The Programmatic Readiness Guide

Prepare Your Organization for Success

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When it comes to programmatic buying, there are typically four different options:

① Outsourced Managed Services

② Buying self-service via a tech-based platform

③ Starting on a path-to-self-service

④ Getting left behind (yikes!)

Let someone else take the reins for you with outsourced managed services, or gain control by utilizing a digital buying platform. Otherwise, take time to adjust and identify current and future needs by starting on a path-to-self-service.

How do you know which path is the best for you, your company, and your team?
Start by figuring out your overarching business goals, and adjust your strategy incrementally to achieve them. If your end goal is to adopt a self-service buying model, the process will take time and look different for everyone, but know that *it is possible*.

The path forward may seem daunting at first, but don't worry—we broke it down for you. Dive into our programmatic readiness guide as you assess the ideal solution for your digital buying needs, and use our 10-step checklist to spark action! After all, it's all about the journey.

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Business Readiness

Is in-housing your advertising right for your brand? Ask yourself: What is the motivation? What are the implications? Think outside of the ability to buy direct and programmatic, and instead, picture your business holistically.

The success of any business or programmatic campaign starts with identifying the KPIs that determine which metrics are important to you, and continually tracking them to analyze and understand where they are steering your efforts.

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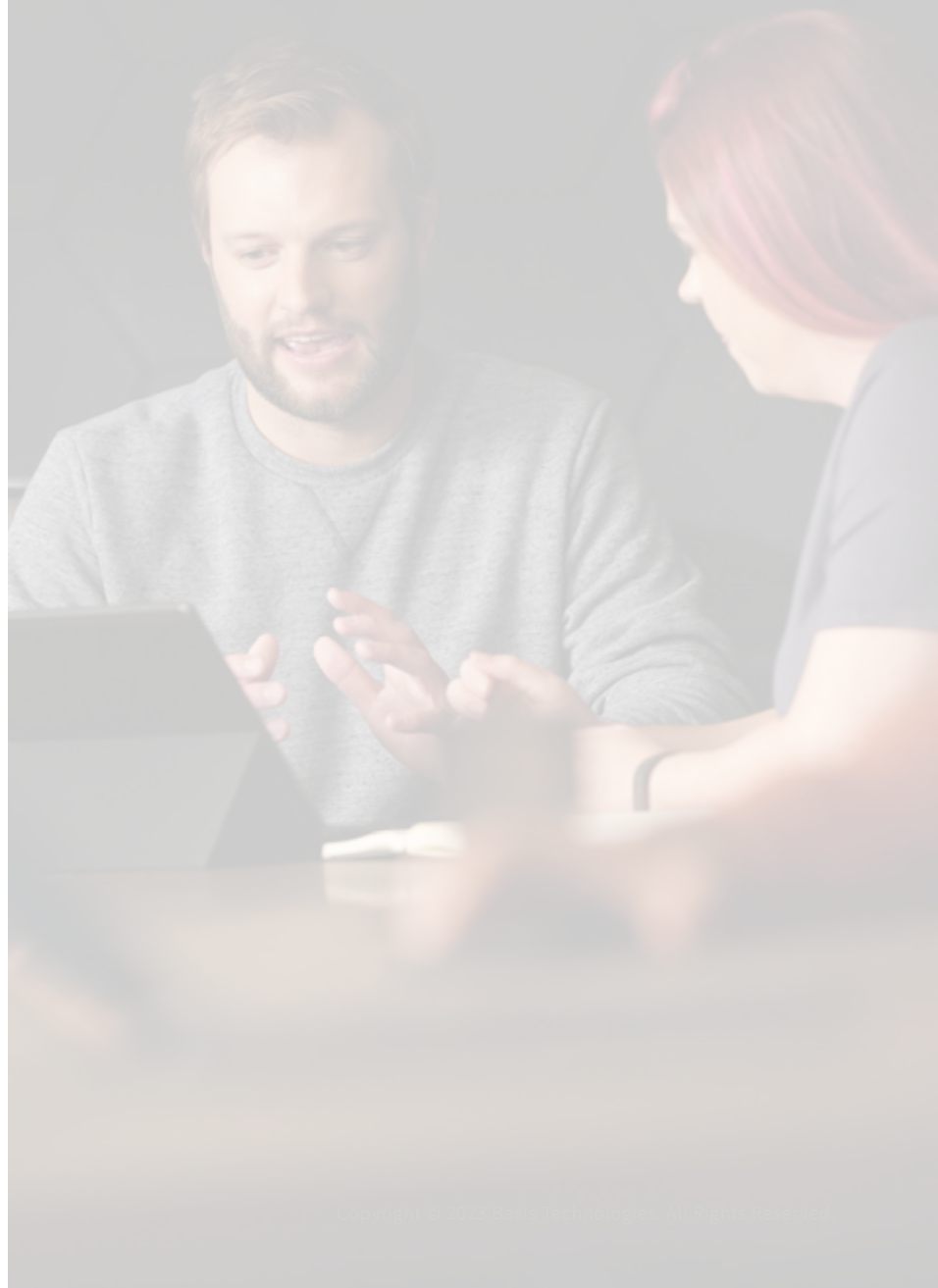
Business Goals to Consider

» Increasing sales / revenue and meeting or exceeding existing KPIs by improving media performance

» Scaling teams and attracting top programmatic talent

» Positioning your brand in the right place, at the right time, with the right message

» Optimizing efficiently across your whole marketing or media budget

» Pivoting more efficiently

BUSINESS READINESS, CONTINUED

Gather as much data as you can, so there is a baseline to measure against, but be specific about your goals and the "why" behind them. Set an intention and stick to it. This will prevent you from drowning in a sea of data without any real insights, or worse—not having enough data to point you in the right direction.

Outside of tracking and measurement, KPIs encourage accountability and boost morale. Stakeholders typically find positive reports rewarding, as they provide a sense of purpose, and allow teams to focus on meeting their goals. What are the KPIs that you need to set your team up for success? What is the end goal (the "from X"/ "to Y" model) and how will you reiterate that vision throughout this journey?

TOP KPI BENEFITS:

★ Increased dollars put towards working media

★ Reduced CPM and administrative costs

★ Better results in brand safety and viewability

★ Immediate access to reporting and historical data

★ More agility to test and optimize quickly

★ Improved transparency and visibility into all costs

Mix it up!

Depending on your campaign goals, different media buying models can help you reach your desired audience.

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People Readiness

The transition to in-housing programmatic buying can be complex, and the processes that support programmatic efforts can't be completed without ample people and technology resources, both of which typically require an investment of sorts (think: time, energy, money).

First, consider your current volume of business, and gauge your team's ability to handle it. What is the average number of programmatic campaigns a team member can manage? Assess the skills, digital acumen, and expertise of your team. What's missing? Programmatic tends to fall on the technical side, so if your current team is used to handling direct buying, it may take a minute to adjust. Does anyone on the team have a background in ad operations, or possess the willingness to learn a new skill set? More importantly, do you have people that enjoy the analytical components that come by way of working within platforms on a daily basis (i.e., pulling reports, establishing workflows, etc.)?

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If the answer is YES:

Celebrate accordingly, and provide direction and guidance on how and where they can learn more.

Conversely, if the answer is NO:

Are you prepared to recruit the right talent with these skills? Is this talent available in your market, or will you have to seek out talent in other markets?

RULE OF THUMB:
50 campaigns per buyer*

NOTE: These numbers are representative of a poll across a 300 person team of programmatic buyers. Campaign complexity and targeting parameters impact volume of campaigns per buyer.

Provide options and resources for employees that may be unsure of their next move, and alleviate unwanted turnover by implementing overarching goals and career paths. Make note of any new hires, ongoing training, or coaching needed. Set your team up for success, and ideally, allow them to grow from within. These days, a buyer, analyst, or engineer in the adtech space will only benefit from learning the ins and outs of programmatic; these added skill sets will make them more marketable and well-rounded in the long-run.

Who are the leaders and key players? Are they clear on what the goals are?
Who will drive the end goal / vision forward throughout this journey? Good communication ensures proper expectations are set around what can be delivered, by when, and for how much.

Process Readiness

Change isn't for the faint of heart, and employee resistance is inevitable. Big shifts in business never come easy; however, with superb management and a seamless transition process, they are still possible. Assess the specific changes necessary for solving these problems, and you'll go far.

Systems and platforms will change and evolve constantly as new releases roll out—typically on a bi-weekly, or bi-monthly basis. Therefore, skill sets and expectations need to be set, and adjusted accordingly. The initial set-up will look different than the ongoing processes needed, to make sure your programmatic practice stays fluid. Continuous training will be required, because let's be honest—the transition from employees conversing via email to working in-platform isn't always a pretty one. Which brings us to our next point…

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Process Prep:

» Create a positive buzz, and empower "internal champions" to utilize the new platform ahead of time

» Cross-train teams to minimize impact

» Envision and lay out a plan, create a timeline, and set deadlines

» Listen to what employees are saying to understand how messages are being perceived

All of these efforts will allow you to pinpoint problems, highlight areas for growth, and assign a level of importance to each one. Know that things will slow down, before they speed up long-term.

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Technology Readiness

Think outside the box of programmatic support. What tools do you have or need to establish the right infrastructure? Own your data! Determine if there's a need, appetite, and framework to store all of the granular data that the DSP generates. For example, it might be necessary to store log files (typically, impression level data) to do more customized analyses, but it can be extremely tedious to manage. Is there a place to store and easily access this data? And more importantly, is it secure?

Speaking of security: a survey among US adult consumers shows that 60% of respondents believe the responsibility lies with advertisers and agencies "for ensuring that ads did not run with dangerous, offensive, or inappropriate content," and 48% said the onus is on "tech providers" to monitor brand safety. *(Statista, 2023)* Are you ready to play an active role in monitoring your brand's presence across all digital campaigns? Think about the supplemental partnerships needed to monitor this type of activity. Should you ever have to defend an ad placement adjacent to inappropriate content, it pays to be prepared.

BARRIERS TO ORGANIZATIONS INVESTING IN MARKETING TECHNOLOGY:

Inadequate tech integration	57%
Measurement and metrics	53%
Marketing budget constraints	50%
Lack of understanding tech	49%

Source: LXA, 2022

Consider other existing marketing technology partnerships in place (e.g.: measurement, third party ad servers, DMPs, site analytics), and make sure that everything "plays nicely" together. Create a dependency diagram or chart of how each system interacts with every other one—data in vs. data out—and list out the specifications that need to be followed from each platform, if used in conjunction with a DSP (e.g.: specific macros for ad serving, creative specs, etc.).

MARKETING TECHNOLOGY CHATTER

76% of marketing leaders say expenses in their company budget include marketing technologies.
Source: Deloitte, 2022

68% of CMOs say martech is at the heart of their marketing strategy and critical to meeting customer expectations.

63% expect their martech budgets to increase in the next 12 months—with that increase coming in around 6%-10%.

65% of CMOs attribute their increase in martech spend to changes in both customer behaviors and the technology landscape.
Source: LXA, 2022

TECHNOLOGY READINESS, CONTINUED

Will the tools that you're looking at also support your direct buying, search, and social, enabling you to be a true cross-channel solution? Is there room in your budget to invest? Don't just think about the short-term—consider the long-term: establish the right processes, and enable holistic digital buying.

ASK YOURSELF:

Does the DSP have creative specifications that will need to be shared and understood by whomever is building ad units? Who is controlling access and permissions to the DSP? Does your IT department need to be involved? What if an employee leaves or is terminated? What permission settings do you need to prevent unauthorized access? Consolidating all tools into one platform will not only provide more control and viewability but also effectively streamline vendor management, buying, and reporting.

Future Readiness

If you've determined that you're ready to in-house your advertising, ask yourself "How do I choose the right partner?"

Start by looking for an expert; someone with digital chops, who has done this before. Confirm their media expertise, turnkey processes, and ensure they have a viable pool of resources to tap into. Seek out a partner who walks the walk, as they talk the talk—someone who wants to make the most of your media spend.

A GREAT PARTNER SHOULD HELP YOU WITH:

» Overflow work

» Initial onboarding and trainings

» Ongoing education programs and resources

» Reference checks

» Assessment of future risks

» Agile technology

- Innovative roadmaps
- Robust reporting features
- Friendly, intuitive UI
- Audience scale / reach
- Advanced audience targeting
- Powerful integrations
- Multi-channel platform

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Netflix, EA Games, and Wayfair have all seen success with in-housing advertising—and it continues to become more widespread. 73% of brands have now moved at least part of their digital marketing in-house, and 63% have increased the size of their in-housing teams over the last 12 months. And as we've continued to utilize a remote workforce, an impressive 62% of respondents said in-housing enabled more efficient remote working *(Digiday, 2021)*.

Programmatic is not one thing—it's a subset of automation; a fusion of strategy, operations, technology, and data. Successful in-housing is possible! After Procter & Gamble saved nearly $65 million in ad spend by in-housing, P&G's CFO Andre Schulten said they "see this as an area of continued investment in terms of our own capabilities with a great ability to drive productivity for years to come" *(Digiday, 2023)*.

"Whether working through an agency or buying in-house, it's become table stakes for brands to have on-demand access to their performance data. This leaves them with two options—to demand more from their agency, or to bring the tools in-house."

— *Shawn Riegsecker, Basis Technologies Founder and CEO*

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10 QUESTIONS TO GAUGE READINESS

Ask yourself these questions to spark action. Ready, set…grow!

1. How much of your digital buying is currently outsourced?

2. What would be the cost savings of moving to a self-service model?

3. Are your teams staffed appropriately?

4. What trainings or continued education will be required to level up your teams' skills?

5. Does the needed talent exist in your company, or in your market?

6. Do you have internal training resources to assist the transition to self-service?

7. What are your data needs? Will a DMP be needed?

8. Would a self-service platform increase your control, visibility, and transparency?

9. Is your existing team currently working out of three or more different platforms to manage digital media?

10. Will a self-service model increase employee satisfaction?

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