

A top-down view of a creative workspace. In the center, a hand points to a color swatch fan with various shades of yellow, orange, and red. To the left, another hand is visible. The desk is cluttered with a tablet showing a green image, a smartphone, a pen, a notebook, and a black folder. In the bottom right, a hand is writing in a spiral notebook with a blue marker. The background is a light-colored surface with some fruit (apple, banana) and a person's arm with a colorful patterned sleeve. A dark blue semi-transparent box contains the title text. A white line and several white-outlined boxes are overlaid on the left side of the image.

# The creative process for programmatic: A guide for marketers



DoubleClick by Google



# Foreword

In the 1950s, advertising drove consumers. Today, it's the other way around. More people are making purchasing decisions and engaging with content in the moments that matter, anytime, anywhere.

To reach these consumers with the most relevant messages in the crucial moments where decisions are made, brands are increasingly turning to programmatic technologies.

According to eMarketer, programmatic will soon rule display advertising: global programmatic ad spend is expected to reach \$21.6B in 2016, and account for 67% of all digital display ad sales<sup>1</sup>.

Programmatic is growing because it works. By using audience insights to deliver the right message to a given individual, tailored to their context and real-time signals, programmatic has greater impact than traditional digital campaigns. It enables brands to reach only the users most likely to convert, and only in the moments that matter.

Over the past few years, I've seen many marketing teams come up to speed on programmatic advertising, creating technology partnerships, and developing media partner relationships to effectively manage the transition to programmatic.

However, changing the way we buy media is only half the battle. We also need creative that takes full advantage of the opportunity programmatic offers for more relevant and customized communications with our customers.

We worked with three brands and their media agencies on a series of creative experiments to help them drive more effective programmatic campaigns. We hope that the information in this guide (along with the right team, tools, and mindset), helps your company see the same success.

**Kate Stanford**

Director of Marketing, Google

1. [emarketer](#), 2015

# Introduction

“Programmatic buying” and “data-driven creative” are now common vocabulary for today’s savvy marketers, who recognize that these techniques enable more successful digital advertising. But although most marketers understand *why* these techniques are so important, there’s still a certain mystique about *how* to do them right.

To help address this question, our team at DoubleClick set out to define best practices for marketers and agencies around creative strategies for programmatic campaigns. In partnership with the digital creative studio, Fancy Pants Group, and the management consulting company, Accenture, we tested several approaches with three global brands.

By applying robust research methods and a scientific mindset to these campaigns, we aimed to discover what worked and what didn’t.



# Meet our partners



Accenture is a leading global professional services company, providing a broad range of services and solutions in strategy, consulting, digital, technology and operations.



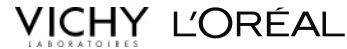
Fancy Pants Group is a digital creative studio dedicated to producing innovative, cross-screen and dynamic executions with notable agencies, publishers and brands



Royal Bank of Canada is Canada's largest bank, and one of the largest banks in the world providing personal and commercial banking, wealth management, insurance, investor services and capital markets products and services on a global basis.

## Initiative

Initiative is a global media strategy and investment agency that is fast, brave, decisive and simple.



Vichy is a world leader in cosmetic skincare; a division of L'Oréal.



Optimedia is a full service media agency, that offers communication planning, digital, broadcast, print, out of home, and content capabilities.

## GILT

Gilt.com is an innovative online shopping destination that provides instant insider access to today's top designer labels, at up to 70% off retail.

We learned that, for marketers to execute data-driven creative successfully, we need to make a few key changes to our campaign process:

- ① Understand all the data that is available, and select the right data signals from the best channels.

Marketers may already be using data from Customer Relationship Management (CRM) tools or market research to fuel campaigns. But a wealth of additional data signals are also available, from 1st-party analytics on company websites to 3rd-party audience data to contextual inputs about device, location, or media type. We need to become aware of all the data available, and learn how to make smart decisions about which signals to use for a given campaign.

## ② Work with creative agencies upfront to develop sound creative strategies that are informed by data.

Too often, the creative agency and production shop are brought into the process only after the media strategy has been decided. Instead of keeping them in the dark about the data being used to reach a target audience, we need to work with them to build creative strategies that are based on data from the beginning. Additionally, we need to think of programmatic campaigns as a testing ground for identifying which creative strategies resonate the most with our target audiences.

## ③ Drive a collaborative, agile campaign process that involves all agencies from start to finish.

Today, the campaign process is siloed and sequential. Each party completes its portion and hands it off to the next with little feedback. This siloed process prevents communication and transparency between media and creative, which is required for successful data-driven campaigns. As marketers, we need to involve the creative agency, media agency and production shop throughout the campaign process and ensure ongoing communication.



# A framework to help marketers make these changes for their campaigns:

In this guide, we share a five-phase process to help marketers and agencies adopt a more data-driven mindset for their next campaign. We also include brand experiments from our research to showcase each phase “in action.”

- 1 Gather insights from all data sources
- 2 Collaborate on a digital brief and align agencies
- 3 Design and develop creative
- 4 QA, traffic and launch
- 5 Learn and optimize

As the central player in this process, the digital or brand marketer is best positioned to spearhead this transition. We encourage you to share this document with the agencies you work with and discuss how you can best proceed with a programmatic campaign of your own. Through our research we found that by following this framework and working closely together, we’re able to create more effective campaigns.



# Assemble your team

Before you get started, take the time to identify the project leader and assemble your team. Your team may include:

## Brand

- Brand manager
- Digital marketer



## Media agency

- Planner/buyer
- Account manager
- Analyst
- Ad ops team



## Creative agency

- Strategist
- Copywriter
- Designer
- Account manager



## Production agency

- Developer
- Tech lead
- Account manager
- Digital producer




PHASE

1




## Gather insights from all the data sources available

Collect all the **data available** about your audience and their contextual signals. This will help you narrow down which user insights to apply to your campaign, and will inform the creative brief and ultimately determine messaging.

A woman in a black blazer is standing and pointing at a large screen displaying a grid of images. She is in a meeting room with other people seated at tables. Some people are looking at their phones or tablets. The room has large windows and a modern interior.

A data signal is information about your audience or their context that can influence your campaign.

## Three types of data signals you can use:

Data Signals	Signal Type	Examples
 <b>Audience signals</b> Information about the types of people you're trying to target	Demographics	Gender, Age
	Website analytics	Previous pages visited, abandoned shopping cart
 <b>Media signals</b> Information about the content your user is looking at where your message might appear	Keyword contextual targeting	"Best baby formula," "Travel deals"
	App category	Travel app
 <b>Environmental signals</b> External factors that may influence the mindset of your users when they're exposed to your marketing	Device type and operating system	Desktop, Tablet, Smartphone Android vs IOS
	Location	Postal code

See Exhibit 1a for a full list of signal types and examples

## Where the data signals come from

Previous campaigns	Audience insights	Additional sources
<b>Creative performance:</b> which format types have provided the most engagement and conversions for your brand?	<b>1st party data:</b> marketer-owned and typically collected from brand websites and ad creative using pixels. Can also be collected in the offline environment through loyalty cards, call centers or store transactions	Marketing research for deeper insight about your users
<b>Audience performance:</b> which audience targeting strategies have worked well previously?	<b>3rd party data sellers:</b> companies that aggregate data and 'resell' it to marketers.	Focus groups or brand lift surveys you may have done to assess how campaigns affect brand perception
<b>Media performance:</b> which media tactics work well for your brand?	<b>Data from media partners:</b> for example, Google provides access to demographic, affinity, and in-market audience data	Expertise and best practices from your agency partners
<b>Device performance:</b> which devices provide the best reach for your target?	<b>Data from paid search campaigns:</b> provide insight on user intent	Industry tools such as Google trends
<b>Purchase data:</b> how have previous campaigns affected purchase behavior?		Information on your content strategies that can aid in the creative ideation process

## Phase 1 Distribution of duties

### Brand



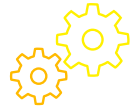
- Defines high-level campaign objectives (such as sales, awareness and engagement)
- Determines sources for audience signals
- Identifies 1st-party data and insights to share with creative and media agency

### Creative Agency



- Provides creative insights relating to consumer behavior online or on mobile devices

### Production Agency



- Provides insights on relevant content development to ensure there will be sufficient assets available for the insights identified

### Media Agency



- Provides relevant previous campaign metrics
- Identifies potential sources of 3rd-party data
- Identifies potential contextual signals



## Phase 1 in action: Using insights to drive our three brand experiments

Each of the brand experiments in this research project used audience insights and data signals to inform the creative strategy and messaging served to viewers. These are the insights that fueled their creative.



RBC Royal Bank

RBC wanted to reach Canadians who were interested in travel, in an effort to drive acquisitions of a premium credit card product. To better understand which messages resonated with the target audience, RBC's marketing team and their media agency, Initiative, developed a matrix of product benefit messages. They found that one product benefit message, "no seat restrictions," led to a performance uptick of 28% in conversion, as compared to the control.



### Audience insight/data signal:

RBC's premium travel rewards credit card offers product benefits to customers that give them the ability to travel where they want, when they want.



### Where did it come from:

Cross-functional RBC team (marketing, product, data analysts)



### How was it used:

To fuel a new set of product benefit messages

---

## VICHY L'ORÉAL LABORATOIRES

L'Oréal built a campaign for two of their Vichy sunscreen products to run in France during the summer. One of the sunscreen products was for women; the other for children. They wanted to show a relevant product and message to women shopping for themselves vs. women shopping for their children. The Optimedia team used audience targeting lists to show the different creative units to the "women" segment and the "women with children" segment. Interestingly, they found that the "women with children" segment had a higher conversion rate than the "women" segment.

### ○ Audience insight/data signal:

Audience targeting lists including affinity and in-market audiences

### ○ Where did it come from:

The programmatic buying tool

### ○ How was it used:

To differentiate women shopping for themselves vs. women shopping for their kids, and show them different product offerings

---

## GILT

Gilt Groupe wanted to drive membership registrations and online purchases on Gilt.com. They used the top three keywords from past campaigns to decide which specific merchandise to show in the creative for each of four target audience segments. For example, the top three search keywords for men's fashion were: "tuxedos," "jeans," and "shoes," so they built a creative unit for each of these merchandise categories. This strategy was particularly successful for the male segment, who converted 80% more often on the test units compared to the control units.

### ○ Audience insight/data signal:

Top performing keywords for each audience segment

### ○ Where did it come from:

Performance reports from past display campaigns

### ○ How was it used:

To determine which merchandise to show in the creative

PHASE

2

## Collaborate on a digital brief and align agencies

This is the most important step in the **entire process**. By having everyone from all organizations involved bring their expertise together to build the digital brief, you set the stage for a data-driven campaign that runs smoothly from start to finish.

### The all-hands kick-off

At the start of the project, conduct an **all-hands kickoff meeting** with every member of the brand, media, creative, and production teams who will be involved in the project. Use this time to go over project goals and start building the digital brief.



### Discussion questions for kick-off

- What are your brand's overall goals for the campaign?
- How do you segment your target audience, and what does each segment care about?
- Which audience, media, and environmental data signals can be used to reach each segment?
- Which message do you want to communicate to each segment?
- What sort of creative might your audiences respond to? How can your audience insights and audience targeting strategy inform the creative design and strategy?

*(See Exhibit 2 for a digital brief template and questionnaire to use in your kick-off meeting.)*





## TIP: Take a round table approach

During the brief-building process, take a round-table approach (in which each seat at the table has equal prominence) by honoring what every organization has to offer:

- **Brand:** brand and audience insights
- **Creative agency:** audience insights and creative best practices
- **Production agency:** creative production considerations and timelines
- **Media agency:** campaign experience and data signals

## Develop a data-driven strategy

Working with the data signals you gathered in Phase 1, alongside the answers to the questions in your collaborative briefing checklist, you can begin to develop a strategy for your campaign using the tips below.



### Choose data signals that align with your business goals.

Make sure that your data signals and creative content align with your business goals. Establish the metrics that will indicate success for your campaign, and verify from the outset that you're set up to capture these metrics across your campaign and web properties. For instance, if you want to measure brand engagement, ensure that your site is tagged to measure time spent and pages viewed. This will help you determine which messaging led to the most engagement from both a post-view and click perspective.

*(See Exhibit 3 for a list of common success metrics and Exhibit 4 for specific reports you can pull to get those metrics)*



**Make the time.** If you plan to test dynamic creative, make sure you have enough time and media spend to test your creative variables with significance, apply the results, and test again. Your schedule should allow enough time for at least three rounds of optimization; more if you intend to test more variables.



**Test with caution.** If you're testing multiple creative variables, it's essential to isolate which variables to test, and to not test too many at once. If you want to test different headlines, images, or functionality, you need to be able to identify which of these is actually driving an uplift in response. Even if you have sufficient resources, remember that testing too many variables may subject your campaign to human error and unreliable results. It's better to start small and scale up than to bite off more than you can chew.

*(See Exhibit 5 for a formula to help you think through the right number of variables to test.)*



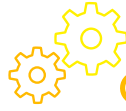
**Avoid "Big Brother" advertising.** Don't make your audience targeting too micro. Creeping out prospective users with cyber-stalker behavior is a sure way to create a negative user experience. It also makes it much more difficult to obtain a statistically significant number of results.

## The brief on briefs

This briefing process may seem more open-ended, collaborative, and cyclical than the process you're used to. Involving your agencies to develop a collective digital brief changes the approach from: "here's what I want you to do" to "here's what I'm thinking, what are your thoughts?" It enables you to take advantage of the considerable expertise on your team, and creates a stronger sense of investment from everyone involved.

During the creative briefing, encourage your team to actively begin to map the campaign on a whiteboard. Writing down all the data signals can help get everyone to generate ideas. It also ensures that nothing slips through the cracks.

## Production Agency



- Identifies technical and creative considerations and concerns
- Assesses complexity to determine if delivery can be accomplished by building a few creative iterations or if it requires a more advanced dynamic set up
- Provides creative development timeline

## Brand



- Provides campaign objectives, target audience segmentation, and user insights
- Identifies the moments in which they want to reach these audiences
- Identifies creative mandatories, including logos, fonts, voice and tone
- Identifies KPIs
- Identifies chain of approvals for launch

# Phase 2 Distribution of duties

## Creative Agency



- Identifies signals that will be leveraged as creative triggers
- Identifies creative elements that need to change over the duration of the campaign
- Provides visual identity and voice and tone guidelines
- Provides storytelling elements and emotional hook

## Media Agency



- Identifies audience, media and environmental data signals that can be leveraged in media targeting
- Provides learnings from previous and/or similar campaigns
- Pulls inventory availability report based on targeting that will be used to determine which creative sizes and formats are required
- Provides media plan information including specs, site type and ad exchanges being used
- Outlines campaign duration
- Identifies brand safety metrics and aligns marketer KPIs to signals being used

## Phase 2 in action: Royal Bank of Canada

To kick off the project for RBC's traveler's credit card, the teams held a collaborative briefing session. It included RBC's marketing teams, Initiative's media buying team, the creative agency handling the production (in this case Fancy Pants Group), and the data analysts who defined the test and control specifications and set up the performance reports (in this case Accenture).

The group developed the testing framework based on the following objectives:

- What are your brand's overall goals for the campaign?
  - To drive acquisition into the credit card product
- Who is your target audience? What do they care about?
  - Canadians who like to travel

- What audience, media, and environmental data signals can be used to reach each audience segment in the moments when they will engage?
  - IP targeting: reach people based in Canadian cities
  - Affinity Segments: reach people interested in travel
- What sort of creative might your audiences respond to? How can your audience insights and audience targeting strategy inform the creative design and strategy?
  - People interested in travel might respond better to images of travel destinations
  - Test awareness messages vs. product benefit messages



RBC Royal Bank

initiative

The critical output of the creative kick-off, the creative testing framework, indicated which tests would be run for the campaign and which data signals would be used to fuel those tests.

### Full decision tree for RBC's campaign strategy

<b>Targeting Strategy</b>	<b>Prospecting</b> Uses third-party audience lists in DBM to target people with the right demographics and interests		<b>Remarketing</b> Uses remarketing lists for people who visited the website but did not apply	
<b>Messaging Strategy</b>	<b>Awareness</b>	<b>Benefit #1</b> Seat restrictions	<b>Benefit #2</b> Blackout periods	<b>Benefit #3</b> Short-haul
<b>Background Imagery test</b>	<b>Popular destinations as background imagery:</b> Selected 10 popular destinations from top cities in Canada, and showed them on equal rotation as the background images for the three messages above			<b>Geo-targeted background imagery</b> Showed destination imagery aligned with the short-haul trip location in the copy of the ad
<b>CTA test</b>	Learn more		Apply now	

PHASE

3

## Design and develop creative

Using your digital brief and data signals, it's time to **design and develop** your creative. Your production agency will take the lead in this stage, but the rest of the team should remain involved.

### Design

Data-driven campaigns present new challenges and opportunities for creative teams. Many embrace the idea of iterative creativity and relish the opportunity to closely track their work's performance. However, there can also be growing pains as they transition into a new way of thinking. On the next page, you'll find six things that creatives need to keep in mind when designing data-driven campaigns.

For a complete list of best practices for dynamic creative design, visit or refer your creative agency team to [this article](#) by a DoubleClick Creative Solutions expert.

It is essential to confirm that you have the right assets, such as images and copy, available for your dynamic strategy. Template design and creative strategy must be approved before development can begin.

## ① Think cross-device.

Gone are the days of resizing desktop banners for mobile phones: the medium now has its own code of best practices. For smaller screens, keep the creative simple, make fonts and buttons big enough to read and tap, account for the interaction mode of the device (tap, tilt and swipe), and provide utility for a better user experience.

## ④ Stay flexible.

In many ways, ideating for data-driven campaigns is the opposite of conceiving for traditional creative. Instead of envisioning how they want the final ad to look, creatives should instead think in terms of flexible (also called “dynamic”) templates that can accommodate changing creative elements.

## ② Know your resources.

Understand the content (imagery and videos) that you have and the ability to create new content for each iteration. Building a messaging matrix that lays out the assets and copy lines is a good way to organize all the resources at your disposal.

## ⑤ Think always-on.

Dynamic creative optimization strategies work best when you can continue to iterate post-launch. Identify which elements of the creative template need to be dynamic *before* your agency begins to develop the template—this will give you the best chance of having a creative template that’s truly nimble.

## ③ Remain clear and concise.

The more complex your campaign, the simpler your design concept should be. Keep messaging and functionality clear and concise, focusing on what you want users to think, feel, or do. (See this [Think With Google piece](#) for more on creating digital display advertising that resonates.)

## ⑥ Apply a research mentality for testing.

If you plan to test multiple creative messages, think of your campaign as a scientific experiment rather than a marketing imperative. Start with a hypothesis based on your campaign objectives, then test it using your ad technology platforms.

## Develop

You can build smart creative strategies that use data signals without having to build a **full dynamic creative** campaign. However, if you want the flexibility to test multiple variables over time, building out a dynamic creative campaign is the best method.

Dynamic creative is composed of two primary pieces. The first is the **creative template**, which provides the structure of the ad unit. The second is the **dynamic content feed**, which houses the creative assets that will get plugged into the creative template, as well as the logic that dictates which assets will be served to which viewers based on your data signals and campaign strategy. Using a feed to control your dynamic campaign strategy gives you maximum flexibility, allowing you to quickly and easily make changes to your creative on the fly.

*(See Exhibit 6 for a more comprehensive primer on dynamic creative.)*

## A note on HTML5

HTML5 is a must for any digital advertising campaign. By building ads in HTML5, you ensure that they'll show up appropriately across all devices and browser types. Further, HTML5 supports both standard and rich media ad formats, giving you flexibility in the types of ads you can include in your campaign.

For this research project, we used [Google Web Designer](#) to build all the dynamic creative templates in HTML5. Google Web Designer is a free HTML5 authoring tool that creative agencies can use to build HTML5 ads that are compatible with any ad server.

## The most popular creative elements that you can make dynamic include:

Copy  
(Headlines,  
prices, CTA)



Images  
(Product,  
Background  
,button)



Image color



Exit URL



Font



Video





## Brand



- Approves dynamic feed content (copy, images, etc)
- Reviews and approves final creative
- Provides licensing information for creative assets

## Production Agency



- Reviews messaging matrix to ensure viability with dynamic templates
- Determines specs for dynamic copy and images (character counts and image sizes)
- Designs and develops all ad sizes in HTML5
- Inserts creative columns and assets into feed
- Ensures correct reporting metrics are coded into creative

# Phase 3 Distribution of duties

## Media Agency



- Identifies reporting metrics needed for the creative
- Delivers creative and reporting naming conventions and final ad specs
- Inserts targeting logic/columns in the feed

## Creative Agency



- Ensures that all messaging and imagery is on-brand
- Provides existing imagery and assets to production agency
- Provides copy/asset matrix

## Phase 3 in action: L’Oreal Vichy

For the L’Oreal Vichy sunscreen campaign, the brand worked with media agency Optimedia and creative agency Fancy Pants Group. Together, they built out dynamic creative templates and a dynamic feed that could show different imagery and copy to two different audience segments: women, and women with children. It could also show a promotional gift to some viewers but not others, to test whether the gift impacted click-through and engagement. Additionally, they wanted to display the nearest store location to viewers based on their post code, to help them complete an in-store purchase.

- In the design phase, the Vichy team provided direction on which elements they wanted to be dynamic: lifestyle imagery, copy, product image, nearest store, and CTA
- The design team created mock-ups of the creative for Vichy to approve.
- Once the strategy was set, dynamic elements identified, and design approved, the feed was developed to bring together dynamic content with corresponding data triggers.
- From this point, the FancyPants team was able to develop the dynamic creative templates in HTML5

VICHY L'ORÉAL  
LABORATOIRES

Optimedia  
The ROI Agency



Creative examples:

Imagery, copy, product image for women

Imagery, copy, product image for women with children

Overall, the targeted dynamic creative outperformed the control on key metrics such as CTR.



Product offer, nearest store location

PHASE

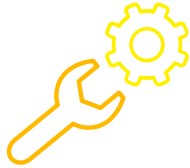
4

## QA, traffic, and launch

Once all creative has been approved by the marketer and creative agency, it's time to run Quality Assurance (QA) on the creative and traffic the campaign. Follow the three steps below to help ensure that the right data signals trigger the right creative for the right audiences.

### Tip: Pull multiple reports

Make sure your media agency pulls both campaign-level reports and dynamic creative-level reports. Campaign-level reports give you information about how your media performed, while dynamic creative-level reports offer insights into creative performance (for instance, one image out-performing another) and can help you decide which creative optimizations to make.



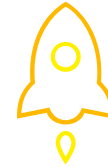
## 1 Traffic your campaign

Once your production agency has set up the dynamic creative feed, your media agency will traffic the campaign using an ad server or programmatic campaign management platform. They will also set up reporting, which is crucial for determining the success of your campaign. Make sure that your reporting strategy aligns with your KPIs and is set up to give you the information you need to help your team adjust the campaign for success.



## 2 Conduct a cross-agency QA

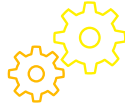
Before you launch, ask everyone on your team—at all participating agencies—to double-check that the strategy mapped out in your feed is feasible given your data capabilities and platform set-up. This is also a great time to proofread copy for spelling and grammar errors, and to review functionality so that everything works on the backend.



## 3 Soft launch

The soft launch is a key component of data-driven campaigns—and can help you save money and avoid embarrassing mistakes. When you first set your campaign live, run it for a couple days at a low daily budget (some experts recommend as little as \$10 a day) to make sure everything works properly. Take the time to review how the creative looks in context and pull reports to ensure the correct metrics are tracking. Once you've evaluated your campaign in a real-world environment, you can ratchet up the daily budget to your desired spend.

## Production Agency



- Creates previews of the creative and backup images
- Conducts full QA on creative units and creative sections of dynamic feed
- Approves QA from other agencies and submits final creative to trafficker at the media agency



## Creative Agency

- QA's the creative fields in dynamic feed to confirm that content is rendering correctly



# Phase 4 Distribution of duties



## Brand

- Approves campaign to go live



## Media Agency

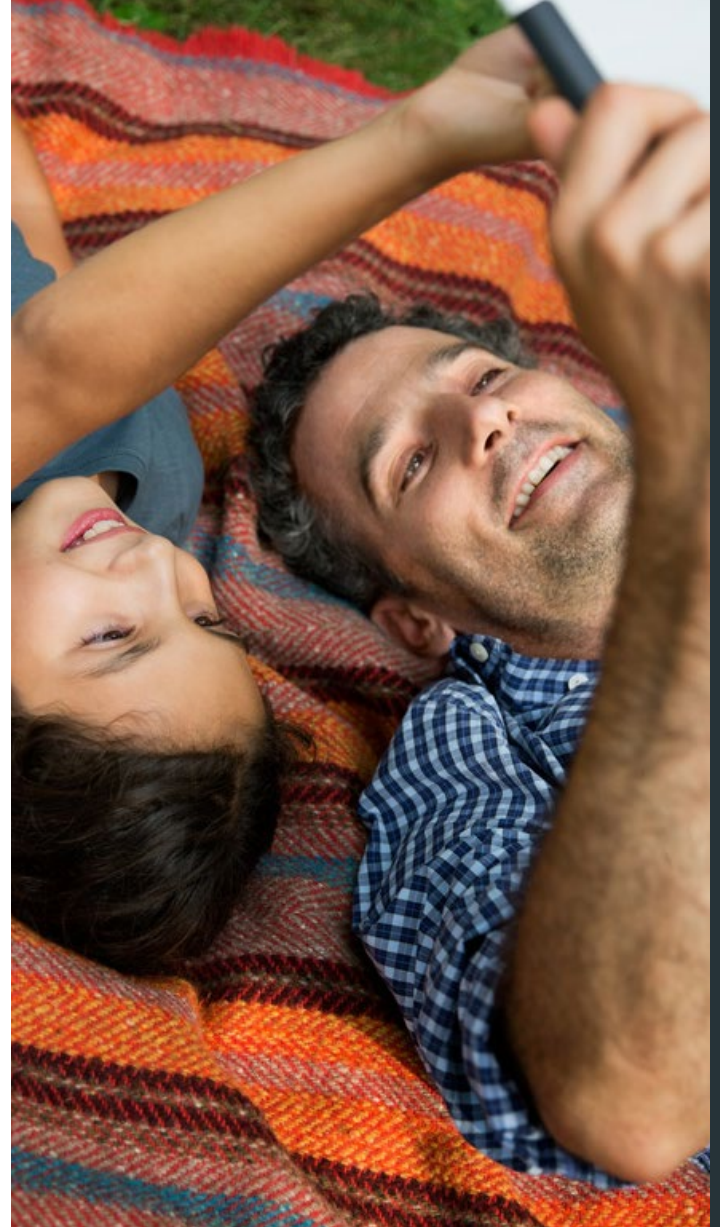
- Reviews campaign platforms to confirm that set-up is complete and optimal for measuring campaign KPIs
- Confirms the target live date
- Sets up scheduled reporting for stakeholders
- Traffics creatives

# Phase 4 In action: Using the DoubleClick digital marketing platform to execute campaigns

For all three of the brand experiments, we used the integrated DoubleClick platform to plan, build, execute and measure the campaigns. Using an integrated platform helped us increase efficiency and connect the dots from the data in the media buy to the creative strategy and design.

The DoubleClick Digital Marketing Platform allows marketers to:

- Gain a single view of the customer so you can identify and understand users, wherever they are in the user journey, and deliver relevant messaging at key moments.
- Efficiently connect data to creative and set up dynamic campaigns, with intuitive workflows and seamless integrations between creative development tool, ad server, analytics, and DSP.
- Complete trafficking tasks with just a few clicks. Creatives automatically sync with the ad server and DSP, meaning no manual handoff.
- Automatically run reports and easily optimize based on information obtained from the robust reporting suite and attribution tools.



PHASE

5

## Learn and optimize

Congratulations: you've successfully launched a programmatic campaign that uses data to deliver informed, engaging creative. However, the real fun starts once your campaign has been live for a few days. As the data begins to come in, you'll be able to see how your creative hypotheses are holding up. Then, based on the insights you've obtained from your campaign so far, it's time to optimize and apply learnings to future campaigns.





## Dynamic creative is an iterative process

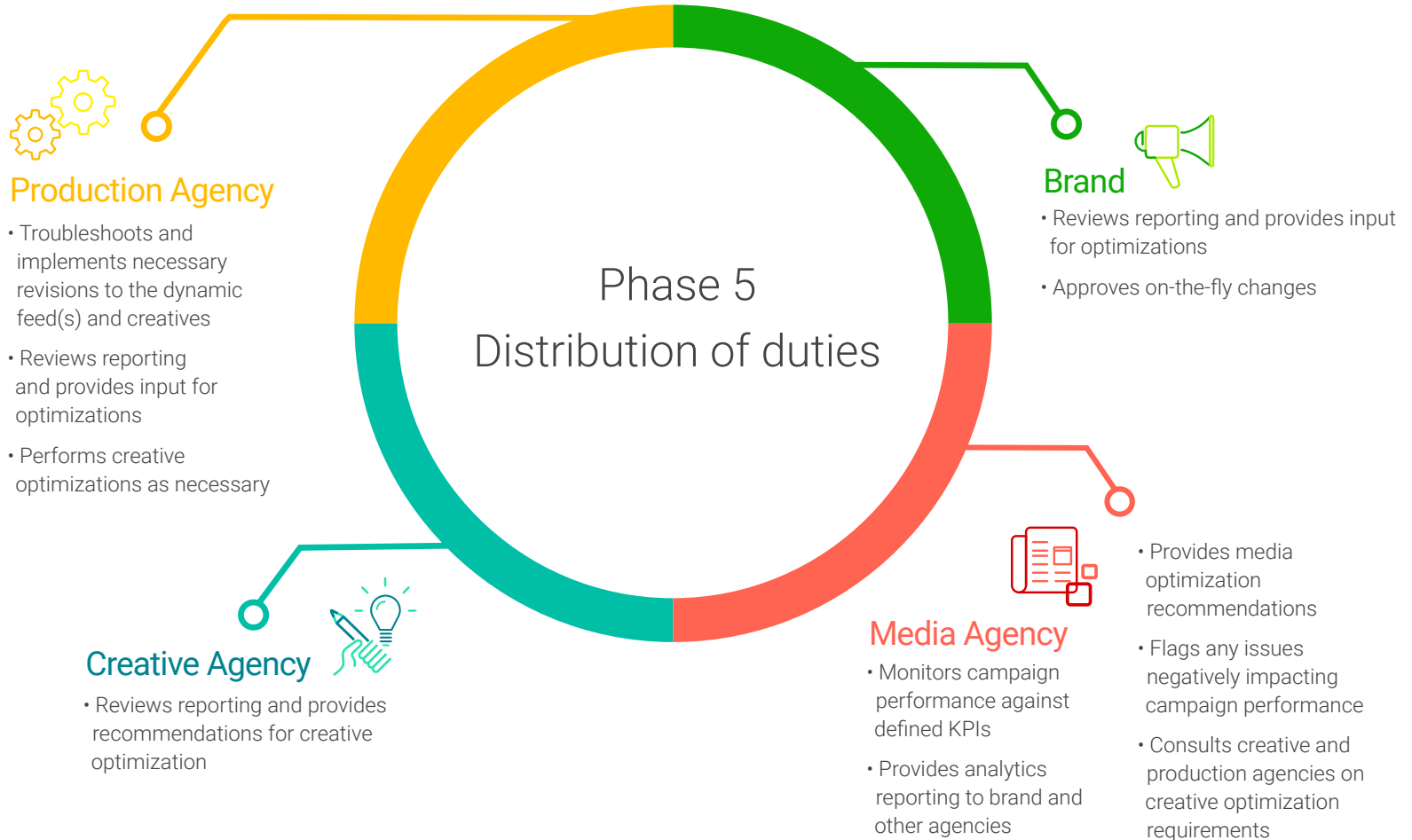
In your second and subsequent rounds, continue to optimize creative, audience segmentation, and testing variables. You can also apply the learnings from your digital campaigns to other areas of your marketing mix. To ensure that your campaigns continually evolve toward better results, follow these best practices for testing:

- Don't wait until the campaign is over before beginning to optimize. You can start learning about halfway through the campaign—or even earlier, depending on volume—and optimize toward what's working best.
- Go beyond CTR and take all metrics into account. For example, you can look at reports for view-through conversions and cross-device conversions to help understand what's driving your campaign's success.
- Make sure your data is reliable. Investigate any results that seem too good to be true—they could indicate click fraud. If you do run into issues, investigate where you're buying your media and choose reliable media sources and exchanges.
- If testing variants, be sure you achieve a significant sample size before making optimizations
- Once you've identified the best-performing audience segments, re-focus your campaign to address those segments only. You can also apply these audience learnings to other areas of your marketing mix, such as print and broadcast.



## TIP: Stay flexible

This process has been developed through extensive testing across multiple campaigns, but it's important to remember that all campaigns are different. As you implement this process, check in frequently with your team to see how it's working. Remember that although these are best practices, they are also guidelines. Feel free to tweak and optimize the process to work for you based on your team's feedback.



## Phase 5 in action: Gilt

Gilt's campaign highlighted to prospective users the types of merchandise available on their website (women's fashion, men's fashion, home goods, and kids gear), with the goal of driving membership registrations and online purchases.

We ran two types of audience targeting for the campaign:

1. Google audience lists to reach women and men interested in fashion, home and kids gear.
2. Search-to-display remarketing to reach people who had already expressed an interest in Gilt by clicking on a Gilt search ad in the past, but who had yet to register for membership.

To build the creative units, we used the top search keywords from Gilt's previous campaign to decide which merchandise categories to show.

**GILT**  
G R O U P E

Post-launch, Gilt can optimize the campaign and the dynamic feed to focus on the areas that have demonstrated high performance. For example, over the course of the initial campaign, Gilt also learned that, while the segmentation between men and women made sense, the segmentation of "home" and "kids" didn't drive additional performance. Gilt can optimize their existing dynamic feed to focus on only the women's and men's segments for their future campaigns to improve reach and increase conversions.

Additionally, the search-to-display remarketing campaign (which targeted users who had searched for Gilt-related keywords but not yet registered) generated high conversion rates. In the future, Gilt can use this same data-driven strategy to reach those who register via the search channel with a message tailored to their initial search. This would broaden the reach of the targeting strategy while maintaining the high relevance to prospective customers.

# Building the strategy into the creative

## Web banner examples

If a man hadn't searched for Gilt previously, he might have seen:



If a woman had searched for a dress, clicked on Gilt's search ad, gone to the website but then left before signing up to be a member, then she might see:



# Conclusion

Data-driven marketing offers incredible opportunities: to reach better qualified users in their decision-making moments, to gain insight into what makes them tick, and to foster efficiency and effectiveness throughout the creative process.


For **creative agencies**, it realizes the opportunity to deliver the creative proposition in the right context to relevant audiences, leading to more memorable creative. Many creatives have found that working on data-driven campaigns has expanded their creativity by providing the opportunity to easily test hypotheses about what messaging works best.

For **production agencies**, data-driven creative provides a more structured process and access to insights that can save time and create efficiencies even in campaigns that don't rely on dynamic creative.

For **media agencies**, it means a greater breadth of services to offer clients, and the opportunity to interface more closely with creative and production agencies to ensure they always have the right creative and format available for the media buy.

The opportunities for **brands** are vast. Learnings from data-driven campaigns can inform brand strategy, content strategy, and marketing strategy; applied correctly, they can have long-ranging effects on how brands reach users.

But in order to realize these opportunities, marketers need to make changes to their process and mindset. We can no longer afford to keep creative, production, and media planning sequential and siloed, as we did in the heyday of mass media campaigns. In order to move forward, we need to adopt a process that's collaborative, iterative, and cyclical, not just in individual campaigns but in long-term marketing strategy.

An overhead photograph of a meeting table. Several people's hands and forearms are visible, some wearing watches and bracelets. On the table are a black coffee cup, a white tablet, and several documents. One document has the heading 'KAPLAN & MERRITT'. A white text box is overlaid on the left side of the image, containing two paragraphs of text. A blue curved line graphic is overlaid on the bottom right of the image.

As evidenced by the brand cases presented above, data and analytics don't have to stifle creativity. In fact, when used correctly, they can foster and improve it while driving the top and bottom line.

Moving forward, we invite you to take the strategies outlined in this guide and customize them to fit your individual needs. Remember that this isn't a one-size-fits-all process, merely a set of best practices gleaned from a series of experimental campaigns. Take them, use what you need, and evolve the rest to work for you. After all, testing and optimizing are what the campaigns of the future are all about.

A man and a woman in business attire are looking at documents on a wall. The woman is pointing at a document with a pen. The man is looking at the document with his hand on his forehead. The scene is dimly lit, suggesting an office or meeting room.

# Exhibits



# Exhibit #1a: Available data signals

1. Audience signals: Information about the types of people you're trying to target

Signal type	What it tells us about the audience
Demographics	Audience characteristics like age and gender
Affinity segments	Users who have demonstrated a qualified and recent interest in a given topic
In-market segments	Users who are intending to buy certain products or services in the near future
Similar audiences	New and qualified consumers who share interests with your existing audiences
Website analytics	Based on user interactions on your site like purchase history and previous pages visited
Search marketing data	Users who clicked on your search ad, signaling intent
Social behavior	If a user has shared, liked, favorited your brand
CRM	Users from offline channels like store visits

2. Media signals: Information about the content your user is looking at where your message might appear

Signal type	What it tells us about the page the ad is on
Keyword contextual targeting	Keyword content on page where ad is running
Category targeting	Website or app category where ad is running
Media placement	Location of your ad on a publisher, for example sports page vs. news page
Data from publisher	Information from the publisher about the page your ad is on, for example, travel destination page

3. Environmental signals: External factors that may influence the mindset of your users when they're exposed to your marketing

Signal type	What it tells us about the viewer's environment
Device information	The type of device the person is using: desktop, tablet, smartphone. The operating system of the user's device: Android vs IOS
Location	User's country, city, postal code, or store proximity
Event information	Information about an event happening at the same time your ad is seen like sporting events, TV schedules, financial markets, weather condition

# Exhibit #1b: Where data signals come from

Previous campaigns	Audience insights	Additional sources
<b>Creative performance:</b> which format types have provided the most engagement and conversions for your brand?	<b>1st party data:</b> marketer-owned and typically collected from brand websites and ad creative using pixels. Can also be collected in the offline environment through loyalty cards, call centers or store transactions	Marketing research for deeper insight about your users
<b>Audience performance:</b> which audience targeting strategies have worked well previously?	<b>3rd party data sellers:</b> companies that aggregate data and 'resell' it to marketers.	Focus groups or brand lift surveys you may have done to assess how campaigns affect brand perception.
<b>Media performance:</b> which media tactics work well for your brand?	<b>Data from media partners:</b> for example, Google provides access to demographic, affinity, and in-market audience data	Expertise and best practices from your agency partners.
<b>Device performance:</b> which devices provide the best reach for your target?	<b>Data from paid search campaigns:</b> provide insight on user intent	Industry tools such as Google trends.
<b>Purchase data:</b> how have previous campaigns affected purchase behavior?		Information on your content strategies that can aid in the creative ideation process.

# Exhibit #2: Briefing questions

## GENERAL INFO

1. Advertiser:
2. Media agency
3. Creative agency:
4. Campaign in scope:
5. Launch date/flight:
6. Required creative end deliverables for the campaign (depending on current creative assets):
  - a. Dynamic, static, or regular build:
  - b. Rich media or standard:
  - c. Assets for dynamic creative (images, videos, copy):
  - d. Specs (devices, dimensions and file sizes):

## CAMPAIGN OVERVIEW

- What is your brand's promise, mission, and values? How do those apply to the product or service featured in the campaign?
- What are your brand's overall goals for the campaign?
- How do you segment your target audience, and what do the people in each segment really care about?
- Which key audience insights will best serve as the basis for your campaign?
- Which data signals can be used to reach each segment of your audience discretely?
- What message(s) do you want to get across? Do those messages differ by segment? If so, how?
- What actions do you want users to take as a result of this campaign? Which destinations (online or brick-and-mortar) would you like them to visit, and what actions would you like them to take there?
- What sort of creative might your audiences respond to? How can your audience insights and audience targeting strategy inform the creative design and strategy?
- On which sites, platforms, and devices can you reach these audiences?
- Might the behavior and mindset of your audiences differ depending on which sites, platforms, and devices they're using? If so, how? [e.g. will your user behave differently on mobile devices vs. desktop?]
- Which assets (fonts, logos, images, taglines, etc.) are available to your team? What needs to be created?
- Is a brand or style guide available?
- If testing something, what should be used as the control unit?
- What is the project timeline? How long will each stage take, and how much time needs to be built in for approvals?

## PRODUCTION TIMELINE

1. What is your typical approval process?
  - a. For each team, what is the # of business days required for review and approval of creative?
  - b. Will all parties be reviewing creative deliverables altogether or will rolling reviews and revisions be made?
2. How long will it take for the creative agency to QA the creative?
3. How long will it take to set up the dynamic feeds?
  - a. Note: Initial feeds usually take 24 - 48 hours, but can vary based on the dependencies and complexities. Feed revisions also happen during development based on production and/or client needs

## PREVIOUS LEARNINGS

1. Which data signals have you used successfully in previous campaigns? (e.g. demographic data, location, interests, previous behavior on websites). You can pull audience composition and performance reporting to obtain this.
2. Which creative sizes tend to get you the most reach within your target audience? You can pull inventory availability reports and filter by creative size to obtain this.
3. Do you have a previous dynamic creative data feed that we can use for this campaign? (DoubleClick experts recommend using Google Docs. Other formats include API, XML, and Excel.)
4. What targeting strategies have you found successful in the past?
5. Which search keywords tend to drive performance in search activity?

## MOBILE CREATIVE

1. Provide details around your previous campaign performance on mobile?
  - a. What was your campaign goal for mobile?
  - b. Did you target both mobile web and in-app?
  - c. Did you target by device type?

- d. Did the ads utilize any mobile specific features (GPS, accelerometer, etc.)?
- e. What formats were built and how did they perform?

## HISTORICAL PERFORMANCE OF KPIS AND IMPRESSIONS VOLUME

1. What is the average CPM for desktop and for mobile? And the highest range of CPM paid?
2. What is the average volume of impressions per week that you typically aim for?
3. What is the average CTR for desktop? For Mobile?
4. What is the target CTR for Desktop and Mobile?
5. What is the target engagement rate?
6. What are your average view-through and click-through conversion rates?
7. What are your assumptions for above (i.e. time period, audience sample size)?

## CAMPAIGN SETUP / OPTIMIZATION

1. What is your preference on how to set up the testing? Please be as specific as possible (i.e. using A/B testing, audience segments, ad rotation)
2. What is your typical optimization procedure? How often do you optimize and what performance metric do you optimize on?

## REPORTING

1. Can you provide historical, granular, placement-level data that details current and past activity, as well as performance over the last 90 days (i.e. a Standard DCM report)?
2. Can you provide a report on creative performance over the last 90 days (i.e. a DCM Standard Creative Performance report)?

## TRAFFICKING GUIDELINES

1. Can you provide us with a flowchart of scheduled activity?
2. What are your current frequency capping settings? And ad rotation settings?
3. What are your creative flight dates?
4. On which sites/ad exchanges do you serve impressions? What are the blacklisted sites or categories?
5. How do you determine your inventory? Your target audience?
6. What are your current placement naming conventions and guidelines?
7. Please provide full specifications regarding current targeting parameters and settings within (i.e. inventory source, page categories, day and time).
8. Are there any other trafficking settings we should modify or take into consideration for the study?

## Exhibit #3: Brief template

Replace italicized content with your own strategy.

Customer Journey Stage	See	Think		Do	Care
Priority	4	2		1	3
Audience Segment	<i>(Anyone that could buy from you) Example: people that will own a car at some point in their life</i>	<i>(Anyone starting to consider buying from your industry) Example: people starting to consider buying a new car</i>	<i>(Anyone starting to consider buying from your industry) Example: people starting to consider buying a used car</i>	<i>(Anyone looking to buy from you now). Example: people comparing car insurance options</i>	<i>Your existing customers</i>
Message(s)	<i>[Insert top-level message]</i>	<i>[Insert messaging that makes the USP tangible]</i>	<i>[Insert messaging that makes the USP tangible]</i>	<i>[Insert a message that conveys an urgency to act]</i>	<i>Insert a message aimed at retaining or upselling customers]</i>
What we want people to think in this phase	<i>Example: Bank X exists and it provides car insurance</i>	<i>Example: There is no fee for the first year when buying a new car</i>	<i>Example: Bank X has the lowest deductible in the market</i>	<i>Example: By ordering within 25hours, I get three car washes</i>	<i>Example: Bank X's car insurance has been voted the best by users for three years in a row</i>
KPI(s)	<i>Awareness</i>	<i>Branded searches and direct traffic to site</i>		<i>Sales</i>	<i>Retention or churn</i>
Digital targeting and Ad formats	<i>To be determined by channel (for example targeting so-called similar audiences)</i>	<i>To be determined by channel (for example, targeting remarking lists)</i>	<i>To be determined by channel (for example targeting remarketing lists)</i>	<i>To be determined by channel (for example, targeting remarketing lists and direct search-engine targeting)</i>	<i>To be determined by channel (for example targeting CRM systems)</i>

## Exhibit #3: Metrics for success

Metric type	What it measures	Creative insight
Interaction rate and time	Level of ad engagement	How users engage with your creative
Dynamic reporting	Reporting by dynamic permutation	What message is most effective
Video metrics	Level of video engagement and view time	How people engage with your video creative
Activity by creative type	Performance by format type	Understand what creative types are most effective
Post view activity	Activity attributed to an ad that was viewed but not clicked on	What action was taken after seeing your creative
Post click activity	Activity attributed to an ad that was clicked on	What action was taken after clicking on your creative
Path to conversion	How users were exposed to your advertising in the lead-up to a conversion	Understand which of your creatives are best at driving conversions across the full journey
Cross device reporting	Conversions across devices or in different environments on a single device	How creative formats and messaging fit into a user journey across device.

## Exhibit #4: DoubleClick reports that can help the briefing process

Report	Insight
Inventory Availability report in DBM	For your target audience, what creative sizes and formats will have the most reach. This is essential for creative development.
Audience Composition report	Deeper insight into how you can segment your target audience to determine relevant messaging tactics.
Cross device reporting from previous campaigns	Insight into how your target audience behaves across device so you can assess what creative formats and messages to deliver on what devices.
Audience performance report from previous campaign	See how well your creatives performed against your target audience lists.
Creative performance report from previous campaign	Look at what formats and messaging tactics perform well historically.

### Creative optimization -- manual vs. automated

Programmatic technology gives you two options for how to optimize your campaigns. Manual optimization allows you to control which creative messaging appears to which audience segment at which time. This is ideal if your primary objective is to see exactly how each creative iteration stacks up against the others.

Auto-optimization is an algorithm that “learns” which variables perform best, taking clicks or conversions into account. It then automatically serves the higher-performing creative more often. Use auto-optimization if you want to take a more hands-off approach to monitoring and analyzing your campaign results, since it will optimize your creative in real time.

# Exhibit #5: How many variables should you test?

To determine the appropriate number of variables to A/B test in your campaign, refer back to what you learned in science class: to run a robust scientific experiment, you need to hold everything constant except for the one variable you want to test, and you must have a control and a test scenario to compare your results. If you want to run multi-variate testing (which helps you understand the impact of every combination of variables), you'll need even more test cells.

If you want to ensure you have statistically significant results to support your findings, start with the number of impressions you need for statistical significance, and work backwards to understand how much budget is required and how many tests you can feasibly run at any given time.

For this research project, we determined that 3.4M impressions per cell were required for statistically significant results. In other words, to be able to say that a "test" had significant results compared to the control, we had to serve a minimum of 3.4M impressions for the control cell and 3.4M impressions for the test cell. This number may differ for your campaigns, but it's a starting point.

Based on your budget, you can determine how many variables you can test at any time. Beyond budget, adding more test variables can increase the complexity of your campaign, so we recommend starting with one or two creative tests and working from there.

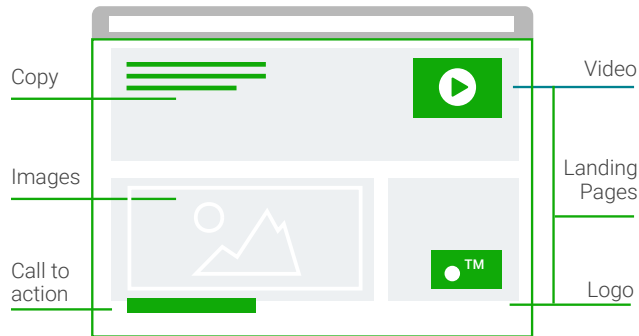
Use the following framework to guide you through your own campaign:

Sample size and cost estimates	
Minimum readable impact	To estimate a minimum 5% incremental lift of the test treatment vs. control
Confidence level	At a <b>90%</b> confidence level
Sample size	We need a minimum of <b>6.8MM</b> impressions spread evenly across the test and control groups <b>6-8 weeks</b> .
Conversion rate	0.04% conversion rate based on industry standards
CPM	Average CPM <b>\$5-\$10</b> (varies by vertical)
Media cost	<b>\$35k-\$65k</b> per test



## Exhibit #6: Dynamic creative primer – Most common dynamic creative elements and dynamic feed overview

Example of a dynamic creative template



Example of a dynamic feed:

Unique_ID	Reporting_Label	Targeting_Column	Headline	Headline Color	Headline_Font_Size	Headline
1	Service		How can we   help you?	#ff0000	12	Our staff is here to make sure we meet all your needs, whatever they may be
2	Dream_Vacation		Dreams do come true	#0000ff	14	On your next vacation, stay with us and make all of your wildest dreams come true
3	Sleep		Sweet Dreams	#ff0000	12	Whether business or pleasure, the best night's sleep you have ever had
4	Location		The Center of it all	#0000ff	16	Join us for your next vacation to be in the center of it all

For more examples of dynamic creative feeds, please visit Google's dynamic solutions page on the [rich media](#) gallery.

Your dynamic feed contains every iteration of content that can be served in the creative, and allows your team to update content easily and quickly, without having to edit the creative assets.

The feed contains columns for both creative assets and targeting logic. In the example above, the various headline copy options, font sizes and colors live directly in the feed. The Targeting\_column would contain the audience list, line item, or other data source from the ad server or programmatic buying tool that dictates which audience details to serve each ad permutation to.



DoubleClick by Google