this content area, you may find it helpful to reference the IAB's *Digital Platform Overviews* which can be found here:
http://www.iab.com/wp-content/uploads/2015/09/moble_platform_status_report.pdf
http://www.iab.com/wp-content/uploads/2015/09/IAB-Games-PSR-Update_0913.pdf
http://www.iab.com/wp-content/uploads/2015/09/dv-report-v3.pdf
http://www.iab.com/wp-content/uploads/2015/09/iTVCommitteeWhitePaperv7.pdf
http://www.iab.com/wp-content/uploads/2015/09/IABDigitalAudioPSR11.pdf

The term "digital media" encompasses several digital advertising formats, including:

- Search advertising formats
- Display advertising
- Rich media
- Video
- Social
- Audio

Depending upon the nature, size, and organizational structure within a given company, digital ad operations professionals might be responsible for managing campaigns within just one, a few, or even all of these digital advertising formats simultaneously. Whatever the scenario, a digital ad operations professional should understand the high-level operational differences between executing campaigns within different digital formats.

Documents housed within the IAB's *Ad Standards & Creative Guidelines* (found at http://www.iab.com/guidelines/mobile-phone-creative-guidelines/
http://www.iab.com/guidelines/html5-for-digital-advertising-1-0-guidance-for-ad-designers-creative-technologists/
http://www.iab.com/guidelines/iab-standard-ad-unit-portfolio/) may prove useful at helping you review this information.  The IAB standard ad unit portfolio was recently updated to provide a range of new display ad sizes and functionalities to support the next generation of digital brand advertising: http://www.iab.com/guidelines/iab-standard-ad-unit-portfolio/.

At this point the supply-side digital ad operations professional will review the client's desired

audience targeting criteria, campaign timeline (including flighting dates and dayparting), exclusivity requests, and retargeting goals.  All of this information goes into an inventory forecasting system – either an ad server or a stand-alone inventory analytics platform – in order to **check inventory and availability** for a specific campaign.  Ad inventory forecasting refers to the process of being able to estimate available ad views for a future period, across different targeting criteria.  Reliable ad inventory forecasting enables sellers to offer clients accurate impressions delivery (avoiding overbooking or underselling) and anticipate future remnant inventory.

Ad inventory forecasting tools use algorithms that consider several criteria:

- General traffic trends of the site(s)
- Seasonal trends
- Desired targeting criteria
- Historical campaign performance
- The client's need for competitive separation

With approximately 20% of all digital advertising sold by one machine talking to another machine—and growing rapidly (see http://www.iab.com/guidelines/programmatic-rtb/), ad operations teams are being asked to take on more intense yield management responsibilities.  Publisher-side ad ops professionals need to tackle inventory forecasting and yield management across channels – direct sales and programmatic -- in order to maximize revenue.

### Campaign Set-Up

Once ad inventory availability is confirmed, the trafficking process begins.  This is the process of technically setting up the ad campaign on one or more ad serving systems so that the campaign can be targeted, delivered, and tracked according to IO specifications.

First, both the seller and buyer **enter order details** into their respective ad servers.  Publishers and advertisers typically maintain their own ad servers, as depicted in the diagram below.  For a detailed, step-by-step explanation of the ad serving process, you can visit this article on AdOpsInsider.com: http://www.adopsinsider.com/ad-serving/how-does-ad-serving-work/.

## How 3ʳᵈ Party Ad Serving Works
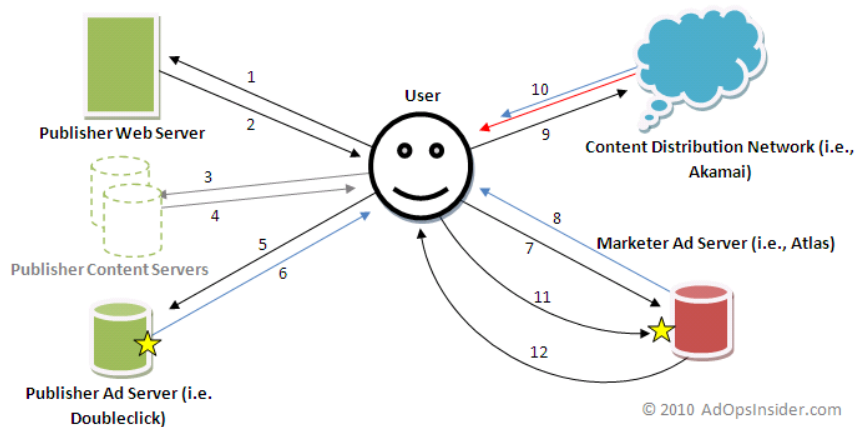


"Doubling up" on ad servers to run a single campaign provides control and accountability for sellers and buyers, while also centralizing their respective reporting.  Publisher-side ad servers enable sellers to centrally run on-demand reports capturing overall site performance, across several different clients over a period of time.  Likewise, marketer-side ad servers allow buyers to centrally generate on-demand reports for their entire campaign, without having to aggregate separate reports among all of their publisher partners. They also allow advertisers to centrally update the creative portfolio for an entire digital campaign without having to negotiate asset switches with individual sites where their ad is running.   The agency-side ad server is known as the count-of-record.

Once the order is opened, the buy-side ad operations professional **implements conversion tags on the advertiser's site**, in order to measure post-view and post-click conversions that occur as a result of the campaign.  Conversion tracking involves pixel-sized tags that can be used to measure desired actions that follow a visitor's arrival on a page as a result of viewing or clicking on an ad – whether this includes views or clicks to an online purchase page, a sign-up/registration page, or another key page a marketer wants to promote.

A conversion is recorded when a user either views or clicks an ad (media) and is redirected to or visits the advertisers site where the web beacon (conversion tag) is implemented.  A conversion is attributed to the media when the desired action is taken within the specified window of time set by the marketer.  For example, if a visitor views the ad, then clicks on it, and is redirected to the advertiser's site and completes a desired behavior (e.g. completing a registration form where a tag has been implemented for tracking), a conversion will be recorded.   Depending upon the rules, goals, and negotiated terms of a particular campaign, a conversion may also be recorded when a visitors views an ad, does NOT click on it, but then later visits the advertiser's site to complete a desired behavior.  This is called a "view-through conversion."  The negotiated period of time through which a post-click or view-through behavior is counted as a conversion – i.e. the "conversion window" – varies dramatically across industry, company, and marketing goals. Now it is time to start focusing on the creative assets.   Assets

are the files that act as the building blocks of a piece of creative (a single advertisement).  One creative can consist of multiple assets, depending on how it is designed and configured.

Using insertion order requirements, the digital ad operations professional **builds a creative strategy** that considers the number of ads to be created, their formats, sizes, creative assets, file types, the inclusion of rich media, and the trafficking needs of specific assets and/or tags.  It is very important at this step that the media buyer and seller ensure they are working from the same set of creative specifications, some of which may be unique to a particular publisher.

This strategy will determine which party – the seller, the buyer, or potentially a third-party vendor – will retain trafficking control over the creative assets themselves (which may involve **creative delivery** and/or **creative intake**), and which parties will traffic redirect tags that "call" the creative assets from the appropriate partner's server, tracking its delivery and measuring performance along the way (which involves **tag delivery** and/or **tag intake** among the parties).

After digital creative assets and tags have been trafficked, ad ops professionals should perform a **vendor** quality assurance check to ensure that all parties associated with a particular campaign are trustworthy.  Information on the IAB's most updated Quality Assurance Guidelines (QAG 2.0) can be found at http://www.iab.com/guidelines/iab-quality-assurance-guidelines-qag-taxonomy/.  QAG-certified companies across the advertising value chain are required to offer: clear, common language associated with their advertising, disclosure of their advertising practices, and compliance / facilitating associated with the resolving of any disputes and complaints.

This process includes a thorough quality assurance check of rich media vendors associated with a particular campaign, as well.  Rich media technology may be used to heighten a consumer's ability to engage and interact with a particular ad.  The IAB has published rich media guidelines that maximize creative potential of these technologies, while remaining mindful of promoting positive visitor experiences on publishers' websites.  The most recent set of guidelines can be found at http://www.iab.com/guidelines/rich-media-guidance/.

Once all of the tags and vendors associated with a campaign have been cleared, a digital ad operations professional **reviews the media plan** that was negotiated between the parties and **aligns creative assets with the media plan.**  This process requires building ads by binding the creative (and other assets or files) with the destination URL(s) (or click-through URLs), and then assigning these ads to their designated placements as defined in the media plan. When all the pieces are in place according to IO specifications, ad ops professionals **implement the creative assets**.   An ad operations representative exports the redirects (or ad tags) from the agency ad server and runs a QA on their functionality (ad displays and clicks through appropriately) before sending them over to the publisher partner for further QA and implementation.  Before the campaign goes live, the ad ops people on the publisher side and the agency side should each **perform pre-launch testing**, as a final precaution before the campaign is activated.

With the trafficking process and pre-launch testing complete, a digital ad ops professional is ready to **launch and configure assets**.   At this time the ad ops professional also **implements competitive separation,** if desired by the client. This ensures that a given advertiser's ad does not show up adjacent to one of its competitors (or a particular company / category) on a given page or placement.

The ad ops person then puts the campaign live and  **verifies a successful launch**, by checking that the ad is running properly and that both of the ad server systems are calling the view and click portions of the ad for counting and reporting purposes.  She is now ready to **develop the campaign workflow**, a shared process that all members of the advertising supply chain will reference to understand their specific responsibilities, deliverables, and expectations for a given campaign.  An overview of operational efficiency best practices can be found on the IAB website at http://www.iab.com/wp-content/uploads/2015/09/Workflow_Best_Practices.pdf, and http://www.iab.com/guidelines/programmatic-rtb/.

*Topic Summary*

Knowledge, skills, and capabilities related to "Executing Campaign Launch" will comprise 23 questions (28.75%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Define campaign goals
- Identify execution strategy
- Check inventory and availability
- Implement conversion tags on advertiser's site
- Enter order details
- Build a creative strategy
- Execute creative delivery from the agency side
- Deliver finalized creative and/or tags
- Perform asset intake
- Perform vendor QA check
- Review the media plan
- Align assets with the media plan
- Implement creative assets
- Perform pre-launch testing
- Launch and configure assets
- Verify successful launch
- Develop campaign workflow
- Implement competitive separation

See the next page for five sample questions related to executing a campaign launch.

Correct answers for these sample questions may be found in Appendix B.

### Question 1

When implementing a conversion tag on a client/advertiser's site, what QA action can be performed to ensure proper tag function?

A.  pull an impression report by placement
B.  use a web debugging tool to confirm tag is firing
C.  take a screenshot of the page where the tag is placed
D.  update call-to-action in the creative across all the advertiser's campaigns

### Question 2

An agency wants to run an expandable.  Which of the following assets is necessary for the publisher?

A.  .jpg
B.  IXI tag
C.  click tag
D.  script tag

### Question 3

When/where can an in-stream creative be displayed?

A.  after in-line text
B.  prior to page re-direct
C.  in between video content
D.  adjacent to a publisher player

**Question 4**

If you have one million impressions to deliver between three creatives, and creative A needs to deliver twice as many impressions as B and C should deliver individually, what weighting rotation should be implemented?

    A. A – 25; B – 25; C – 25
    B. A – 40; B – 30; C – 30
    C. A – 50; B – 25; C – 25
    D. A – 100; B – 25; C – 25

**Question 5**

What two items are needed for the agency to verify a campaign has launched properly?

    A. screenshots and reporting
    B. confirmation email and traffic sheet
    C. IO and traffic sheet
    D. media plan and reporting

# 5│ MANAGING LIVE CAMPAIGNS

Digital media offers greater opportunity for engagement, interactivity, targetability, measurability, and on-the-fly optimization than traditional media.  To ensure optimal performance, a digital ad operations professional performs ongoing quality assurance and optimization reviews for each live campaign throughout its lifecycle.  Actions include managing client expectations, assessing campaign performance through campaign reports, flagging and troubleshooting live issues, and optimizing campaigns. These operations support discrepancy investigations, media plan modification, and campaign wrap-up activities.  A digital ad operations professional is also responsible for client communications (especially related to analytic performance overviews), defining monitoring or alerting requirements, carrying out ongoing security checks, and monitoring fraudulent activity.

This section corresponds to Content Area B in the Detailed Content Outline found in Appendix A.  Of the 80 total graded items on the Certification exam, 20 questions (25.00%) will be devoted to topics outlined in this section.

## TOPIC REVIEW

### Performance Review & Optimization

Once a digital campaign goes live, ad operations professionals need to actively **manage client expectations** as to how well it is preforming.  This requires them to access third-party reporting systems, generate the appropriate reports, and continuously **assess campaign performance** against stated KPIs.  The DAOC Exam does not attempt to assess process-related knowledge associated with pulling reports from specific third-party ad servers.   Frequent campaign reviews allow ad operations professionals to identify performance problems early, and **troubleshoot live issues** before they become escalated discrepancies.

Ongoing performance reviews also enable ad operations people to **identify opportunities to optimize** the campaign, to meet the needs of the real-time environment in which the campaign is running.  For example, it may be helpful to update campaign targeting criteria or flighting schedule to accommodate unexpected changes in inventory availability, or favor one campaign placement over another to meet changes in the advertiser's marketing strategy.  Once new optimization opportunities are approved by the seller/buyer team, the ad ops professional will **optimize the campaign**, either manually or with the help of a third-party optimization technology.

### Campaign Reporting & Analysis

Campaign performance reports are also helpful client communication tools during and after a digital media campaign.  Individuals working in digital ad operations **provide campaign reporting** to their clients to ensure that the seller and buyer are viewing similar results in their respective ad servers.  Each party has an independent set of reports that can be used to audit the other, and ad ops departments are often called upon to **investigate discrepancies** that arise between them.  This investigation process may involve a familiarity with caching issues, log files, filtration, counting rules and even system attribution models.   Over the years, the IAB has developed and updated guidelines for ad campaign impression measurement (see http://www.iab.com/guidelines/iab-measurement-

guidelines/) that address auditing and the handling of discrepancies.  The IAB has also published documents related to counting rules and click measurement (see http://www.iab.com/wp-content/uploads/2015/06/click-measurement-guidelines2009.pdf), with more updates on viewability expected.

 The IAB has also published information regarding digital attribution models – the measurement to the value of each digital marketing contact that contributed to a desired outcome – to allow marketers to more clearly understand what's working and what's not.  An *Attribution Primer* can be found here: http://www.iab.com/wp-content/uploads/2015/04/AttributionPrimer1.pdf and the Forrester Research report *Digital Attribution Comes Of Age*, commissioned by the IAB, can be found here: http://www.iab.com/wp-content/uploads/2015/08/DigitalAttributionComesOfAge.pdf.  For more information on measuring reach and frequency, you can find *Audience Reach Guidelines* here: http://www.iab.com/wp-content/uploads/2015/06/AudienceReachMeasurementGuidelines.pdf.

Sometimes, performance anomalies and discrepancies occur as a result of malicious behavior.  Those working in digital ad ops must **define monitoring or alerting requirements** in order to identify such issues as early as possible.  They should also **carryout ongoing security checks** and proactively **monitor fraudulent activity.**   Ad verification tools can help identify such issues, whether intended or unintended.  Information about verification systems may be found under the *Ad Verification Guidelines* at: http://www.iab.com/wp-content/uploads/2015/06/Ad-Verification-Guideline-for-the-Conduct-of.pdf.

In addition, publishers may wish to use SafeFrame technology for their ad serving, a managed API-enabled iframe that opens a direct line of communication between the publisher page content and the iframe-contained external content, such as ads. This communication allows for secure data collection and rich interaction within the iframe, while protecting the publisher's page from undetected changes that might otherwise damage page integrity.  More information is available at http://www.iab.com/guidelines/safeframe/.

Through the lifecycle of a campaign, ad operations professionals **manage client communications** related to performance results, optimization opportunities, and discrepancy resolution.  It is important that for these professionals to maintain strong relationships with their clients and understand their communication preferences.  Where necessary, the parties may require individuals working in ad operations to **modify the media plan** in order to reflect the reality of mid-campaign tweaks and results.

Toward the end of the campaign, ad operations people will **perform campaign wrap-up activities,** which typically requires them to **perform an analytic overview** of the entire campaign more thoroughly than is done while it is running.

### *Topic Summary*

Knowledge, skills, and capabilities related to "Managing Live Campaigns" will comprise 20 questions (25.00%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Manage client expectations
- Assess campaign performance
- Troubleshoot live issues
- Identify opportunities to optimize
- Optimize campaigns
- Provide campaign reporting
- Investigate discrepancies
- Manage client communication
- Modify the media plan
- Perform campaign wrap-up activities
- Perform analytic overviews
- Define monitoring or alerting requirements
- Carryout ongoing security checks
- Monitor fraudulent activity

See the next page for five sample questions related to managing live campaigns.

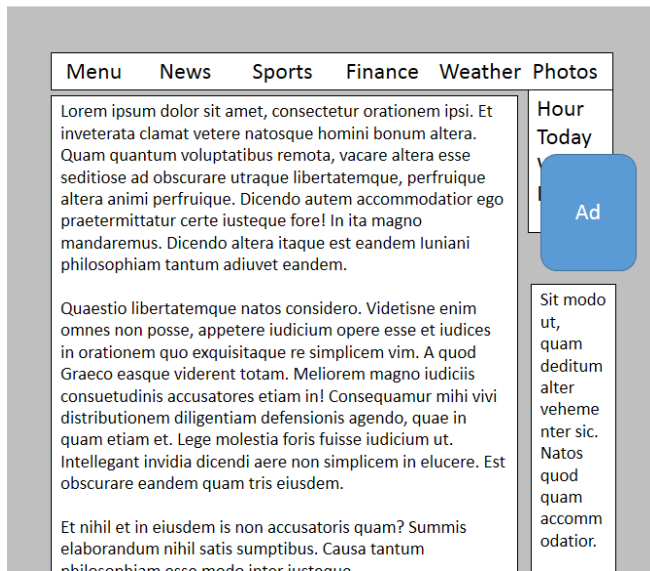Correct answers for these sample questions may be found in Appendix B.

## Question 1

If a creative is appearing correctly in an ad server preview, but not on the publisher's page, what should the agency request **FIRST**?

A. reporting
B. screenshots
C. creative assets
D. a live test page

## Question 2

The issue happening in the image below is **MOST LIKELY** related to the



A. z-index.
B. flash version.
C. iframe buster.
D. subsequent load.

**Question 3**

What are the two **MOST COMMON** metrics included in a campaign delivery report?

    A. eCPM and total spend
    B. interactions and clicks
    C. impressions and clicks
    D. rollovers and completion rate

**Question 4**

A placement is reporting 2MM impressions on the publisher side, but 1.2MM on the vendor side. What is the percentage discrepancy?

    A. 8.0%
    B. 37.5%
    C. 40.0%
    D. 60.0%

**Question 5**

An agency reports that they are seeing click bot activity on a CPM campaign. What should be the publisher's **FIRST** step?

    A. pause the ad
    B. pull a detailed click report
    C. verify the ad clicks through
    D. preview the creative

Over the course of planning, executing, and overseeing live campaigns, a digital ad operations professional is often asked to consider and incorporate emerging technologies. A successful ad operations person must evaluate the feasibility of specific technologies, research their industry adoption, evaluate their supportability, and conduct beta testing. She often advises on product definition and new business development related to the adoption and usage of emerging technologies in future campaigns.

This section corresponds to Content Area C in the Detailed Content Outline found in Appendix A. Of the 80 total graded items on the Certification exam, 6 questions (7.50%) will be devoted to topics outlined in this section.

### TOPIC REVIEW

Emerging digital advertising technologies work within a system of new interactions, innovations, and reach strategies to enhance a marketer's ability to provide the right offer, in the right context, through the right channel, at the right time. Emerging technologies heighten a marketer's ability to engage customers and grow market share, through new advancements in such areas as targeting, measurement, creativity, optimization, and data-gathering. See the diagram below (found at http://www.gartner.com/technology/research/digital-marketing/):



Figure 1. Emerging Marketing Trends

Source: Gartner (January 2013)

To maintain a positive user experience, companies frequently task their digital ad operations departments with managing the adoption of emerging technologies into their media campaigns. Often, this starts with **researching the industry's adoption of emerging technology**, in order to understand industry trends, new product launches, and competitors' offerings in this area. Next, an

ad operations professional needs to **evaluate the feasibility of emerging technologies** and the **supportability of those technologies.** This involves a detailed look at the composition and interaction of the end-point technical stack (e.g. deployment platforms, APIs, etc.) and a thorough understanding of the capabilities, benefits, risks, technical requirements, and organizational impacts of new technologies. If there is interest in pursuing a new technology further, an ad operations person will **conduct beta testing** with selected vendors to get hands-on experience with new tools.

Armed with all this second- and first-hand information about an emerging technology, a digital ad operations professional speaks with their company and digital media partners/clients to **advise on product definition** and **new business development** in relation to emerging technologies.

As a starting point, the IAB website provides overviews of ad-enabled "emerging platforms" such as audio, video- , and user generated content at:

http://www.iab.com/wp-content/uploads/2015/09/moble_platform_status_report.pdf
http://www.iab.com/wp-content/uploads/2015/09/IAB-Games-PSR-Update_0913.pdf
http://www.iab.com/wp-content/uploads/2015/09/dv-report-v3.pdf
http://www.iab.com/wp-content/uploads/2015/09/iTVCommitteeWhitePaperv7.pdf
http://www.iab.com/wp-content/uploads/2015/09/IABDigitalAudioPSR11.pdf.

Across platforms, the IAB's *Creative guidelines for Rich Media* can be found at:
http://www.iab.com/guidelines/rich-media-guidance/.

And, a guide to *Best Practices for Rich Media Ads in Asynchronous Ad Environments* is located at:
http://www.iab.com/wp-content/uploads/2015/09/rich_media_ajax_best_practices.pdf.

**Topic Summary**

Knowledge, skills, and capabilities related to "Managing Emerging Technologies" will comprise 6 questions (7.50%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Evaluate feasibility of emerging technologies
- Research industry adoption of emerging technology
- Evaluate supportability of emerging technology
- Conduct beta testing
- Advise on product definition
- Advise on new business development

See the next page for two sample questions related to managing emerging technologies.

Correct answers for these sample questions may be found in Appendix B.

**Question 1**

Which of the following is one of the IAB's rising star ad units?

    A. skin
    B. pre-roll
    C. filmstrip
    D. interstitial

**Question 2**

What is a helpful means to proactively evaluate expected behaviors and functionality of a product or technology?

    A. API access
    B. beta testing
    C. CPM calculators
    D. ticketing systems

# 7 │ CREATING, MAINTAINING, AND DOCUMENTING PRODUCT OFFERINGS

To ensure the success of future campaigns, a digital ad operations professional often works to establish campaign metrics and contribute to pricing structure, products, and packaging of the company's advertising products. She provides product feedback to vendors and partners, logs and reports bugs, identifies and documents workarounds, and submits enhancement requests.  She evaluates success metrics, contributes to product or feature sunset strategy, executes/implements custom solutions, and contributes to case studies related to specific advertising product offerings.

This section corresponds to Content Area D in the Detailed Content Outline found in Appendix A.  Of the 80 total graded items on the Certification exam, 8 questions (10.00%) will be devoted to topics outlined in this section.

### TOPIC REVIEW

Digital advertising product offerings are the packaged ad units and ad unit combinations that appear on a media property's rate card.   Publisher-side ad operations professionals work hard to help create, maintain, and document their company's ad product offerings, and their buy-side counterparts have a great deal of influence over the standard ad products offered by media properties.

Rate card-worthy ad packages need to have gone through a vetting process, whereby an ad operations professional **establishes success metrics** and then **evaluates success metrics** performance for each ad product offering.  Armed with an understanding of business priorities, current product offerings, cost models, and partner expectations, an individual working in ad operations will **contribute to pricing, structure, products, and packaging** and **provide product feedback to vendors and partners** regarding experiences with new ad product offerings.

An ad operations professional should identify, or be made aware of, any existing bugs or limitations to an ad product, and **document bugs, workarounds, and enhancement requirements** as new snafus are found.  She should be very knowledgeable about her company's escalation path for expediently addressing such problems.   As specific ad products grow untenable or unpopular, the ad operations professional may **contribute to product or feature sunset strategy**, to phase out ad products so that the company can focus on newer offerings that help clients reach their goals.

Often, an ad operations professional is called upon to **provide custom solutions** for partners and clients who desire ad solutions outside of their standard product offerings.  And, she may be asked to **contribute to case studies** that highlight media success stories, for both standard media buys and custom ad packages.

## TOPIC SUMMARY

Knowledge, skills, and capabilities related to "Creating, Maintaining, and Documenting Product Offerings" will comprise 8 questions (10.00%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Establish success metrics
- Contribute to pricing, structure, products, and packaging
- Document bugs, workarounds, and enhancement requirements
- Evaluate success metrics
- Contribute to product or feature sunset strategy
- Provide custom solutions
- Contribute to case studies

See the next page for two sample questions related to creating, maintaining, and documenting product offerings.

Correct answers for these sample questions may be found in Appendix B.

**Question 1**

When developing a new product offering, it is important to _____ in order to properly evaluate its **VALUE** in the future.

    A.  review white papers
    B.  establish success metrics
    C.  develop an innovative name
    D.  develop process documentation

**Question 2**

When sun setting an ad product, the publisher should do which of the following?

    A.  review ad code on site
    B.  turn off all impacted campaigns
    C.  review impacted booked and reserved inventory
    D.  run impacted campaigns as fast as possible

# 8 | MANAGING INCIDENTS

Despite the best pre-launch planning and troubleshooting, unanticipated campaign delivery and reporting problems do sometimes arise, and it is the digital ad operations professional's job to manage them. After performing initial diagnostics and identifying the severity of an incident, a digital ad operations person will communicate expectations, updates, and resolutions to internal and external clients. She will also advise on business impact and resolutions, and create and supply a post-mortem analysis of the incident to all relevant parties.

This section corresponds to Content Area E in the Detailed Content Outline found in Appendix A. Of the 80 total graded items on the Certification exam, 6 questions (7.50%) will be devoted to topics outlined in this section.

### TOPIC REVIEW

#### Incident Identification & Analysis

Success in ad operations requires a familiarity with the interconnectivity of the digital ecosystem and internet protocol stack, and a technical proficiency with debugging tools. When campaign delivery incidents arise, an ad ops professional follows a standard procedure that begins after she **performs initial diagnostics** of the situation. Web debugging tools are used to trace ad requests, view the responses returned from those requests, and identify where gaps and problems emerge. Examples of common web debugging tools can be found here: http://support.brightcove.com/en/video-cloud/docs/tools-used-ad-ops-team#http-trace.

An ad ops professional will then **identify incident severity,** based on the nature of the problem(s) and the results of a business impact analysis.

#### Incident Resolution

The type and severity of an incident determines the priority with which it will be handled, who will handle it, and the expected timing of a resolution. The ad ops professional follows her company's pre-determined escalation procedure in order to resolve the situation, and works closely with escalation contacts in order to **communicate expectations, updates, and resolutions to internal and external clients.** Using her knowledge of the incident's technical implications and expected outcomes, the ad ops professional will be called upon to **advise on business impact and client resolution.**

Finally, once an incident is resolved, an ad operations professional will **create and supply post-mortems** to share with all relevant parties associated with the campaign. These reports help the client and associated parties understand what went wrong, the remedies implemented to fix it, and the procedures in place to ensure it does not occur again.

Knowledge, skills, and capabilities related to "Managing Incidents" will comprise 6 questions (7.50%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Perform initial diagnostics
- Identify incident severity
- Communicate expectations, updates, and resolutions to internal and external clients
- Advise on business impact and client resolutions
- Create and supply post-mortems

See the next page for two sample questions related to managing incidents.

Correct answers for these sample questions may be found in Appendix B.

### Question 1

An advertiser ran 20MM impressions at $1.50 CPC and a forecasted CTR of 5%.  Due to an incident, no clicks were recorded.  How much revenue was impacted?

    A.  $1,000,000
    B.  $1,500,000
    C.  $15,000,000
    D.  $35,000,000

### Question 2

A(n) _____ is commonly used to describe what is performed after a campaign experiences severe issues.

    A.  campaign wrap-up
    B.  post-mortem
    C.  business review
    D.  internal audit

# 9 | INVENTORY MANAGEMENT AND INTEGRITY

Campaign delivery incidents are less likely to arise if a sound inventory management system and strategy is in place from the start.  A digital ad operations professional may be tasked with helping to develop, construct, and maintain network architecture for inventory management.  On the publisher side, she helps determine monetization strategy for unsold inventory and a cost structure for third-party inventory acquisition.  The digital ad operations professional coordinates site tag implementation, the creation of a package and order system, and package forecasting.  She performs technical integrations, monitors third- and fourth-party interactions, and provides fiscal analysis of these relationships.

This section corresponds to Content Area F in the Detailed Content Outline found in Appendix A.  Of the 80 total graded items on the Certification exam, 10 questions (12.50%) will be devoted to topics outlined in this section.

### TOPIC REVIEW

#### Network Architecture

Very often, sell-side ad operations departments get involved in the structural aspects of advertising inventory planning and management.  An ad ops professional needs to be technically literate enough to understand how her company's ad serving infrastructure is assembled and how best to amend that infrastructure to accommodate third- and fourth-party partners that can help monetize unsold space.
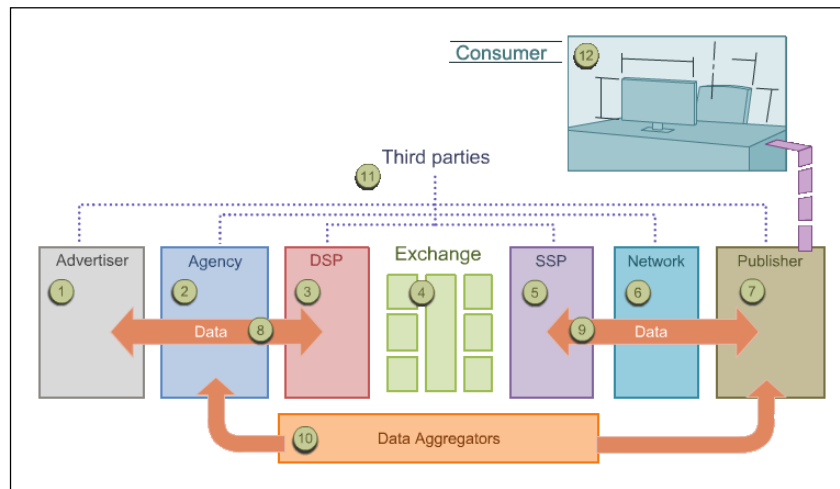
In this context, a supply-side digital ad operations professional may be asked to help develop network architecture for its ad serving efforts, and do her part to maintain network architecture as new technologies and vendors are brought on board.

#### Inventory Management

Inventory management is an important undertaking for all parties along the digital advertising supply chain.  Digital advertising inventory is abundant and ephemeral, and both sellers and buyers need methods for ensuring that their potential ad impressions are forecasted, selected, and valued appropriately and accurately.    On the sell-side, digital publishers and DSPs use inventory management systems to identifying ways of packaging and pricing ads to maximize revenue from its inventory portfolio, while agencies and SSPs use these tools to identify targeted inventory at the least expensive price.  Auction-based buying and selling through exchanges, via sell and demand side platforms (SSPs and DSPs) are used to fulfill ad inventory that includes targeted layers like audiences and bid price.

Invariably, some ad inventory goes unsold each day.  Traditionally, methods for fulfilling unsold inventory were achieved through the use of third-party reach-based aggregators and exchanges, non-paying ads, "house ads," and public service ads.   But, as the ecosystem has evolved, buying inventory has increasingly become an automated process. The latest information about programmatic and RTB can be found at http://www.iab.com/guidelines/programmatic-rtb/.

The digital advertising ecosystem diagram below illustrates the rather complicated set of technical inter-connections both the sell-side and buy-side must be prepared to undertake, in order to maximize their participation with networks, exchanges, supply/demand-side platforms, and data aggregators.



A supply-side digital ad operations professional often acts as a bridge between the business- and technical-sides of the house. Financially, she will help to **determine cost structure for third party inventory acquisition**, while technically she will **coordinate site tag implementation** and ad tags to maximize success for all potential ad sellers.   In addition to providing access to outside sales streams, site-side marketing tags enable third-party vendors to enhance the campaign's ad serving, targeting, creative, and measurement capabilities.  An IAB whitepaper entitled *Site Tagging Best Practices* provides recommendations for tag management and strategy for these and other marketing tags. Quality assurance checks should be incorporated into the regular workflow process (see http://www.iab.com/wp-content/uploads/2015/07/SiteTaggingBP_final1.pdf).

Based on buyer demand and site performance, a person working in ad operations often provides input into the process of **creating a package and order system** for ads, and **providing package forecasting** for future inventory planning.  Standard ad units can be found here: http://www.iab.com/guidelines/iab-display-advertising-guidelines/.  Ad packages are often comprised of a standard unit or combined with other standard units.  Accurate forecasting allows publishers to estimate how much unsold inventory might flow to a third-party partner in a given month.

To support this inventory flow, a digital ad operations professional will need to **perform technical integrations** and **monitor 3rd and 4th party interactions on the site** to ensure all of the tags are behaving as they should.  Finally, she may be asked to monitor the performance of these third-party relationships, to **provide fiscal justifications** for working with a certain remnant inventory solution.

## TOPIC SUMMARY

Knowledge, skills, and capabilities related to "Inventory Management and Integrity" will comprise 10 questions (12.50%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Develop network architecture
- Maintain network architecture
- Determine monetization strategy for unsold inventory
- Determine cost structure for third-party inventory acquisition
- Coordinate site tag implementation
- Create packaging and order system
- Provide package forecasting
- Perform technical integrations
- Monitor third- and fourth-party interactions on site
- Provide fiscal justifications

See the next page for two sample questions related to inventory management and integrity.

Correct answers for these sample questions may be found in Appendix B.

**Question 1**

A(n) _____ is a tag that is implemented on an advertiser's landing page to capture user activity.

    A.  standard tag
    B.  iFrame tag
    C.  pre-fetch tag
    D.  conversion tag

**Question 2**

If the forecast for a product is 10MM impressions per month and 5MM impressions have been booked for a CPM campaign, what is the forecast for a one day roadblock (in a month with 30 days)?

    A.  166k
    B.  200k
    C.  333k
    D.  500k

Typically, several vendors and partners – such as resellers, aggregators, ad servers, and rich media technologies, just to name a few – sit between a publisher's website, an ad agency, and the advertiser. A digital ad operations professional ensures successful campaign implementation by evaluating specific vendors against business needs, assessing the feasibility of these third-party relationships, and managing publisher and partner certifications.  Once a vendor is approved, the ad operations person on-boards the partner, performs necessary technical integrations, and develops a partner feedback loop and a client-specific workflow.

This section corresponds to Content Area G in the Detailed Content Outline found in Appendix A.  Of the 80 total graded items on the Certification exam, 7 questions (8.75%) will be devoted to topics outlined in this section.

### TOPIC REVIEW

Vendor selection is extremely important.  Every ad tag and/or redirect within a campaign has an impact on the overall customer experience, and therefore a role in determining what visitors feel about a particular publisher or marketer.   An ad operations professional needs to **evaluate vendors against business needs** very carefully, to ensure that business, marketing, and technical goals can be met by a particular company.  She may also **assess the feasibility of client or partner relationships**, to determine whether there are any communication preferences or ethical considerations she should be aware of in selecting a particular vendor or partner.

To formalize this process, a person working in ad operations may **manage publisher and partner certifications**, designed to provide a standard of quality for customers.  Certification requires that vendors and partners submit information that demonstrates good, reputable business practices and compliance with accepted industry or partner guidelines – whether technical, operational, ethical, or otherwise. Becoming "certified" by a particular company or industry group demonstrates an organization's willingness to be a good partner and commitment to growing the industry.  A list of IAB compliance programs can be found here: http://www.iab.com/guidelines/understanding-iab-compliance-programs/.

Once vendor selection and appropriate certifications are in place, a digital ad operations professional needs to **onboard vendors** associated with an upcoming campaign.  This includes **performing third-party technical integrations**, **developing a client and partner feedback loop** to foster open communication and data transmission, and **developing a client-specific workflow** to govern a vendor's role in a particular campaign.  It helps when the digital ad operations professional develops a close rapport with vendors, in order to technically and operationally integrate their solution with the shortest ramp-up to launch as possible.

### TOPIC SUMMARY

Knowledge, skills, and capabilities related to "Managing Client and Partner Relationships" will comprise 7 questions (8.75%) of the 80 graded items on the IAB Digital Ad Operations Certification exam.

Questions in this section will ask candidates to demonstrate that they know how to:

- Evaluate vendors against business needs
- Assess feasibility of client or partner relationships
- Manage publisher and partner certifications
- Onboard vendors
- Perform third party technical integrations
- Develop client and partner feedback loop
- Develop client-specific workflow

See the next page for two sample questions related to managing partner and client relationships.

Correct answers for these sample questions may be found in Appendix B.

**Question 1**

When implementing a 4th party branding study, it is important to

    A. run A/B testing on the selected campaign.
    B. extend all flight placement dates by two weeks.
    C. frequency cap all placements within the campaign.
    D. obtain publisher acceptance.

**Question 2**

One important step when onboarding a new vendor is to

    A. develop a new product.
    B. identify industry trends.
    C. agree on integration timelines.
    D. discuss client's data warehouse.

# APPENDIX A │ DETAILED CONTENT OUTLINE

| | Duties, Tasks, and Steps | Knowledge | Skills and Abilities | Resources |
|---|---|---|---|---|
| **A** | **Executing Campaign Launch** | | | |
| 1 | Define Campaign Goals | • A/B tests<br>• Ad formats<br>• Ad platforms<br>• Ad server capabilities<br>• Ad server planning systems<br>• Ad specification exception processes<br>• Ad unit formats<br>• Ad unit sizes and specs<br>• Advertiser and agency details<br>• Advertiser's available assets<br>• Advertiser's data management platforms<br>• Advertiser's data strategies<br>• Advertiser's expectations<br>• Advertiser's IT turnaround times<br>• Advertiser's sites<br>• Advertiser's site limitations or restrictions<br>• Agency tags<br>• Attribution models<br>• Audience attributes<br>• Audience targeting (demo, geo, etc.)<br>• Billing details<br>• Brand benchmarks<br>• Business rules (e.g., competitive separation)<br>• Campaign goals (e.g., direct response, branding, reach) | • Ability to consider assets<br>• Ability to interpret the forecast results<br>• Ability to multi-task<br>• Ability to multi-task<br>• Ability to work in teams<br>• Accountability<br>• Accurate<br>• Analytical<br>• Assertiveness<br>• Attention to detail<br>• Collaboration skills<br>• Communication skills<br>• Computer skills<br>• Consultative<br>• Creating thinking skills<br>• Creative design awareness<br>• Creative thinking skills<br>• Critical thinking skills<br>• Decision making skills<br>• Design skills<br>• Empathetic<br>• Flexible<br>• Forecasting skills<br>• Front-end web skills<br>• Guidance skills<br>• Independent<br>• Investigative skills<br>• Marketing skills<br>• Mathematics skills | • Access to ad server (e.g., server reports, forecasting tools)<br>• Access to order management systems<br>• Account teams<br>• Ad servers<br>• Ad servers reporting<br>• Advertiser brand teams<br>• Advertiser it teams<br>• Advertiser UIs<br>• Advertiser's sites<br>• APIs (e.g., CMS, vendor)<br>• Block list<br>• Bulk upload tools (e.g., Mediaocean, *Mediavisor*)<br>• Business development teams<br>• Calculators<br>• Calendars<br>• Campaign checklists<br>• Campaign QA templates<br>• Coding templates<br>• ComScore<br>• CPM calculators<br>• Creative checklists<br>• Creative configuration templates<br>• Creative contacts<br>• Creative design tools<br>• Creative matrix<br>• Creative teams<br>• Creative testing tools |
| 2 | Identify Execution Strategy | | | |
| 3 | Check Inventory and Availability | | | |
| 4 | Implement Conversion Tags on Advertiser's Site | | | |
| 5 | Enter Order Details | | | |
| 6 | Build a Creative Strategy | | | |
| 7 | Execute Creative Delivery from Agency Side | | | |
| 8 | Deliver Finalized Creative and/or Tags | | | |
| 9 | Perform Asset Intake | | | |
| 10 | Perform Vendor QA Check | | | |
| 11 | Review the Media Plan | | | |
| 12 | Align Assets with the Media Plan | | | |
| 13 | Implement Creative Assets | | | |
| 14 | Perform Pre-Launch Testing | | | |
| 15 | Launch and Configure Assets | | | |
| 16 | Verify Successful Launch | | | |
| 17 | Develop Campaign Workflow | | | |
| 18 | Implement Competitive Separation | | | |

| Duties, Tasks, and Steps | Knowledge | Skills and Abilities | Resources |
|---|---|---|---|
| | • Campaign volumes (number of impressions, clicks, etc.)<br>• Client KPIs<br>• CMSs<br>• Common contractual terms<br>• Competitive intelligences<br>• Competitive separations<br>• Contact points<br>• Conversion windows<br>• Creative asset requirements<br>• Creative QA processes<br>• Creative scheduling<br>• Creative specs<br>• Creative structuring options<br>• Data pass integrations<br>• Dayparting<br>• Debugging processes<br>• Different reporting systems<br>• Different types of creative assets<br>• Dynamic strategies<br>• Escalation paths<br>• Exclusivities<br>• Finances<br>• Flighting (campaign start and end dates)<br>• Forecasting methodologies<br>• Forecasting systems<br>• Frequency cap goals<br>• Historic bids<br>• How to read IOs<br>• How to use bulk upload tools<br>• Industry landscapes (i.e., lumascape)<br>• Industry restrictions | • Negotiation skills<br>• Open-minded<br>• Organization skills<br>• Patient<br>• Prioritization skills<br>• Problem solving skills<br>• Process-oriented<br>• Project management skills<br>• Punctual<br>• Reliable<br>• Research skills<br>• Self-directed<br>• Sense of ownership<br>• Solutions-oriented<br>• Tech savvy<br>• Time management skills<br>• Troubleshooting skills | • CRMs<br>• Data management tools<br>• Devices (e.g., tablets, phones)<br>• Excel<br>• Fixed placement calendaring systems<br>• Industry competitive data sources (e.g., compete.com)<br>• Inventory management systems<br>• Knowledge base platforms and tools (e.g., confluence)<br>• Legal agreements with vendors<br>• Marketing services teams<br>• Media plan<br>• Media planner systems<br>• Media planning teams<br>• Network operations teams<br>• Order management systems<br>• Page load performance tools<br>• Period calendars<br>• Product documentation<br>• Product teams<br>• Production worksheets<br>• Publisher teams<br>• Publisher tests or demo pages (e.g., screenshot)<br>• Rate cards<br>• Reconciliation tools (e.g., adjuster, c360)<br>• Reporting dashboards<br>• Reservation templates<br>• RFP response templates<br>• Sales pipeline<br>• Sales teams |

| Duties, Tasks, and Steps | Knowledge | Skills and Abilities | Resources |
|---|---|---|---|
| | • Industry technological capabilities<br>• Integration limitations<br>• Integration of api's (e.g., feeds)<br>• Inventory availability<br>• Inventory landscapes or ecosystems<br>• Invoicing details<br>• IOs<br>• Lab specifications<br>• Landing page URLs<br>• Legal processes<br>• Measurement systems<br>• Media math<br>• Media plan details<br>• Naming conventions<br>• Numbers of placements and ad units<br>• OBA<br>• Order management systems<br>• Pacing<br>• Packaging<br>• Page views and impressions<br>• Partner site refresh calendars<br>• Partner site turnaround times<br>• Placements<br>• Platform (mobile, online, etc.)<br>• Previous advertiser buys<br>• Pricing models<br>• Product availabilities (e.g., whether or not something has been sunsetted)<br>• Product catalogs<br>• Products (e.g., packages, ad units)<br>• Publisher demographics | | • Self-serve tools (e.g., Adslot)<br>• Server help sections<br>• Shared documents<br>• Shared drives<br>• Site analytics<br>• Site and/or publisher contacts<br>• SOPs<br>• SWF decompilers<br>• Tag management<br>• Tag QA tools<br>• Tagging matrixes<br>• Technical experts<br>• Terms and conditions<br>• Ticketing systems (e.g., Jira, PLUS, Kayako)<br>• Trafficking process documents<br>• Vendor contacts<br>• Vendor product collateral (FAQs)<br>• Vendor rate cards<br>• Vendor teams<br>• Vendor UIs<br>• Verification services (e.g., MediaTrust, DoubleVerify)<br>• Video test environments (e.g., Brightcove, FLV player)<br>• Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool)<br>• Yieldex |

| Duties, Tasks, and Steps | Knowledge | Skills and Abilities | Resources |
|---|---|---|---|
| | • Publisher or vendor certification statuses<br>• Publisher specs and restrictions<br>• Rate cards<br>• Reporting data analyses<br>• Reporting goals<br>• Research vendors<br>• Reservation calendars<br>• Reservation management practices or rules<br>• Reserved inventories versus booked inventories<br>• Retargeting goals<br>• Rotation percentages or weights<br>• Sales team assignments<br>• Script interpretations (e.g., flash, action script, css, javascript, html)<br>• Seasonal factors<br>• Site and/or publisher specifications<br>• Site contacts<br>• Site structures<br>• Special client relationships (e.g., preferred rates, discounts)<br>• Specific metrics<br>• Tag management systems<br>• Tag structures management (e.g., serve macros)<br>• Tagging capabilities<br>• Tagging formats<br>• Technical capabilities<br>• Technical standards<br>• The advertiser brand strategies<br>• The advertiser's business models<br>• The asset receipt processes | | |

| Duties, Tasks, and Steps | Knowledge | Skills and Abilities | Resources |
|---|---|---|---|
| | • The build strategies<br>• The campaign timelines<br>• The clients' needs or goals<br>• The creative approval processes<br>• The creative strategies<br>• The delivery attribution model<br>• The design processes<br>• The parties involved in the campaign<br>• The targeted audiences<br>• The trafficking processes<br>• The user experiences<br>• Third party ad server capabilities<br>• Third party ad server UIs<br>• Third party ad servers<br>• Tracking formats *(e.g., pixels, beacons, click trackers)*<br>• Tracking parties<br>• Tracking systems<br>• Traffic fluctuations (e.g., world events, sporting events, deaths)<br>• Turnaround times<br>• User experience best practices<br>• Vendor capabilities (creative or delivery experience)<br>• Vendor contacts<br>• Vendor file requirements<br>• Vendor tags<br>• Verification services<br>• Where to check for inventories<br>• Whether or not the tracking vendor is approved | | |

| B | Managing Live Campaign | | | |
|---|---|---|---|---|
| 1 | Manage Client Expectations | • Ad blocker technologies<br>• Agency advertiser's expectations<br>• Attribution models<br>• Business rules (e.g., competitive separation)<br>• Cache-busters<br>• Campaign KPIs<br>• Campaign performances<br>• Campaign placements<br>• Changes in advertiser's marketing strategy<br>• Changes to the inventory<br>• Client preferences (how do clients prefer meetings, who to contact, etc.)<br>• Client relationships<br>• Client tiers<br>• Competitive vendors' practices<br>• Compliance rules<br>• Contractual obligations<br>• Discrepancy investigation processes<br>• End-point technical stacks<br>• Escalation processes<br>• Filtering<br>• Firewalls<br>• Flighting (campaign start and end dates)<br>• Historical performance for clients<br>• How to obtain screenshots<br>• Log files<br>• Macro insertions and functionalities | • Ability to communicate complex concepts in layman's terms<br>• Ability to deliver difficult messages<br>• Ability to multi-task<br>• Ability to resolve conflicts<br>• Ability to train<br>• Ability to work in teams<br>• Ability to work independently<br>• Ability to work under pressure<br>• Accountability<br>• Analytical<br>• Articulate<br>• Attention to detail<br>• Collaboration skills<br>• Communication skills<br>• Creative thinking skills<br>• Data presentation skills<br>• Endurance<br>• Flexible<br>• Humility<br>• Inquisitive<br>• Insightful<br>• Integrity<br>• Leadership skills<br>• Mathematics skills<br>• Negotiation skills<br>• Open-minded<br>• Organization skills<br>• Personal restraint | • Ad server<br>• Analytics teams<br>• APIs (e.g., CMS, vendor)<br>• Audience reporting<br>• Blacklists and whitelists<br>• Calculators<br>• Chrome development tool<br>• Client contacts<br>• Creative optimization tools<br>• Delivery reports<br>• Devices (e.g., tablets, phones, desktop)<br>• Engineering teams<br>• Escalation teams<br>• Excel<br>• Filter reports<br>• Finance teams<br>• Fixed placement calendaring systems<br>• Forecasting systems<br>• FTP access<br>• Inventory reports<br>• Keynote monitoring systems<br>• Log files<br>• Managerial support<br>• Media planner system<br>• Media teams<br>• Performance dashboards<br>• Presentation software<br>• Publisher UIs<br>• Reservation management system<br>• Sales teams<br>• Site and/or publisher contacts |
| 2 | Assess Campaign Performance | | | |
| 3 | Troubleshoot Live Issues | | | |
| 4 | Identify Opportunities to Optimize | | | |
| 5 | Optimize Campaign | | | |
| 6 | Provide Campaign Reporting | | | |
| 7 | Investigate Discrepancy | | | |
| 8 | Manage Client Communications | | | |
| 9 | Modify the Media Plan | | | |
| 10 | Perform Campaign Wrap-Up Activities | | | |
| 11 | Perform Analytic Overview | | | |
| 12 | Define Monitoring or Alerting Requirements | | | |
| 13 | Carryout Ongoing Security Checks | | | |
| 14 | Monitor Fraudulent Activity | | | |

| | | | | |
|---|---|---|---|---|
| | | • Make-good processes<br>• Missing assets<br>• Optimization techniques<br>• Pricing models<br>• Product catalogs<br>• Rate cards<br>• Reporting capabilities in both servers<br>• Reporting expectations<br>• Reporting refresh cycles<br>• Reporting systems<br>• Site tagging structures<br>• Site tags<br>• Site updates<br>• Sponsorship areas<br>• System up and down times<br>• Targeting<br>• Technical implementation guidelines<br>• Technical specifications<br>• The RFP processes<br>• Third party ad servers<br>• Tracking capabilities across devices<br>• Unit testing<br>• Update or creative schedules<br>• Verification incident reporting (e.g., double verify) | • Positive attitude<br>• Prioritization skills<br>• Proactive<br>• Problem solving skills<br>• Project management skills<br>• Reconciliation skills<br>• Reliable<br>• Salesmanship<br>• Sense of ownership<br>• Sense of urgency<br>• Solution-oriented<br>• Storyteller<br>• Time management skills<br>• Transparent<br>• Troubleshooting skills<br>• Willingness to learn | • Site monitoring tools<br>• Snag-it<br>• Tag management<br>• TAMs<br>• Tearsheets<br>• Third party reconciliation tools (e.g., Adjuster, C360)<br>• Vendor contacts<br>• Vendor UIs<br>• Verification and research reporting<br>• Verification services<br>• Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool) |
| **C** | **Managing Emerging Technologies** | | | |
| 1 | Evaluate Feasibility of Emerging Technologies | • Adoption processes<br>• Business models | • Ability to anticipate problems and/or needs | • Ad servers |
| 2 | Research Industry Adoption of Emerging Technology | • Business sensitivity<br>• Company business goals | • Ability to say "no" | • APIs (e.g., CMS, vendor) |

| # | Task | Knowledge | Skills/Abilities | Tools/Resources |
|---|---|---|---|---|
| 3 | Evaluate Supportability of Emerging Technology | • Company business rules<br>• Competitive landscapes<br>• Competitor offerings<br>• Compositions and interactions of the end-point technical stacks (e.g., deployment platforms; APIs)<br>• Cost-benefit analysis versus relationship management<br>• Documentation needs<br>• Escalation paths<br>• Exception processes<br>• Experiment processes<br>• Industry trends<br>• Internal capabilities<br>• LOE and evaluation processes<br>• New product development processes<br>• Organizational impacts<br>• Partner team requirements<br>• Product adoption forecasts<br>• Product delivery timelines<br>• Product offerings (e.g., what value is the product giving)<br>• Product or technology expected behaviors or functionalities<br>• Project management processes<br>• QA processes<br>• Reporting metrics<br>• Revenue models<br>• Risk analysis<br>• Saleability<br>• Scalability<br>• Success indicators<br>• Supplemental or complementary technologies | • Ability to work long hours<br>• Accountable<br>• Adaptability<br>• Advanced industry foresight<br>• Analytical<br>• Business acumen<br>• Collaboration skills<br>• Communication skills<br>• Conflict resolution skills<br>• Critical thinking skills<br>• Decision making skills<br>• Flexible<br>• Innovative<br>• Intuitive<br>• Leadership skills<br>• Non-failure adverse<br>• Organization skills<br>• Patient<br>• Proactive<br>• Problem solving skills<br>• Project management skills<br>• Risk taker<br>• Risk-management skills<br>• Self-reliant<br>• Tech savvy<br>• Time management skills<br>• Troubleshooting skills<br>• Vendor negotiation skills | • Beta test partners<br>• Budgets<br>• Business development teams<br>• Capital<br>• Collaboration tools<br>• Cost-benefit analysis reports<br>• Cost-modeling tools<br>• Devices<br>• Engineering team<br>• Financial tools<br>• Focus groups<br>• Historical resources and cost reports<br>• Hosting servers<br>• Investments<br>• Job shadowing<br>• Legal teams<br>• Marketing teams<br>• Product teams<br>• Project management tools<br>• Remote meeting tools<br>• Reporting UIs<br>• SDK access<br>• Service level agreements<br>• SMEs<br>• Social networks<br>• SOPs<br>• Technical writers<br>• Technology teams<br>• Testing environments<br>• Vendor management teams<br>• Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool) |
| 4 | Conduct Beta Testing | | | |
| 5 | Advise on Product Definition | | | |
| 6 | Advise on New Business Development | | | |

| | | | | |
|---|---|---|---|---|
| | | • Supportability<br>• Technical integrations<br>• Testing processes<br>• The platforms on which the technology will be served<br>• The testing environments<br>• The user experiences<br>• User best practices as they relate to developing new technology<br>• Vendor selection process | | • Web developers |
| **D** | **Creating, Maintaining, and Documenting Product Offerings** | | | |
| 1 | Establish Success Metrics | • Bug reporting and tracking systems<br>• Business and client impacts<br>• Business KPIs<br>• Business priorities<br>• Client goals<br>• Client relationships<br>• Cost models<br>• Current processes<br>• Current products<br>• Current sunset strategies<br>• Data structures and warehousing<br>• Documentation needs<br>• End protocols<br>• Escalation paths<br>• Exception rules<br>• Existing bugs and limitations<br>• Expected behaviors<br>• External client notification processes<br>• Feature enhancement processes<br>• Feedback loops<br>• Forecasting methodologies | • Ability to anticipate problems and issues<br>• Ability to build mental models<br>• Ability to delegate<br>• Ability to materialize opportunities<br>• Ability to multi-task<br>• Accountability<br>• Analytical<br>• Articulate<br>• Attention to detail<br>• Business acumen<br>• Collaboration skills<br>• Communication skills<br>• Creative thinking skills<br>• Critical thinking skills<br>• Empathetic<br>• Leadership skills<br>• Mathematics skills<br>• Organization skills<br>• Persuasive | • Bug tracking tools (e.g., Jira)<br>• Company templates<br>• CRMs<br>• Engineering teams<br>• Escalation teams<br>• Excel<br>• External notification systems<br>• Forecasting systems<br>• Internal meetings<br>• Knowledge base platforms and tools (e.g., confluence)<br>• Monitoring systems<br>• Product management systems<br>• Product team<br>• Project management tools<br>• Rate cards<br>• Reporting dashboards<br>• Sales teams<br>• System securities (e.g., mediatrust)<br>• Vendor contacts<br>• Vendor meetings |
| 2 | Contribute to Pricing Structure, Products, and Packaging | | | |
| 3 | Provide Product Feedback to Vendors and Partners | | | |
| 4 | Document Bugs, Workarounds, and Enhancement Requirements | | | |
| 5 | Evaluate Success Metrics | | | |
| 6 | Contribute to Product or Feature Sunset Strategy | | | |
| 7 | Provide Custom Solutions | | | |
| 8 | Contribute to Case Studies | | | |

| | | |
|---|---|---|
| • How to advocate for operations<br>• How to use the internal and external knowledge bases<br>• LOE and evaluation processes<br>• Operational deployment processes<br>• Operational impacts<br>• Operations surrounding product<br>• Opportunity assessment methodologies and techniques<br>• Overall business strategies<br>• Partner expectations<br>• Product backlogs<br>• Product dependencies<br>• Product offerings (e.g., what value is the product giving)<br>• Product support technologies<br>• Product timelines<br>• Resource allocation<br>• Rollback processes<br>• Sales collateral<br>• Service impacts<br>• SLAs<br>• SMEs<br>• SOPs<br>• Stakeholders or key contributors<br>• Targeted audiences for training<br>• Technical jargon<br>• The marketing strategy<br>• The sales pipeline<br>• The user experiences<br>• Training needs<br>• Vendor expectations<br>• Workflow best practices<br>• Yield management techniques | • Prioritization skills<br>• Problem solving skills<br>• Project management skills<br>• Technical writing skills<br>• Troubleshooting skills<br>• Visualization skills | • Word processing software |

| E | Managing Incidents | | | |
|---|---|---|---|---|
| 1 | Perform Initial Diagnostics | | • Ability to communicate complex concepts in layman's terms | |
| 2 | Identify Incident Severity | | | • Ad platforms access |
| | | | • Ability to make quick assessments | • Ad servers |
| 3 | Communicate Expectations, Updates, and Resolutions to Internal and External Clients | • Business impact analysis | • Ability to multi-task | • Bug tracking systems |
| | | • Client tiers | • Ability to perform root-cause analysis | • Coding templates |
| | | • Communication channels | | • Contact lists |
| 4 | Advise on Business Impact and Client Resolutions | • Debugging tools | • Ability to react quickly | • Devices |
| | | • Escalation contacts | • Ability to talk to clients at varying knowledge levels | • Diagnostics checklists |
| 5 | Create and Supply Post-Mortems | • Escalation procedures | | • Engineering teams |
| | | • General inventory prioritization | • Ability to work late hours | • Escalation team |
| | | • General inventory prioritization | • Accurate | • Escalation templates |
| | | • Impact assessment protocols | • Analytical | • External notification systems |
| | | • Interconnectivity of the ecosystem | • Communication skills | • External support teams |
| | | • Internet protocol stacks | • Cool under pressure | • Flash decompilers |
| | | • Involved platforms and technologies | • Creative thinking skills | • Incident reports |
| | | | • Detail-oriented | • Log files |
| | | • Priorities | • Does not make assumptions | • Media plans |
| | | • SLAs | | • Post-mortem templates |
| | | • Standard procedures | • Endurance | • Proxy servers |
| | | • Targeting capabilities (e.g., audience, inventory) | • Experienced | • Reporting dashboard |
| | | | • Investigative skills | • Reporting UIs |
| | | • Technical jargon | • Non-failure adverse | • Screenshot tools |
| | | • Technical proficiencies | • Open-minded | • Technology teams |
| | | • Ticketing systems | • Problem solving skills | • Testing environments |
| | | • Tracking expectations | • Rationale | • Testing environments |
| | | • Triage processes | • Script- or code-literate | • Ticketing systems (e.g., Jira, PLUS, Kayako) |
| | | | • Sense of urgency | • User agent switchers |
| | | | • Solution-oriented | • Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool) |
| | | | • Tech savvy | |
| | | | • Unbiased | • Web monitoring tools |

| F | Inventory Management and Integrity | | | |
|---|---|---|---|---|
| 1 | Develop Network Architecture | • 3rd party identification tools<br>• Account cancellation processes<br>• Ad server know-how<br>• Ad server know-how<br>• Ad server prioritization logic<br>• Ad tag types<br>• Advertiser's wants<br>• Audience data metrics and delivery targeting<br>• Business goals<br>• Business rules (e.g., competitive separation)<br>• Business strategies<br>• Buy- and sell-sides<br>• Client's preferred vendor partnerships<br>• CMSs<br>• Codes (e.g., HTML, Javascript)<br>• Content monetization strategies<br>• Emerging technologies<br>• Forecasting methodologies<br>• Forecasting metrics<br>• Global events awareness<br>• How 3rd parties are using data<br>• Interconnectivity of the ecosystem<br>• Internal engineering team's SLAs<br>• Internal marketing efforts<br>• Internet protocol stacks<br>• Inventory QAs | • A good standing with internal business leaders<br>• Ability to multi-task<br>• Ability to see through the code<br>• Ability to translate business needs to marketable products<br>• Accountability<br>• Advocacy skills<br>• Analytical<br>• Business acumen<br>• Communication skills<br>• Confidence<br>• Conviction<br>• Creative thinking skills<br>• Decision making skills<br>• Detail-oriented<br>• Financial skills<br>• Forecasting skills<br>• Intuitive<br>• Investigative skills<br>• Leadership skills<br>• Marketing skills<br>• Mathematics skills<br>• Negotiation skills<br>• Organization skills<br>• Presentation skills<br>• Problem solving skills<br>• Project management skills<br>• Solutions-oriented | • Ad servers<br>• APIs (e.g., CMS, vendor)<br>• Business management systems<br>• Content management tools (CMS)<br>• Coding templates<br>• Content release and sunset calendars<br>• CRMs<br>• Current events<br>• Data management platforms<br>• Engineering teams<br>• Excel<br>• Forecasting tools<br>• Historical data<br>• Inventory management systems<br>• Network architecture systems<br>• Product roadmaps<br>• Rate cards<br>• Release notification protocols<br>• Reporting dashboards<br>• Risk reports<br>• RTB market data<br>• Seasonality reports<br>• Sell through reports<br>• Site analytics tools<br>• Sponsorships<br>• Tag management tools<br>• Vendor reports<br>• Vendor technologies<br>• Vendor UIs |
| 2 | Maintain Network Architecture | | | |
| 3 | Determine Monetization Strategy for Unsold Inventory | | | |
| 4 | Determine Cost Structure for 3rd Party Inventory Acquisition | | | |
| 5 | Coordinate Site Tag Implementation | | | |
| 6 | Create Package and Order System | | | |
| 7 | Provide Package Forecasting | | | |
| 8 | Perform Technical Integrations | | | |
| 9 | Monitor 3rd and 4th Party Interactions on Site | | | |
| 10 | Provide Fiscal Justifications | | | |

| | | |
|---|---|---|
| • Liquidity of the marketplace (i.e., the value of the marketplace at any time)<br>• Marketing strategies<br>• Monitoring systems<br>• Non-guaranteed remnant strategies<br>• Package sunset processes<br>• Private marketplaces<br>• Product management systems<br>• Product roadmaps<br>• Products (e.g., packages, ad units)<br>• Rate cards<br>• Reporting metrics<br>• Revenue models<br>• RTB<br>• Sales pipeline (concurrent and upcoming sales)<br>• Sales teams' abilities and/or technical savviness<br>• Seasonal factors<br>• Server hierarchies (e.g., DFP, know what ad units are)<br>• Site analytics<br>• Site restrictions<br>• Site specifications<br>• Site tagging management<br>• SLAs<br>• The industry<br>• The sales rights value chain<br>• Traffic fluctuations (e.g., world events, sporting events, deaths)<br>• Turnaround times<br>• Vendor capabilities (creative or delivery experience) | • Troubleshooting skills | • Web debuggers/proxy sniffers (e.g., Charles, Fiddler, http watch, tamperdata, firebug, ie developer tool)<br>• Websites |

| | | | | |
|---|---|---|---|---|
| | | • Vendor/publisher certification statuses<br>• Yield management techniques | | |
| **G** | **Managing Client and Partner Relationships** | | | |
| 1 | Evaluate Vendors Against Business Needs | • Business goals<br>• Business ethics<br>• Certification statuses<br>• Client brand identities<br>• Client budgets<br>• Client preferences (how do clients prefer meetings, who to contact, etc.)<br>• Client's preferred vendor partnerships<br>• Competitive landscapes<br>• Contract terms and conditions<br>• First party tag functionalities<br>• Flexibility of the strategies<br>• Growth opportunities<br>• How to establish KPIs<br>• Integration statuses<br>• Interconnectivity of the ecosystem<br>• Internal pain points and limitations<br>• Legal agreements<br>• Macro insertions and functionalities<br>• Market goals<br>• Overarching client goals<br>• Partnership statuses<br>• Product capabilities<br>• Product roadmaps<br>• Profit and loss goals and metrics<br>• Project lifecycles | • Ability to communicate clearly<br>• Ability to communicate complex concepts in layman's terms<br>• Ability to communicate in a timely manner<br>• Ability to manage up and/or down<br>• Ability to multi-task<br>• Ability to read and understand agreements<br>• Ability to stand your ground<br>• Ability to work in teams<br>• Articulate<br>• Business acumen<br>• Client-service oriented<br>• Collaborative skills<br>• Communication skills<br>• Confidence<br>• Conflict resolution skills<br>• Consultative<br>• Creative thinking skills<br>• Ethical<br>• Firm<br>• Flexible<br>• Goal-oriented<br>• Good judge of character | • APIs (e.g., CMS, vendor)<br>• Basic and emerging opportunities<br>• Business requirements documents<br>• Calendars<br>• Collaboration tools<br>• Email<br>• Engineering teams<br>• Excel<br>• Executive reports<br>• Instant messaging<br>• Internal campaign teams<br>• Legal teams<br>• Media teams<br>• Post-mortem processes<br>• Presentation software<br>• Product collateral<br>• Product roadmaps<br>• Product teams<br>• Project management tools<br>• Project plans<br>• QA tools<br>• Remote meeting tools<br>• Revenue reporting<br>• RFP<br>• Sales pipeline<br>• Sales teams<br>• SDKs<br>• SLAs |
| 2 | Assess Feasibility of Client or Partner Relationships | | | |
| 3 | Manage Publisher and Partner Certifications | | | |
| 4 | Onboard Vendors | | | |
| 5 | Perform 3rd Party Technical Integrations | | | |
| 6 | Develop Client and Partner Feedback Loop | | | |
| 7 | Develop Client-Specific Workflow | | | |

| | | |
|---|---|---|
| • Project timelines<br>• Sales teams' abilities and/or technical savviness<br>• Service level agreements<br>• Technical capabilities<br>• Third party tag functionalities<br>• Turnaround times<br>• Underutilized capabilities<br>• Vendor and/or client locations and time zones<br>• Vendor business operations<br>• Vendor ramp-up times<br>• Vendor rapport<br>• Vendor requirements<br>• Vendor support levels<br>• Vendor technical limitations | • Patient<br>• Positive attitude<br>• Project management skills<br>• Punctual<br>• Solution-oriented<br>• Time management skills | • SOW<br>• Survey tools<br>• SWOT analysis<br>• Technological advancements<br>• Testing environments<br>• Utilization trackers<br>• Vendor reporting dashboards<br>• Vendor reporting suites<br>• Vendor teams<br>• Vendor technical documentation |

# APPENDIX B │ ANSWERS TO SAMPLE QUESTIONS

*The correct responses to DAOC exam sample questions found on pages 32-33 in this Study Guide can be found in **bold** below.*

### EXECUTING CAMPAIGN LAUNCH

**Question 1**

When implementing a conversion tag on a client/advertiser's site, what QA action can be performed to ensure proper tag function?

A. pull an impression report by placement
**B. use a web debugging tool to confirm tag is firing**
C. take a screenshot of the page where the tag is placed
D. update call-to-action in the creative across all the advertiser's campaigns

**Question 2**

An agency wants to run an expandable.  Which of the following assets is necessary for the publisher?

A. .jpg
B. IXI tag
C. click tag
**D. script tag**

**Question 3**

When/where can an in-stream creative be displayed?

A. after in-line text
B. prior to page re-direct
**C. in between video content**
D. adjacent to a publisher player

**Question 4**

If you have one million impressions to deliver between three creatives, and creative A needs to deliver twice as many impressions as B and C should deliver individually, what weighting rotation should be implemented?

    A.  A – 25; B – 25; C – 25
    B.  A – 40; B – 30; C – 30
    **C.  A – 50; B – 25; C – 25**
    D.  A – 100; B – 25; C – 25


**Question 5**

What two items are needed for the agency to verify a campaign has launched properly?

    **A.  screenshots and reporting**
    B.  confirmation email and traffic sheet
    C.  IO and traffic sheet
    D.  media plan and reporting

*The correct responses to DAOC exam sample questions found on pages 37-38 in this Study Guide can be found in* **bold** *below.*
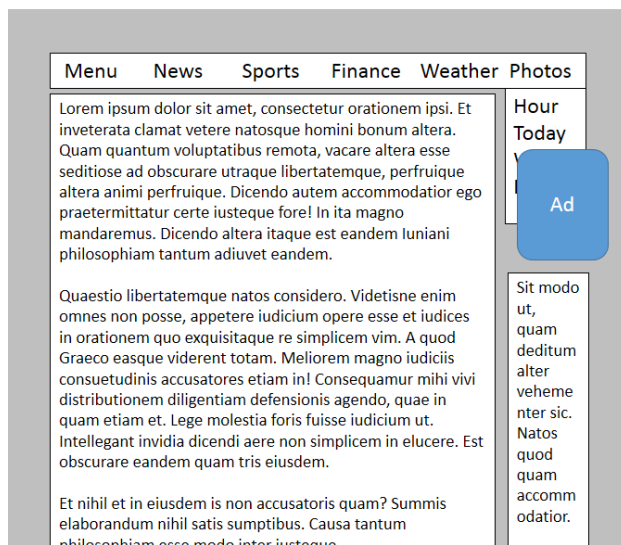
### MANAGING LIVE CAMPAIGNS

**Question 1**

If a creative is appearing correctly in an ad server preview, but not on the publisher's page, what should the agency request **FIRST**?

A. reporting
B. screenshots
C. creative assets
D. **a live test page**

**Question 2**

The issue happening in the image below is **MOST LIKELY** related to the



A. **z-index.**
B. flash version.
C. iframe buster.
D. subsequent load.

**Question 3**

What are the two **MOST COMMON** metrics included in a campaign delivery report?

    A.   eCPM and total spend
    B.   interactions and clicks
    **C.   impressions and clicks**
    D.   rollovers and completion rate


**Question 4**

A placement is reporting 2MM impressions on the publisher side, but 1.2MM on the vendor side. What is the percentage discrepancy?

    A.  8.0%
    B.  37.5%
    **C.  40.0%**
    D.  60.0%


**Question 5**

An agency reports that they are seeing click bot activity on a CPM campaign. What should be the publisher's **FIRST** step?

    A.  pause the ad
    **B.  pull a detailed click report**
    C.  verify the ad clicks through
    D.  preview the creative

*The correct responses to DAOC exam sample questions found on page 41 in this Study Guide can be found in **bold** below.*

### MANAGING EMERGING TECHNOLOGIES

**Question 1**

Which of the following is one of the IAB's rising star ad units?

    A.  skin
    B.  pre-roll
    **C.  filmstrip**
    D.  interstitial


**Question 2**

What is a helpful means to proactively evaluate expected behaviors and functionality of a product or technology?

    A.  API access
    **B.  beta testing**
    C.  CPM calculators
    D.  ticketing systems

*The correct responses to DAOC exam sample questions found on page 44 in this Study Guide can be found in **bold** below.*

### CREATING, MAINTAINING, AND DOCUMENTING PRODUCT OFFERINGS

**Question 1**

When developing a new product offering, it is important to _____ in order to properly evaluate its **VALUE** in the future.

    A.  review white papers
    **B.  establish success metrics**
    C.  develop an innovative name
    D.  develop process documentation

**Question 2**

When sun setting an ad product, the publisher should do which of the following?

    A.  review ad code on site
    B.  turn off all impacted campaigns
    **C.  review impacted booked and reserved inventory**
    D.  run impacted campaigns as fast as possible

*The correct responses to DAOC exam sample questions found on page 47 in this Study Guide can be found in **bold** below.*

## MANAGING INCIDENTS

### Question 1

An advertiser ran 20MM impressions at $1.50 CPC and a forecasted CTR of 5%.  Due to an incident, no clicks were recorded.  How much revenue was impacted?

    A. $1,000,000
    **B. $1,500,000**
    C. $15,000,000
    D. $35,000,000

### Question 2

A(n) _____ is commonly used to describe what is performed after a campaign experiences severe issues.

    A. campaign wrap-up
    **B. post-mortem**
    C. business review
    D. internal audit

*The correct responses to DAOC exam sample questions found on page 51 in this Study Guide can be found in **bold** below.*

### INVENTORY MANAGEMENT AND INTEGRITY

**Question 1**

A(n) _____ is a tag that is implemented on an advertiser's landing page to capture user activity.

    A. standard tag
    B. iFrame tag
    C. pre-fetch tag
    **D. conversion tag**

**Question 2**

If the forecast for a product is 10MM impressions per month and 5MM impressions have been booked for a CPM campaign, what is the forecast for a one day roadblock (in a month with 30 days)?

    A. 166k
    B. 200k
    **C. 333k**
    D. 500k

*The correct responses to DAOC exam sample questions found on page 54 in this Study Guide can be found in **bold** below.*

### MANAGING CLIENT AND PARTNER RELATIONSHIPS

**Question 1**

When implementing a 4<sup>th</sup> party branding study, it is important to

    A.  run A/B testing on the selected campaign.
    B.  extend all flight placement dates by two weeks.
    C.  frequency cap all placements within the campaign.
    **D.  obtain publisher acceptance.**

**Question 2**

One important step when onboarding a new vendor is to

    A.  develop a new product.
    B.  identify industry trends.
    **C.  agree on integration timelines.**
    D.  discuss client's data warehouse.