MEDIA + PERFORMANCE: PAID SOCIAL MANAGEMENT PROCESS
09.13.23

Planning Input

- Project request from ACT, and initial schedule set with PM
- Briefing (ACT)
  - Brand Overview
  - Fill out the Integrated Planning Brief to inform research (additional questions included at the end of this process document)
  - Complete picture of go-to-market plan inclusive of digital and social ($/Organic)
  - Target Audience (primary/secondary) – Geographies, Industries, Companies, Job Titles, Job Levels, etc. (for B2B)
  - Creative messaging
  - Flighting/Key Dates
  - Goals/KPIs: Share any prior benchmarks that may be used for KPI development
  - Platform preferences: Meta (FB/IG weighted), LinkedIn, Pinterest, Tik/Tok, etc. (retail vs food service)
  - Discovery: share any relevant/available 1st Party Data, customer file, prospect lists for targeting purposes. Source client customer/prospect lists whenever possible for targeting purposes

- Plan Presentations (M+P)
  - Specify targeting capabilities for platforms recommended
  - Include all targeting criteria in the deck to gain client alignment
    - Full detail may be provided in the Appendix, as appropriate
  - Include asset recommendation for creative (versions, sizes, specs, total #, etc)
  - Detail strategies and budget allocations by product, audience, etc.
  - Outline estimates for goals, KPIs as well as any benchmarks by platform (as relevant to client as possible)
  - 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

- Close list Complete 1 week after plan approved
  - Input lines for assets x platform (Channel Owner + Media Coordinator)
    - Channel Owner to loop in Media Coordinator regarding assets needed so they can build out close list as soon as campaign is approved.
    - Each piece of creative should have its own line in the close list; they need to be broken out by flighting (typically each month has its own lines for creative) – # of executions (with sizes / types) and rotation
  - Include launch timing, flight dates, due date (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 and align Refer to plan deck/flowchart (Channel Owner)
  - Timing/Flight
  - Objectives/Target Audience(s)
  - Platform(s)
  - Goals/KPIs: Define success/What winning looks like...

- Campaign Build:
  - Ensure Google Analytics is set up for all relevant websites/ microsites(Channel Owner)
  - Build out campaign for each audience/objective (Channel Owner)
    - Leverage prior key learnings.
    - Do not simply clone prior campaigns unless strategically necessary
    - Map appropriate funnel approach: targeting, creative sequencing, retargeting, etc.
    - Build out targets based on available inputs + data:
      - Client/ First-Party data (if available)
      - Internal curated audiences, Look Alike or Suppression sets
      - Job Titles/Companies/$Vol... (input from ACT)
      - Key Geos (if any) (Channel Owner/M+P)

        - Additional inputs + insights needed from account team (ACT/Channel Owner)
    - Save audiences in-platform for future campaigns. Also save to Audiences Google doc along with screenshot and date of update for all active campaigns
        - https://docs.google.com/spreadsheets/d/1fm8dYSQSMhj_1BUn_j9cf6Z6oS4Oa91GAga5A75S21M/edit?usp=sharing

· Assets Loaded
- Name file according to unified naming conventions: Client/Campaign/IO/Creative, etc. (Channel Owner + Creative)
- Once all assets are approved; 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)

· QA (CP/ACT)
- Confirm audience set-up as outlined in plan deck (including 1st Party/3rd Party targeting) (CP)
- Confirm flight dates and budget allocations (CP)
- Review creative x size x platform x device type (CP)
- Review campaign set-up with account for final check (Channel Owner/ACT) – CTAs/CTRs/etc.
- Launch campaign (Channel Owner)

· In Market (Channel Owner/M+P)
- Pull live proof of launch (POL) and place conversation in client Media Management job on WMJ
- Monitor daily in each platform/Tracker for budget pacing and performance
- 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)
- Be proactive in bringing 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)

- Update team of creative changes per Close List x Month (includes kill dates and new creative available along with run-dates). (MK + Channel Owner)

*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

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?
- Is there any language/messaging we should avoid in conjunction with your brand?

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? Examples included in section 1 ‘Briefing’ above.
- 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)?
- Are there specific landing pages on your website that we should be directing your customers to?
- 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?

Marketing/Reporting (cont'd):
- 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?