



# The Budget Pacing Playbook

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Your guide to effective and efficient budget management with Fluency.

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# Welcome to Fluency's Budget Pacing Playbook

This guide is your complete resource for managing your advertising budgets on the Fluency platform.

Here, you'll learn how to effortlessly manage and optimize your spend with robust budget automation, ensuring you never over or underspend again.

Together, these tools empower you and your team to create, manage, and optimize budgets across all major channels.

**Let's unlock your greatest work yet.**

# Setting Up Your Budgets

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Budget configurations are crucial in ensuring that your budgets have the settings in place to reach your desired spend. It's important to choose a pacing strategy that aligns with your business' industry and goals.

# Automate your budgeting with comprehensive pacing management

*Configure your budgets, set up underspend mitigation and overspend protection, and determine your budget pacing strategies. Once your budgets are configured to your desired settings, let the system do the work for you.*



**90+%**

**Reduced Time Spent  
on Budget Management**

## Setting and aligning your budgets

In order to reach your full month's spend, make sure that the total budget of your active campaigns equals your spend limit. Configuring your budgets can be done in three simple steps:

1. Set your Spend Limit.
2. Assign active campaigns to the budget.
3. Confirm that the Total Budget equals the Spend Limit.

## Choosing your pacing strategy

All pacing strategies aim to reach full spend by the end of the month. Different strategies allow you to spend that budget differently throughout the month. Determine which pacing strategy is best for each of your budgets.

Choose from a number of budget pacing strategies to ensure your budget reaches your monthly spend goals. Fluency tracks spend hourly throughout the month and adjusts daily targets, resulting in near 99% pacing accuracy for most users, with no manual intervention needed.

- |                  |                         |                   |
|------------------|-------------------------|-------------------|
| • Custom         | • No Daily Pacing       | • Strong Start    |
| • Even*          | • Recurring Lifetime    | • Traffic Tracker |
| • Fixed Daily    | • Segmented (One-Time)  | • Weekdays        |
| • Front Loaded   | • Segmented (Recurring) | • Weekends        |
| • Business Week  | • Strong Finish         |                   |
| • Metric-Based** |                         |                   |

*\*Generally the same amount of daily spend throughout the month.*

*\*\*Ability to pace budgets to meet (but not exceed) a configurable metric (conversions, video views, impressions, etc.) while staying under a budget cap.*

## Configuring global budget settings

Set default budget settings for all accounts.

- **Fast Recovery:** Enable fast recovery to increase daily spend for a set number of days (recovery window) to make up for underspend.
- **Budgets created via Reverse Sync:**
  - Set a default pacing strategy for budgets pulled in via reverse sync.
  - Turn budget proration on or off for new budgets created mid-month.
  - Enable or disable new budgets to automatically pause campaigns when their budgets are exhausted.
- **Scaling Budgets:** Automatically scale all budgets proportionally whenever a spend limit or budget group changes.
- **Ad Schedules:** Customize the number of hours to allow your campaigns to run before or after your ad schedule ends when a campaign is underspending.
- **Meta:** Enable Meta Invoice billing and/or Account Spend Limiter.
- **Google:**
  - Enable Google Account Budget Orders.
  - Accelerate Strong Start pacing strategy for Performance Max budgets.
- **Budget Rollovers & Adjustments:** Customize the minimum amount of underspend for an account to appear in the Budget Rollover and Adjustments tool.
- **Proposal:** Set the default percentage by which the Global % Fee is increased when generating proposals.

## Configuring account-level budget settings

Set customizable settings for account-level budgets.

- **Spend Limit:** Input a spend limit. The individual budget amounts will automatically scale up or down based on the amount entered.
- **Enable Overspend Protection:** Stop the spending on all of an account's campaigns when the spend limit is met.
- **Next Month Budget Change:** Input next month's budget to automatically apply at the start of the new month. Ability to set at the account, budget group, or campaign level.
- **Temporarily Stop Ad Spend:** Temporarily put a global stop to all budgets within a single account with an "account hold."
- **Customize Budget Reallocation Settings:** Customize how and when budget reallocation recommendations are generated.

## Budget pacing preferences

- **Target Full Spend:** Select a time in the month (represented as a percentage) to spend the full budget. This helps speed up spending or mitigate underspending.
- **Pause Campaigns When Exhausted:** Automatically pause campaigns once the budget is spent.
- **Notify when Paused:** Receive a notification when the budget is automatically paused.
- **Allow Reallocation:** Receive notifications to approve or reject budget reallocation recommendations, allowing you to move spend to higher performing campaigns and/or channels.
- **Partner Allocations:** Allocate a percentage or fixed budget amount to distribute between channels.

## Budget automation

- **Reallocation Recommendations:** Receive automated budget reallocation recommendations for shifting budget between campaigns and/or channels for optimized campaign performance. The recommendations generated aim to optimize for cost per conversion, conversion volume, and, if there are no conversions, cost per click. Accept, reject, or edit recommendations.



- **Budget Rollover & Adjustments:** Carry forward unspent funds from the previous month to the next month. Customize which budgets receive the rollover.
- **Temporary Budget Adjustment:** Temporarily add or remove funds to adapt to evolving campaign needs. Budgets automatically reset the following month to the original monthly budget.

## **Bulk budget management**

- Apply bulk changes to budgets via [Bulk Manage](#) or [Advanced Download](#).
- Schedule budget changes for the future.

## **Budget groups**

Group, manage, and monitor budgets across channels or partners. This allows you to:

- Manage and track different advertising partner budgets separately in your portfolio.
- Group budgets based on campaign type, especially if they need to reach a specific spend amount each month (e.g., for co-op purposes).
- Take advantage of budget reallocation, pacing, overspend protection, and reporting capabilities within mutually exclusive groups in the same account.

## Underspend mitigation

Automatically and incrementally relax campaign restraints for under-pacing budgets to address any underspend issues as a month progresses. Enable the mitigation strategies most relevant to your business, including:

- **Bid Adjustment:** Automatically increase bids by a specified percentage.  
Note: This works only for manual CPC, not smart bidding.
- **Remove Blocking Keywords:** Remove negative keywords that block other keywords.
- **Broad Match Keywords:** Adjust top 100 phrase and exact match keywords to broad match.
- **Relax Ad Schedules:** Add additional hours to the existing ad schedule.
- **Increase Geo Radius:** Expand the targeted geographical area by a specified number of miles.

## Overspend protection

Stops the spending on all of an account's campaigns when the spend limit is met. It's turned on by default, as seen with a check in the green checkbox. When overspend protection goes into effect, all campaigns will have a \$0.01 budget applied to prevent spend.

# Monitoring Your Spend

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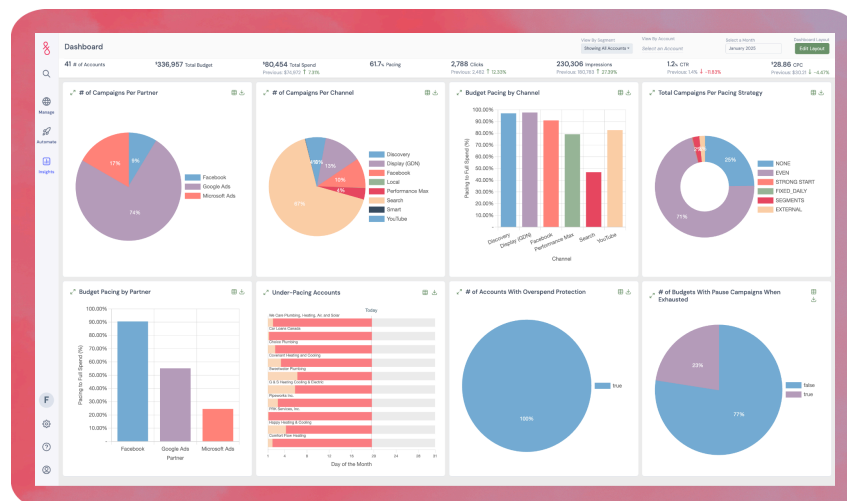
The Fluency platform delivers unified reporting and next-level insights in order for you to easily stay on top of your budget pacing metrics throughout the month. Create custom notifications and dashboards to stay informed of real-time changes for a more efficient and scalable way to manage your budgets at scale.

# Tracking Pacing Metrics

With Fluency, you eliminate the need to manage advertising programs across separate channels and publishers by centralizing all your accounts, campaigns, budgets, ad groups, keywords, and creatives for streamlined execution. Our system natively integrates all standard publisher features, and supplements these with additional management tools that enable you to optimize campaigns with greater precision and control.

## Monitoring budget pacing

- **Account Dashboard:** Quickly access key metrics and portfolio performance through a personalized dashboard with customizable widgets, providing analysts and managers with role-specific insights for better decision-making and oversight.
- **Account Table:** Sort and filter pacing and impression share metrics across accounts, channels, etc.
- **Budget Table:** Oversee pacing metrics across campaigns within an individual account.
- **Performance Bounds:** Set specific budgeting success boundaries for your vertical to easily assess portfolio pacing health.



Account dashboard with custom widgets

## Creating custom notifications and reports

- **Creating Custom Notifications:** Make the most out of alerts by creating custom notifications based on saved data sets in Data Explorer.
- **Data Explorer:** Instantly generate insightful, multidimensional reports across variables for quick and informed decision-making. Customize, filter, share, and download reports instantly. Save data sets for future use and generate links to connect with tools like Excel, Tableau, and PowerBI.
- **Building Pacing Reports:** Easily create, customize, schedule, and save professional reports with tailored metrics to meet your business needs. Automatically send reports to your internal team on your preferred schedule with personalized subject lines, sender addresses, and reply-to email addresses.
- **Advanced Download:** Export budgeting metrics at scale and import changes back into the system in bulk.

# Optimizing Your Campaigns

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With Fluency's platform features, you and your team can eliminate tedious account maintenance and manage your portfolio in bulk. Focusing on what matters most will accelerate your productivity and lead to enhanced outcomes.

# Optimizing budgeting and pacing effortlessly

*Implementing recommended changes, resolving notifications and adapting your strategy will enable you and your team to reach your desired budget pacing outcomes.*

## Resolving Fluency notifications

Monitor and address account issues at scale with 24/7 alerts, helping you focus and resolve issues that may be affecting your budget pacing. Types of notifications include:

Category	Notification
Ad Serving	Expired Messaging Concerns Account On-Hold Call Extensions Destination URLs with Problems Disapproved Ad Extensions Limited/Disapproved Ads Serving Alerts
Budget & Spend	Budget Alignment Alerts Budget Reallocation Recommendations Grouped Budget Concerns Account Budget Exhausted Budget Authority Concerns Incorrectly Linked Accounts Zero Spend Accounts Zero Spend Campaigns
Compliance Review	Ad Copy Compliance Concerns

Launch and Account Management	Account Synchronization Errors Domain Configuration Concerns Client Requested Change
Performance Health	Performance Concerns Learning Spend Concerns Month over Month Concerns
System Info & Alerts	Duplicate Partner References General Notifications Google Verification Requests Linked Accounts Monitored Webhooks Partner Errors Product Catalog Count Issues Relaunch Issues Stale Data Alerts
Targeting & Keywords	Blocked Positive Keywords Keyword Recommendations Missing Geo Targets Out of Country Spend Questionable User Targeting



## Adapting your campaign strategy

*Oftentimes, there are issues within accounts that prevent your campaigns from spending properly and reaching its full budget. Here are some questions to consider along with Fluency's recommended next step:*

Items For Consideration	Recommendation
Are your campaigns able to share budgets?	Enable ' <u>Allow Reallocation</u> ' in order to optimize your budgets based on the metric of your choice.
Do your campaigns have the majority of impression share?	Expand <u>geo targeting</u> , <u>keyword strategy</u> and/or audiences ( <u>Google/Microsoft</u> and <u>Meta</u> ).
Did you recently change the bid strategy that may have caused a learning period?	Allow for a learning period to conclude with no additional major changes.
Have you recently launched new campaigns that are in a learning period?	Allow for a learning period to conclude with no additional major changes or move to a manual bidding strategy.
Have you recently made a large increase to the budgets?	Increase <u>budget recovery</u> response period for faster recovery time.
Are your keywords flagged as ineligible due to low search volume?	Add additional <u>keywords</u> and/or incorporate <u>broad match</u> keyword variations.
Is the size of your audience large enough?	Add additional <u>Google/Microsoft</u> and <u>Meta</u> audiences.
Is your geo targeting large enough?	Expand <u>geo targeting</u> and/or add <u>bid adjustments</u> on higher performing locations.