

Your playbook for scale

Advertising automation can greatly enhance efficiency and performance. To help you get started, we have created a checklist to assess your foundational operational workstreams. It can guide you in conducting a high-level audit of your current operations, identifying key focus areas, and setting priorities to boost efficiency.

Assess your data

Identify how you are collecting and formatting advertising data today:

- Signal data
- Campaign data (e.g. inventory, locations)

Identify your first-party data sources and clarify what makes your first-party data unique

Identify if you use any second or third-party data

Identify if you have incomplete data sets and any data health issues

Assess your processes

Identify where your ad operations teams are investing most of their execution time.

Consider the following key workstreams:

- Pacing/Budgeting
- Flighted promotions and/or specials
- Compliance and brand safety management
- Campaign launching
- Internal alignment
- Reporting and analysis

Identify your current strategist-to-account ratio

Set your strategist-to-account ratio goal

Assess and optimize your platforms and technology

Assess your current ad tech stack

- Identify all the systems you currently have to manage ad execution

Identify your AI tools

- Identify any standard practices around AI usage and governance
- Identify any AI safety and privacy concerns

Ready to go deeper?

[Get the full buyer's guide to advertising operations solutions > > >](#)