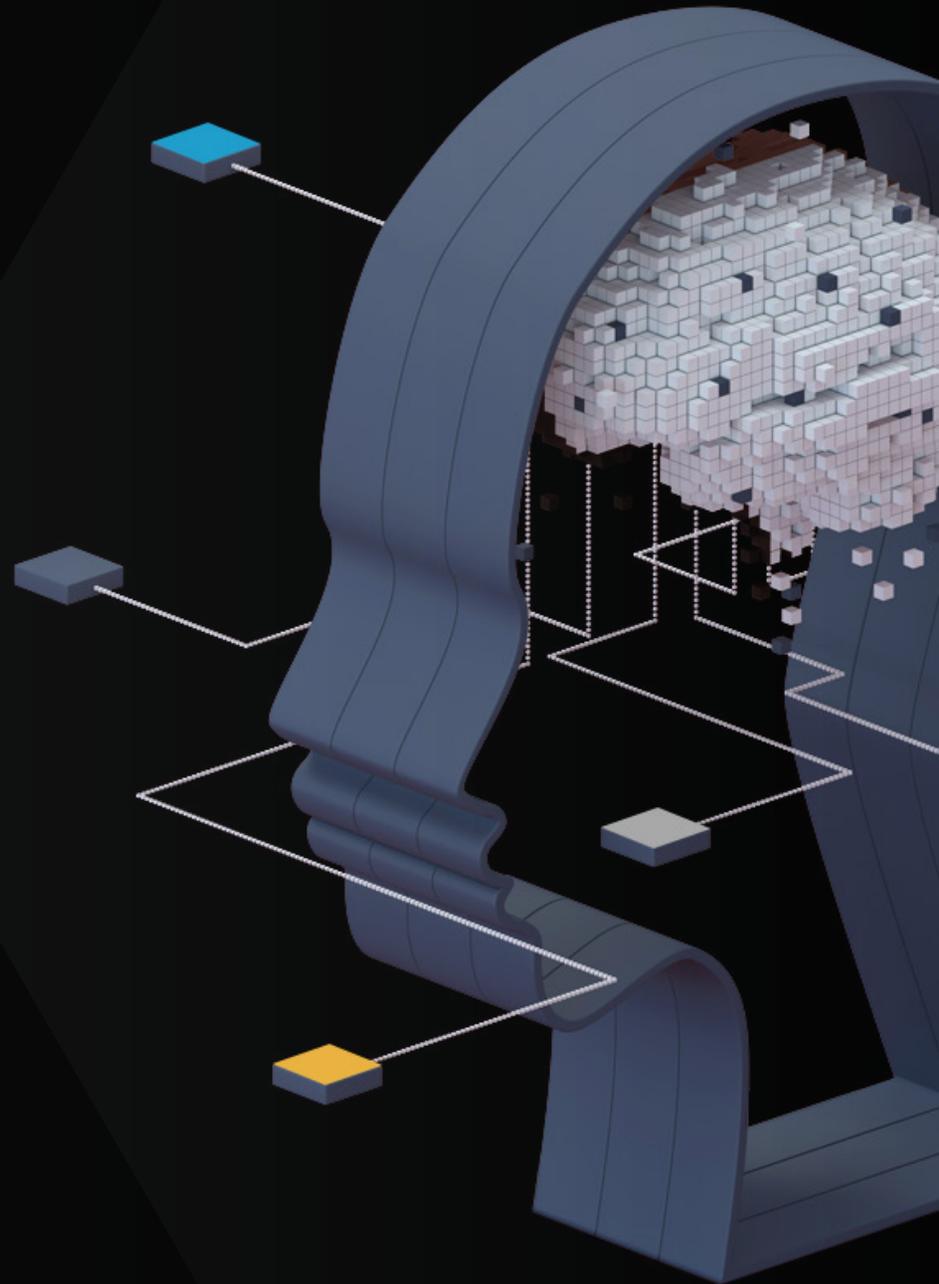


Meeting the Moment with Advertising Automation

Basis[®]
Technologies



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1 Advertising Automation: A Call to Action

We stand at a pivotal moment in the advertising industry.

As the advertising landscape continues to evolve and fragment at breakneck speed, marketers have come to realize that consumers are no longer satisfied with the status quo. Younger generations, in particular, now expect a more contextually personalized, experience-driven online experience, and advertisers now realize that creating a seamless, personalized customer journey is essential for any digital marketing strategy.¹ In turn, brands and agencies need to rewrite their playbooks and flex new digital muscles as they search for ways to deliver compelling content and bespoke, cross-channel initiatives to attract and retain their desired audiences.

The problem, however, is that most marketing organizations lack the nimble solutions they'll need to do this effectively at scale. Digital marketers require prudent concepting, smarter budget allocation, algorithmic optimization, data harmonization, granular reporting, and swift financial reconciliation to drive improved performance, yet few organizations or agencies have installed the appropriate infrastructure in even half these areas. As Gartner's "2021 Annual CMO Spend Survey" reported, **only 17% of CMOs believe they have the digital capabilities and competencies they'll require to successfully operate as a digital business.**²

¹ <https://basis.net/blog/gen-z-and-the-future-of-digital-advertising>

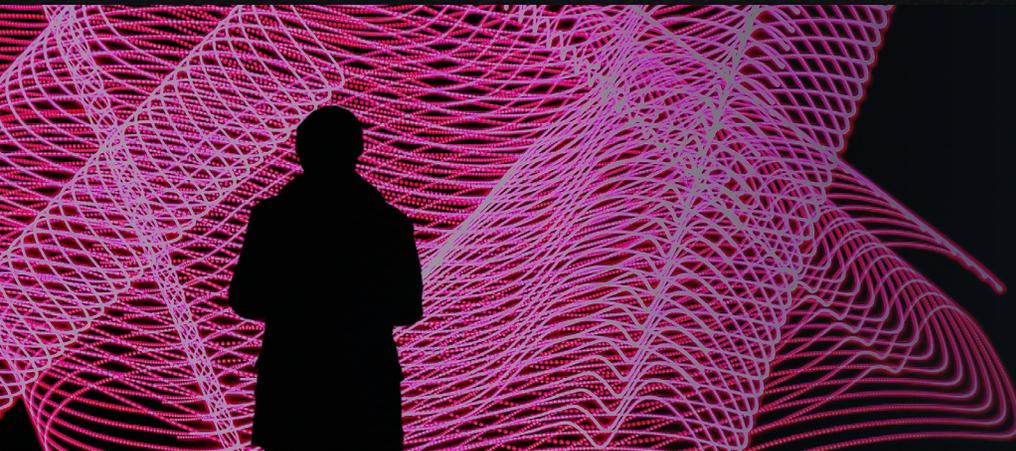
² <https://www.gartner.com/en/marketing/research/role-of-marketing-in-digital-transformation-innovation>



Complexity is Soaring

In a world where consumers switch effortlessly between web and mobile channels and between physical and digital outlets, the levels of fragmentation and complexity are proving to be a massive obstacle for marketers, impeding true cross-channel success.

And the problem is only intensifying...

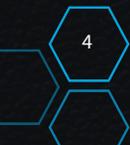


With the dramatic rise in connected TV adoption³, the increasing influence and relevance of TikTok⁴, the resurgence of Pinterest⁵, and a sprawling landscape of new streaming content platforms, the world of digital media is growing ever-more complex—and it's making the job of implementing streamlined approaches across channels even harder for advertisers.

³<https://www.nielsen.com/us/en/insights/article/2021/getting-ahead-of-the-curve-in-ctv-advertising/>

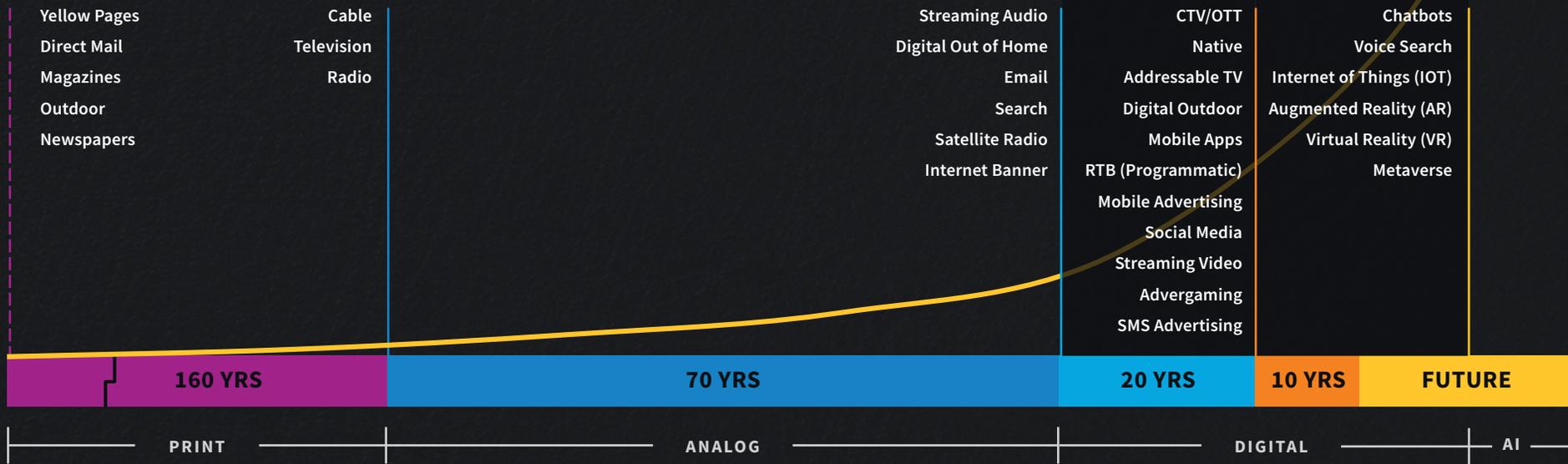
⁴<https://content-na1.emarketer.com/new-tiktok-research-shows-platforms-influence-brands-numbers>

⁵<https://content-na1.emarketer.com/worldwide-digital-ad-spending-2021>



Industry complexity has increased *significantly* over past two decades

MEDIUMS, METHODS & CHANNELS



Sources: Company Research

Tools & Platforms

MSFT Office Suite	CRM	CDP
Market Research	DMP	DSP(s)
Paid Social	SEM	Ad Server(s)
Flowcharts	Viewability	Web Analytics
Business Intelligence	Attribution	Accounting / Ledger
Document Management	Project Management	Time Tracking

Workforce

Research Strategists	Planners & Buyers
Social	Search
Programmatic	Campaign Operations
Performance Analysts	Finance
Creative	Executive Leaders

Executive Insights

Productivity	Workload
Profitability	Channels
Vendor Stats	Verticals
Spend Analysis	Creative

Fragmented and
Disconnected

Messaging & Communication

Email	Slack
MS Teams	Zoom

File & Documentation Management

RFPs	T&Cs	Insertion Orders
Flowcharts	Media Briefs	Media Plans
Client Authorizations	Proposals	Ad Tags
Client Presentations	Trafficking	Optimization Logs

Up to this point, marketing organizations have mostly ignored the importance of their digital buying infrastructure.

The dominant strategy among digital marketers has been to continually add more and more single-point solutions that help solve the challenges pertinent to the day. However, with consumer behavior now outpacing marketers' capacity to respond quickly and effectively, it's become clear the industry needs to embrace a new outlook.

The good news is that more senior industry leaders are beginning to recognize the challenges this complexity represents to their performance, employees, and business goals. According to recent reports, 72% of CMOs are planning to increase their investment in marketing innovation.⁶

72%

of CMOs are planning to increase their investment in marketing innovation⁶

The first step toward change is always the hardest: the willingness to commit to digital transformation and put dollars behind it. For those that have yet to take that first step, the time is now.

⁶ <https://www.gartner.com/en/marketing/research/role-of-marketing-in-digital-transformation-innovation>

The Key to Future Advertising

For too long, the advertising and media industries have clung to legacy systems that no longer satisfy the needs of the modern customer experience in a complex media landscape.

With more industry leaders now committed to updating those systems, now is the perfect time for media buyers to add a powerful modern solution to their digital advertising toolkit: **advertising automation**.

PROGRAMMATIC COMPLEXITY CALLS FOR NEW SOLUTIONS

Up to now, much of the industry has unfortunately demonstrated a lack of urgency when it comes to adopting the types of automated systems that can nullify operational drag. A recent study revealed that among B2B marketers' top priorities, automation was all the way down in sixth place.⁷

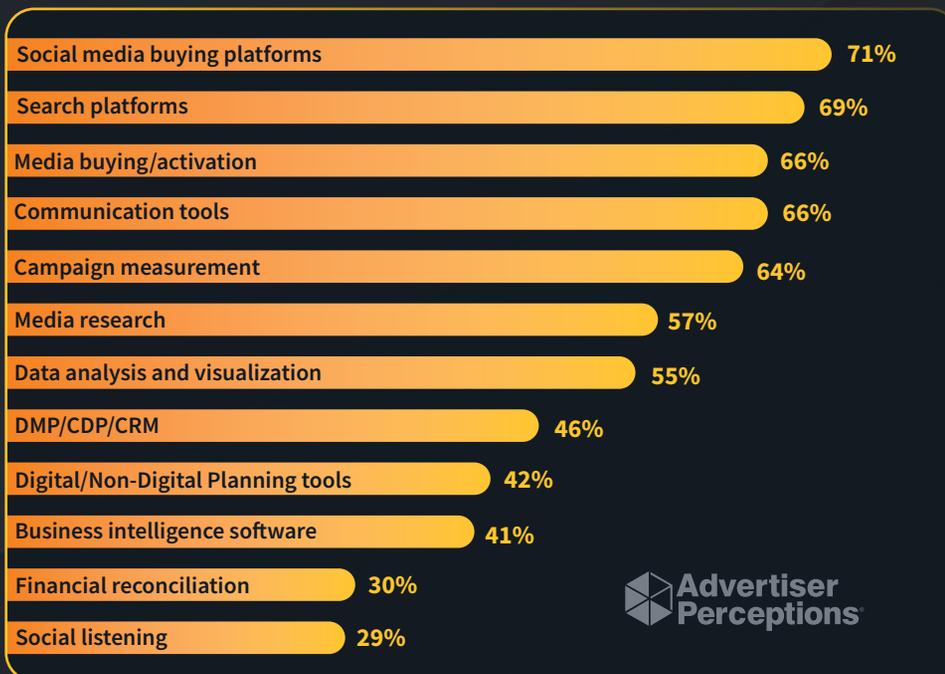
One of the main issues here is that much of the industry mistakenly believes that programmatic ad buying is the only automation they need. But if we peel back the rhetoric and compare this technology to the benefits that workflow automation provides—namely, increasing operative speed, growing profit margins, and creating happier employees—programmatic actually does the opposite. Managing programmatic advertising requires more talent, platforms, and integrations than most advertisers have ever had to deal with previously.

Only 23% of B2B marketers identified automation as a top priority.

While programmatic unquestionably empowers marketers with new and exciting opportunities, it has also been a major contributor to the aforementioned complexity in digital media. A recent survey found advertisers use an average of seven platforms a day and nine platforms in a typical ad campaign.⁸ For all the progress the industry has made around digital processes, there has been a glaring lack of proportionate upgrades to procedures and tools that can help advertisers move seamlessly through their tasks and perform at their highest levels.

PLATFORM PROLIFERATION:

The majority of advertisers use **7 platforms** in a typical day and **9 platforms** for a typical ad campaign



In this guide, we'll explore why automation is essential to the future success and the long-term growth of the media buying marketplace, and reveal how intelligent automation systems help marketers feel more confident in their ability to contribute toward a healthy, growing business.

⁸ <https://basis.net/reports/complexity-job-satisfaction-automation>

2 | What is Advertising Automation?

Advertising automation is the missing link in most marketing programs today.

It is the process center of digital transformation, encompassing a holistic set of technologies and methodologies associated with the full lifecycle of a campaign—from plan creation to ad buying, full-channel campaign optimization and analytics, all the way to reporting, performance, and financial reconciliation. It improves organizational agility, eliminates menial manual work, and supports dynamic optimizations.

In short, advertising automation enables efficiency and collaboration on levels that are nearly impossible to reach without it.

By simplifying processes and accelerating operations, automation empowers brands and agencies to develop a fuller picture of marketing effectiveness and generate more value without having to spend additional dollars. This approach is not just about extracting more from each individual stage of the funnel—it's about understanding how each stage intertwines with the others to amplify their impact and drive a slick consumer experience. For example, consider how social media ad campaigns can drive online and in-store visits, or how connected TV can influence email content. They're all connected, and the insights sitting idle in data—waiting for someone to along and unlock and activate them—are virtually endless.

Five Benefits of Advertising Workflow Automation

BENEFIT #1

Enhanced Personalization

“Give consumers a thoughtful, tailored advertising experience and they will buy more, become more loyal, and share their positive engagement with others.” In theory, a simple concept, yet it’s one that is extremely difficult to execute.

Delivering a great customer experience depends on a range of factors, including speed, convenience, consistency, and approachability. The big one, though, is the human touch: creating real connections by making technology feel more human and meeting people in the moment, where they are and on an individual level.

The rising consumer demand for personalization is not just limited to big brands, either—customers have come to expect it from businesses of all sizes.

DEMAND FOR PERSONALIZATION⁹

66%

of consumers expect companies to understand their unique needs and expectations

52%

always expect brands will provide them personalized offers

76%

expect consistent interactions across departments

It’s clear that all brands executing a digital-first or direct-to-consumer strategy must move beyond a blanket targeting approach and, instead, create content that caters to their audience’s unique experiences and deliver it on their preferred channel—be that Facebook, Instagram, TikTok, Amazon, Hulu, Spotify, Pandora, or elsewhere.

⁹<https://www.salesforce.com/resources/articles/customer-expectations/>

BENEFIT #1 (CONT'D)

Enhanced Personalization

Right now, many brands are still leveraging production teams or agencies to manually build creative variations, which (when done manually) can be a cost-sapping exercise.

This model was once the only one available, yet it is inadequate for an era where marketers need to be able to easily modify and customize creative assets with audience-specific language, calls-to-action, visuals, and products.

Further exacerbating these challenges is consumers' recent reevaluation of businesses' roles in society, with stakeholder capitalism becoming an increasingly major factor in purchasing decisions.

Modern consumers want more than just personalized experiences—they want empathetic and authentic ones, with 53% of consumers saying they feel an emotional connection to the brands they buy from the most.¹⁰

¹⁰ https://www.salesforce.com/content/dam/web/en_us/www/documents/research/salesforce-state-of-the-connected-customer-4th-ed.pdf

BENEFIT #1 (CONT'D)

Enhanced Personalization

In essence, there is now so much nuance to personalization strategies that in order to achieve the greater flexibility, efficiency, and scalability they'll require, advertisers will need the power, flexibility, and time that automation affords.

The good news is recent technological developments enable brands to create more personalized content while leaving antiquated manual techniques behind.

Dynamic Creative Optimization (DCO) solutions activated by Customer Data Platform (CDP) infrastructure can automatically build thousands of digital ads that vary in real-time for product-based retargeting, creative personalization, audience segmentation, and customer journey enhancement. By adopting workflow automation, media buyers have more time to focus on these types of strategies and ensure they are crafting messaging that better targets unique segments.

The end results: more conversions, loyalty, and revenue.

BENEFIT #1 (CONT'D)

Enhanced Personalization

The Current State of Personalization

84%

of consumers say being treated like a person, not a number, is very important to winning their business.¹¹

70%

of consumers say that a company understanding how they use products and services is very important to winning their business.¹²

80%

of companies report seeing an uplift since implementing personalization.¹⁴

71%

of consumers feel frustrated when a shopping experience is impersonal.¹⁵

38%

When customers receive transparent ads based on their activity on a site, **the revenue of the product grows by 38%**.¹³

15%

Marketers report that personalization efforts can **boost revenues by up to 15%**.¹⁶

¹¹ <https://www.salesforce.com/resources/articles/customer-expectations/>

¹² <https://www.salesforce.com/resources/articles/customer-expectations/>

¹³ <https://hbr.org/2018/01/ads-that-dont-overstep>

¹⁴ <https://econsultancy.com/reports/2018-optimization-report/>

¹⁵ <http://grow.segment.com/Segment-2017-Personalization-Report.pdf>

¹⁶ <https://www.adweek.com/brand-marketing/despise-recognizing-the-importance-of-personalization-marketers-are-still-missing-the-mark/>

BENEFIT #2

Granular Campaign Optimizations

Data complexity is sky-high. Competition is tougher than ever. Expectations around privacy are growing. Your brand's social values must be front and center. To connect with today's consumer, advertisers must get everything right, and optimizing manually simply no longer meets requirements.

Modern campaign optimization should never be a set-it-and-forget-it task, but with the immense challenges of winning at auction, marketers increasingly need to be able to automate a wide-ranging set of actions within previously-defined parameters.

Automated campaign execution is ultimately an all-encompassing concept covering a number of different areas. Every advertising activity has an end goal—from increasing brand awareness and lifting social engagement, to expanding lead generation and driving sales, and everything in between. Through various means, automation can help advertisers achieve those goals in the most efficient way possible.

Let's break them down.

+ Optimizing Bids

Automated bidding solutions help advertisers harness data patterns to raise the odds of reaching consumers when they are most likely to respond.

By leveraging the latest advances in data science—including machine learning algorithms, Bayesian modeling, predictive performance methodology, and natural language processing—automated engines can tailor bids for every auction to ensure media buyers are spending the optimal dollar amount for each impression. The result is less waste and increased returns on campaigns that are data protected from the outset and set up to help advertisers achieve their goals faster and more efficiently.

+ Accurate Forecasting

AI forecasting engines turn the art of planning into a data-driven science.

AI analyzes historical performance and bid landscapes to surface trend data, which is subsequently fed into predictive models that help map strategies across channels and devices. Armed with this technology, advertisers no longer need to send trial balloons out into the real world to gauge interest, so say goodbye to costly designated learning budgets. Instead, machine learning algorithms continually learn from past campaigns to provide increasingly-accurate forecasts before any budget is even spent, all so advertisers can predict the most lucrative investments and stay two steps ahead of the competition. Essentially, they take the guesswork out of the media buying equation.

+ Controlling Budget Pacing

Depending on company size and program ambition, the amount of money flowing through a digital media buyer's hands can be daunting. The larger the budget, the greater the impact of even the smallest mistakes.

This is where AI-powered budget pacing comes in, playing a critical role in monitoring the movements of digital advertising spend and keeping campaigns on course to meet desired performance targets.

Should advertisers encounter any volatility in the form of significant overspend or underspend, they will receive automatic alerts that allow them to rectify the issue and regain control over the budget.

+ Anomaly Detection

Successful anomaly detection hinges on a capacity to accurately analyze time-series data in real-time. Considering the number of relevant metrics in any given campaign and the speed at which market trends shift, doing this manually—and at scale—is just not practical.

Algorithmic anomaly detection systems, on the other hand, can alert advertisers instantaneously if a campaign's performance is meaningfully deviating from forecasted models, while also providing actionable next steps so buyers can quickly make any requisite changes.

This is a critical (yet oftentimes neglected) facet of campaign optimization. Imagine the cost per click on a certain ad is suddenly soaring—or, on the flip side, that sales volume is unexpectedly skyrocketing. If advertisers want to amend and optimize their campaigns, they need to be able to act on these valuable insights in the moment.

+ Managing Inventory Effectively

Inventory management refers to the process by which media buyers can track the availability of their products or services, and thus safeguard against bidding on ads that direct consumers to an offering that is unavailable. The costs of disregarding this process are well-documented—just Google “Nike i2 fallout,” or “how Best Buy stole Christmas,” or “Target Canada merchandise management.”

One of the most rudimentary goals for any advertiser is to target the right people at the right time in the most profitable way possible, and they certainly can't do that if they're wasting money on redundant ads. Automated inventory management nullifies that risk.

+ Safeguarding Against Advertising Fraud

By 2023, worldwide digital advertising fraud could cost companies US\$100B.¹⁷ It is a problem lurking ominously, as measurement remains difficult and transparency standards like ads.txt are still nascent and not yet widely adopted.

Armed with the right tools, however, advertisers can automatically detect and abate fraudulent activity—and, in turn, ensure they are spending their budgets on real impressions.

At higher levels of functionality, automated solutions include built-in systems designed to mitigate advertising fraud in addition to both allowlisting and blocklisting sources and publishers in paid media campaigns.

BENEFIT #3

Multi-dimensional Reporting

According to the International Data Center, the global data sphere is expected to grow to a massive 163 zettabytes by 2025.¹⁸ For context, that is the equivalent of 163 trillion gigabytes—or 10 times more than the amount recorded in 2016—and ever-increasing percentages of that data are addressable...or, at least they are to anyone who deploys the right tools to manage and parse it.

When advertisers want to analyze their campaign performance data, they need to account for not just elemental organic signals like page views, unique visitors, session duration, email open rate, and others, but also paid signals such as impressions, click-through rate, conversion rate, and revenue per click. *(That's an awful lot of data!)*

0.291%
conv rate

1,839,034
total imps

\$2.45
eCPC

Jan 5	
Maximum	\$2.80
Average	\$2.45
Minimum	\$2.10

0.09%
CTR

Modern solutions can even augment all this information by location data gathered from mobile and wearable devices. Oh, and don't forget about preference data from social media and enriched personal data that comes from first-party sources such as account and purchase history. Then, away from performance metrics, you can add CRM data, competitive intelligence, market research, commercial transactions, customer feedback, and financial data to the equation—plus much, much more. Tally it all up and marketers today have an avalanche of data to deal with.

¹⁸ <https://www.seagate.com/files/www-content/our-story/trends/files/idc-seagate-dataage-whitepaper.pdf>

BENEFIT #3 (CONT'D)

Multi-dimensional Reporting

Yet at many organizations, all that information is sitting underutilized in siloed systems, as they lack the mechanisms to connect, clean, and centralize it. Many analysts are still trying to stitch it all together manually using SQL scripts. But that comes with many dangers—including increased manual errors, higher maintenance and support costs, higher risk of redundancies, slower access to insights, challenges in scalability, misaligned metrics, and questionable data quality—that can potentially result in wildly inaccurate analytics.

47% of marketers say silos are their biggest problem when it comes to extracting insights from data. An additional 20% say they don't even have the knowledge or capacity to glean insights from their data.¹⁹

On these accounts, the disconnection concern is stark, but all is not lost: advertisers can now find solutions through AI-driven automated reporting technology.

When marketers have this tech in their arsenal, they gain three very important things: granular visibility at scale, on-demand multi-dimensional reporting, and unrivaled customer journey insights. Leveraging reporting automation essentially opens a new world of opportunity and capabilities for brands, providing connectivity between and among all areas of the workstream and surfacing correlations that were previously invisible to the naked eye.

Multi-dimensional Reporting

NEW AUTOMATION-DRIVEN MARKETING ANALYTICS CAPABILITIES

1

Extracting micro data by overall campaign, by select ad sets/grouping, by individual pieces of creative, by grouped sets of creative around a particular theme, and more.

2

Slicing and dicing big data like never before—for example, determining customer acquisition costs by creative asset type, what messaging resonates best in different DMAs, or which device for an individual audience member is performing best.

3

Getting a global perspective on customers' journeys across all channels and platforms. Let's say "Customer X signed up via email but reengaged with a paid Instagram post" or "Customer Y browses online but always purchases in store at location Z." These insights can dictate future channel usage, budget allocation, or any number of other directions.

With so many sources at play, marketers need to adopt a scientific approach to getting the most out of their data. The advertising industry has reached a point where the focus is shifting away from data collection and toward data consolidation. This is a positive, and necessary, trend.

Doubling down on the ability to bring together the right data—the kind that provides actionable intelligence and help brands communicate in smarter ways and fuel next-level growth—is critical to business sustainability.

BENEFIT #4

Financial Reconciliation

When it comes to adopting new technology that can streamline day-to-day work, marketing finance units have historically languished behind other areas of the enterprise. Instead, they remain ensnared in highly manual, spreadsheet-driven processes underpinned by Excel spreadsheets and rigid dashboards. Relying on such antiquated models only breeds inefficiency—often in the shape of increased delays and risks, disconnected workflows, and a limited grasp of the full picture.

As the digital media economy turns upside-down in the wake of rapidly changing consumer behaviors, brands must act now to rectify these issues or risk becoming less agile in the market—and, consequently, inhibiting their growth potential.

Getting access to this data will require new, modernized marketing finance solutions. In short, it requires automation.

The companies that make this transition will significantly reduce the amount of time they spent on their balance sheets and ultimately realize value and ROI sooner. Automation can also better support hybrid and remote work environments—making it easier to collaborate from afar—while simultaneously providing transparency into any financial reconciliation process bottlenecks. All of this can instill confidence in every organizational stakeholder, be they employees, customers, or investors.

BENEFIT #5

Talent Retention

One of the hardest aspects of any manager's role is finding and retaining great talent.

This has perhaps never been truer than now, as employers stare down the ongoing Great Resignation and employees are increasingly uncompromising—especially millennials and Gen Z. If employers don't meet these rising expectations, younger employees won't hesitate to move on to something better.

Agencies have long faced higher-than-average turnover rates, but the problem is now hitting in-house media buyers as well: a recent MarketerHire survey found that 48% of marketing professionals were planning on leaving their job.²⁰ Additionally, a 2022 Basis Technologies/Advertiser Perceptions report showed that advertising professionals only planned to stay at their current job for 3.5 more years—with 38% saying they aimed to leave in less than two.²¹

²⁰ <https://marketerhire.com/blog/is-every-marketer-about-to-quit>

²¹ <https://basis.net/news/nearly-forty-percent-ad-professionals-plan-to-leave-jobs-two-years>

²² <https://basis.net/reports/complexity-job-satisfaction-automation>

²³ <http://www.innodox.com/wp-content/uploads/2019/05/Intelligent-Automation-Kofax-Forbes-Insights.pdf>

Such widespread personnel changes can negatively impact client, consumer, and partner relationships—not to mention labor costs—so ensuring employees enjoy their daily work is critical to the long-term success of a business.

When polled, marketers have said they want better processes and tools to improve their workplace productivity, as well as more time to focus on high-value tasks like optimization, strategic thinking, and engaging new opportunities.²² Modern workflow automation tools open a direct path to employee fulfillment by reducing repetitive and error-prone manual tasks that can tie up their talent's time. With workflow automation in place, employees can instead focus on more high value, needle-moving creative tasks.

Automation can even have a positive impact on employees' health and mental well-being, with a Forbes 2019 Insights study revealing that 92% of companies saw an improvement in overall employee satisfaction after deploying automated processes.²³

When organizations invest in workflow automation, they are investing in human capital, which can generate greater value both internally and externally with client and vendor partners.



What would **you** do with more time in your work day?

Professional Development

“Continue professional education/courses/learning about new aspects of this field.”

– Marketer Executive

Network/Collaborate

“Meet and strategize with more outside vendor partners.”

– Marketer Executive

Trends/Data Analysis

“Staying up to date on emerging trends and platform updates to provide innovative recommendations to clients.”

– Agency Manager

Technology

“Research new marketing channels/automation tools.”

– Marketer Executive

3 In Summation

Simply put, advertising automation can help businesses realize what humans alone cannot.

As AI-powered technology evolves, so will marketers' ability to optimize their entire workstreams in parallel.

The way in which most marketing organizations are set up today is limiting. **Legacy solutions often allow marketers to see what is happening, but not the why behind it.** The ability to analyze mass quantities of data in real-time, divide that into appropriate segments, identify anomalies, create scoring models and predictive content recommendations, and then activate updated market messaging that resonates with individual consumers—and to do so at scale—is now paramount to maximizing return on ad spend, growing category share, and driving brand growth.

Beyond that, advertising automation can deliver some pretty astonishing time savings. An Advertiser Perceptions study found that media buying professionals could save an average of **nine hours per week** by embracing technology that automates redundant and low-value tasks.

Successful workflow automation can also lead to:

63% increase in time for strategic thinking and creativity,

47% more time for optimization and analysis, and a

54% boost in productivity.²⁴

Just think of all the things media buyers could do with all that extra time!

²⁴<https://basis.net/reports/complexity-job-satisfaction-automation>



The Future of Advertising Has Arrived.

While this new breed of cognitive technology isn't necessarily groundbreaking science, the industry has only recently attained the computing power—coupled with decreased implementation costs—that are necessary for mass adoption.

But the good news is this: [the wait is over.](#)

The automated future of advertising is here, the solutions exist, and we are only just scratching the surface of how automation will improve interoperability, unlock synergies, and revolutionize marketing.



Connect with us at basis.com today to see
what automated advertising can do for you.