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STUDY GUIDE

DIGITAL MEDIA BUYING & PLANNING

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1. INTRODUCTION

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

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

The purpose of this study guide is to educate candidates about the DBPC exam they must pass in order to obtain their certification in digital media buying and planning. It contains information about how the exam is structured, as well as information about the core digital media buying and planning knowledge that candidates must possess in order to become certified.

This study guide contains sample exam questions complete with a detailed answer guide to help acquaint candidates with question style and identify priority topics to review as they prepare for the exam.

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

How to Use This Guide

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

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

2. ABOUT THE EXAM

Exam Format

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

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

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

Scoring

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

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

Exam Content

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

1. **Collaborating on Campaign Briefs.** When creating a successful and effective media campaign, it's important that everyone on the team shares the same vision. This is why campaign briefs are so important. Campaign briefs outline and define objectives and goals, and help establish campaign guidelines and timelines. Successful digital media planners and buyers will understand how to create concise briefs in conjunction with the rest of their team.

2. **Creating Media Strategies.** No two digital media campaigns are 100 percent alike. Each must meet the specific needs of the brand or product in question. Digital media planners and buyers will be tasked with creating the appropriate media strategies specific to individual campaigns. They will be responsible for conducting campaign research activities and defining media mix allocation, as well as collaborating with creative agencies, and designing a data strategy and measurement plan. Finally, after all of the above has been completed, digital media buyers and planners deliver strategic recommendations for the brand.

3. **Developing Digital Media Plans.** The digital world is huge and highly nuanced, with many media channels that the experienced and knowledgeable digital media buyer and planner will be able to deftly maneuver. In doing so, they will create a plan that can effectively increase brand awareness, encourage and cultivate leads, and eventually drive consumer purchases, according to the goals of the campaign.

4. **Executing Campaigns.** Even the most carefully organized digital media plan can go awry if it isn't managed correctly. Digital media planners and buyers must understand how the campaign execution process works in order to help ensure success for their clients. They must be knowledgeable in the vendor negotiation process and standard insertion order terms and conditions. The capability to actually kick off the campaign, the ability to manage the trafficking, tagging, and reporting processes, and verify campaign launch, are each essential to being a successful digital media buyer and planner.

5. **Managing Campaigns.** Once the campaign has been successfully launched, it must be closely managed in order to detect and correct any issues that might arise as early as possible. Digital media buyers and planners will understand how to analyze and optimize a campaign, troubleshoot any campaign issues that might develop, and manage the

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

6. **Educating Stakeholders.** It's important to keep key stakeholders informed about the status of digital media campaigns, and digital media buyers and planners should understand how to create ad hoc reporting as well as reports designed to highlight campaign success. They should also be comfortable constructing industry POVs, and setting up media days.

The blueprint on the next page shows what topics will be tested for each of these six areas, as well as their approximate weighting on the exam.

Exam Blueprint

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

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

3. CORE DIGITAL MEDIA BUYER AND PLANNER KNOWLEDGE

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

Specialized Knowledge

You should be prepared to demonstrate an understanding of the following specialized knowledge items listed on the following pages when taking the certification exam. You will not be permitted to bring along any kind of "cheat sheet" defining the following items into the testing center.

The tables below illustrate the specialized knowledge areas that you will be utilizing as a digital media buyer and planner. As you can see, they are quite diverse and cover an immense amount of ground. We suggest that you spend time familiarizing yourself with the table as a whole, but focus most of your attention upon any items that seem particularly foreign to you rather than memorizing the exact definition of every item included.

Knowledge Required of Digital Media Planners and Buyers

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

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

Skills and Abilities

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

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

Tools, Equipment, and Resources

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

Tools, Equipment, and Resources	
access to brand's site map	accounting sheet
ad ops team	ad servers
ad serving platform (e.g., double click)	ad technology
ad verification platforms	ad verification tools
agency corporate contracts or rate cards	agency research department
analytics teams	analytics tools
authorization software	billing and finance teams
billing software	billing template
brand brief	brand data
brand first party data	brand guidelines
brand health trackers	brand sales data
brand sales reports	brand segmentation
brand's legal team	buying platforms
case studies	channel SMEs
competitive research tools (e.g., ad intel, kantar, moat)	creative assets
creative examples	data sources
delivery report	DMP
finance team	flowchart software
flowcharts	historical MMA or ROI reports
historical reports	IAB standards
IAB terms and conditions	industry benchmarks (e.g., ad verification, viewabilty)
in-market research tools	internal and brand's finance department
internal POVs and case studies	internal terms and conditions
internal vendor database	IO software system
IT support	keyword list
KPI benchmarks	legal team
marketing mixed modeling tools	media buying platform
media buying tools	media flowchart software

Tools, Equipment, and Resources	
media flowchart template	media kits
media plan	media plan template
media planning flowcharts	media research tools (e.g., comScore)
meeting space	naming convention document
office services	other agency experiences
past campaign performance	post-buy reports
POV template	presentation software
presentations	previous brand briefs
previous media plans	production timelines
publisher guidelines and policies	regulatory standards
relevant creative examples	reporting templates
reporting tools	research and analytics team
research team	RFP software (e.g., iDesk)
RFP templates	screen capture tool
search engine	site map
SMEs	spec sheet
spreadsheet software	syndicated research tools
tag verification software	tagging strategy
third party partners	third party research tools
trade publications	traffic sheet
vendor contact information	vendor databases
vendor invoices	vendor knowledge base
vendor reputation	vendor spec sheet
vendors	

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

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

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

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

Media Buying Platforms
DSP
FMP
PMD
Search Engines
SEM Platform

Channels
content
display
native
search
social
video

Selected Definitions

A. *Ad Verification:* A process which attempts to verify that one or more attributes of a served online ad have been executed in a manner consistent with the terms specified by the advertiser or agency and agreed to as part of the ad campaign terms. Ad Verification services offer technology to ensure that ads appear on intended sites and reach the targeted audience. In 2012, IAB published formal *Ad Verification Best Practices .* This document is intended to provide information to verification vendors and users of verification services to ensure a common understanding of existing practices, transparency and other general principles involved in campaign assessments.

B. *Agency Corporate Contracts or Rate Cards*: Rate cards are documents that list the descriptions and prices for various advertising options offered by a given media outlet.

C. *Audience Behavior*: This refers to the importance of understanding your target audience's behavior when it comes to how they consume information and brands. This helps in the creation of effective internet campaigns.

D. *Basic Marketing Fundamentals*: Digital marketing fundamentals include concepts like brand identification, brand consistency, search marketing, content optimization, outreach via social media, and sales leads conversions.

E. *Brand Competitive Set*: Competitive sets refer to the principal group of competitors that a brand faces. Being aware of this competition is important when planning an effective marketing campaign.

F. *Brand Expectations*: Brand expectations refers to what the brand expects to happen as a result of hiring you and building a comprehensive online campaign. You need to understand what these expectations are in order to meet (or perhaps revise) them.

G. *Brand Guidelines*: These are a set of rules that describe how the brand in question should be represented. This can include things like the brand's vision and key values, and can provide guidance on everything from the visual design of ad campaign creative to the proper use of social media for advertising purposes.

H. *Brand History*: Also known as a brand story, brand histories help relate the brand in question to consumers. What motivates the brand in question, and why did they start their business in the first place? The answers to these questions can play a part in building a successful, relatable campaign.

I. *Brand Responsiveness*: Brand responsiveness refers to how quickly a brand responds to inquiries or feedback. Note that these inquiries might come from customers *or* your team. It's important to understand what you're working with as far as brand responsiveness goes in order to plan ahead and build communication techniques accordingly.

J. *Brand Safety*: Brand safety refers to the need to ensure that ads do not appear in placements that are not aligned with brand values. Brand safety best practices ensure that advertising dollars are not spent delivering impressions on unsafe or off-brand web content. Brand safety guidelines are particularly important when

purchasing media via programmatic technology or ad networks.

K. *Brand Verticals*: In digital marketing, referring to a brand's "vertical" is typically interpreted as referring to the brand's *industry*. Examples of verticals used for categorizing advertiser brands for marketing research and benchmarking purposes include Automotive, CPG (consumer packaged goods), Entertainment, Finance, Pharmaceuticals, and Retail, just to name a few.

L. *Brand's or Agency's Existing Contracts*: You need to be aware of and sensitive to any existing contracts a brand or agency might have when you're working with them. This might dictate the vendors used, for example, when there's a contract in place that overrides your preferences.

M. *Creative Agency Scope*: This refers to the capabilities and role of the creative agency selected for the campaign, and will typically have an impact on campaign planning.

N. *Creative Responsibilities*: It's important to set specific responsibilities for each role within the campaign creation and execution process. What tasks will be handled by the creative shop, what tasks will be handled by you or a member of your team, and what tasks will the ad operations teams or publisher teams be responsible for? Don't leave this aspect of the campaign execution process to chance.

O. *Digital Ad Pricing Models*: There are a number of different pricing models available when it comes to digital advertising. The selected pricing model will have budgetary consequences, so it's important to understand the different options (CPM, CPC / PPC, CPA, CPE, etc.) before making a decision.

P. *Historical Performance*: How have campaigns for the brand performed in the past? Historical campaign performance gives the digital media buyer and planner a guideline for how similar campaigns may perform in future and perhaps indications as to what aspects can be tweaked to enhance campaign KPIs.

Q. *KPI*: Key performance indicator. A KPI is a specific performance metric used to evaluate campaign success. KPIs are unique to campaign goals and media objectives. Examples of KPIs can include achieving a specific CTR (click through rate) or CPA (cost per action or acquisition), or achieving a specific conversion rate relative to total campaign reach, or a certain number of video 'shares.' Campaign KPIs should be defined early on in the planning process, and monitored closely during campaign flight dates.

R. *Legal Regulatory Restrictions*: Digital marketers must be aware of both federal regulatory requirements and industry self-regulatory best practices for digital advertising, in addition to complying with any legal guidelines required by or of the brand in question.

S. *Media Capabilities*: It is necessary to be reasonable about the potential capabilities of the media in question. This means understanding the strengths and weaknesses of different media channels, in terms of both the ad formats they can support and the potential audience reach the publishers / channel providers can guarantee. For example, a native in-feed ad unit on a social network will not perform identically to an in-app video ad placement. Each channel and media outlet should be considered according to its own capabilities and merits.

T. *Media Landscape*: Understanding the digital media landscape refer to understanding the different media channels, platforms and devices available as means of reaching an audience; as well as having an understanding of the different kinds of technology used to purchase ad impressions and deliver ads to end users, and an awareness of the major publishers and media providers in market currently.

U. *Media Objectives*: Media objectives are derived from a brand's marketing objectives. They should be measurable and actionable, backed by campaign research, and geared toward achieving an advertiser's business goals.

V. *Media Timelines*: Media timelines refers to the amount of time needed by media outlets / publishers once ad tags or campaign creatives are received. These timelines include publisher "SLAs" or 'service level agreement' commitments to complete ad quality assurance within a certain timeframe, implement ad tags / creatives in ad servers / on websites, "launching" ad units / placements within a certain number of days / by a certain date, as well as timelines for receiving / access to delivery and performance reports.

W. *Publisher Guidelines and Policies*: In addition to the brand guidelines, as well as the legal regulatory restrictions, it's important to understand what policies and guidelines your selected publisher(s) have set that you must follow. This can include creative specifications by ad unit type, restrictions on content areas where your ad can appear, and any other requirements the publisher decides to impose.

X. *Seasonality*: Different advertising strategies and tactics make sense at different times of year. Seasonality can impact the way in which an ad campaign should be designed, executed, and measured; it can impact the way that consumers perceive and respond to a campaign; and it can even impact the volume of web traffic you can expect to deliver to across media channels.

Y. *Stakeholder Timelines*: Campaign stakeholders include the creative agency, the ad tech vendors you're working with, other teams within your agency or even other members of your team, and of course, your advertiser / client. It's important to be aware of stakeholder expectations when mapping out campaign timelines, and provide key stakeholders with updates if timelines change.

Z. *Standard and Custom Creative Development Turnaround Times*: This refers to how long it takes the creative team to complete development work for standard ad units and custom creative builds. These timelines can impact your campaign deadlines if you're not careful, so make sure you understand how long you should expect to wait for initial creative delivery as well as how long it might take to execute any creative changes needed.

4. COLLABORATING ON CAMPAIGN BRIEFS

Collaborating on Campaign Briefs is the activity of responding to the marketing needs outlined in a client briefing or the 'brand brief'. Without a brief from the client, there is no proposal, period. All of your agency's work on a campaign begins and ends with the stated objectives on the client – or brand - brief. The brand brief is the statement of the challenge/opportunity for a brand. It is a succinct summation of the brand's current position, its marketing strategy and what it wants to accomplish through advertising, written by the client.

Digital media planners and buyers must be able to determine the over-arching client goal, interpret that picture for themselves and their team members, and establish a digital media strategy around it. This is done via the construction of campaign briefs – documents that contain the guidelines and parameters governing the campaign "project." Campaign briefs outline and define campaign objectives and goals, and help everyone involved in planning the campaign stay on the same page and work effectively together.

Topic Review

Establish Plan Parameters

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

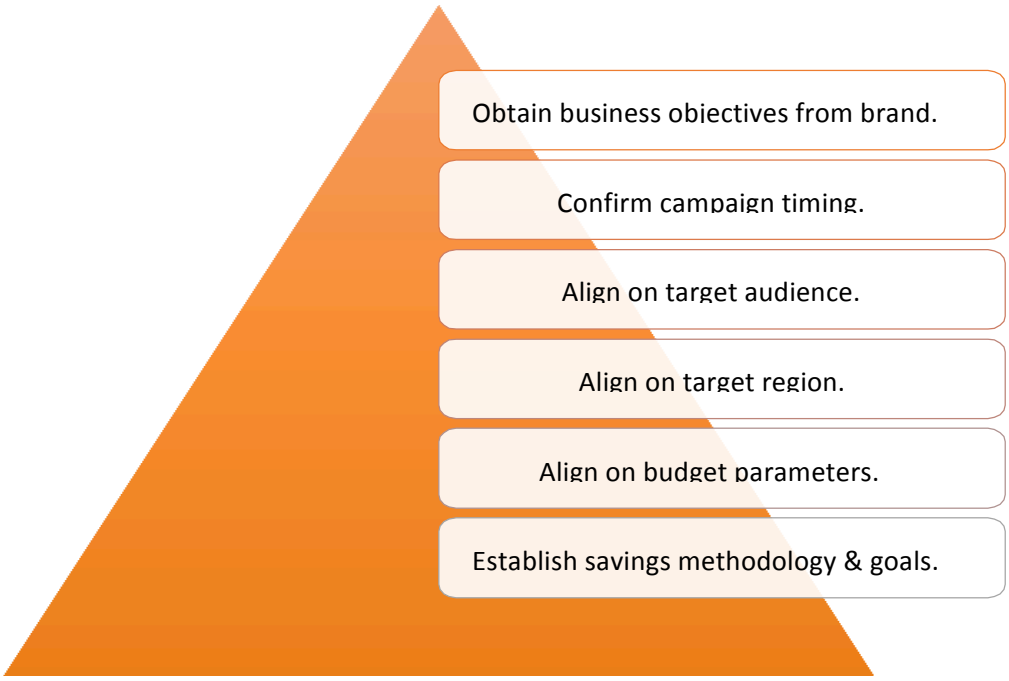

Figure 1 Six Steps for Establishing Plan Parameters

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

Knowledge

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

Tools

A. Brand Brief

Develop Media Objectives

After creating a brand brief, digital media planners and buyers must next work on developing media objectives. This a chance to assess the business objectives provided by the brand and determine whether or not they are feasible. It's also a chance to work directly with subject matter experts (SMEs) within your organization to determine appropriate media objectives, as well as confirm what first party data sources that brand has available to use for this campaign. Digital media buyers and planners should then create media objective based upon the aforementioned business objectives. They present their resulting proposed media objectives to the brand and, upon gaining approval, move forward to the next part of the process.

Knowledge

A. Audience Behavior
B. Basic Marketing Fundamentals
C. Brand Vertical
D. Campaign Parameters
E. Historical Performance
F. Media Capabilities (i.e., what media is capable of achieving)

Tools, Equipment, and Resources

A. Brand Brief
B. Brand First Party Data
C. Past Campaign Performance

D. Previous Brand Briefs
E. SMEs

Establish Buying Guidelines

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

Figure 2 Establish Buying Guidelines

Knowledge

A. Ad Verification Best Practices
B. Brand Safety Best Practices
C. Brand's or Agency's Existing Contracts
D. Digital Ad Pricing Models
E. Legal Regulatory Restrictions
F. The Brand Competitive Set
G. Historical Campaign Guidelines

Tools, Equipment, and Resources

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

Confirm Available Assets

Before the digital media strategy creation process can truly begin, it's important to verifying what kind of current and potential creative assets will be used for this campaign, as well as the creative delivery timeline. The digital media buyer and planner should be introduced to the brand's current creative team and determine, based on the planned scope of work whether they will be able to make creative recommendations, as well as what creative requirements potential media partners must be able to support.

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

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

Knowledge

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

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

Tools, Equipment, and Resources

A. Brand Guidelines
B. IAB Ad Portfolio Guidelines
C. Publisher Creative Specs and Requirements
D. SMEs
E. Spec Sheet

Construct Planning Timeline

Constructing a planning timeline is probably one of the most important parts of the entire campaign brief creation process. At this stage, a smart digital media buyer and planner will take the time to do the following:

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

Determining the timeline of the campaign project includes planning around internal progress reports/checkpoints that will help keep them on track and in control of the project. Something else to keep in mind is that digital media buyers and planners are responsible for keeping their team and the brand stakeholders informed of campaign status, as well as any other teams, departments or tech vendors that are involved in the digital media process.

Knowledge

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

Tools, Equipment, and Resources

A. Brand Brief
B. Spreadsheet Software

Sample Questions: Collaborating on Campaign Briefs

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

Question 1

A brand has requested to serve creative assets used for a previous year's campaign. An appropriate FIRST step for the digital buyer/planner is to:

a. Pull an ad server report
b. Traffic tags to approved sites
c. Confirm creative specs adhere to current guidelines
d. Review site container tag placements

Question 2

To help provide brand safety in a programmatic buy, a digital planner/buyer should use:

a. 2nd party data
b. Site blacklists
c. Behavioral targeting
d. Event tracking pixels

Answers

Question 1

A brand has requested to serve creative assets used for a previous year's campaign. An appropriate FIRST step for the digital buyer/planner is to:

- **a.** Pull an ad server report
- **b.** Traffic tags to approved sites
- **c.** **Confirm creative specs adhere to current guidelines**
- **d.** Review site container tag placements

Question 2

To help provide brand safety in a programmatic buy, a digital planner/buyer should use:

- a. 2nd party data
- **b.** **Site blacklists**
- **c.** Behavioral targeting
- d. Event tracking pixels

5 CREATING MEDIA STRATEGIES

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

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

Topic Review

Conduct Campaign Research Activities

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

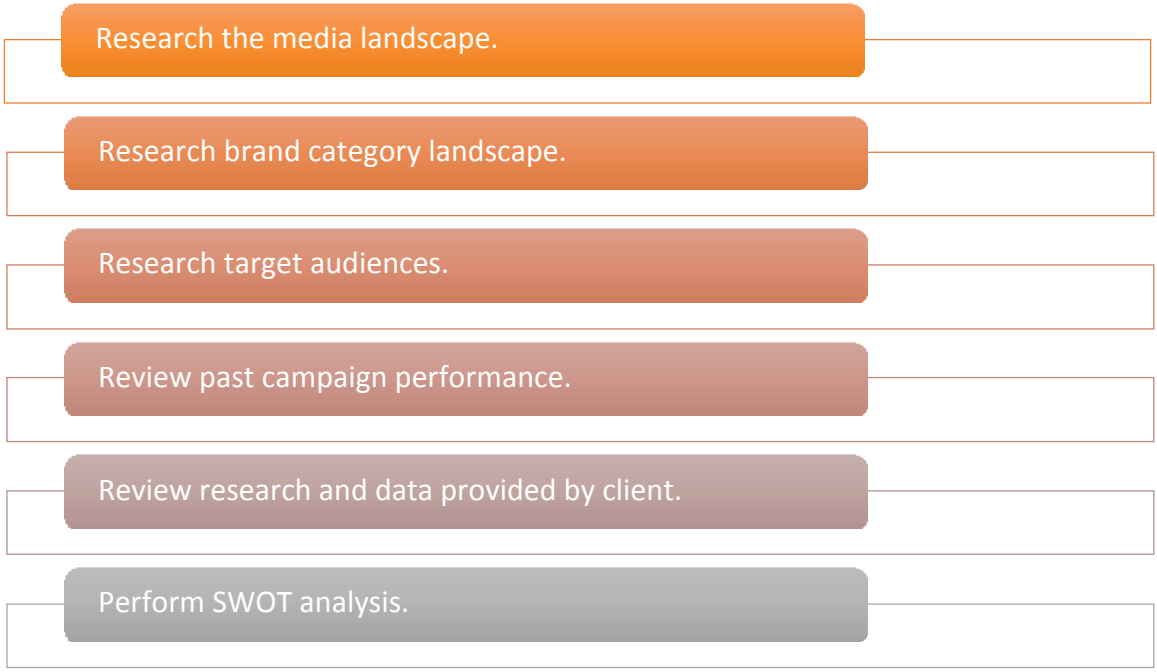

Figure 3 Steps to Construct a Planning Timeline

Knowledge

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

Tools, Engineering, and Resources

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

Define Media Mix Allocation

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

Knowledge

A. Brand Guidelines Regarding Which Media Must Be Included / Must Not Be Included
B. Campaign Brief
C. Media Capabilities (i.e., scalability)
D. Media Math
E. Strengths and Weakness of Media Types

Tools, Equipment, and Resources

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

Collaborate with Creative Agencies

Once the media mix allocation has been defined, it's time for the digital media buyer and planner

to begin to collaborate with the creative teams. This will enable them to understand the creative content of the campaign, as well as sequencing, technology requirements, and creating testing scenarios.

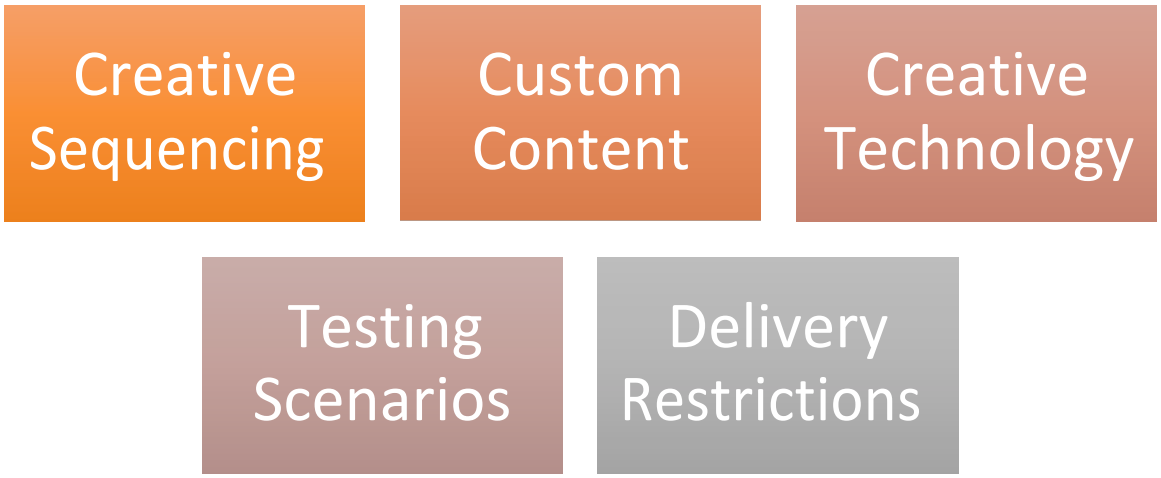

Figure 5 Elements to keep in mind when collaborating with creative agencies.

Knowledge

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

Tools, Equipment, and Resources

A. Brand Brief
B. Brand Guidelines
C. IAB Ad Portfolio Guidelines
D. IAB Ad Serving Standards
E. Relevant Creative Examples
F. Spec Sheet

Design Data Strategy and Measurement Plan

A digital media strategy must have measurable elements that can be assessed to gain an understanding regarding the overall campaign performance. It is important that during the media strategy creation process, digital media buyers and planners set measurable key performance indicators (KPIs) based on a clear data strategy and measurement plan. Having these KPIs clearly defined, and the technical means by which this data will be captured in place, is absolutely essential to proving campaign success at a later date. In this phase, the digital media buyer and planner does the following:

A. Define campaign KPIs.
B. Define channel KPIs.
C. Define creative KPIs.
D. Define vendor KPIs.
E. Create tagging strategy.
F. Determine measurement tools and partners used to measure KPIs.
G. Consult with strategy and analytics teams.
H. Align on conversion windows with brand.
I. Establish benchmarks for all KPIs.
J. Establish reporting cadence.
K. Create data measurement plan.
L. Identify data management work flows / timelines.

Knowledge

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

Tools, Equipment, and Resources

A. Access to Brand's Site Map
B. Analytics Tools
C. Brand Brief
D. Brand Data

E. KPI Benchmarks
F. Post Buy Report
G. Reporting Template
H. Research and Analytics Team

Develop Strategic Recommendations for the Brand

After all of this research and planning, it's finally time to develop and deliver digital media strategy recommendations for the brand in question. This includes the following steps:

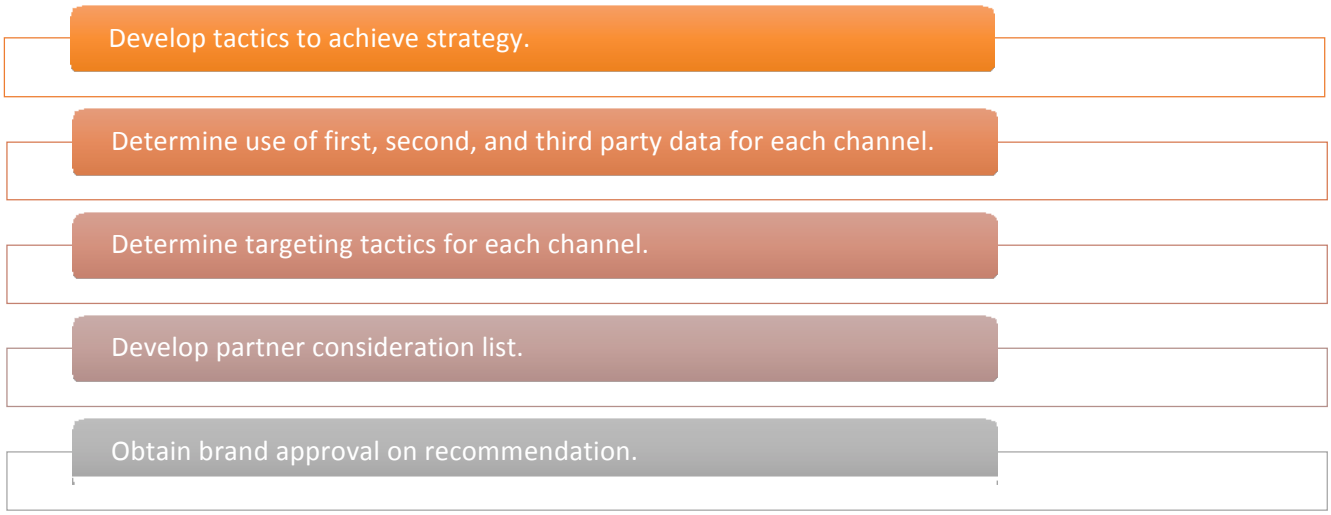

Figure 6 Steps to Developing Strategic Recommendations for Brand

Knowledge

A. Available Partners
B. Channel Capabilities
C. Channel Mix
D. Creative Assets
E. Partner Capabilities
F. Target Audience
G. The Flow of Data

Tools, Equipment, and Resources

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

Sample Questions: Creating Media Strategies

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

Question 1

For a direct response campaign, what is an ideal media mix?

a. Less digital media than offline media
b. More digital media than offline media
c. The brand needs to dictate budget allocation
d. Attribution data should dictate where to allocate budget

Question 2

What are the two most common pre-roll video lengths?

a. :10 and :15
b. :10 and :60
c. :15 and :30
d. :30 and :60

Answers

Question 1

For a direct response campaign, what is an ideal media mix?

a. Less digital media than offline media
b. More digital media than offline media
c. The brand needs to dictate budget allocation
d. Attribution data should dictate where to allocate budget

Question 2

What are the two most common pre-roll video lengths?

a. :10 and :15
b. :10 and :60
c. :15 and :30
d. :30 and :60

6 DEVELOPING DIGITAL MEDIA PLANS

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

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

Topic Review

Manage RFP Process

A digital media buyer and planner must manage the Request for Proposal (RFP) process in order to complete the process of building a media plan. This process includes the following steps:

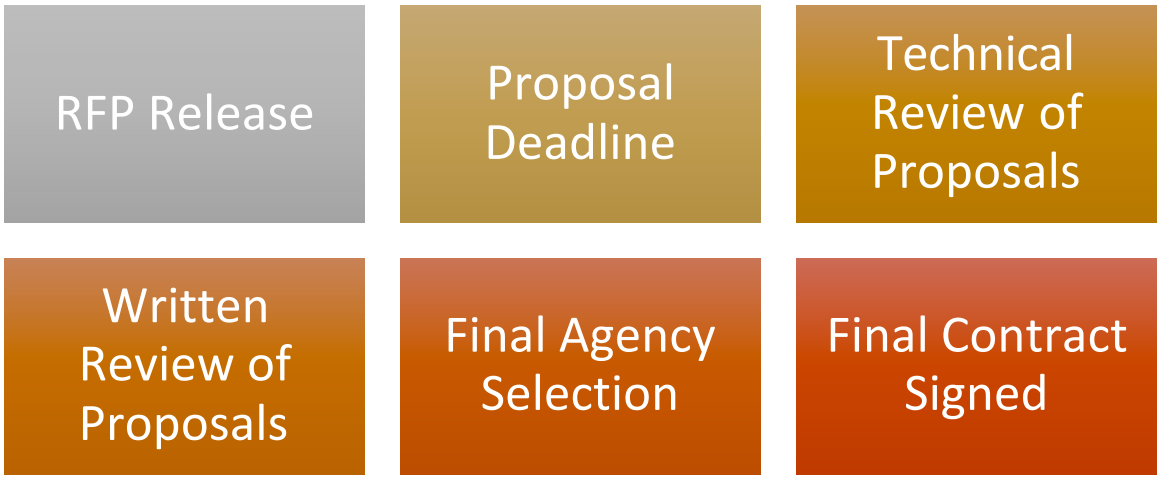

Figure 7 Managing the RFP Process

The first step is to send out the RFP, which should include a non-disclosure agreement to protect sensitive brand information, and provide media vendors with a proposal deadline. Then, when collecting vendor proposals, a detailed review of both the vendor's technical capabilities and media offering – the sites, placements, custom creative options, rates and pricing, cost models and added value impressions included – is needed.

If the RFP process includes self-service buying platforms, key stakeholders may need to help assess whether the platform meets the technical requirements of this and future campaigns.

Once proposals have been evaluated, the digital media buyer or planner will provide a written response to each vendor, and re-negotiate any items they'd like to see altered. While finalizing negotiations with each vendor, they'll begin to create a consolidated media plan. Once terms have been agreed to, a final contract – either an insertion order (IO) for a specific media buy or an MSA (a master services agreement) for a self-service platform - will be signed.

The experienced digital media buyer should be comfortable managing each stage of this process. The nuances of evaluating and reviewing proposals, forecasting media returns, and negotiating the contracts themselves are of particular importance.

Knowledge

A. Acceptance of Third Party Tags and Technology
B. Ad Verification Guidelines and Thresholds
C. Available Partners in the Marketplace
D. Campaign Parameters
E. Organizational Mandates that need to be included In the RFP
F. Project Timeline

Tools, Equipment, and Resources

A. Media Research Tools (E.G., ComScore)
B. RFP Software (e.g. Mediaocean)
C. RFP Templates
D. Vendor Databases

Evaluate and Negotiate Media Proposals

Once the proposals start rolling in, successful digital media buyers and planners will be careful to closely evaluate them. They will do this with their brand's needs and goals in mind, and be sure to negotiate the best terms possible for their brand. This includes checking for things like execution feasibility, vendor availability and flexibility, as well as support or use of specific ad technology. Experienced digital media buyers and planners will also understand the importance of staying within their client's budget, and will do everything in their power to research current pricing benchmarks and secure the best price available.

Knowledge

A. Brand Savings Goals
B. Campaign Goals
C. Campaign Parameters

D. Creative Assets
E. Execution Feasibility
F. Existing Rate Cards
G. Industry Jargon

Evaluate and Negotiate Media Proposals

Once the proposals start rolling in, successful digital media buyers and planners will be careful to closely evaluate them. They will do this with their brand's needs and goals in mind, and be sure to negotiate the best terms possible for their brand. This includes checking for things like execution feasibility, vendor availability and flexibility, as well as support or use of specific ad technology. Experienced digital media buyers and planners will also understand the importance of staying within their client's budget, and will do everything in their power to research current pricing benchmarks and secure the best price available.

Knowledge

H. Brand Savings Goals
I. Campaign Goals
J. Campaign Parameters
K. Creative Assets
L. Execution Feasibility
M. Existing Rate Cards
N. Industry Jargon
O. Marketplace Conditions
P. Pricing Benchmarks
Q. Specific Terms and Conditions
R. Technological Capabilities
S. Vendor Acceptance of Ad Technology
T. Vendor Flexibility

Tools, Equipment, and Resources

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

Forecast Media Returns

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

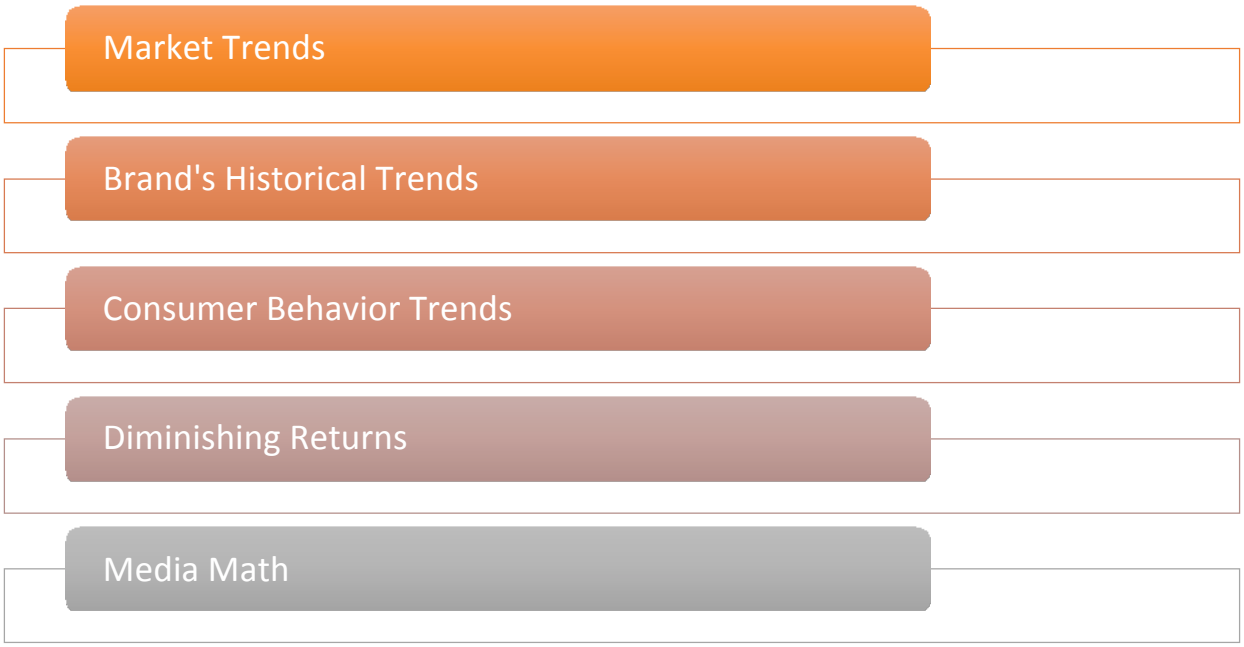

Figure 8 Elements included in determining investment return.

Knowledge

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

Tools, Equipment, and Resources

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

Finalize Media Plans

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

Knowledge

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

Tools, Equipment, and Resources

A. Authorization Software
B. Channel SMEs
C. Internal and Brand Finance Departments
D. Media Flowchart Software
E. Media Flowchart Template
F. Media Plan Template

Sample Questions

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

Question 1

Which of the following options will most likely affect a campaign's performance?

a. Competitive media spend
b. Analytics platform
c. Industry benchmarks
d. Ad Server

Question 2

The criteria used for evaluating vendor proposals should be based on the:

a. Flowchart
b. Campaign parameters
c. Analytics platform
d. Stakeholder schedules

Answers

Question 1

Which of the following options will most likely affect a campaign's performance?

- **a. Competitive media spend**
- **b.** Analytics platform
- **c.** Industry benchmarks
- **d.** Ad Server

Question 2

The criteria used for evaluating vendor proposals should be based on the:

- a. Flowchart
- **b. Campaign parameters**
- c. Analytics platform
- d. Stakeholder schedules

7 EXECUTING CAMPAIGNS

There are six specific phases to executing campaigns.

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

Topic Review

Negotiate Vendor Terms and Conditions

Successful digital media buyers and planners understand that sometimes the best contract is hard-won after hours of negotiation. As a digital media buyer and planner, you need to have the ability and willingness to approach vendor terms and conditions with a keen eye. Look over the contracts carefully and think about your client's needs and wants. You should have a firm understanding of digital media terms and conditions, and of what's "typical" versus what is possible through negotiation. Strive to achieve a mutual understanding with your vendor with regard to clarity on service expectations and terms and conditions, while negotiating effective contracts that achieve your campaign goals.

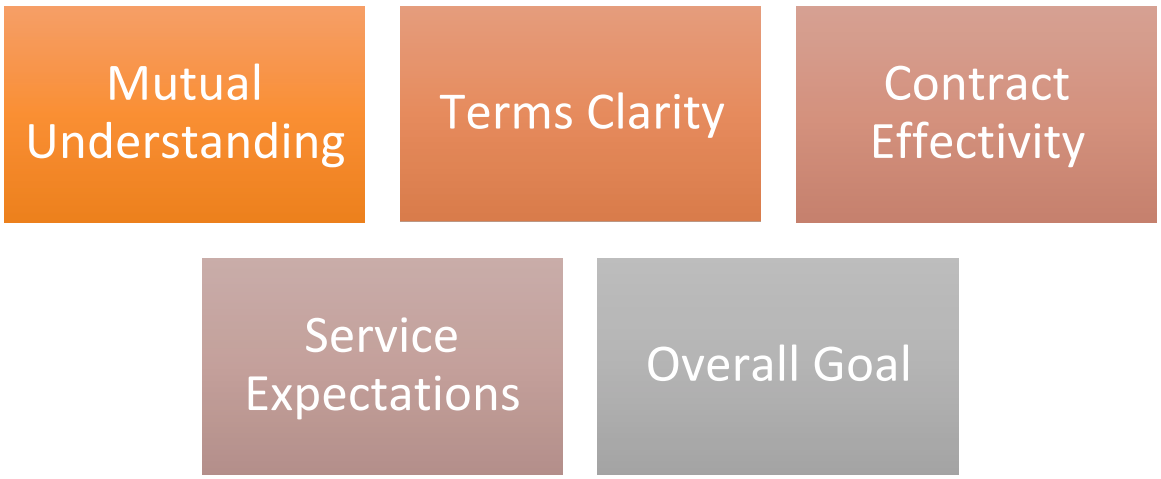

Figure 9 Negotiating Vendor Terms and Conditions

Knowledge

A. Campaign Workflow Best Practices
B. Brand's Terms and Conditions
C. IAB's Terms And Conditions
D. Vendor's Terms and Conditions

Tools, Equipment, and Resources

A. Finance Team
B. IAB Terms And Conditions
C. Internal Terms and Conditions
D. Legal Team
E. Regulatory Standards

Manage IO Process

While some might argue that the insertion order (IO) digital media purchasing process is on its way out, the savvy digital media buyer and planner will understand how to execute an insertion order that corresponds to specific line items or placements on a media plan. One notable best practice involves the use of consistent naming conventions across all insertion orders which will then match to placement names on the media plan.

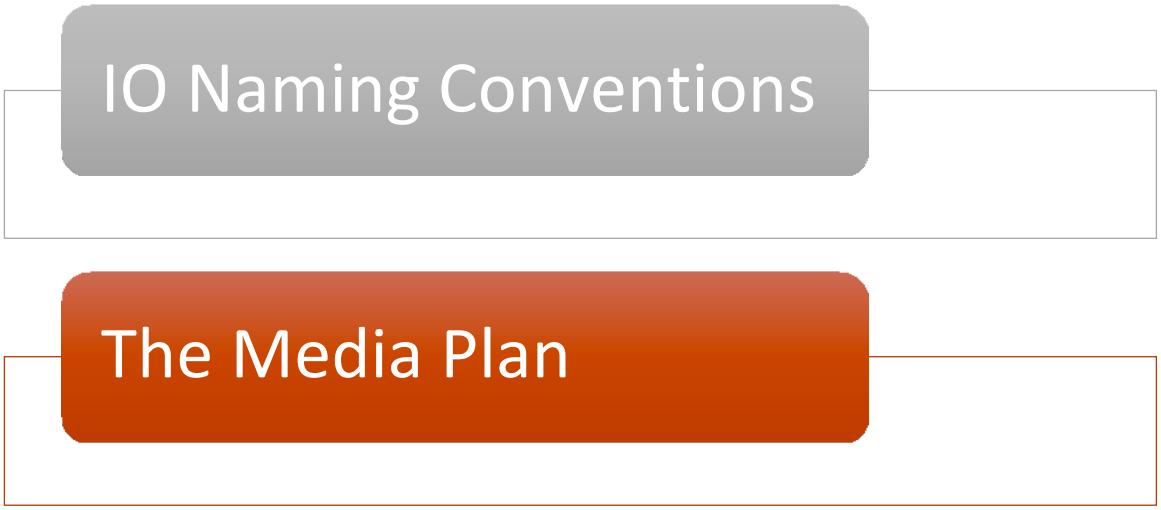

Figure 10 IO process basics.

Knowledge

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

Tools, Equipment, and Resources

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

Kick-Off Campaign

Finally, it's time to kick off the campaign. It is vital that when planning a campaign kick-off call, the digital media buyer and planner pay attention to the defined goals and timelines specific to their campaign.

Whether you're hosting one kick-off call that brings all key campaign stakeholders, tech vendors, and teams together – or you're scheduling multiple kick-off calls to address different elements of the campaign – you should plan to:

- Allow time for team and client introductions
- Highlight the goals of the campaign as they are relevant to the call
- Address any workflow processes between stakeholders that have not been previously defined, and how all parties will best work together (email, phone, etc.)
- Identify any approvals are still needed (Ad QA, client approvals, etc.)
- Share how often campaign check-ins or regularly scheduled meetings will take place
- Clarify what turn-around times or vendor SLAs will be in effect
- Confirm campaign launch dates and other timeline milestones
- Express how you will determine if this campaign is a success i.e. what KPIs you'll be monitoring

In addition, you should share any other information relevant to the stakeholders gathered for the call. This is your opportunity to get everyone on the same page prior to the campaign launch, and identify and correct any potential issues before they arise.

Knowledge

A. Ad Formats
B. Ad Serving
C. Ad Tracking
D. Ad Types
E. How the Media Ecosystem Functions

F. Media Plan
G. The Flow of Data
H. Typical Production Timelines

Tools, Equipment, and Resources

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

Manage Trafficking and Tagging Process

Not understanding how to manage trafficking and tagging can render all of the efforts of even the best digital media buyer and planner useless. You must ensure that the brand in question has sufficient hardware and experience to handle increased traffic load. In fact, plan for the best/worst case scenario and ensure that the website can handle even the most viral of campaigns. All conversion tags should be implemented and tested on the brand site well before the campaign launch date, as well as any retargeting tags needed to create audience targeting populations. You should also understand how to efficiently use media tracking tags in the campaign as well as when and where to place them.

Knowledge

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

Tools, Equipment, and Resources

A. Ad Ops Team
B. Ad Serving Platform (e.g. DoubleClick, Sizmek, etc.)
C. Ad Verification Tools
D. Analytics Tools
E. Buying Platforms
F. Creative Assets
G. Site Map

H. Tagging Strategy
I. Traffic Sheet

Manage Reporting Process

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

Knowledge

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

Tools, Equipment, and Resources

A. Ad Ops Team
B. Ad Technology
C. Analytics Teams
D. Analytics Tools
E. Brand Data
F. Media Buying Platforms
G. Reporting Templates
H. SMEs
I. Spreadsheet Software
J. Third Party Partners

Verify Campaign Launch

A successful digital media buyer and planner understands that they need to independently verify their campaign has successfully launched. This means understanding how to pull basic delivery

reports from the ad server, and following up with media vendors as appropriate to receive screenshots of live ads on published pages functioning properly.

Knowledge

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

Tools, Equipment, and Resources

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

Sample Questions

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

Question 1

Placements on IOs should have:

a. Consistent naming conventions
b. Creative names
c. Pre-negotiated rates
d. Verification information

Question 2

The digital planner/buyer has all assets and campaigns set up except for revenue conversion tags. What is the BEST action to take if the brand insists on going live as soon as possible?

a. Go live based on industry benchmarks
b. Go live with an assumed conversion rate
c. Go live once conversion tags are in place
d. Go live using historical revenue projections

Answers

Question 1

Placements on IOs should have:

a. **Consistent naming conventions**
b. Creative names
c. Pre-negotiated rates
d. Verification information

Question 2

The digital planner/buyer has all assets and campaigns set up except for revenue conversion tags. What is the BEST action to take if the brand insists on going live as soon as possible?

a. Go live based on industry benchmarks
b. Go live with an assumed conversion rate
c. **Go live once conversion tags are in place**
d. Go live using historical revenue projections

8 MANAGING CAMPAGINS

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

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

Topic Review

Analyze and Optimize Campaign

Experienced digital media buyers and planners understand that it's important to keep tabs on a campaign once it has launched. They'll be available to monitor how a campaign is progressing and make changes on the fly to help refine and optimize it. This is an incredible advantage of digital media campaigns, where digital media buyers and planners have the ability to assess the performance of a campaign using a wealth of tools, and take steps to enhance it for the target audience. This typically includes techniques such as moving budget from poor performing placements / tactics to placements / tactics where performance is strong, and applying blacklists in your DSP to remove sites that are under-performing or violate campaign requirements.

Knowledge

A. Biddable Landscape
B. Brand Benchmarks
C. Data Strategy
D. Industry Benchmarks
E. KPIs
F. Media Math
G. Media Platforms
H. Regulatory Compliance Standards
I. Saleable Media
J. Terms and Conditions
K. The Media Plan

Tools, Equipment, and Resources

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

Troubleshoot Campaign

Sometimes, despite the best efforts of everyone involved, digital media campaigns just don't work out the way they were supposed to. The numbers in different systems just aren't adding up, or the brand isn't seeing the kind of return they anticipated.

When this happens, it's up to the digital media buyer and planner to take the time to troubleshoot the campaign. Particularly when the issue is related to measurement of campaign ad impressions, clicks, or conversions, it is important to troubleshoot live issues before they become escalated discrepancies. Over the years, the IAB has developed guidelines for ad campaign measurement that address auditing and the handling of discrepancies.

An experienced digital media buyer and planner will understand how to work with their ad operations and vendor technical support teams calmly and effectively to investigate and resolve issues, and they should also understand what represents a serious problem that should be escalated – and what kinds of issues are minor and can be resolved within standard timelines.

Knowledge

A. Ad Serving Verification Systems
B. Data Strategy
C. Historical Campaign Context
D. Media Buying Platform
E. Plan Parameters
F. When to Escalate a Problem

Tools, Equipment, and Resources

A. Ad Ops Team
B. Ad Servers
C. Ad Verification Platforms
D. DMP
E. Media Buying Platforms
F. Research Team
G. SMEs

H. Tag Verification Software
I. Vendors

Manage Flowchart Process

A media plan flowchart is often the primary document used in gaining client media plan approval and monitoring progress and milestones throughout the campaign timeline. The media plan flowchart provides concise visualization of what media is being purchased, how much is being spent per placement, how budget is allocated by channel, when each creative will run, and how much is being spent monthly quarterly and overall.

As with most campaign management tools, a media plan flowchart must be maintained throughout the campaign, remaining an evergreen reflection of campaign spend allocation. This can mean making a lot of updates to the original document / in the system where the flowchart is created. A responsible digital media buyer and planner will stay on top of flowchart updates, making changes to reflect campaign optimization decisions.

Knowledge

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

Tools, Equipment, and Resources

A. Ad Server
B. Delivery Report
C. Flowchart Software
D. Spreadsheet Software

Managing Digital Media Finances

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

Knowledge

A. Accounting
B. Agency Billing Processes
C. Brand Billing Terms
D. Brand's Billing Processes
E. Buying Models

F. Contractual Agreements
G. Media Math
H. Non-Working Media Rates
I. Savings Methodology and Goals
J. The Brand's Fiscal Calendar
K. The Media Plan

Tools, Equipment, and Resources

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

Sample Questions

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

Question 1

The digital planner/buyer notices customers purchasing products from the brand's site that are not on the landing page. What is the appropriate next step?

a. Change creative rotation
b. Notify the research team
c. Check the conversion tags
d. Recommend featuring products on the landing page

Question 2

A campaign delivery report indicates that a vendor under-delivered by 16%. What is the BEST first action to take?

a. Send a revised IO
b. Extend the campaign
c. Accept the delivery and the full invoice
d. Request a makegood

Answers

Question 1

The digital planner/buyer notices customers purchasing products from the brand's site that are not on the landing page. What is the appropriate next step?

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9 EDUCATING STAKEHOLDERS

The most common tasks associated with educating stakeholders are:

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

Topic Review

Create Ad Hoc Reporting

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

Knowledge

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

Tools, Equipment, and Resources

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

Create Industry POVs

Another tool that's particularly useful when it comes to educating stakeholders is the industry POV. Point of view (POV) reports are used to help investors understand different marketing options or tools. This is helpful when attempting to explain why a particular marketing strategy would be more useful than others. To create the best industry POV possible, it's important to consider:

Figure 13 Industry POV considerations.

Knowledge

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

Tools, Equipment, and Resources

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

Set Up Media Days

One final but important resource to use when educating stakeholders is the use of media days. The successful digital media planner and buyer will use media days to help illustrate a campaign's performance and explain the reasons for its success to the stakeholders in question. The idea is to have the client and vendors meet and learn about their media and technology offerings, and the strategic opportunities they provide.

Knowledge

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

Tools, Equipment, and Resources

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

Sample Questions

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

Question 1

Which of the following reports would be MOST useful when evaluating market share for a specific industry?

a. Verification
b. Campaign pacing
c. Competitive analysis
d. Creative performance

Question 2

After recently announcing technology changes, it is important to:

a. Write a subjective POV using your experience
b. Write an unbiased POV in a timely manner
c. Wait for the technology to evolve before completing a POV
d. Wait for a POV to be written and shared by media experts before completing a POV

Answers

Question 1

Which of the following reports would be MOST useful when evaluating market share for a specific industry?

- **a.** Verification
- **b.** Campaign pacing
- **c.** **Competitive analysis**
- **d.** Creative performance

Question 2

After recently announcing technology changes, it is important to:

- a. Write a subjective POV using your experience
- **b.** **Write an unbiased POV in a timely manner**
- c. Wait for the technology to evolve before completing a POV
- d. Wait for an industry POV to be provided to you