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MEDIA + PERFORMANCE: PAID SEARCH MANAGEMENT PROCESS
9.13.23

General:
Need a paid search training for the account team to help
Paid search 101 → build on strategy + need to create a 201 version
-https://atwork.marriner.com/departments/accounts/paid-search-whats-it-all-about/

<u>Planning Input</u>

- Project request from ACT, and initial schedule set with PM
- Briefing (ACT/Channel Owner)
  - Fill out Integrated Planning Brief to inform keyword research (additional questions included at the end of this process document).
  - Provide any historical insights and/or insights from other divisions that can help set team up for success
  - Set 30-min kick-off to talk through with channel owner to gain alignment
- Keyword Discovery (Channel Owner/ACT)
  - Leverage information provided to develop potential keyword list and relevant ad groups
  - Utilize forecasting tool, SEMRush, organic search/trends
  - Share with ACT for approval
- Plan Presentations (M+P)
  - Detail strategies, tactics and budget allocations by product, objective, etc. Inclusive of Brand, General and Competitive terms, etc.
  - Specify ad groups and representative keywords
  - Include full keyword list in Appendix
  - Include number and types of ads to be created: Responsive, Dynamic, Regular Search Ads w/ or w/o Image + Site Links
  - Outline goals, KPIs and benchmarks by platform
  - Share initial flowchart

- **Plan Approved (Client/ACT)**

- Media Admin:
  - Create Insertion Order(s)
  - Create/add flowchart(s)

- Account/Project Management:
  - ACT put in project request for creative (images, copy, etc)
  - PM/JoAnn provide cost estimates

· Asset Creation: (Channel Owner/Creative/ACT/PM)
- Channel owner provides copy input to Creative..
- Channel owner provides input on landing pages and links to ACT.
- Channel owner provides input on site-links and extensions to ACT.
- Channel owner provides input on DSA/RSA to ACT.
- Creative team drafts ad copy with related images and submits to ACT for approval (headlines, copy, and makes recommendation for site-links as appropriate.
- ACT provides feedback to copywriter for appropriate revisions
- ACT submits final copy/assets to client for approval (2 rounds of revisions allowed)
- Once all assets are approved; will move to Files for Output (FFO – copy dock/assets); conversation in WMJ - Task when uploaded to FFO (Creative/PM)
- Upload to platform (Channel Owner)
- Confirm when build completed in WMJ to alert team when ready for QA (Channel owner)

<u>Close list Complete 1 week after plan approved</u>
- Input lines for assets x platform (Channel Owner)
  - Channel Owner to work with Media Coordinator on what creative is needed
  - Media Coordinator will add lines in CL
  - Channel Owner to QA once complete
- Include launch timing, flight dates, due dates (Channel Owner)
- Detail placement specs and provide link to specs (Channel Owner)
- Account to fill in creative rotation (ACT/Creative)
- Confirm when completed in WMJ to alert team when ready for QA (Channel owner)

<u>Campaign Execution and Management</u>

Campaign Build Allow 5 business days for campaign build

· Task for build (PM)

· Review plan and align - refer to plan deck/flowchart (Channel Owner)
- Timing/Flight
- Budget
- Objectives/Target Audience(s)
- Platform(s)
- Goals/KPIs: Define success/What winning looks like…
- Intake Form for confirmation

- Campaign Build:
  - Ensure Google Analytics is setup for the client(especially for new clients) and the Google Ads platform is linked to Analytics(Channel Owner)
  - Ensure conversion tracking is implemented for Search Ads
  - Build out campaign based on approved ad groups (Channel Owner)
  - Upload approved ad copy and images
  - Include recommended budget allocations
  - Include Dynamic and/or Responsive search tactics (as determined in plan deck).

- QA (Channel Owner/PM/ACT)
  - Confirm ad groups and keywords as outlined in plan deck (ACT)
  - Confirm flight dates and budget allocations by campaign (ACT)
  - Review creative x tactic x campaign (ACT)
  - Review campaign set-up with account for final check – including any UTMs and site-links, etc (Channel Owner/ACT)
  - Launch campaign (Channel Owner)

<u>In Market (Channel Owner/M+P)</u>

- Pull live proof of launch (POL) and place conversation in client Media Management job on WMJ
- QA one week after launch as campaign is in learning phase within the first week
- Monitor daily for budget pacing and performance in platform/tracker
- Maintain weekly campaign tracker across clients for quick view of all live campaigns and ensure data is pulling through accurately (should include budget pacing and performance against goal)
- Share weekly/bi-weekly internal update on pacing and performance snapshot to ACT. (Channel Owner/Data Analyst/ACT)
- Assess campaigns weekly to track pacing, performance and identify optimization opportunities (Channel Owner)
  - Current performance, optimizations to bid management
  - Learnings on how the audience is finding/searching
- Proactively bring key stakeholders together to discuss findings and needs to improve performance as appropriate (M+P/Creative/ACT)
- Prepare channel data and insights for monthly reporting meetings. Share insights and optimization opportunities with other channel owners to align prior to monthly internal review. (M+P)

*When there are shifts to budget/timing/original Campaign (Channel Owner/ M+P)

- Channel owners to confirm exact shifts with account team
- Once confirmed with account team and client, channel owner is to draft a detailed email to Kate/Erica so all docs can be updated
- Media Coordinator to update: Flowcharts, IOs in Bionic, IOs in WMJ, and the close list
- Media Coordinator to send out updated flowchart with PM, Account Team, Billing, and M+P team
- Keep notes on changes and reflect back in the accounting reconciliation

Reporting: Tracking, Analysis, Insights + Recommended Optimizations.

- Setup dashboard as part of campaign build or part of/adjacent to QA process.
- Recommend bi-weekly ACT touchbase (15mins) to share pacing, performance, insights, recommendations/optimizations.

M+P to Build Out Separate Reporting/Analysis Process Tied to Execution

Additional Information to be Collected as Part of the Integrated Planning Brief:

Brand/Business:

- Who are your main competitors?
- What key points set your product (or brand/company) apart from your competitors?
- Are there any nicknames or abbreviations of your brand name that we should be aware of? Are we able to use these nicknames/abbreviations in our ad messaging?
- Is there any language/messaging we should avoid in conjunction with your brand?
- Is your brand name a registered trademark? If so, are we permitted to use this trademark in your ads?

Marketing/Reporting:

- Do you have goals/KPIs for the channels/campaigns that MMC Media will be managing?
- Can you share any historical benchmarks for success?

- What paid search or social/display/video campaign types are currently running? (ex. Google, Microsoft/Bing, Meta, LinkedIn, Display, Video, etc.). If not currently running, can you provide any historical performance from prior campaigns (within the past year).
- Are there any specific requirements around targeting? For example, geographies (priorities or exclusions).
- When planning goals/KPIs and optimizations, what actions on the site classify as conversions?
    - Purchase
    - Add to Cart
    - Registration, Email, etc.
    - Sales Lead (please define what information must be included)
    - Where-to-buy or other event/button activity on the website
- Are you currently using a tag manager to manage all website pixels? If so, which one(s)?
- Do you have Google Analytics 4 setup for your website? If yes, please provide details.

Marketing/Reporting (cont'd):

- Are there specific landing pages on your website that we should be directing your customers to?
- Do you have creative (images, video, etc.) that you would like us to use in our marketing campaigns?
- Is there any language/messaging that should be avoided in copy?
- Are there any strategies that have been used in the past that were deemed unsuccessful we should be aware of?
- Do you currently have any reporting dashboards set up and running that you refer to on a regular basis (ex. LookerStudio, Tableau, Datorama)?
- Can you provide any sales data or other data that we may use to aid in targeting or segmentation? Customer data?