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Implementing Cross-Channel Measurement for Marketers Playbook

**A Step-by-Step Guide: 20 Common Mistakes—
and Recommendations for Continuous Improvement**





Introduction / Background

In today's digital age, consumers engage with brands across numerous channels and devices, such as social media, display, and video, across different devices such as mobile, desktop, tablet, and connected TV (CTV). This variety of touchpoints presents opportunities and challenges for marketers. To navigate this complex landscape effectively, a comprehensive cross-channel measurement strategy is crucial.

This guide offers a step-by-step approach to implementing cross-channel measurement to ensure success. By following these guidelines, marketers can overcome common challenges, gain a thorough understanding of their marketing efforts, and achieve better business outcomes.

A well-implemented cross-channel measurement strategy provides a unified view of campaign performance, helping marketers understand how different channels contribute to overall success. By integrating data from multiple sources, marketers can gain holistic insights into consumer behavior, optimize media spend, and improve customer experiences. However, implementing an effective cross-channel measurement framework requires careful planning, diverse tool integration, and a commitment to continuous improvement.

For a more detailed understanding of best practices, marketers can refer to the [IAB Cross-Channel Measurement Best Practices for Marketers](#) guide. This essential resource delves into the complexities of cross-channel measurement, offering practical insights to overcome challenges such as data silos, attribution complexities, and privacy concerns.

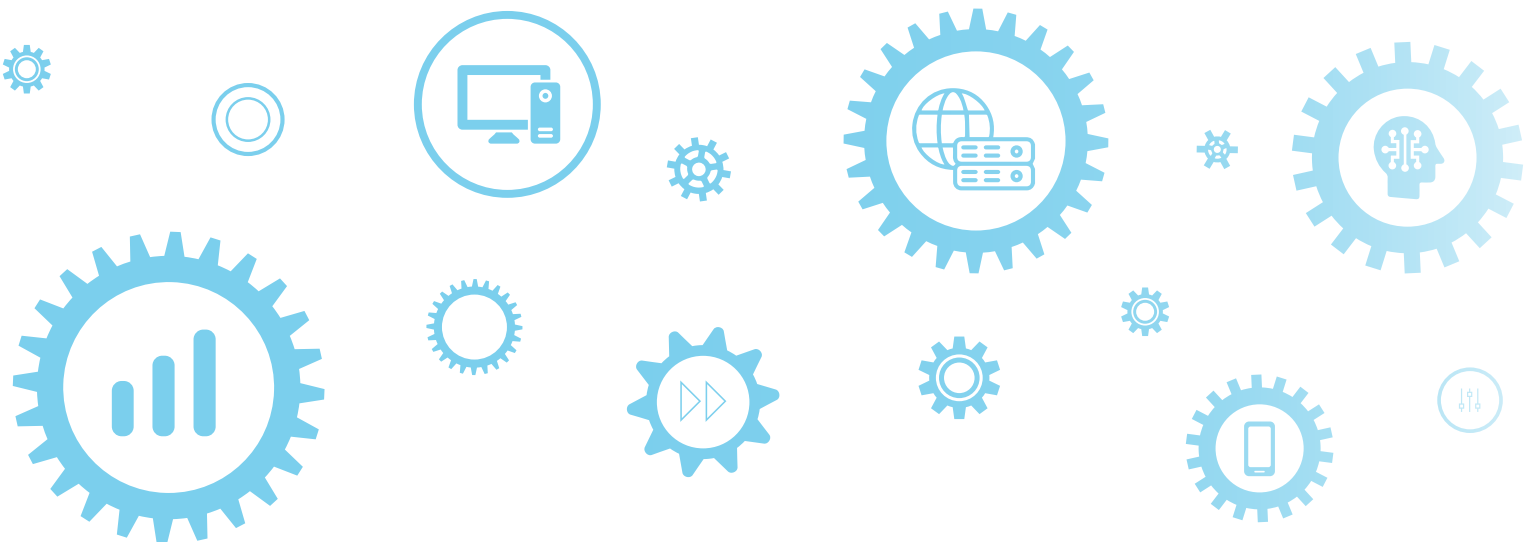
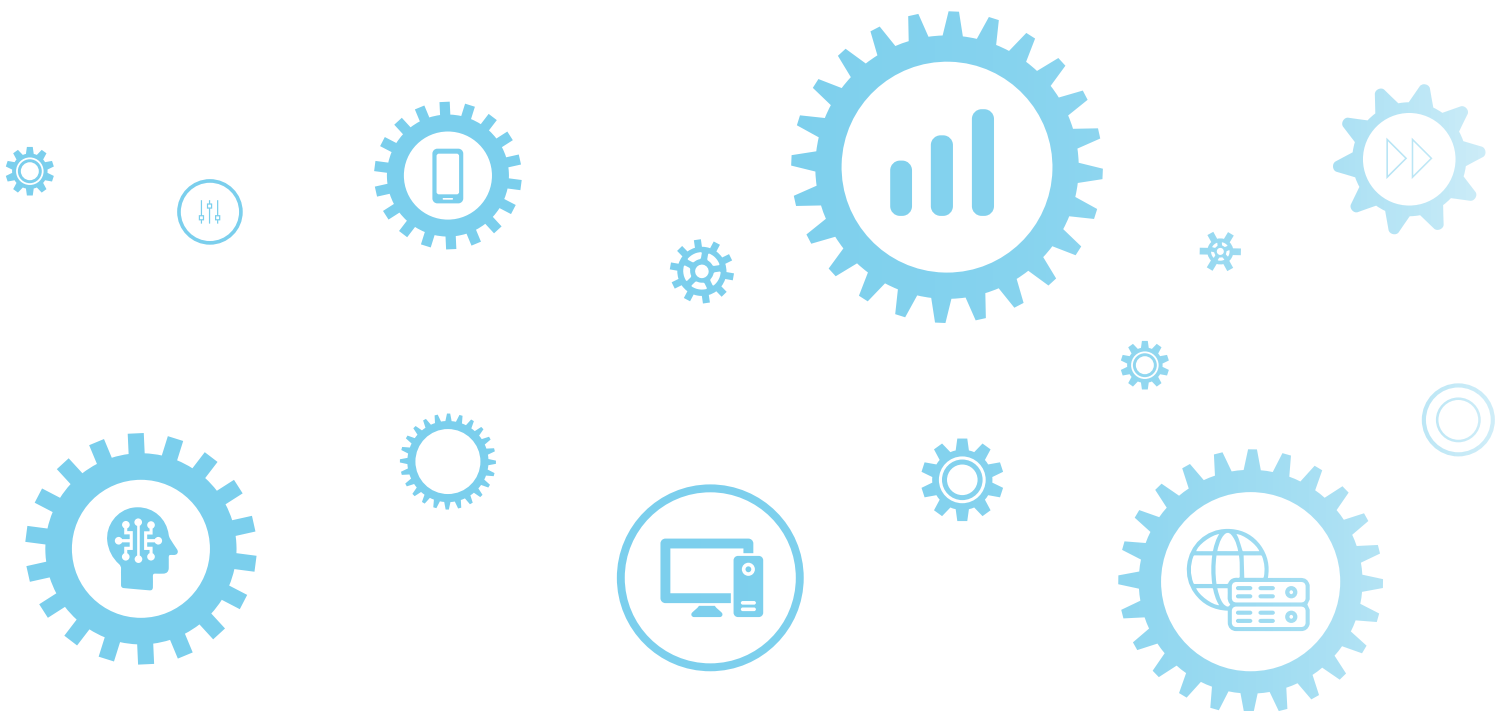




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Executive Summary

Navigating the complexity of today's advertising landscape requires a comprehensive cross-channel measurement strategy. This guide offers a detailed approach to integrating data from various sources, selecting appropriate attribution models, and leveraging advanced analytics to gain more holistic insights into consumer behavior. By avoiding common pitfalls and implementing best practices, marketers can optimize media spend, improve customer experiences, and drive better business outcomes. Emphasizing continuous improvement through regular audits, stakeholder engagement, and adaptability to industry trends ensures sustained success in the ever-evolving digital environment.

KEY POINTS:

1 Importance of Clear Objectives and KPIs

Establishing specific, measurable, attainable, relevant, and time-bound (SMART) goals and key performance indicators (KPIs) is essential for alignment and clarity in measurement strategies. Additionally, it's crucial to ensure that what you're measuring aligns directly with the decisions you're making or planning, whether it's about audience targeting, consumer insights, messaging strategies, or campaign approaches.

2 Unified Data Strategy Development

To achieve a comprehensive view of customer interactions across channels, making data interoperable and ensuring quality is crucial. Using ETL (extract, transform, and load) processes allows the integration of data from various sources. Since data often resides in separate systems, it's not just about bringing it together, but also ensuring it can be easily accessed and joined. This integration enables deeper insights and more informed decision-making.

3 Advanced Analytics and Attribution Models Implementation

Selecting appropriate attribution models, leveraging predictive analytics, and incorporating machine learning helps accurately assess the impact of different channels and optimize marketing strategies.

4 Privacy Compliance and Data Integrity

Adhering to regulations like GDPR and CCPA, implementing consent management systems, and maintaining data accuracy and consistency are necessary to protect user privacy and enhance data reliability.

5 Continuous Improvement and Collaboration

Regularly auditing data, setting performance benchmarks, engaging stakeholders, encouraging team collaboration, and staying adaptable to industry trends ensure ongoing refinement and effectiveness of the cross-channel measurement framework.



Step-by-Step Guide to Implementing Cross-Channel Measurement

Implementing a robust cross-channel measurement framework is critical for understanding and optimizing marketing efforts across multiple channels. This chapter provides a detailed step-by-step guide, highlights common mistakes to avoid, and outlines best practices to ensure success.

1 Step 1: Define Objectives and KPIs

- Identify Business Goals:** Clearly define your objectives for the cross-channel measurement strategy, such as increasing ROI, improving customer engagement, or optimizing media spend.
- Get Stakeholder Alignment:** Engage with stakeholders across departments to ensure goals are aligned.
- Set KPIs:** Establish KPIs that align with business goals, considering both cross-channel perspectives and specific metrics for each channel, funnel stage, or campaign, such as conversion rates, customer acquisition costs, or click-through rates.
- Set Measurement Benchmarks:** Create internal and industry benchmarks for both overall cross-channel performance and specific channel or campaign targets, allowing you to measure progress and identify improvement areas.

2 Step 2: Conduct an Audit of Current Team and Technical Capabilities

- Evaluate Existing Tools and Data:** Assess the current tools and data sources in place, identifying any gaps in data collection or integration.
- Determine Integration Needs:** Identify which systems need to be integrated to provide a unified view of campaign performance across all channels.
- Establish Your Readiness Level:** Assess your team's level of knowledge and capacity, identify and engage internal partners and stakeholders, and review existing operational processes.



3 Step 3: Develop a Unified Data Strategy

- Centralize Data Storage:** Use a data warehouse or data lake to consolidate data from all channels. If centralization isn't possible, ensure data access and interoperability across systems for seamless analysis and a unified view.
- Ensure Data Quality:** Establish data governance policies to ensure the accuracy, consistency, and completeness of your data.
- Use ETL Processes:** Employ ETL tools to automate data integration from various sources.

4 Step 4: Select and Implement Attribution Models

- Choose Appropriate Models:** Select attribution models that align with your business goals and reflect the complexity of the customer journey. This can include a mix of single-touch (first-click, last-click) and multi-touch (linear, time decay, position-based) models, as well as data-driven models that use machine learning to dynamically assign credit based on actual impact.
- Test and Optimize Attribution Models:** Continuously test and refine your chosen attribution models to ensure they accurately capture the customer journey and provide actionable insights.

5 Step 5: Deploy Advanced Analytics and Reporting Tools

- Set Up/Update Dashboards:** Evaluate current performance reporting and planning cycles to decide if integrating measurement into existing dashboards is more beneficial or if new dashboards are needed. Enhance or create dashboards to display key metrics and KPIs in real time, ensuring they are interactive and customizable for different stakeholders' needs.
- Automate Reporting Processes:** Implement automated reporting tools to streamline data collection and analysis, reducing manual effort and ensuring timely, consistent insights.
- Leverage Advanced Analytics:** Employ advanced analytics techniques to gain deeper insights into customer behavior and forecast future trends. Use methods like predictive analytics and machine learning to identify hidden patterns and relationships within the data.



6 Step 6: Ensure Privacy Compliance

- Adhere to Regulations:** Ensure your data collection and usage practices comply with regulations such as GDPR and CCPA.
- Implement Consent Management:** Use robust consent management systems to obtain and manage user consent for data collection and usage.
- Anonymize and Aggregate Data:** Protect user privacy by anonymizing and aggregating data wherever possible.

7 Step 7: Analyze Data

- Regularly Monitor Data:** Continuously analyze collected data to identify trends, gaps, and anomalies.
- Identify Gaps:** Detect inconsistencies or missing data points that could impact analysis accuracy.
- Investigate Issues or Anomalies:** Examine any identified issues or anomalies to understand their underlying reasons, ensuring that your measurement framework can accurately capture and reflect true changes in trends.

8 Step 8: Quality Assurance and Troubleshooting

- Conduct Regular Audits:** Schedule periodic audits to review data integrity, tool effectiveness, and process efficiency.
- Implement Feedback Loops:** Collect and analyze feedback from stakeholders and clients to continuously refine measurement strategies.
- Implement QA Processes:** Establish quality assurance protocols to verify the accuracy and consistency of your data and measurement tools.
- Conduct Regular Testing:** Regularly test your systems and processes to identify and address potential issues before they impact your analysis.
- Troubleshoot Issues Promptly:** Develop a troubleshooting framework to quickly identify, diagnose, and resolve any problems in your measurement strategy.
- Document Solutions:** Keep detailed records of issues and their resolutions to build a knowledge base for future reference and continuous improvement.



20 Common Mistakes and Best Practices in Implementing Cross-Channel Measurement

Implementing a cross-channel measurement framework can be challenging, and even small missteps can lead to significant inefficiencies and inaccuracies. Understanding common mistakes can help marketers avoid these pitfalls and develop a more effective measurement strategy.

1 Lack of Clear Objectives

Starting without clearly defined goals and KPIs.

- **Impact:** Without clear objectives, it becomes difficult to measure success, leading to misaligned efforts and wasted resources.
- **Best Practice:** Start with clear objectives by defining specific, measurable, attainable, relevant, and time-bound (SMART) business goals and KPIs. These should guide your measurement strategy and ensure alignment across teams.

2 Lacking Stakeholder Engagement

Not involving key stakeholders from different departments.

- **Impact:** Without stakeholder engagement, there may be a lack of buy-in, misalignment of goals, and missed opportunities for valuable insights.
- **Best Practice:** Engage stakeholders by involving key players from various teams or departments. This ensures a holistic and collaborative approach to cross-channel measurement.

3 Failing to Align Measurement with Business Goals

Measuring metrics that do not directly indicate whether business objectives are being achieved, such as vanity KPIs (e.g., the number of likes).

- **Impact:** This misalignment can result in focusing on irrelevant data, leading to ineffective strategies and efforts that don't contribute to achieving key business outcomes.
- **Best Practice:** Ensure that all measurement activities are aligned with business goals, using metrics that provide clear insights into whether those objectives are being achieved. Regularly review and adjust metrics to prioritize those that offer meaningful indicators of success rather than vanity metrics that don't drive actionable insights.



4 Ignoring Data Quality

Failing to implement data validation processes and maintain structured, consistent data can lead to inaccuracies and inconsistencies, making it difficult to compare performance across platforms.

- **Impact:** Poor data quality and lack of standardized structure result in unreliable insights, and potentially misleading decision-making and media optimization efforts.
- **Best Practice:** Invest in data quality by establishing robust data governance policies, validation processes, and consistent taxonomies. Regularly validate and monitor your data to maintain its integrity, ensuring that it's structured and comparable across platforms for accurate performance analysis.

5 Siloed Data

Keeping data fragmented across different systems and departments.

- **Impact:** Siloed data prevents a holistic view of the customer journey and makes it difficult to analyze cross-channel interactions effectively.
- **Best Practice:** Centralize data using data warehousing or data lakes to consolidate information from all channels. If data sets must stay separate, ensure they are interoperable and consistent for seamless analysis. Align cross-channel measurement data with other sources of truth, such as marketing spend, and understand how modeled outcomes may differ from other reports (e.g., gross vs. net sales) to ensure accuracy and consistency.

6 Choosing the Wrong Attribution Model

Using a one-size-fits-all attribution model that doesn't align with business goals or customer journey complexity.

- **Impact:** Incorrect attribution can misrepresent the value of different touchpoints, leading to sub-optimal budget allocation and strategy.
- **Best Practice:** Assess various attribution models to determine which ones best suit each campaign and business objectives. It's important to use different models for different business reasons, as no single model fits all scenarios. Regularly evaluate and adjust these models to ensure they accurately represent the value of each touchpoint and align with both the customer journey's complexity and your specific goals. This tailored approach helps in making more informed budget allocations and strategic decisions.



7 Neglecting Privacy Compliance

Failing to update and optimize measurement strategies.

- **Impact:** Non-compliance with privacy regulations can result in legal penalties and damage to the brand's reputation.
- **Best Practice:** Ensure privacy compliance by adhering to regulations such as GDPR and CCPA. Implement robust consent management systems and anonymize data where possible to protect user privacy.

8 Static Measurement Framework

Failing to update and optimize measurement frameworks regularly.

- **Impact:** A static framework can become outdated as consumer behaviors and market conditions change, leading to ineffective measurement and optimization.
- **Best Practice:** Promote continuous improvement by scheduling regular audits, setting performance benchmarks, and implementing feedback loops. Stay agile and ready to adapt your strategies as needed.

9 Overcomplicating the Framework

Implementing overly complex measurement frameworks that are difficult to manage and understand.

- **Impact:** Complexity can lead to confusion, errors, and inefficiencies, making it challenging to extract actionable insights.
- **Best Practice:** Simplify the framework by focusing on key metrics and ensuring that the tools and processes are user-friendly and scalable. This makes the framework easier to manage and more effective.

10 Inadequate Training and Resources

Failing to provide adequate training and resources to the teams involved in cross-channel measurement.

- **Impact:** Without proper training, teams may struggle to use tools effectively and interpret data accurately, leading to suboptimal outcomes.
- **Best Practice:** Provide adequate training by investing in training programs and resources. Ensure that all team members have the necessary skills and knowledge to implement and use the measurement framework effectively.



11 Ignoring Other Factors

Focusing solely on internal data and ignoring external factors such as market trends, competitive landscape, economic conditions, and non-media factors like price, distribution, and promotional events.

- **Impact:** Ignoring other factors can lead to incomplete, or potentially inaccurate insights and strategies that are out of sync with the broader market environment, potentially overlooking key influences on performance.
- **Best Practice:** Incorporate other data by including market trends, competitive analysis and non-media factors in your measurement framework. This provides context, enhances the accuracy of your insights, and is inclusive of overall market dynamics.

12 Overlooking Technical, Operational, Logistical, and Legal Challenges

Failing to account for the technical, operational, logistical, and legal aspects involved in cross-channel measurement.

- **Impact:** Neglecting these areas can result in implementation delays, compliance issues, and operational inefficiencies, not to mention negative PR, and in extreme cases, fines from regulatory authorities.
- **Best Practice:** Involve experts from IT, legal, and operations teams early in the planning process. Proactively address these challenges to ensure smooth implementation and adherence to regulations.

13 Not Preparing for Future Changes

Failing to anticipate and plan for future changes, such as the loss of non-persistent identifiers, evolving privacy regulations, and technological advancements.

- **Impact:** Unpreparedness for these changes can lead to disruptions in measurement capabilities, non-compliance with regulations, and missed opportunities for innovation.
- **Best Practice:** Stay informed about industry trends and regulatory updates. Develop flexible strategies to adapt to changes, such as investing in first-party data collection and privacy-friendly measurement techniques. Regularly review and update your measurement framework to ensure it remains resilient and effective in a rapidly evolving digital landscape.



14 Not Testing or Experimenting with Different Models, Solutions, or Partners

Sticking to a single approach without exploring alternative models or solutions.

- **Impact:** This can lead to missed opportunities for optimization and innovation.
- **Best Practice:** Regularly test and experiment with different models, solutions, and partners. Use A/B testing and pilot programs to identify the most effective strategies.

15 Not Sourcing/Investing in the Right Talent

Neglecting to hire or develop skilled professionals who effectively manage cross-channel measurement.

- **Impact:** A lack of expertise can result in poor implementation and analysis, leading to suboptimal results.
- **Best Practice:** Invest in hiring and training talent with the necessary skills and experience. Encourage continuous learning and professional development.

16 Not Investing Time with External Expertise

Neglecting to seek external expertise and insights.

- **Impact:** This can result in a narrow perspective and missed opportunities to learn from industry best practices.
- **Best Practice:** Engage with external experts by joining trade associations and interacting with peers from different companies. Attend industry conferences, webinars, and workshops to gain diverse perspectives and insights.

17 Lack of Integration With Marketing Platforms

Not integrating measurement tools with marketing platforms and systems.

- **Impact:** This can lead to data fragmentation and inefficiencies in measurement and optimization efforts.
- **Best Practice:** Ensure measurement tools are integrated with key marketing platforms and systems to enable seamless data flow and comprehensive analysis.



18 Underestimating the Importance of User Experience

Focusing solely on data without considering the user experience.

- **Impact:** The performance data you see may be skewed by poor user experience factors, such as directing users to the wrong landing page or having too many steps in the conversion process. This can lead to lower engagement and conversion rates that don't reflect the campaign's true potential.
- **Best Practice:** Incorporate user experience metrics into your measurement framework. Regularly gather and analyze user feedback to pinpoint areas for improvement, ensuring that any performance issues are not due to avoidable UX problems and making it easier to interpret data accurately.

19 Neglecting Cross-Channel Consistency

Inconsistent measurement methods and KPIs across different channels.

- **Impact:** This can lead to fragmented data, making it difficult to compare performance across channels and gain a cohesive understanding of overall effectiveness.
- **Best Practice:** Ensure consistency in measurement methods, KPIs, and data collection across all channels. Establish unified guidelines and frameworks for cross-channel measurement to enable accurate comparisons and a holistic view of performance, helping to inform more strategic decision-making.

20 Over-Reliance on Historical Data

Relying too heavily on historical data without considering current trends and changes.

- **Impact:** This can result in outdated strategies and missed opportunities.
- **Best Practice:** Evaluate whether historical data remains relevant to current market conditions and trends. Use insights from the right models to inform decisions within the appropriate time frame, and ensure that these models can adapt to changes in the environment or marketplace. This allows for more accurate estimations of marketing effectiveness and better-informed optimizations.



Recommendations to Foster Continuous Improvement

Continuous improvement is crucial for maintaining an effective cross-channel measurement framework. Implementing the following recommendations will help ensure your strategy remains robust, adaptive, and aligned with business goals.

1 Adjust Performance Benchmarks

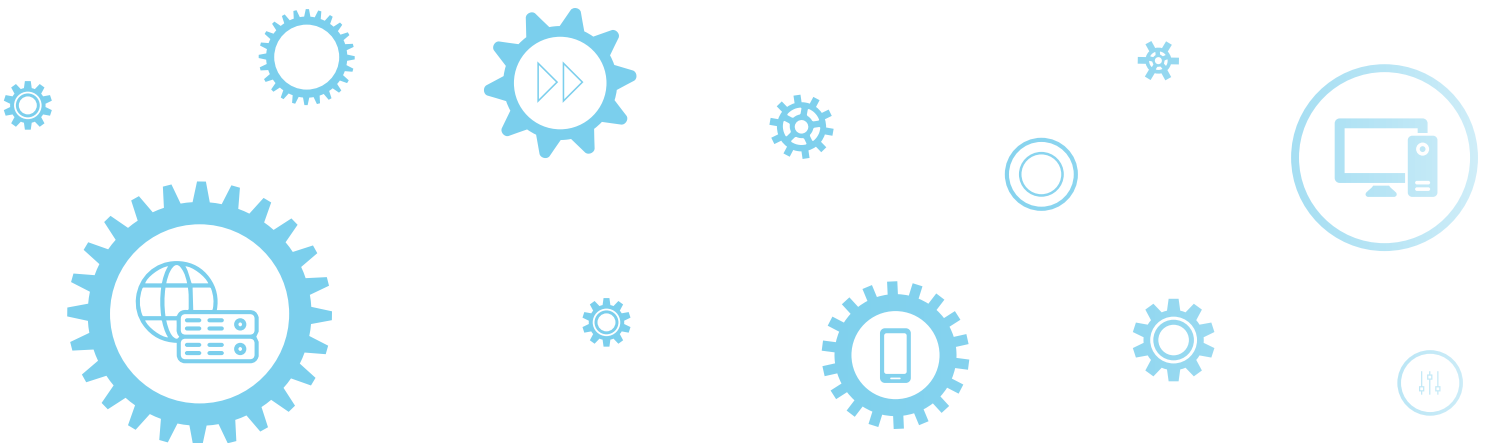
- **Action:** Continuously reevaluate and adjust internal benchmarks to measure progress, aligning the frequency of these adjustments with the pace of performance change.
- **Benefit:** Identifies areas for improvement and helps track performance against standards.

2 Implement Feedback Loops

- **Action:** Collect and analyze feedback from campaigns, stakeholders, and customers.
- **Benefit:** Continuously refines measurement strategies to enhance effectiveness.

3 Develop & Update a Measurement Framework

- **Action:** Agree on a combination of attribution, econometric, and experimentation-based techniques to monitor and measure impact on preset business objectives.
- **Benefit:** The organization knows what success looks like, the ways to measure progress and achievement of success, and ways to course-correct based on intermediate and final outcomes.





4 Source and Develop Talent

- **Action:** Invest in sourcing and developing talent with expertise in analytics, data science, and measurement. Include business strategists who can translate business questions into analytic questions and then interpret and communicate insights in a way that is understandable and actionable for decision-makers.
- **Benefit:** Ensures your team has the necessary skills and knowledge to manage and improve measurement frameworks effectively while also bridging the gap between technical analysis and business strategy.
- **Additional Action:** Provide continuous learning opportunities to keep skills updated, ensuring your team stays current with the latest tools, methodologies, and industry trends.

5 Engage With External Experts

- **Action:** Join trade associations and interact with peers from different companies.
- **Benefit:** Gains diverse perspectives and insights from industry experts.
- **Additional Action:** Attend industry conferences, webinars, and workshops.

6 Encourage Team Collaboration

- **Action:** Foster a collaborative culture by establishing regular cross-departmental meetings specifically focused on measurement activities, such as measurement readouts, strategy reviews, and performance assessments.
- **Benefit:** Promotes shared goals, open communication, and knowledge sharing among various stakeholders, ensuring that insights are understood and leveraged across departments.
- **Additional Action:** Involve all relevant stakeholders in these sessions to ensure alignment and a unified approach to measurement strategies, ensuring that everyone is working towards common objectives and that the measurement framework reflects the needs and insights of the entire organization.



7 Align Stakeholder Interests

- **Action:** Ensure that all stakeholders are engaged and aligned with the measurement strategy.
- **Benefit:** Enhances relevance and engagement, leading to more effective collaboration and strategy implementation.

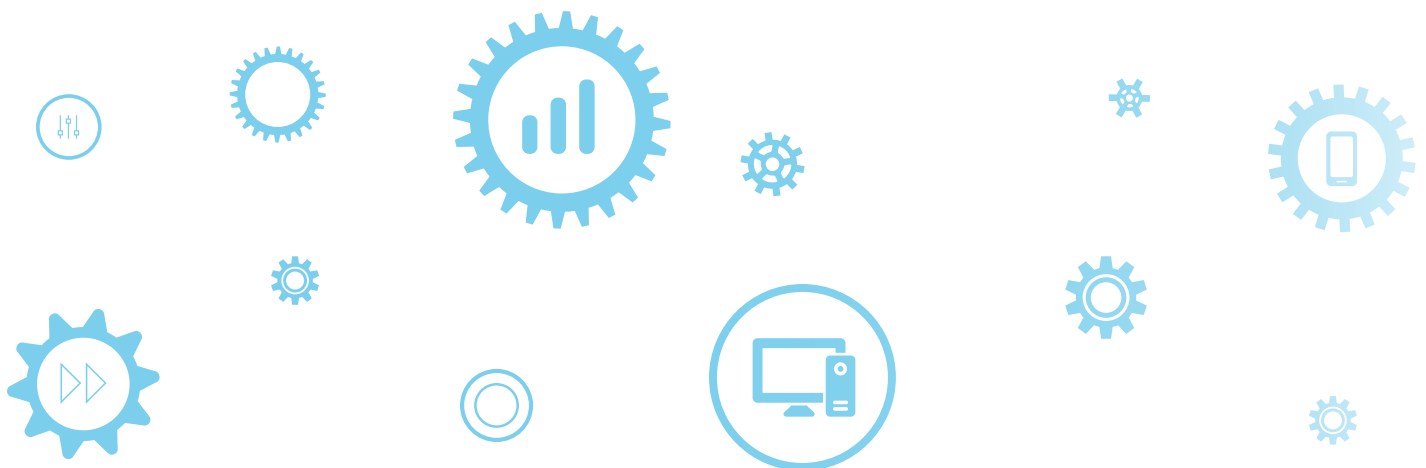
8 Stay Informed on Trends

- **Action:** Regularly review and update your measurement strategies based on the latest industry trends and developments.
- **Benefit:** Keeps your framework current and effective in a rapidly changing digital landscape.

9 Adapt Quickly to Changes

- **Action:** Maintain flexibility to adapt your measurement framework as the digital landscape evolves.
- **Benefit:** Ensures your strategy remains effective and relevant amidst changing conditions and technologies.

Implementing these recommendations will help foster a culture of continuous improvement, ensuring your cross-channel measurement framework remains effective, adaptive, and aligned with your business goals.





Acknowledgements

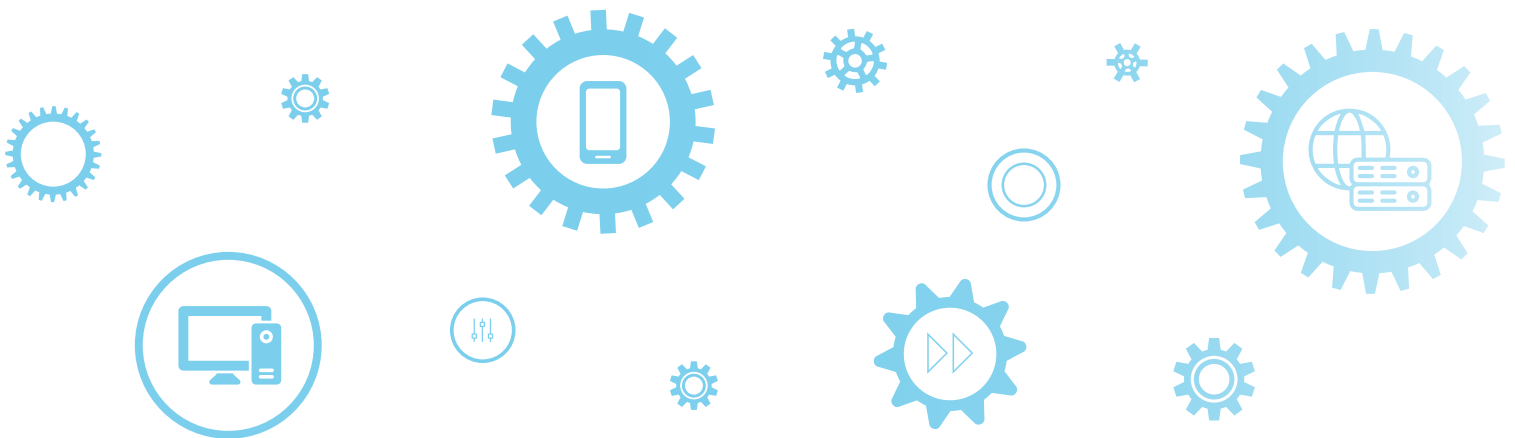
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ABOUT IAB

The Interactive Advertising Bureau (IAB) empowers the media and marketing industries to thrive in the digital economy. Its membership comprises more than 700 leading media companies, brands, agencies, and the technology firms responsible for selling, delivering, and optimizing digital ad marketing campaigns. The trade group fields critical research on interactive advertising, while also educating brands, agencies, and the wider business community on the importance of digital marketing. In affiliation with the IAB Tech Lab, IAB develops technical standards and solutions. IAB is committed to professional development and elevating the knowledge, skills, expertise, and diversity of the workforce across the industry. Through the work of its public policy office in Washington, D.C., the trade association advocates for its members and promotes the value of the interactive advertising industry to legislators and policymakers. Founded in 1996, IAB is headquartered in New York City.

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IAB's Measurement, Addressability & Data (MAD) Center Board of Directors aims to provide essential industry guidance and education on solutions and changes in underlying technology and privacy regulations. The MAD Center specializes in measurement and attribution, addressability, advances in retail media, and privacy concerns, providing a comprehensive approach to digital media challenges. Board members set the agenda and direction for IAB and the industry, approve and prioritize key initiatives, influence industry best practices, receive priority access to IAB experts, research, and tools, and participate in exclusive events and meetings.





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