



Campaign Setup Beta

November 2019



Confidential & Proprietary



Agenda

Campaign Setup Defined

Define and outline the goals and outcomes of Platform Campaign Setup

Development Approach

We breakdown the build process and show you how you play a key role in its success

Demo & Utilization Training

Show you the product and demonstrate how to perform the various setup tasks

Next Steps & Resources

The what, when and how of the Beta program - what do we expect of Beta users and when

Questions

We will leave time at the end, so please hold your questions until then...

Campaign Setup Defined

A process that must take place to get a campaign ready to serve on a demand-side platform (DSP), such as DV360. Campaign Setup on the Platform provides a more automated, system-assisted process to users that enables them to fully capture client needs and translate these needs into optimal execution within a DSP.

The goal of Campaign Setup on the Platform is to increase trust, ensure quality, and enhance operational efficiencies, which will ultimately ensure that the product:

- Empowers users to **more efficiently execute this critical first step** in the tactical execution of a campaign lifecycle
- Enables users to more efficiently translate the terms of the campaign contract (insertion order) into **pre-designed/analyst-approved tactics**
- **Reduces the mental strain, and therefore error rates**, of campaign setup
- Reduces the disconnect of what is sold and what is actually setup, **increasing trust** among campaign management groups (Sales, AMs and CCs)

Rethinking Setup



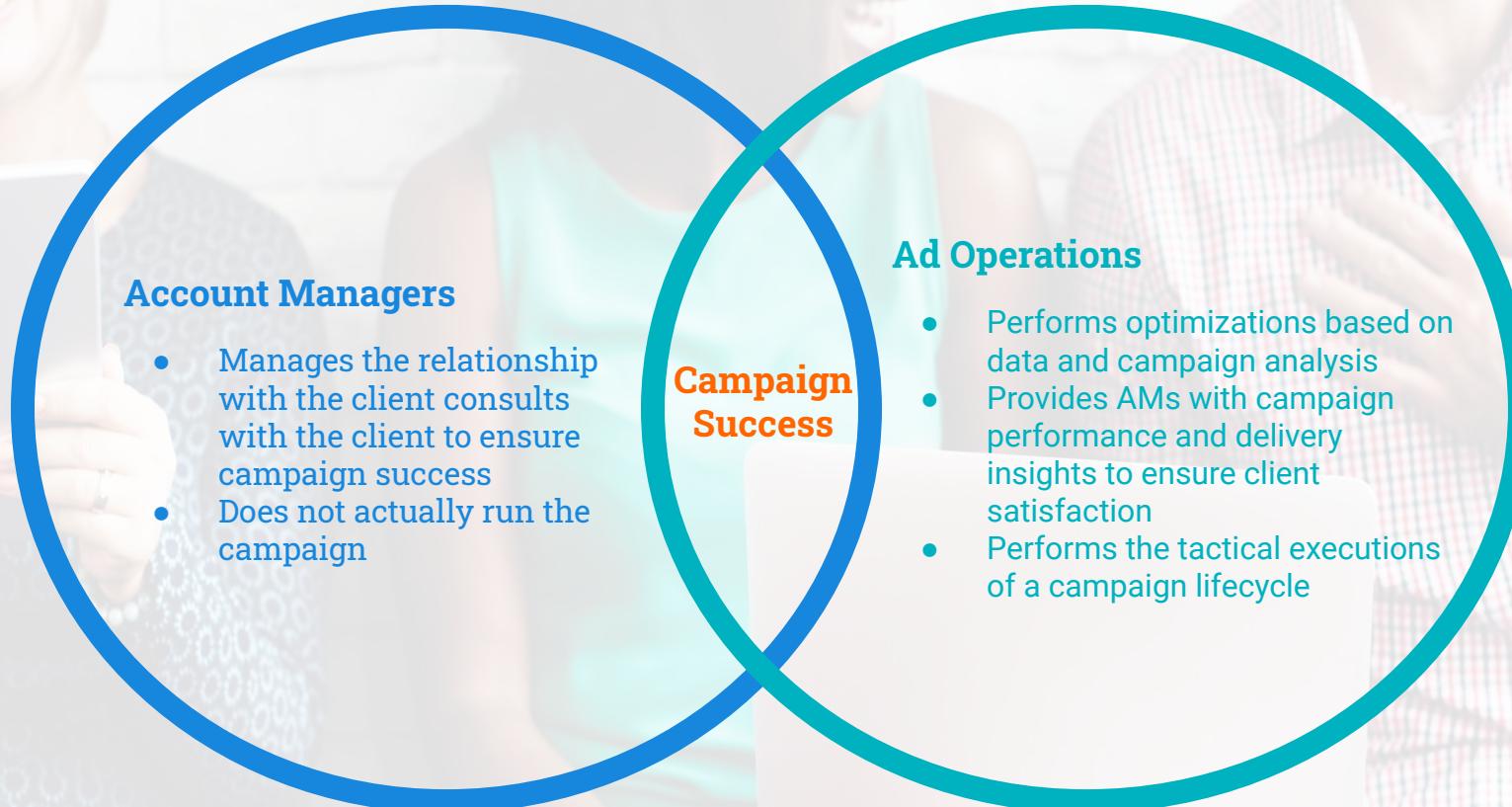
The Balancing Act of Campaign Success



Role Ownership Maintains the Balance



Separate Roles, Same Goal



Milestone Detail

1 User Message
Creatives Attached

2 Billing
Address Attention Line
Billing Address: 230 N Michigan Avenue, Chicago, Illinois, United States

3 Campaign Reporting
Campaign Name: Navigator Conversion Pixel ID: 216113
Navigator Homepage Pixel ID: 216114
Navigator Product Pixel ID: 216115
Navigator Search Pixel ID: 216116
Navigator Shopping Cart Pixel ID: 216117
Navigator Tracking Pixel ID: 216118

4 Opportunity Product Detail
Opportunity: St Jane Chicago V Platform: DBM
IO/Campaign ID: 10308656 DCM Campaign ID:
Product: Display Revenue Type: T
Est. Total Bill: T

5 ACM Initial Onboarding Information
Sojern Goal Rate: 12,000 Min Margin %: 65%
Max eCPM: 100 Prioritization: Default

6 Setup Details
Account AOB: Frequency Cap Restriction: None
Retargeting Restrictions: Retargeting Allowed
Prospecting: Yes Attribution: Michigan Ave

7 US Process
Effective Date: October 9th, 2018 Effects: All IOs for US AMs

8 SALESFORCE NOTES (Campaign And Targeting Notes)
REQUIRED INPUTS
New Setup or Duplication:
IO to Duplicate (NA if New Setup):
Is this a DCO Setup? (Y/N):
If Yes, AM Reminder, please submit or provide the TADA codes for account Advertiser Name:
Was duplicated campaign previously on ACM?
Remove old creatives? Yes/No
Do you have creatives from the client which have already been uploaded in If so, please details): Suballoc Budget: If SMB, Prioritize **This fi

9 SOJERN Audience Manager Audience Search
New York

10 SALESFORCE FIELDS
Required Fields
Retargeting Restrictions - Filled C
Advertiser - Filled Out: Y/N
Click/View Attribution Window - F
3rd Party Ad-Server
Geo Restrictions - Filled Out: Y/N
Other Pixels Set Up - Filled Out: Y/
Pixel Exclusion Window - Filled O
Frequency Cap - Filled Out: Y/N

11 Setup Details
Advertiser: Frequency Cap Restriction: None
Retargeting Restrictions: Retargeting Allowed
Prospecting: Yes Attribution: View & Click
Attribution Window for View (Days): 30
Attribution Window for Click (Days): 30
View Thru Attribution %: 100% Optimization Event: Conversion
Date of Kick Off Call
Geography Restrictions

12 Information to fill out for CC:
DCM, DCO or APN Advertiser?: DCM
Advertiser Name: St Jane Chicago V
Are creatives ready to be assigned to line items? (Y/N): Y
Assign to a LI within each product (Y/N): Y
If Yes, please specify how to assign to Line Items: NA
Remove old creatives from all Line Items (Y/N): NA

13 Assigned To: Jack Searl

Campaign Setup Simplified

Capture
Contractual
Inputs

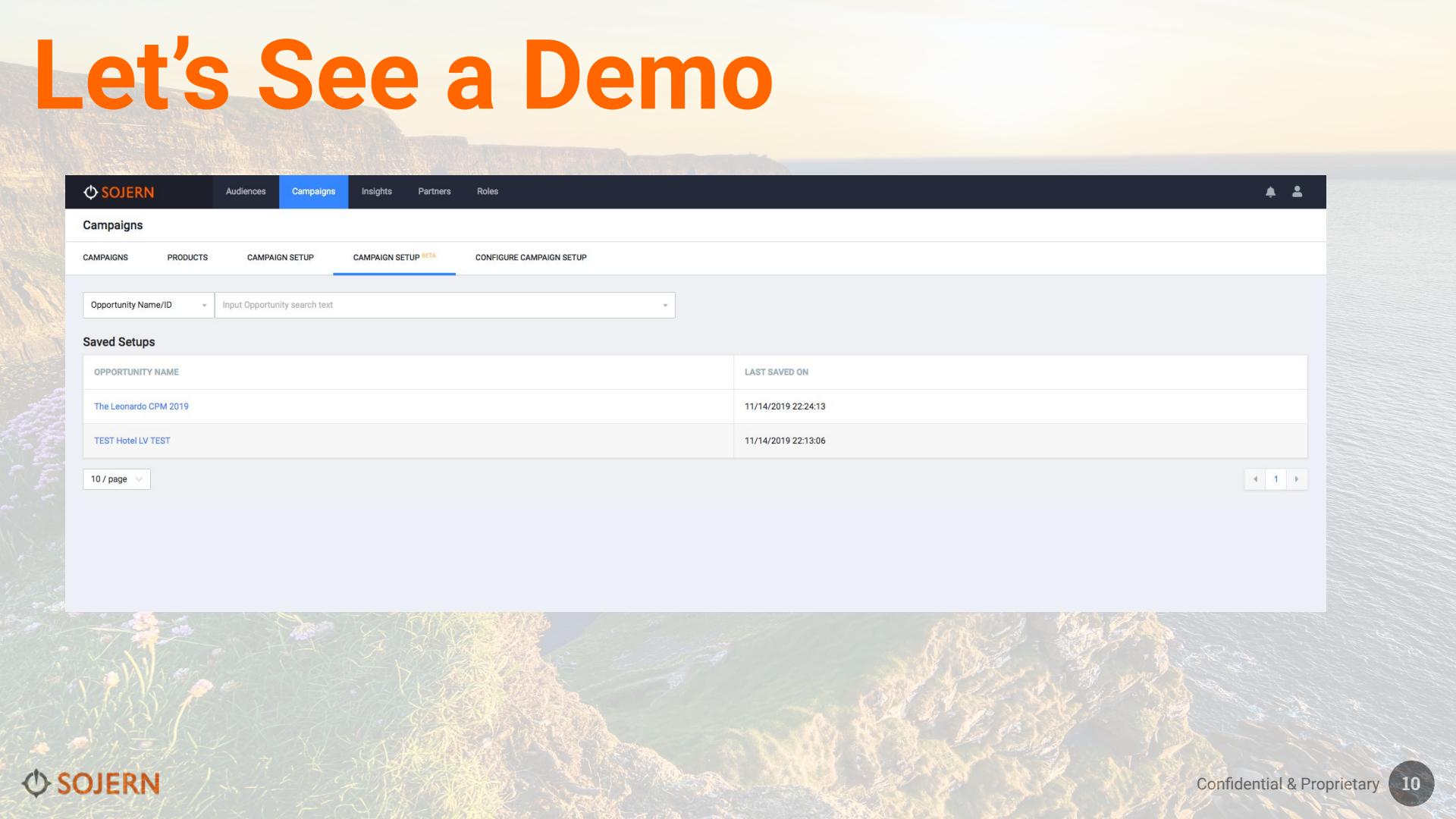
Define Campaign
Restrictions

Select
Audiences

Review
Setup
Summary

Generate
SDF Files

Let's See a Demo



The screenshot shows a software interface for managing campaign setups. At the top, there is a navigation bar with tabs: Audiences, Campaigns (which is selected and highlighted in blue), Insights, Partners, and Roles. To the right of the navigation are icons for notifications and user profile.

The main content area has a title "Campaigns" and a sub-section "Campaign Setup". Below this, there are several tabs: CAMPAIGNS, PRODUCTS, CAMPAIGN SETUP, CAMPAIGN SETUP BETA (which is currently active), and CONFIGURE CAMPAIGN SETUP.

A search bar at the top of the main content area allows users to search for opportunities by name or ID. The results for "Saved Setups" are displayed in a table:

OPPORTUNITY NAME	LAST SAVED ON
The Leonardo CPM 2019	11/14/2019 22:24:13
TEST Hotel LV TEST	11/14/2019 22:13:06

At the bottom left, there is a pagination control showing "10 / page" and a dropdown menu. On the right side, there are navigation arrows for the table.

There's Always a Beginning

Spotify Premium

Finger Eleven

Share • (•) Start Artist Radio

Related artists

Trapt • Seether • Theory Of A Deadman • Saliva • Puddle Of Mudd • Sick Puppies • Fuel • Hinder • P.O.D. • Crossfade • 12 Stones • Breaking Benjamin

Top Hits

1 2 3

Top Hits

Rank	Title	Length
1	Paralyzer	3:28
2	One Thing	4:40
3	Living In A Dream	3:05
4	Good Times	3:56
5	Stay in Shadow	3:16

Albums

Life Turns Electric (2010)

Rank	Title	Length
1	Any Moment Now	3:07
2	Pieces Fit	3:10
3	Whatever Doesn't Kill Me	3:37
4	Living In A Dream	3:05
5	Good Intentions	3:05
6	Stone Soul	2:41
7	Ordinary Life	4:01
8	Don't Look Down	3:07
9	Famous Last Words	3:20
10	Love's What You Left Me With	3:23

Living In A Dream

Finger Eleven

0:32 3:05

thefacebook

Scott Pearson's Profile (This is you)

Information

Account Info:

- Name: Scott Pearson, BS
- Member Since: January 12, 2005
- Last Update: February 3, 2005

Basic Info:

- Email: pearsonic2@carleton.edu
- Status: Alumnus/Alumna
- Sex: Male
- Year: 2004

SALESFORCE.COM

SALESFORCE.COM Highlights

New to SALESFORCE.COM?

Sales Automation for the masses

Customer 1

What your friends are doing.

Jack Just received a txt message from a person in Brazil wanting to twtr. (7 minutes ago) x

Dom It would be impossible to surf Linda Mar with the short board, but it won't stop teh Stewie! (13 minutes ago) x

Crystal my krispy behind it's fine all of the time. (23 minutes ago) x

donnie I'm hopin it comes true! (31 minutes ago) x

Garett Gulf shrimp w/ artichoke broth and hearts of palm mmmh :} (about 1 hour ago) x

biz Just had a good workout! (about 1 hour ago) x

Crystal eyes feeling dizzy, hoping my intro back into super-aerobics is ok after my poison oak forced break! (about 1 hour ago) x

lisa saw two crying women on two different subways this evening. (about 1 hour ago) x

Dan Inviting everyone I know to twtr r/t now. (about 2 hours ago) x

You friends. Add more!

Waiting for these people to accept

rob cancel

merlin cancel

Star someone to get a txt message every time they update. Those in bold (40) have starred you.

Ami

User Centered Iteration



Elements of Campaign Setup Beta

REVIEW DOCUMENTATION

- [Training Video](#)
- [Beta Content Hub](#)
 - [Internal Release Document \(IRD\)](#)
 - [FAQs](#)
 - [User Guide](#)
 - [Glossary of Terms](#)
 - [Screenshots](#)
 - [SFDC Field Documentation](#)

TEST

- [Link to Campaign Setup on the Platform](#)
- [Follow 'Phase 1' Testing Instructions](#)

PROVIDE FEEDBACK

- Answer questions and provide feedback in the channels provided (*phase 1 is through survey monkey*)
- Communicate with the team any questions, comments or concerns in the Slack channel [#campaign-setup-beta](#)



Q&A



Appendix

Placeholder for SFDC Fields (not sure if this belongs in deck or as one-sheeter)

Thank You!

RESOURCES

Accessing Campaign Setup:
platform.sojern.com/campaign/setup/

Campaign Setup Beta Documentation:

- Feedback Form or Program
- Training Video
- Internal Release Document

Beta Slack Channel:
[#campaign-setup-beta](#)

NEXT STEPS

Platform/Project Carbon Website:
platformhub.sojern.com

Regular Updates:

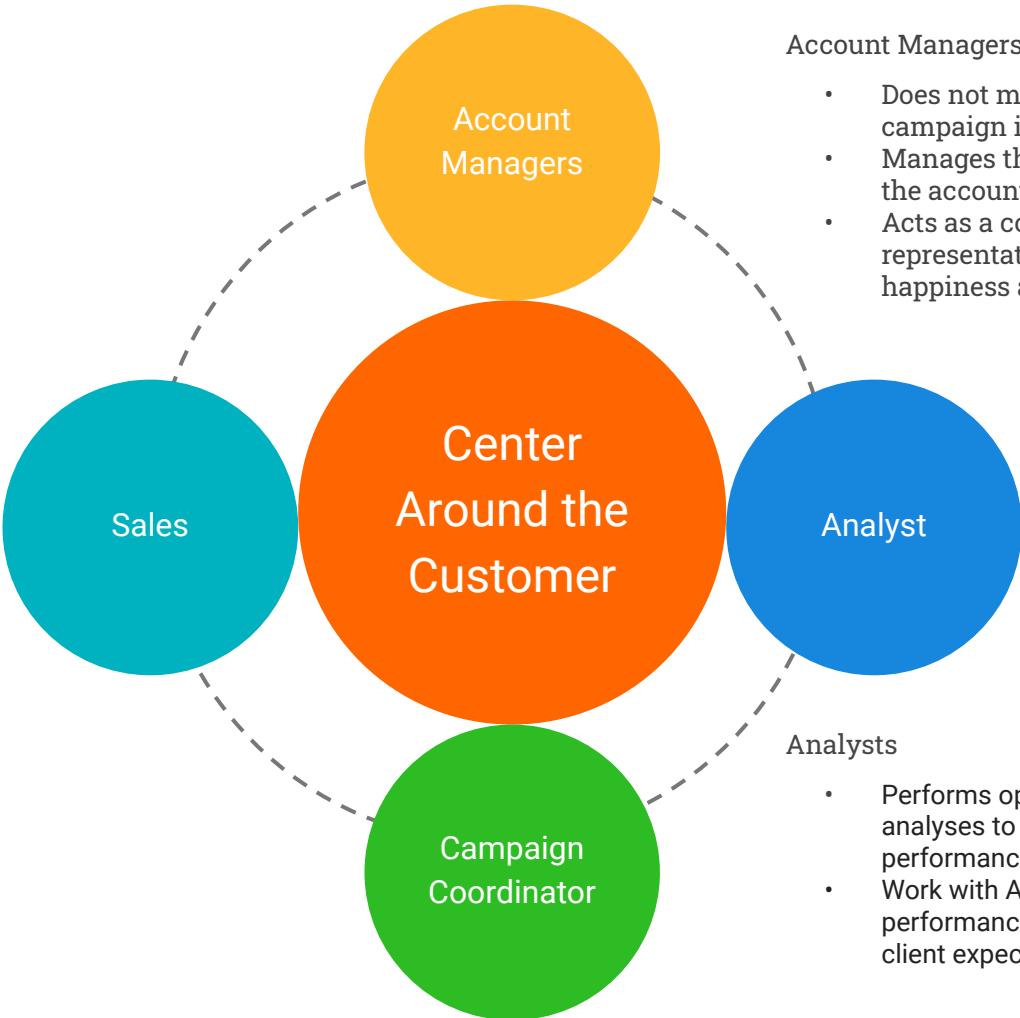
- Bi-Weekly Newsletter - "This Just In"
- Monthly Product Videos
- Platform Blog

New Platform Team Email:
platformteam@sojern.com

New Slack Channel (Be sure to join!):
[#project-carbon-hub](#)

Sales

- Will fill in details later



Account Managers

- Does not manage the daily running of the campaign itself.
- Manages the relationship with the client of the account(s) they are assigned to.
- Acts as a consultant and internal representative for the client to ensure client happiness and account success

Campaign Coordinators

- Will fill in details later

Analysts

- Performs optimizations based on tests and analyses to improve campaign performance
- Work with AMs to provide insights into performance and/or delivery and ensure client expectations are being met