



The Buyer's Guide for Ad Operations Solutions

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Choosing the right partner
for your team and business.

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Starting your journey to improved performance and efficiency.

Welcome to your guide to ad operations solutions. The following pages will offer you a roadmap to understanding the rapidly evolving world of digital advertising technology.

We know selecting new technology partners can be challenging. Advertising operational leaders like you need to consider how your solutions will meet immediate and future client demands, deliver against a complex set of strategic requirements, and help you adapt to the rapid pace of technological change. Key factors include the size and structure of your digital advertising organization, budget, your existing revenue technology stack, and of course your defined business objectives.

We hope this guide will help equip you to make an informed decision. Through it, you will:

- Identify how to conduct an overall needs analysis that helps you find the right capabilities for your organization and strategy.
- Understand the key differences between ad tech “tools” and comprehensive platforms.
- Learn key features and capabilities for advertising operational platforms, and how to align them with your business needs.
- Learn how to ready your organization for new solutions, and how to measure success.

CHAPTER 1

Embracing the future: Why advertising operations teams need automated solutions.

Embracing the future: Why advertising operations teams need automated solutions.

Today's advertising organizations face unprecedented changes and rising expectations. The growth of digital ad channels, programmatic targeting capabilities, and ever-evolving digital ad formats has created significant execution challenges that exist alongside rising client service demands. Operationally, this creates a significant burden for advertisers, as they are increasingly required to build infrastructure and processes to both unify and align their data, strategies, and teams.

That's where automation can help. Advertising automation refers to the use of software and technology to streamline, automate, and measure advertising tasks and workflows, so that organizations can increase operational efficiency and grow revenue faster.

This approach not only simplifies the repetitive tasks associated with advertising campaigns, but also provides a more personalized experience for the customer. Some of the key problems advertising automation helps to solve include:

- **Campaign management:** Simplifying the creation, management, and analysis of advertising campaigns across multiple channels.
- **Full funnel advertising:** Enabling a comprehensive approach to advertising that addresses every stage of the customer's journey, from awareness to consideration to decision. This ensures a consistent and cohesive messaging strategy that guides potential customers towards making a purchase.
- **Customer segmentation:** Easily segmenting audiences based on their interactions, purchasing behaviors and demographics, allowing for more tailored advertising efforts.
- **ROI measurement:** Providing precise analytics to measure the effectiveness of advertising campaigns and strategies, helping businesses allocate their resources wisely.

How automation and AI are creating a new paradigm.

Advertising automation technologies eliminate the manual data entry and task work traditionally associated with advertising execution, and enable more comprehensive and strategic advertising workflows. While some automation capabilities exist within advertising publishers like Google, Meta and other channels, these capabilities tend to be limited to channel-specific workflows. Comprehensive operational systems allow you to leverage automation more broadly, enabling you to streamline entire workstreams and deliver comprehensive ad sets.

Automation also streamlines the creation and launch of ads, enhancing efficiency and reducing errors, and also plays a crucial role in maintaining a consistent quality of ads by allowing real-time adjustments based on data-driven insights.

When supported by automation and controlled effectively, AI streamlines key ad operational workflows, ranging from ad creative development to data normalization and reporting. Future advancements are expected to further capitalize on machine learning algorithms to enhance ad targeting and customization, broadening the scope of digital advertising's potential. These innovations not only improve the operational efficacy and impact of ad campaigns, but also lay the groundwork for new, adaptive marketing strategies that meet the evolving demands of today's digital consumers.

CHAPTER 2

Understanding the ad tech landscape.

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Evaluating operational solutions requires an understanding of the overall ad tech space – a category that has grown significantly in response to the increasing complexity of digital advertising. Within the overall ad tech landscape, several categories of solutions have emerged:

- **Demand Side Platforms (DSPs):** DSPs allow advertisers to automate the purchasing of digital advertising across various inventories and channels based on their unique goals and strategies. This allows for efficient media buying across channels and audience segments.
- **Supply Side Platforms (SSPs):** Often integrated with DSPs, SSPs are the source for publishers to manage their advertising inventory, helping ensure maximum ad relevance for advertisers, and optimal pricing for each ad sold.
- **Data Management Platforms (DMPs):** Crucial for storing and analyzing huge amounts of data, DMPs help advertisers and publishers make more informed decisions based on user behavior and demographics.
- **Customer Relationship Management (CRM) platforms:** CRMs facilitate a seamless flow of customer information across sales, marketing, and customer service teams to enhance engagement strategies and personalize customer experiences.
- **Advertising execution and management platforms:** Ranging from specialized tools that focus on one channel (such as paid search management) or multiple channels, ad management platforms typically focus on streamlining and improving campaign execution and performance.
- **Advertising analytics solutions:** Analytics solutions support cross-channel reporting and insights that align advertising with overall marketing objectives.
- **Digital advertising operating systems (DAOS):** A comprehensive operating system uses automation and data integration to streamline and improve execution and performance, as well as reporting and insights, and can be tailored to your specific needs.

The selection of an appropriate ad tech partner should be guided by your specific requirements. For instance, if you're aiming for a holistic view of customer interactions, lean towards solutions that provide robust CRM integration capabilities. Understanding core needs is essential to navigating the ad tech ecosystem effectively, ensuring that new technologies complement existing systems instead of exacerbating inefficiencies or duplicating functions.

Ultimately, by implementing automated solutions, you can significantly reduce the time and human effort required for repetitive and labor-intensive tasks.

CHAPTER 3

How to choose the right solution for your organization.

How to choose the right solution for your organization.

Your overall business needs should determine your approach to choosing operational solutions. By examining and auditing your key operational workstreams, and mapping them to your business objectives, you can determine the key capabilities you need. This should be your first step in evaluating solutions. From there, your evaluation should include:

- The core features that the solution will deliver.
- The channels and integrations it supports.
- The onboarding and support structure it offers.

A “total cost of ownership” evaluation can accompany this process. For instance, a best-in-class solution will eliminate the need for your teams to make additional investments in engineering or internal tech-enablement, and save you significant labor costs. A good partner will work with you to assess these.

The following core capabilities offer a roadmap for your needs analysis, highlighting key operational workflows along with corresponding capabilities and features that can help you address and improve them:

Key operational workflow	Why it matters	Capabilities you should look for	Potential use case
Account and campaign creation	Automation can enable virtually-instant digital advertising setup and creation.	Ability to enable both campaign and account creation at scale.	You work with clients who have location-specific needs and require the ability to quickly create scalable account and campaign structures across each of them.
Campaign launching	Automation can save 90% of time on campaign launches.	Ability to launch compliant campaigns and accounts across channels.	You have a high volume of inventory that you need to market, and want the ability to capitalize on market opportunities and changes within hours, not days.

Key operational workflow	Why it matters	Capabilities you should look for	Potential use case
Budgeting	Automation can save 97% of time on budget management and pacing.	Ability to adjust pacing strategies, automatically reallocate budgets, and set spending rules to eliminate overspend and underspend.	You need flexibility with budgeting and pacing, such as setting campaigns to maximize their spend within a key selling period, or ensuring a “fast start” to your month.
Alerts and notifications	Notifications allow you to proactively identify potential issues, before they cost your business.	If you manage a high volume of accounts, you need robust notifications that alert you to ad serving issues, budget and spend issues, compliance issues, performance health and overall system alerts.	You have challenges with errors and budget pacing, and want to immediately identify high-priority issues, then fix them instantaneously.
Campaign management	Address issues immediately and optimize across like accounts.	Ability to manage your multichannel campaigns in bulk – so you can quickly scale optimizations and updates.	You want to test strategic changes in “small batches,” identify where performance opportunities exist, and immediately apply changes across like accounts for improved performance.
Content and creative management	Build and manage your campaign assets faster while managing compliance.	Ability to leverage AI to quickly create ad copy variants, and to centralize all campaign assets into one platform so that you can create, test, and optimize your campaigns through a single interface.	You want to improve your ability to manage and build creatives, e.g. create 10 new headline and subhead variants using AI.
Data integration	Align your customer and CRM data with ad data.	A bi-directional API is essential to helping you unify the your advertising infrastructure and stay up to speed on all channel updates.	Google or a channel partner makes a change its system, and you need to ensure your campaigns are minimally impacted.
Compliance and brand safety	Compliance issues create significant risk, which can grow as you add more channels into your strategy.	Ability to integrate specific requirements and compliance rules, and deploy them at scale.	You need to create a number of ad variants, but have specific messaging and brand guidelines that must be applied to every ad.

Key operational workflow	Why it matters	Capabilities you should look for	Potential use case
Reporting and insights	Centralize KPIs and business insights, and eliminate the need to manually compile reports.	Centralized and configurable reporting dashboards, and automation that eliminates the need to manually generate reports.	Answer any client or internal question about how accounts are performing, in real time.
Cross-functional support and alignment	Eliminate swivel chairing between systems and align customer facing teams.	Centralized advertising reporting and data, as well as tools allow account and sales teams to create recommendations and enablement assets.	Sales and support teams need to quickly identify client and account status, access relevant data, and create assets and documentation.
Robotic process automation	Repeatable, manual processes like campaign data entry often account for the majority of strategist time, and force you to attempt to “hire your way to scale.”	Ability to help you immediately leverage your existing data and processes, and automatically create and update campaigns in real time, whenever your data changes.	You need to create a comprehensive, multi-location ad set within minutes or hours, not days.
Data support	“Siloed” data creates internal misalignment and external inefficiencies.	Ability to access and align both internal and client-side data into one single source of truth.	A client has access to sales data they want you to leverage in campaign strategy. You need a single source that makes that data easy to utilize.
AI governance	AI offers the ability to dramatically accelerate multiple workstreams, but must be governed effectively.	Ability to apply your specific business requirements around your team’s use of AI, and to apply it toward key workflows including report generation, creative development, and campaign performance analysis.	You need to quickly analyze trends across a high volume of campaigns.
Client collaboration	Your teams often need a more efficient way to collaborate directly with clients to minimize potential for errors.	Ability for clients to access your operational system and collaborate on campaigns as needed.	A client seeks to make their campaign adjustments and interface directly with your team through one platform.

Channel support

Along with supporting key workflows, your ad operations system should support a wide variety of channels, particularly those most relevant to your target audience, including Google, Meta, Microsoft, as well as Demand Side Platforms. It should enable the execution of Search, Social, and Display campaigns efficiently. Furthermore, it's crucial that your solution has integrations that enable alignment with each channel's ongoing updates and changes. Many providers struggle with the rapid and complex changes, especially in API updates from giants like Google and Meta.

Ongoing support and partnership – from implementation to sustained success

Adopting automation-powered advertising operations is an ongoing process. In addition to evaluating technical features, you'll need to thoroughly evaluate the quality of service, support, and client success models offered by any partner. Key questions to aid you in this process should include:

1. Will I be assigned a dedicated point of contact?
2. What kind of advertising operations expertise does my client success team possess? Are they seasoned in advertising, or do they have a broader SaaS or tech support background?
3. What kind of support is provided during the implementation phase? How does the provider facilitate change management?
4. Is the training for using the platform hands-on, or is it entirely up to me to learn?
5. Can the provider share any testimonials or evidence of client retention success?

A partner's commitment to customer success and their readiness to provide on-call support are pivotal factors that go beyond the mere choice of an ad tech platform. They are fundamental to ensuring not only a smooth transition but also the long-term success and scalability of the chosen solution. This deeper level of engagement signifies a partner's dedication to not just meeting immediate needs but fostering ongoing growth and adaptation.

CHAPTER 4

Getting started with a partner: How to approach your journey to operational transformation.

Getting started with a partner: How to approach your journey to operational transformation.

Advertising automation can be a transformational shift that requires change management and organizational alignment to accomplish. Preparing your organization in advance will help you ensure immediate and sustained success. Here are a few key approaches to enable this process:

Conduct a data evaluation and operational audit:

By conducting an audit, you can dissect every layer of your operational activity and ultimately pinpoint inefficiencies, assess the utilization of technology, and identify opportunities where technology can transform manual, time-consuming tasks into streamlined, efficient processes.

Here are some of the key questions you and your teams will need to address:

- **What data do you have and how is it organized?** By pinpointing where manual processes still persist, you can unlock the full potential of your data.
- **What processes are you currently executing manually?** Is your team still relying on manual keystrokes to critical components of your advertising workflows, such as generating reports, data entry, and data validation? There's a better way. With the power of automation, you can seamlessly integrate data and assets from templates and spreadsheets, adjust budgets and pacing across multiple campaigns with ease, effortlessly generate comprehensive reports, and initiate and manage campaigns without the manual hassle. This shift not only saves time but also enhances accuracy and efficiency, allowing your team to focus on more strategic tasks.
- **What is your current approach to AI?** According to the HubSpot's 2024 State of Marketing Report, a notable 77% of marketers recognize the power of generative AI in creating content that connects with individuals more effectively. Similarly, 72% of marketers who utilize AI and automation report improved proficiency in customizing experiences based on individual customer preferences. Advertisers can effectively leverage AI to support ad content development, the normalization of diverse data sets for consistency, data analysis for insights, and reporting among other workstreams. Auditing the extent to which you are currently leveraging AI will inform your future approach.

Prepare for change management:

Change management plays a pivotal role in the successful integration of automation technologies within an organization. A comprehensive strategy will prepare your organization and align all your stakeholders toward overarching business goals.

Despite its critical importance, the process of change management can be overlooked prior to adopting new systems. Yet, it's the organizations that welcome and adeptly manage this transformation that stand out as the most successful. With this in mind, it's imperative to set definite objectives, clearly communicate the rationale behind the change, and implement gradual changes. This approach helps employees adjust smoothly.

Key change management strategies include:

- **Company-wide alignment:** Ensure every level of your organization is fully briefed on the rationale and goals that drive your investment in automation, and ensure both executive and end-user stakeholders are included in key onboarding sessions.
- **Goal-setting:** To effectively leverage automation, it's essential to identify the primary goals that your teams aim to achieve with the help of automation. Start by focusing on 1-3 key objectives and plan to expand your efforts from there.

In selecting an ad tech partner, it is crucial to find one with deep insights into the complex shifts surrounding change management, especially within the fast-evolving field of digital advertising. They should deliver:

- Approaches that allow smooth transitions to emerging technologies and alterations in the marketplace.
- Ongoing education and training to your team.
- Powerful data analysis capabilities.

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Experiencing the benefits of automation wasn't immediate—it came from a lot of work and effort and a lot of hand-holding. But once you get there, and you start seeing your employees' ideas come to life, that's when you realize the true value of your investment and know you've made the right choice”

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ALEX MOTEVOSIAN, COO, PROFICY

Identify how you will measure success:

Operational change is a journey. When evaluating solutions, consider your near, medium and long term business and client objectives. A good partner will deliver immediate efficiency gains as well as a lasting operational transformation.

- **Staffing ratios:** A comprehensive operational solution powered by automation will enable individual advertising strategists and account managers to effectively manage a higher account volume by dramatically reducing the need for manual data entry and execution. A 2-3X increase in accounts managed per strategist is possible.
- **Labor savings potential:** a good operational partner can help support you in forecasting your potential labor savings by considering key inputs like total account volume, average spend, and total salary and overhead costs. In your evaluation, work with your potential partner to determine labor savings per account.
- **Credits:** If your needs include budgeting and pacing automation, assess what you are currently issuing each quarter in credits and set targets for reducing this.
- **Advertising execution:** Consider the time you are currently spending on ad execution workflows and set new targets to measure against. It's not uncommon to achieve over 90% reduction in time spent for the following key workflows:
 - Speed to launch
 - Monthly changes
 - Budget management
- **Advertising performance:** Improved operations and process automation will reduce human errors, improve ad delivery and optimization, and create capacity for improved strategy, all of which will improve campaign performance. Performance improvement targets should range from overall return on ad spend across programs to individual campaign KPIs. Here is an example set of KPIs that you might evaluate against:
 - Overall return on ad spend (ROAS) across programs
 - Overall account growth
 - CPC and CPM
- **Client success:** Improved business operations will help create more capacity for high-touch account strategy and internal sales alignment. This can be tracked and measured in several ways including overall customer retention, portfolio growth, and sentiment analysis.

CONCLUSION

Key takeaways

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Automated operational solutions drive efficiency, reliability and scalability for today's digital advertisers. Beyond streamlining processes, automation significantly reduces the margin for error, ensuring operations consistently perform at their peak. The following key takeaways from this guide will help you ensure long-term success:

Ad operations teams need new solutions:

Today's advertising landscape is complex with digital ad channels, advanced targeting, and various formats. Meeting high client service expectations presents operational challenges, pushing advertisers to unify data, strategies, and teams. Advertising automation emerges as a solution to streamline tasks for efficiency and revenue growth.

Choose solutions that align to your

business needs: Evaluate solutions based on critical features like scaled launches, compliance, reporting insights, and support for key ad channels. A good partnership extends beyond technology to include comprehensive support and a commitment to customer success.

Automation powers transformative

results: Leverage historical data to understand how automation can streamline ad operations, focusing on labor savings, efficiency, and the ability to scale quickly with precision.

Prepare your organization, and success

will follow: Approach automation integration with a clear understanding of your current manual processes, data organization, and areas ripe for improvement. Effective change management strategies are essential for a smooth transition and long-term success.

APPENDIX

Additional resources

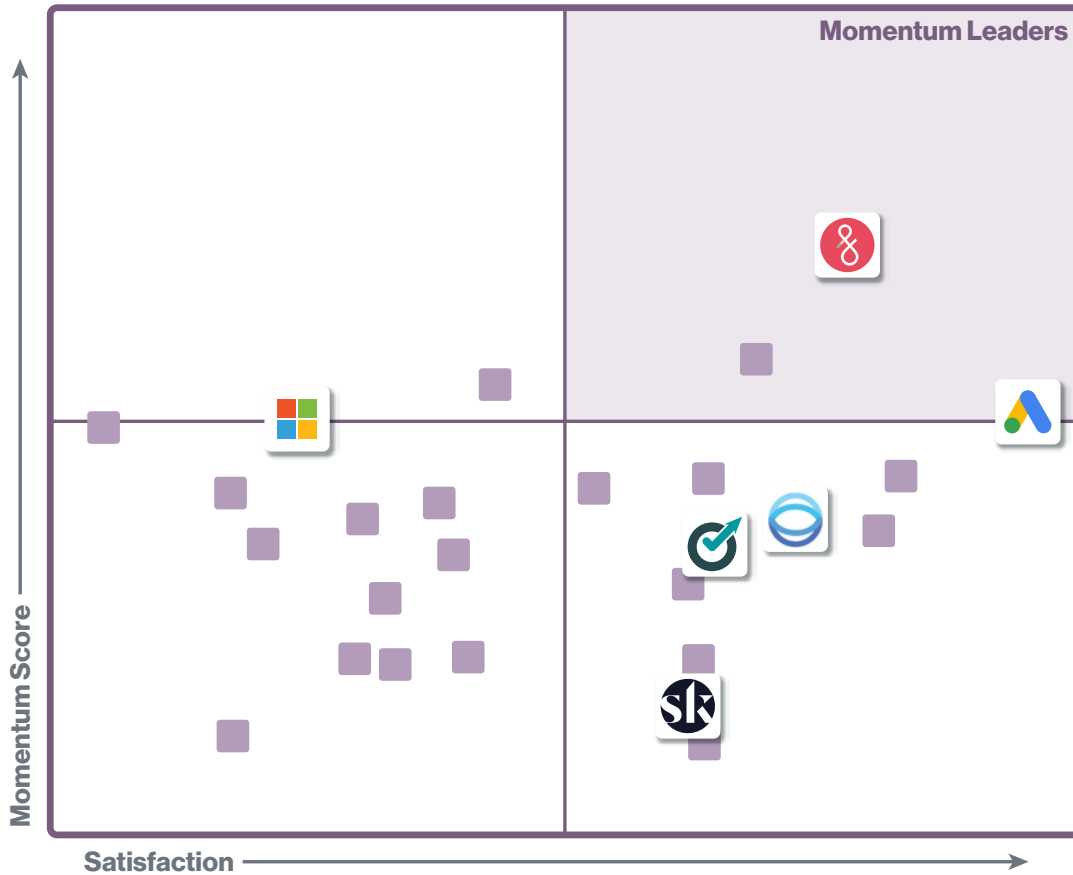
Additional resources

In the rapidly evolving world of automation, understanding the competitive landscape is crucial for businesses aiming to stay ahead. G2 reports, known for their comprehensive analysis and insights, play a vital role in this understanding.

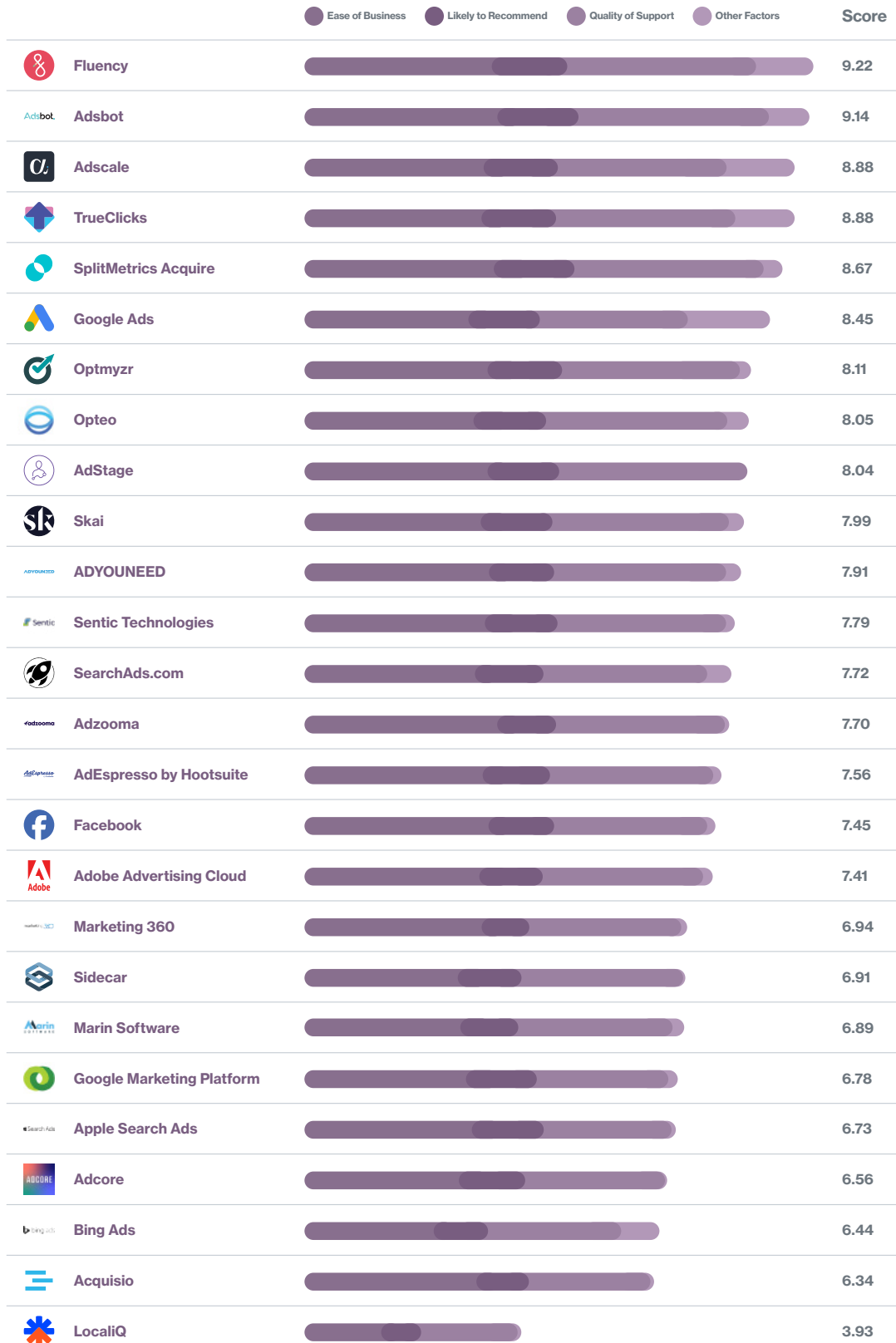
They offer a deep dive into various automation tools and platforms, comparing them against their competitors across multiple dimensions. Leveraging insights from G2 reports can guide companies in making informed decisions that align with their operational needs and strategic goals in the automation realm.



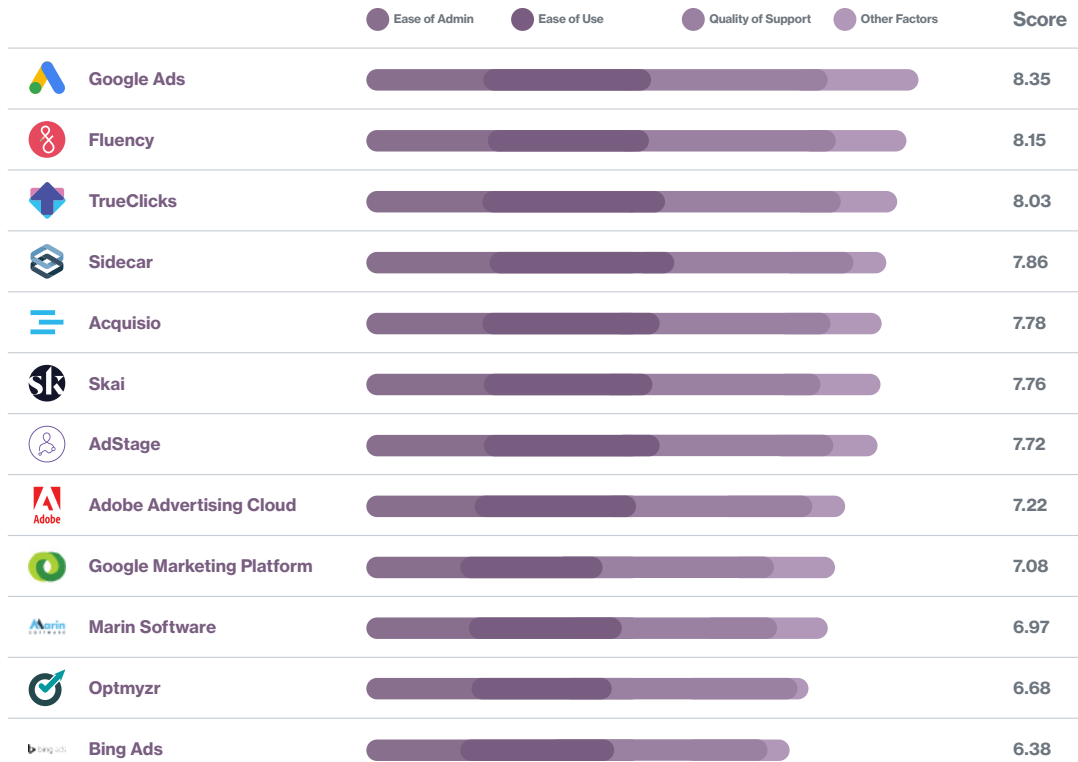
G2 Momentum Grid® Report for Search Advertising | Spring 2024



G2 Relationship Index for Search Advertising | Spring 2024



G2 Mid-Market Usability Index for Search Advertising | Spring 2024



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