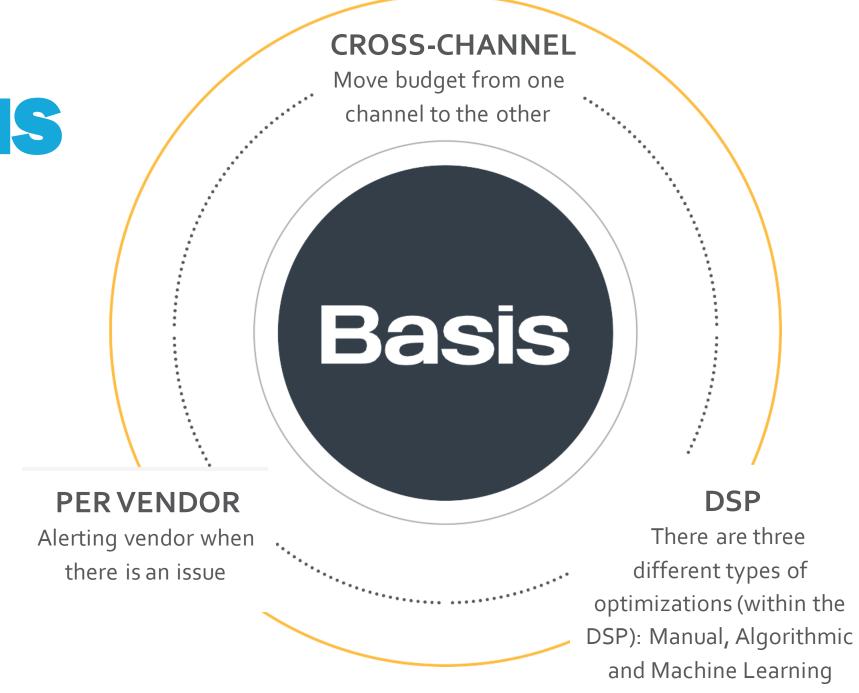


### AGENDA

- Optimizations in Basis
- Pacing & Optimization
- Optimization Strategies
- Common Pitfalls to Avoid



## OPTIMIZATIONS IN BASIS





## MEDIA METRICS

#### BASIC METRIC DESCRIPTIONS



#### **IMPRESSIONS WON:**

The volume of impressions won at auction

**DATA SPEND:** 

spent on data

The dollars of budget

CLICKS:

The volume of

clicks garnered

#### CTR:

The percentage of clicks garnered with respect to impressions delivered

#### **MEDIA SPEND:**

1000 impressions)

TOTAL eCPM:

The total effective CPM

(what you actually pay for

The dollars of budget spent on pure media

#### TOTAL eCPC:

The total effective CPC (the efficiency of budget vs. the volume of clicks garnered)

#### **WIN RATE**

Auctions Won / Auctions Bid

#### **DSP SPEND:**

The total of media and data spend



#### BASIC METRIC DESCRIPTIONS



#### **CLICK CONVERSIONS:**

Click thru Conversions (volume of clicks to conversions)

#### CLICK CONVERSTION RATE:

Conversion Rate Metric
The percentage of
conversions with respect
to clicks garnered

#### **VIEW CONVERSIONS:**

View thru Conversions (volume of views to conversions)

#### CONVERSION REVENUE:

The revenue contributed to conversions

#### TOTAL CONVERSIONS:

The total amount of conversions garnered

#### **NET ROAS:**

Return on Ad Spend
The cost of the advertising in regards to the revenue it drives

#### GROSS/TOTAL eCPA:

The total effective CPA (what you actually pay for a conversion)



#### VIDEO & AUDIO DESCRIPTIONS



#### QUARTILE COMPLETE:

The 25/50/75/100 % of a video ad completed

#### **VIDEO STARTS:**

The number of times a video ad started

#### **VIDEO VIEWS**

The number of times a video has been viewed

#### TOTAL eCPV:

The effective Cost PerView (what you actually pay for a video view)

#### **COMPLETION RATE:**

The percentage of video ads completed in regards to number of video starts

#### **TOTAL eCPCV:**

The effective Cost Per Completed View (what you actually pay for a completed video view)





## CHECK LIST: BEFORE SETTING UP A CAMPAIGN

- Distinct objective & KPIs have been established
- Tactics are aligned with goals
- Geo is appropriate for budget
- Determine optimization strategy
- Campaign flexibility is determined
  - Adjusting bids
  - Shifting budgets
  - Editing domains/tactics/creatives/segments





#### PERFORMANCE SCREEN

ORGANIZE, MANAGE AND PRIORITIZE YOUR MEDIA BUYS

#### WHAT IS THE PERFORMANCE SCREEN?

A dedicated and accessible screen that allows users to quickly monitor performance across all live line items in relation to their budgets and KPIs

#### ALL THE INFORMATION YOU NEED IN ONE SCREEN

- Performance Table: provides a summary of all your campaigns' delivery and performance metrics
- Trend Graph: gives a visual representation of all your campaigns' pacing over the last seven days
- History: allows you to store notes on what modifications have been applied or need to take place

#### **HOW DOES IT HELP?**

#### **MANAGE:**

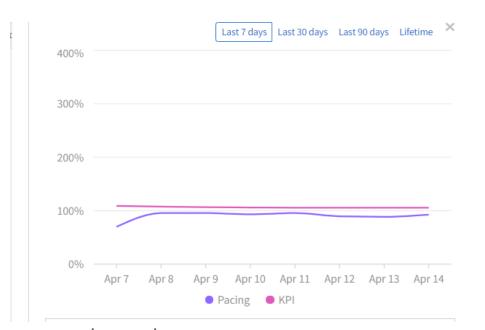
- Monitor all line items across an entire campaign portfolio in one view
- Report campaign health to clients on-demand

#### **PRIORITIZE:**

• Quickly identify areas of concern to help determine line item optimization prioritization

#### **ORGANIZE:**

- Stay organized on the last adjustments made and upcoming checkup dates
- Management can quickly scan to ensure their teams are properly monitoring campaigns on a regular cadence





#### PERFORMANCE VIEW

										data thru: Tuesday	Download CS
BASIS PLATFORM										data tinu. Tuesuay	Downtoad CS
Dashboard											
Basis Dashboard [BETA]		CAMPAIGN *	CAMPAIGN ID *	START DATE	END DATE .	PACING \$	DAILY TARGET *	YESTERDAY SPEND *	DAILY DIFFERENCE +	TO KPI GOAL *	CONTRACTED
Line Items	sortQuest	Visit South W P ID: 19VSW000]	19VSW PKG 2 -	11/18/19	12/31/19	105.4%	\$276.09	\$327.76	-\$51.68	63.1%	\$13,401.6
Performance 🔸	veport, LA	Visit Lake Ch 'ID: 19LCCVB016	19LCCVB001	07/26/19	12/31/19	103.1%	\$29.45	\$40.48	-\$11.03	56.9%	\$4,934.70
nsights Reports	stic travel	Visit Lake Ch 7 ID: 19LCCVB016	19LCCVBAA-001	09/30/19	12/31/19	102.8%	\$26.05	\$37.91	-\$11.87	48.0%	\$5,998.86
	vne Wharf	Visit South W P ID: 19VSW000]	19VSW P PKG 1 -	11/18/19	12/31/19	100.9%	\$175.31	\$180.32	-\$5.02	65.3%	\$7,881.65
SETTINGS User Settings	estin - 019	Visit South W P ID: 19VSW000]	19VS ales Coop	11/22/19	12/31/19	100.0%	\$135.80	\$135.63	\$0.17	59.9%	\$5,475.00
Agency Account	Antonio, TX	Visit Lake Ch PID: 19LCCVB016	19LCCV ry Video	08/30/19	12/31/19	98.8%	\$258.23	\$245.33	\$12.90	221	\$14,748.7
Follows Security Lighting C	mercial	Entergy - Sec ZP ID: 19ENT019	19ENTIMERCIAL	09/27/19	12/31/19	98.5%	\$132.12	\$119.69	\$12.43	32.4%	\$11,499.9
DSP ASSETS Domain Lists	dential	Entergy - SecZP ID: 19ENT019	19ENTIDENTIAL	09/27/19	12/31/19	92.3%	\$257.96	\$166.89	\$91.07	21.4%	\$16,500.0
	ntonio, TX	Visit Lake Ch PID: 19LCCVB016	19LCCV ry Video	08/30/19	12/31/19	82.6%	\$65.41	\$3.17	\$62.24	31.1%	\$5,000.01
og Out	ber 2019	Visit South W19VSW000] 20'-9	19VSWY/NATIVE	12/01/19	12/31/19	67.9%	\$327.94	\$160.31	\$167.63	55.1%	\$7,311.25
	019 Media	NOLA   2020 'P ID: 19RNR034]	19RNR0trations	09/06/19	12/31/19	57.1%	\$153.22	(20)	\$153.22	30.8%	\$5,000.00
		San Diego   20' ID - 19RNR034]	19RNR0;trations	09/06/19	12/31/19	54.0%	\$279.45	( <del></del>	\$279.45	22.0%	\$8,499.99
		Nashville   20:P ID: 19RNR034]	19RNR0;trations	09/06/19	12/31/19	38.4%	\$92.41	-	\$92.41	60.6%	\$2,100.00
	ber 18-24	Visit South W:P ID: 19VSW000]	19VSW ¿Culture	12/18/19	12/31/19	0.0%	\$174.11	100	\$174.11	55.5%	\$2,437.50
	ber 18-31	Visit South W P ID: 19VSW000]	19VSW ، Culture	12/18/19	12/31/19	<u>0</u> 57	\$0.00	22	Arct	22	\$2,437.50
	estin - 019	DISREGARD P ID: 19VSW000]	19VS ales Coop	11/22/19	12/31/19	<u> 22-</u> 1	\$0.00	14-4	4-1	22	\$5,475.00



#### RECOMMENDATIONS

#### SET YOURSELF UP FOR SUCCESS: ALL TIME GROUP BUDGET WITH DAILY TACTIC BUDGETS

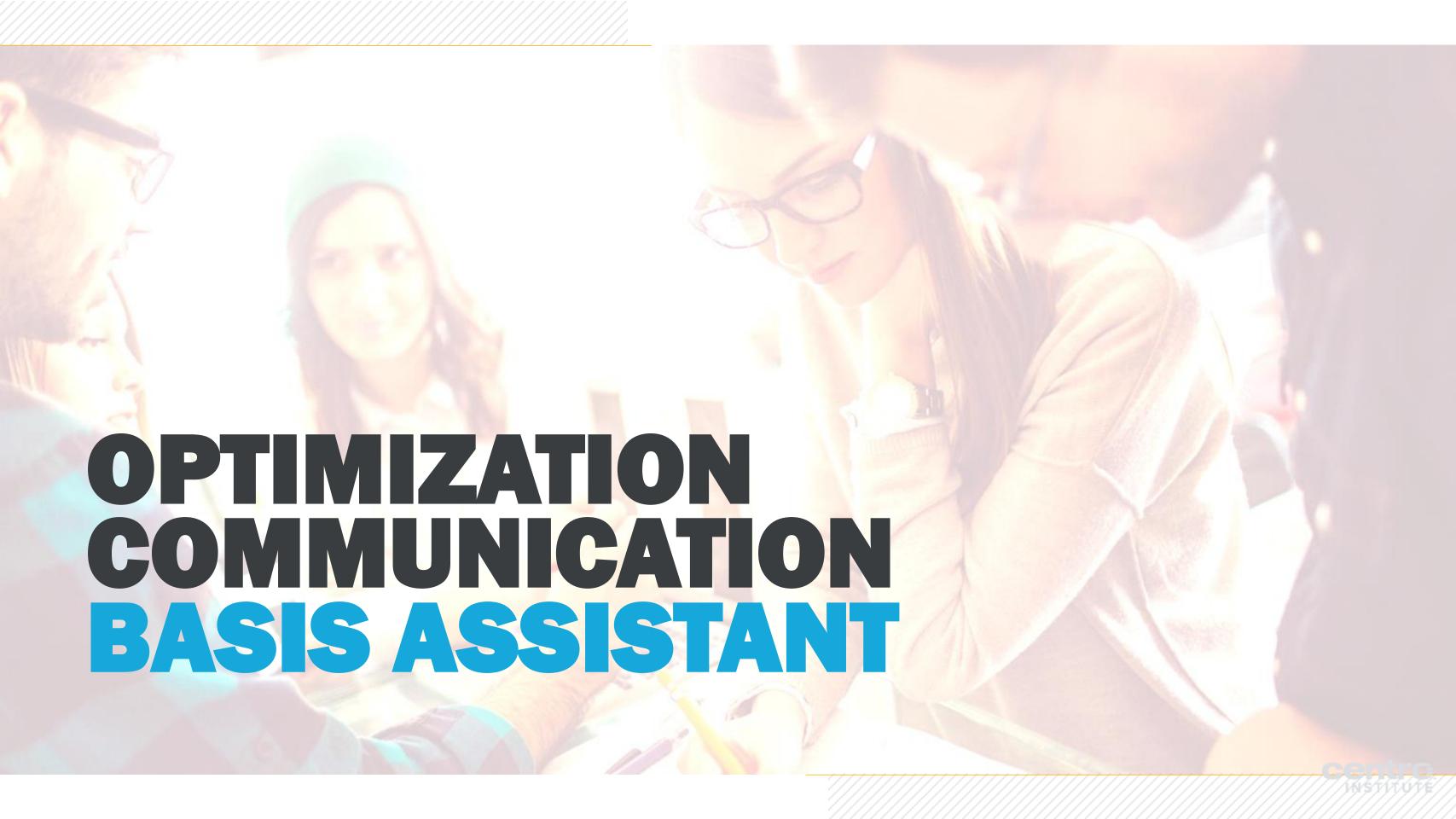
GROUP BUDGET	TACTIC BUDGET	TACTIC ALLOCATION	ADVANTAGES
All Time, Pacing OFF	Daily, Pacing ON or OFF depending on tactic	Ensure sum of tactic daily budgets equals the daily spend needed at group level	Helps identify pacing issues, makes it easy to optimize to top performing tactics



#### EXAMPLE

co	NTROLS Edit					Last saved a few seconds ago.
:		DETAILS	DATES	UNITS	RATES	COSTS
: 5	Sweet Mandy B's COVID   Prospecting; Contextual Targeting; Behavioral Targeting; Retarge ting	formats Display sizes 160x600, 300x250, 300x50, 300x600, 320x50, 728x90 KPI Cost per Action (CPA) goal \$10.00	starts 05/01/20 ends 06/30/20	Dynamic CPM rate type 8,888,889 est imps	\$4.50 est media \$4.50 est gross	\$40,000.00 media \$40,000.00 gross
	Ad Serving	type Ad Serving		CPM rate type 8,888,889 est imps	ad serv	ad serv
e GR	P Sweet Mandy B's COVID   PT, CT, BT, RT	status Offline group ID 271999	starts 05/01/20 ends 06/30/20	off pacing		\$40,000.00 budget
:	TCT Prospecting	status Offline tactic ID 1329958	starts 05/01/20 ends 06/30/20	<b>on</b> pacing	Group needs to spend \$655.80/day to	\$163.95—daily budget
:	TCT Contextual Targeting	status Offline tactic ID 1329959	starts 05/01/20 ends 06/30/20	<b>on</b> pacing	hit \$40K during flight.	\$163.95—daily budget
*	TCT Behavioral Targeting (Audience Targeting)	status Offline tactic ID 1329962	starts 05/01/20 ends 06/30/20	<b>on</b> pacing	\$655.80/4 = \$163.95	\$163.95—daily budget
*	тст Retargeting	status Offline tactic ID 1330365	starts 05/01/20 ends 06/30/20	<b>on</b> pacing		\$163.95—daily budget





#### **BASIS ASSISTANT**

WATCH LIVE DEMO here

#### SIMPLIFY LOGGING PROCESS AND FACILITATE KNOWLEDGE SHARE WITH BASIS ASSISTANT

#### WHAT IS BASIS ASSISTANT

A dedicated and accessible screen that allows users to quickly monitor performance across all live line items in relation to their budgets and KPIs

#### **HOW IT WORKS**

- **1** Download the <u>browser extension</u>
- Connect your Basis Account
- Authorize partner platforms for note
- **3** tracking

#### **HOW DOES IT HELP?**

#### **WORKFLOW AUTOMATION:**

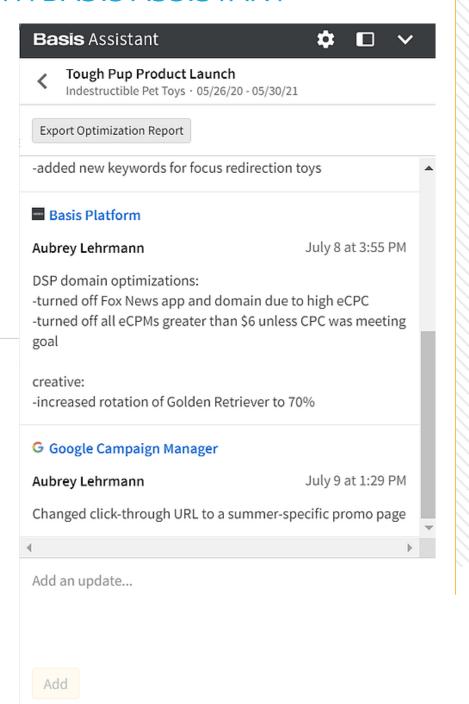
• Continue working on current tasks without switching programs and reduce the number of third-party tools needed.

#### **COMMUNICATION AND DOCUMENTATION:**

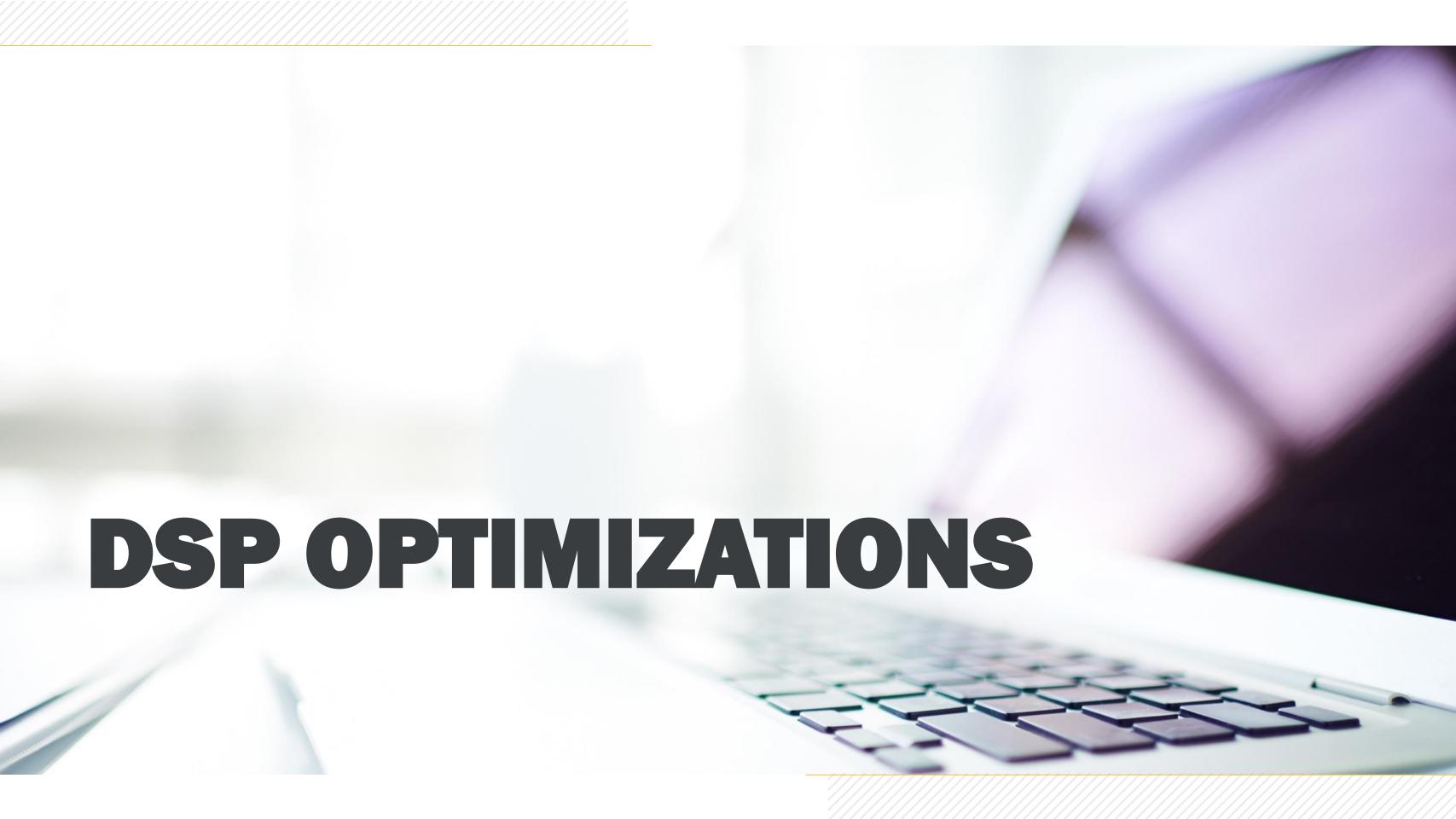
- Create a standardized process to capture information
- Download optimization logs for ease of sharing

#### **CAMPAIGN PERFORMANCE:**

- Helps users remember what, when, and why they made a change
- Manage and improve performance, share information with teammates, and provide better campaign end reporting







## TYPES OF OPTIMIZATION IN BASIS DSP









MANUAL ALGORITHMIC

MACHINE LEARNING **BID MULTIPLIER** 



# SPOTLIGHT MANUAL OPTIMIZATIONS

## ORDER OF OPERATIONS 3 STEPS



#### **Accrue Data**

Ensure sample size is large enough to make statistically sound decisions

2

#### In Line

Begin to make changes to push spend toward performance 3

#### **Broad Brush/**

#### **Advanced**

Start pulling optimization levers



### OPTIMIZATION STRATEGIES USE DATA TO MAKE SMARTER DECISIONS

- 1 Recall Your KPI (CPC, CPA, CTR, etc.)
- Set Evaluation Sample Size
  (\$1,000/month- 1,000 impressions,
  \$10,000/month- 10,000
  impressions)
- Set Date Range (to match flight date of current campaign)
- 4 Sort By Impressions Won (highest to lowest)

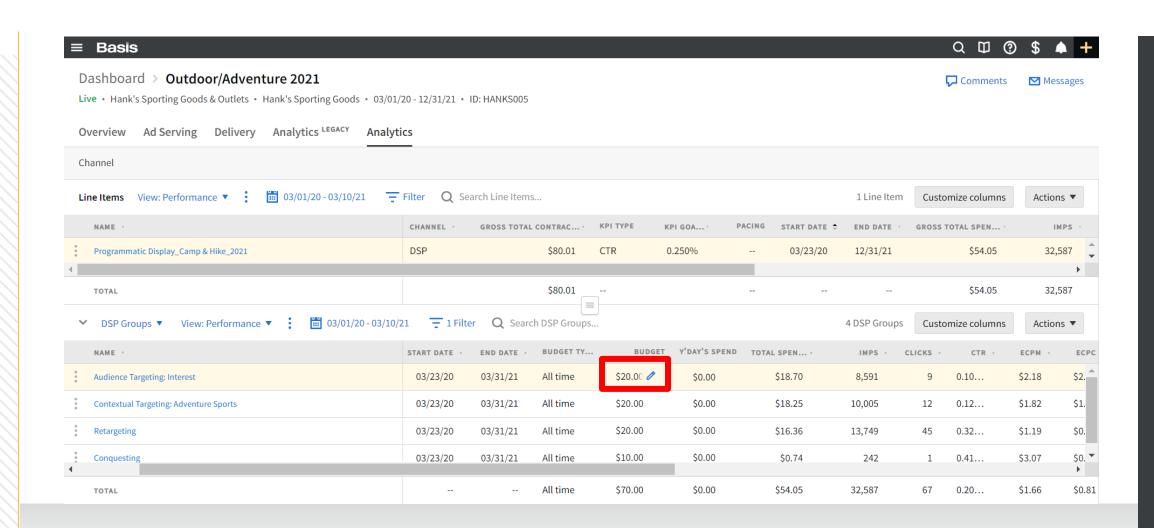
#### **WEAKNESS OR OPPORTUNITY**

CAN BE IDENTIFIED BASED OFF OF IMPRESSIONS WON PAIRED WITH YOUR PERFORMANCE GOALS



#### MANUAL OPTIMIZATION

#### **TACTIC EDITS**



#### **SPEND TO BUDGET**

Compare tactic DSP Spend to daily budgets to identify pacing issues

#### **ADJUST BIDS + BUDGETS**

If tactics don't hit budgets, try increasing bid or move spend to other tactics

#### **IDENTIFY OPPORTUNITIES**

Consider your KPIs, and give top performing tactics more budget

#### **BULK EDIT**

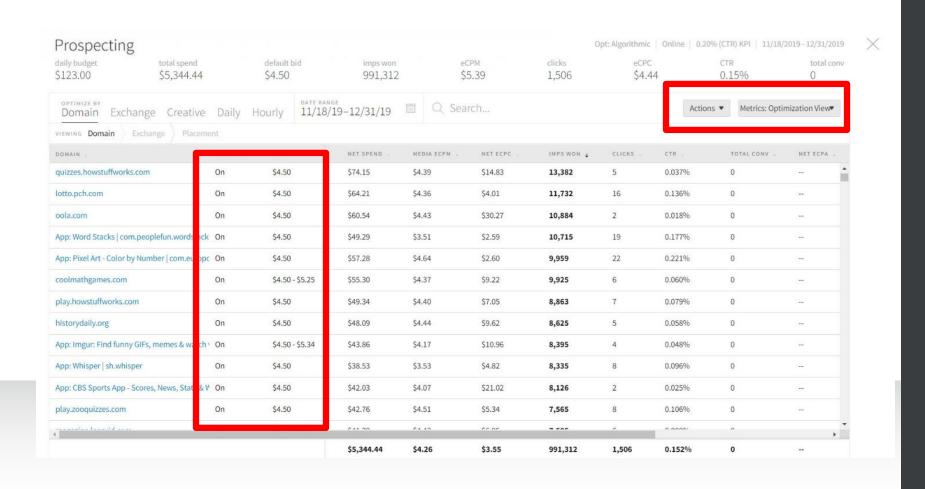
Making in-line changes to many tactics at once





#### MANUAL OPTIMIZATION

#### INVENTORY/CREATIVE



#### **IN-LINE**

make changes to campaigns IN-LINE Without Exporting DATA

#### **ADJUST BIDS & ULINK CREATIVE**

Increase or decrease BIDS at domainlevel, or unlink creatives WITHOUT OPENING CAMPAIGN EDITOR

#### **REAL-TIME**

Fresh data every 15 seconds. You can't find that anywhere else

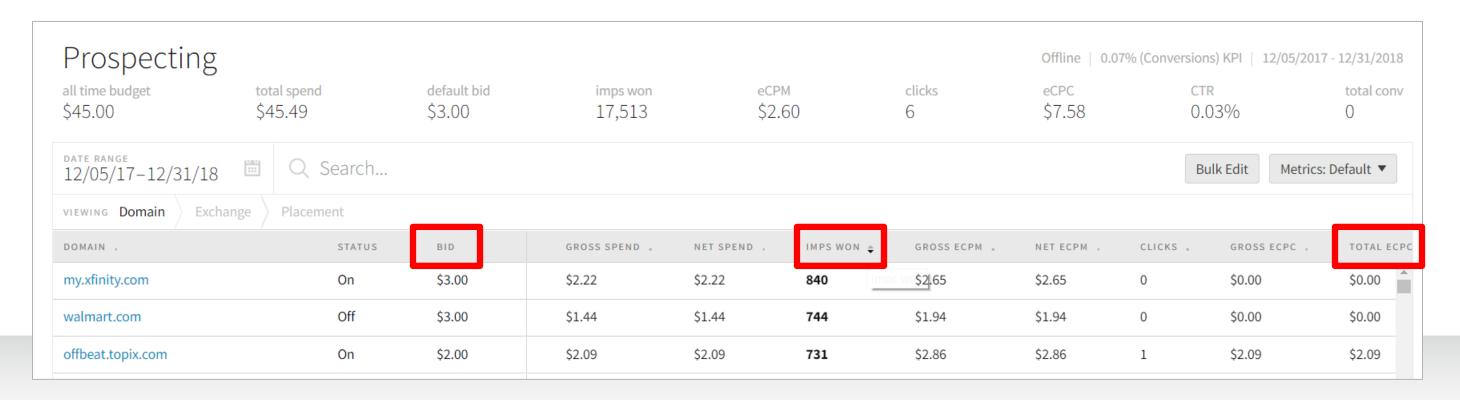
#### **BULK EDIT**

Making in-line changes to many domains at once



#### MINOR OPTIMIZATION STRATEGIES

#### **TACTIC AND DOMAIN**



#### **TACTIC**

- Sort by impressions won
- Can you spend more on the top performing tactics?

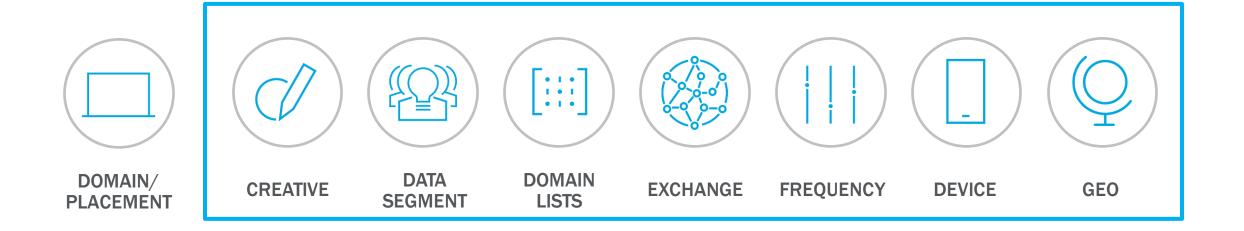
#### **DOMAIN**

- Sort by impressions won
- Are the top spending sites meeting or exceeding your KPI?
  - Yes? Increase bid
  - No? Turn off



#### MAJOR OPTIMIZATION STRATEGIES REPORTING:

**LEVERS YOU CAN PULL** 



Cross device, Conversion & PMP Reports Available when applied to campaign targeting

#### **CENTRO CERTIFIED TIP:**

Minor and major optimizations should be made in tandem!





#### Fall/Winter Sports - Reports

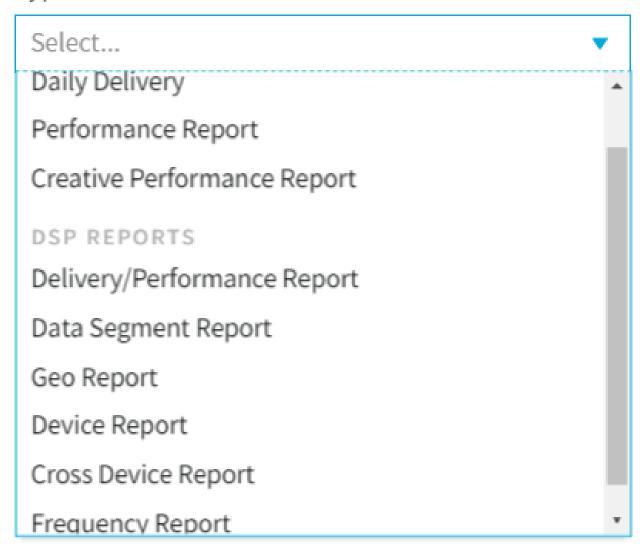
#### Туре

66

67

168

169



Different types of reports to help you determine the type of data you want to see and optimize towards

Let's review what types of reports help with your broad brush/advanced optimizations

#### TRANSLATING REPORTS

WHAT DO I WANT TO KNOW?	DSP REPORTS TYPE	DIMENSIONS	INTERVAL
Best/Worst Sites/Apps for a Domain List?	Delivery/Performance Report	Domains	Lifetime
Which <b>PMP</b> is Performing Best/Worst?	Delivery/Performance Report	Deals	Lifetime
Which <b>BT</b> segment is doing Best/Worst?	Data Segment Report	Tactic > 3 <sup>rd</sup> Party Audience Segment	Lifetime
Which CT segment is doing Best/Worst?	Data Segment Report	Tactic > Contextual Entry Segment	Lifetime
Should we Heavy up on <b>Desktop, Tablet</b> or <b>Mobile</b> ?	Device Report	Tactic > Device Type	Lifetime
Should we <b>Daypart</b> for better performance?	Delivery/Performance Report	Tactic	Hourly or Daily
Which <b>Ad Sizes</b> are Performing Best/Worst?	Delivery/Performance Report	Ads > Size	Lifetime
How is <b>Page Position</b> Affecting my Performance?	Delivery/Performance Report	Domains > Exchanges > Placements	Lifetime
How is <b>Video Player Size</b> Affecting my Performance?	Delivery/Performance Report	Domains > Exchanges > Placements	Lifetime



#### DON'T STRIKE OUT



STRIKE 1:

OPTIMIZING TOO QUICKLY



STRIKE 2:

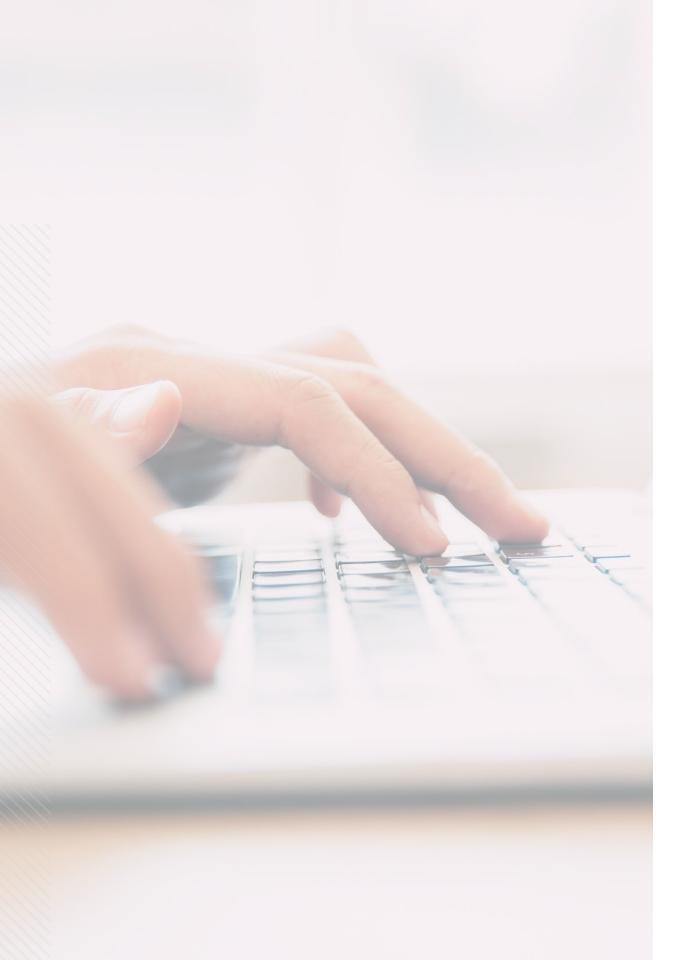
OPTIMIZING TOO FREQUENTLY OR INFREQUENTLY



STRIKE 3:

NOT KEEPING TRACK OF CHANGES

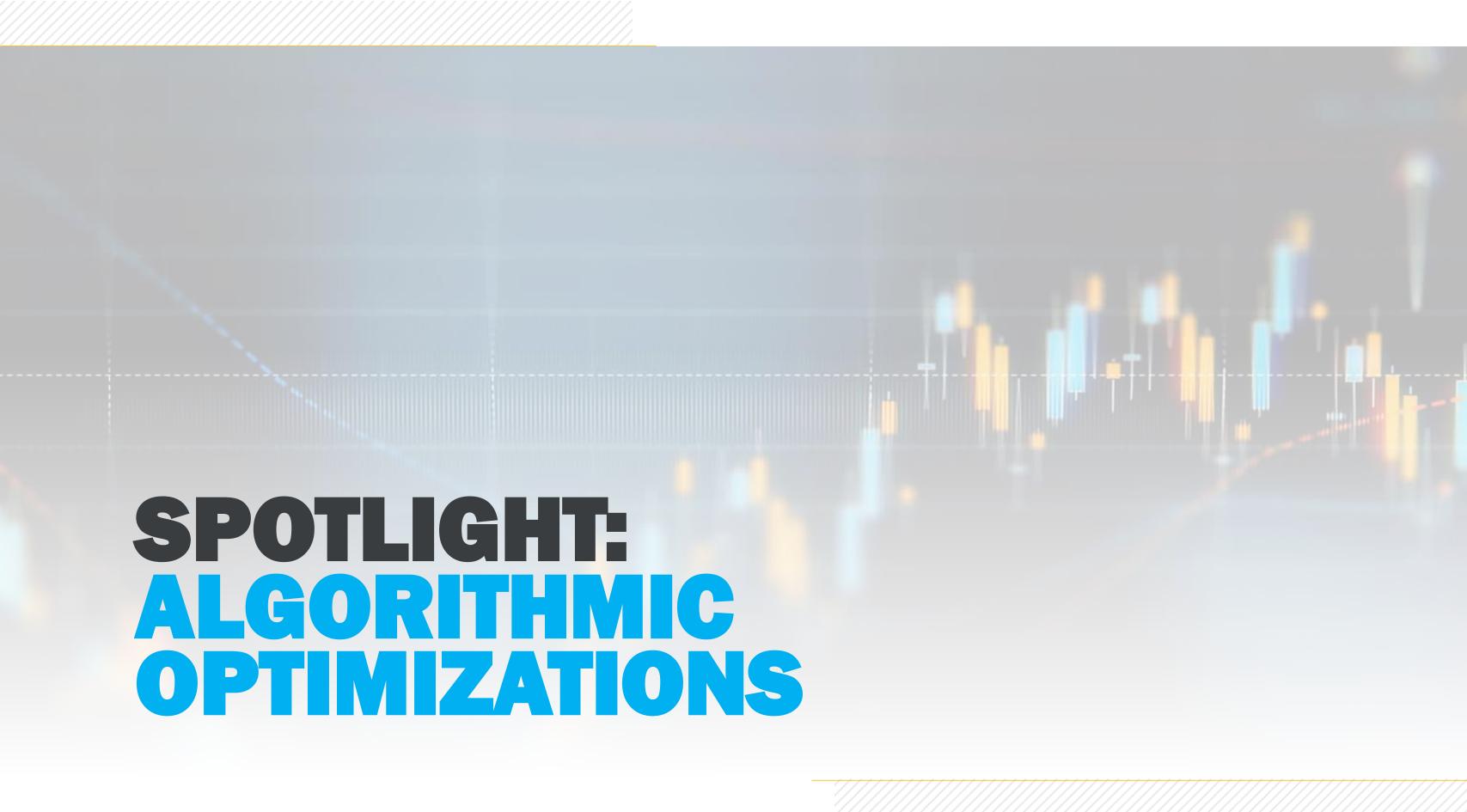


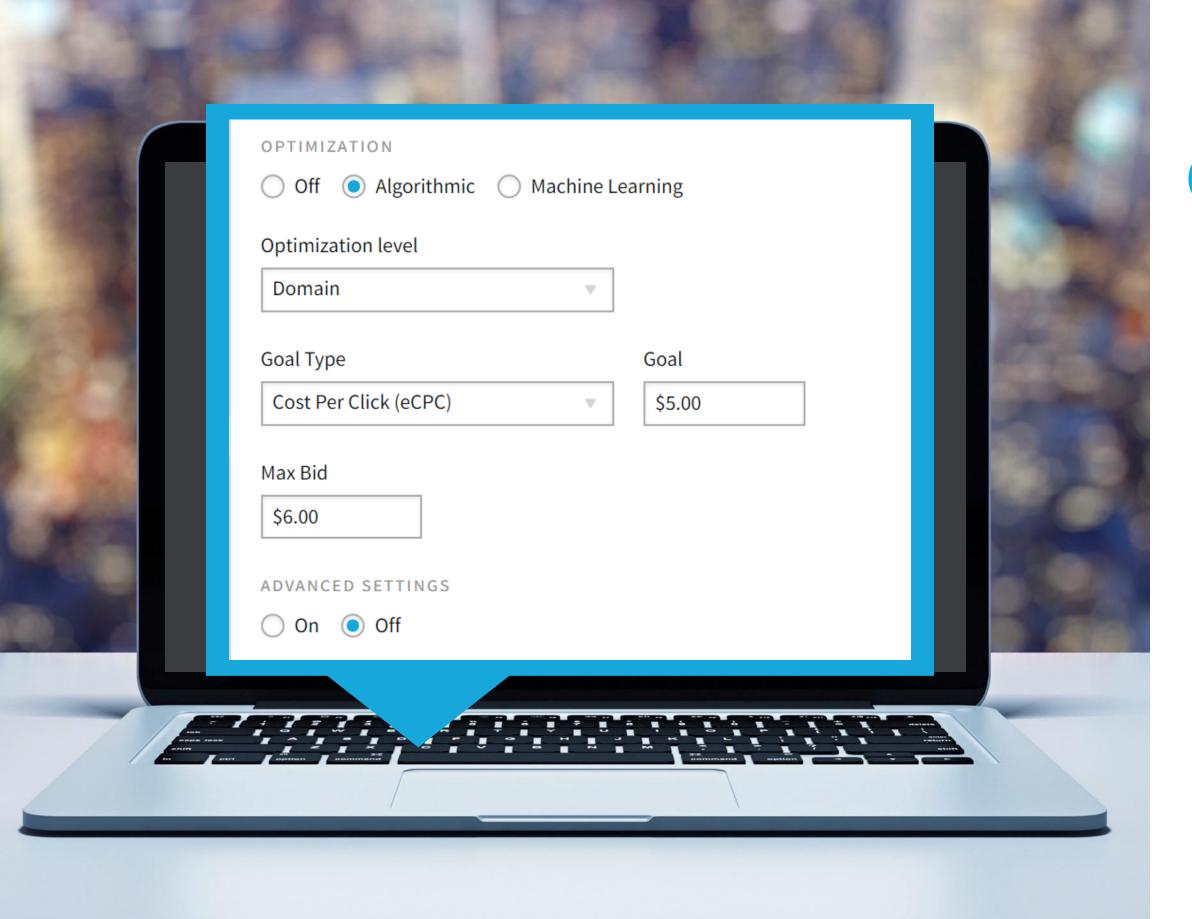


## WHEN TO USE MANUAL OPTIMIZATIONS

You want full control of your optimizations and know what levers to pull to make your campaign successful







### **ALGORITHMIC OPTIMIZATION**

A simple, time saving option for new and experienced users who want to optimize their campaigns.

#### WHAT IS IT?

Centro's optimization engine maximizes the spend of a campaign's budget by adjusting the CPM bid given to a placement based on user-set campaign goals.

#### **HOW DOES IT WORK?**

The optimization feature changes the CPM bid or status of individual placements in small amounts so that a campaign can reach a goal set by the user.



#### **ALGORITHMIC OPTIMIZATION:**

#### STREAMLINE CAMPAIGN ANALYSIS

Optimization level	
Domain	
Goal Type	Goal
Cost Per Acquisition (eCPA)	\$25.00
Max Bid	
\$20.00	
ADVANCED SETTINGS	
On Off	
Min Bid	
\$0.75	ts/domains on when they reach the Min Bid
Learn Budget Bid Step	
\$0.16 \$0.10	

#### **PERFORMANCE**

Generate better outcomes with automated bid adjustments based on best performing Inventory

#### **TRANSPARENCY**

All changes are captured real-time in the campaign grid

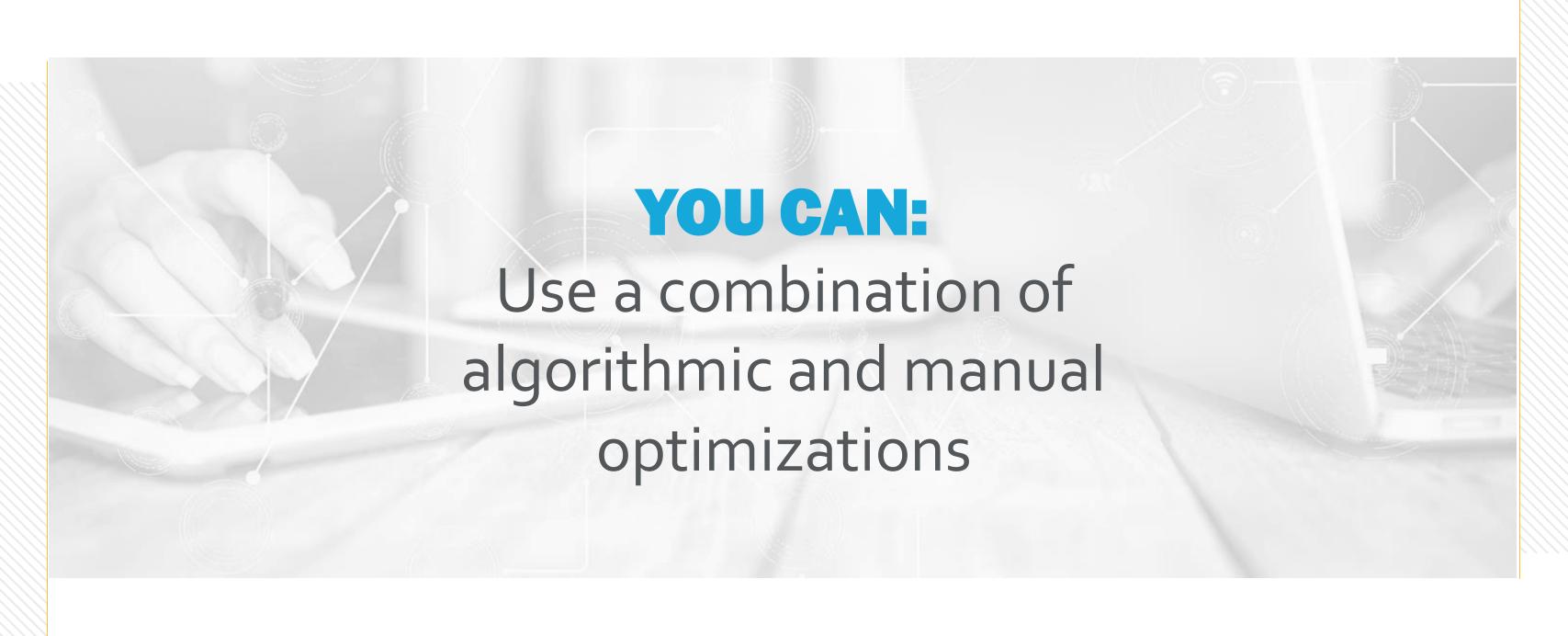
#### **EFFICIENCY**

Minimize individual campaign tactics to focus on business objectives

#### **CONTROL**

Interact with the algorithm to leverage your expertise and influence behavior







## SPOTLIGHT: MACHINE LEARNING **OPTIMIZATIONS**

#### WHAT IS IT?

#### **USES BRAND DATA FROM**

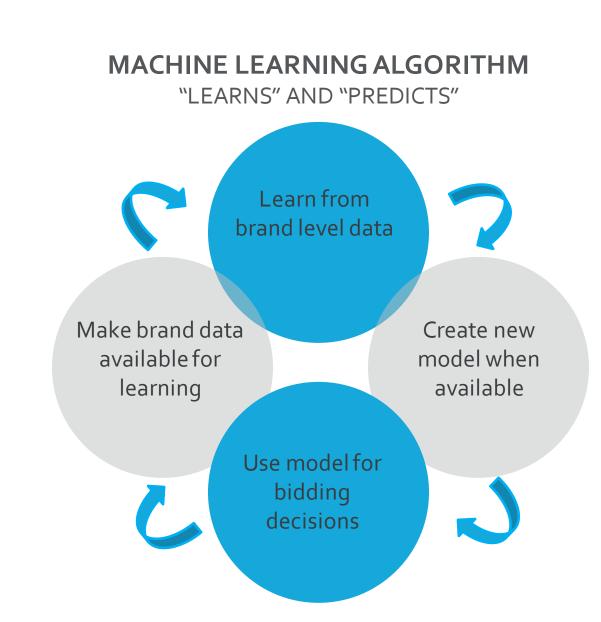
#### 30+ PARAMETERS

to predict an event for each ad impression in real time.

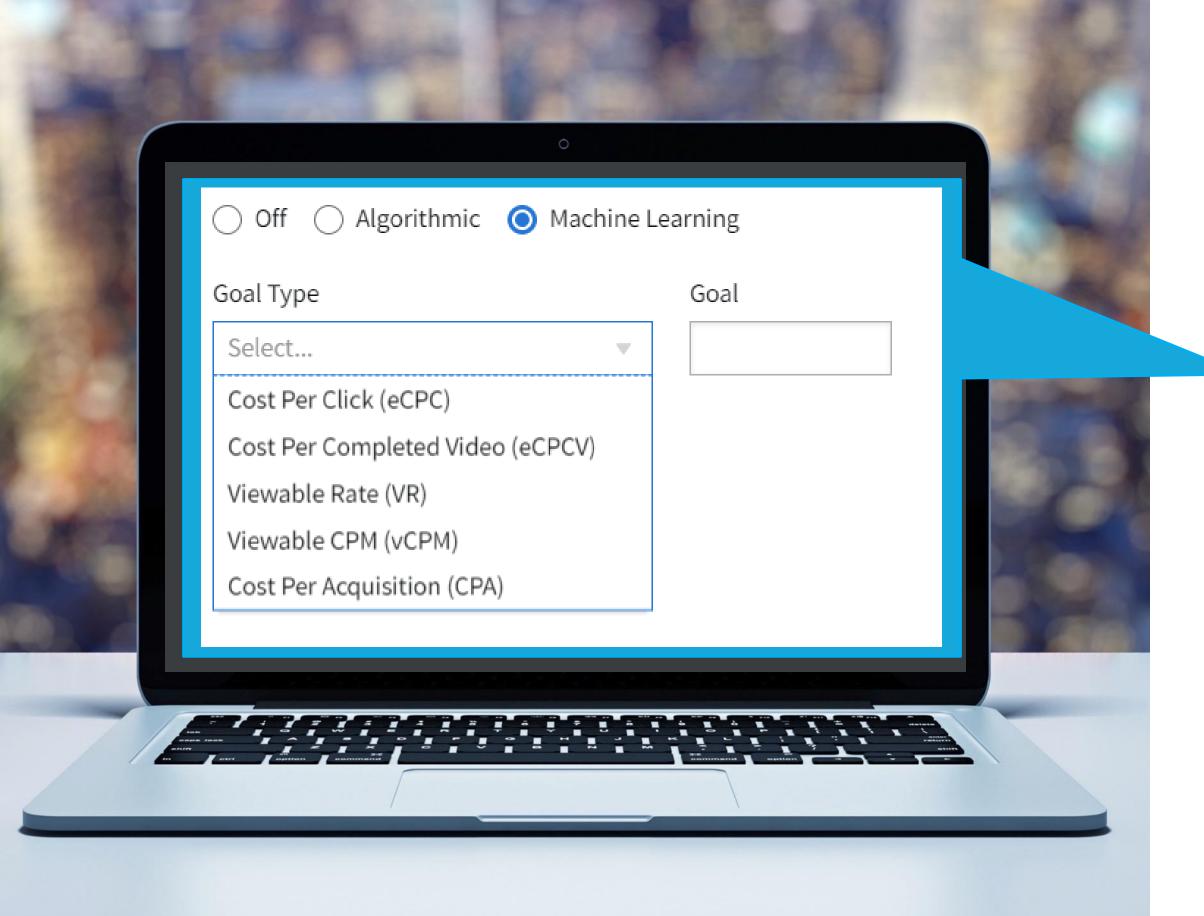
Examples of Parameters include:

- Domain
- Placement
- Time of day
- Device

Bids higher for higher likelihood Bids low/doesn't bid for lower likelihood







# MACHINE LEARNING OPTIMIZATION

Available for eCPC, CTR, eCPCV, VR, vCPM, eCPA

# **BENEFITS**

- ✓ Leverage learnings from previous campaigns and transfer them to new ones
- ✓ Automatically optimizes towards chosen goal

# **HOW IT WORKS**



# **SET-UP**

Goal Type	Goal
Cost Per Click (eCPC)	\$5.00
Max Bid \$10.00	

### **GOAL**

Campaign's goal value/KPI to meet

### **MAXIMUM BID**

What the user is willing to pay for an impression

2

## **LEARNING**

- Stage where the technology captures information to create the model
- Campaign uses the default CPM bid
- Uses over 30 parameters but needs a minimum threshold of actions before kicking in
- MLO will look back into the past 30 days worth of data. So if you enable MLO partway through a campaign, it will incorporate the past 30 days of data into its learning

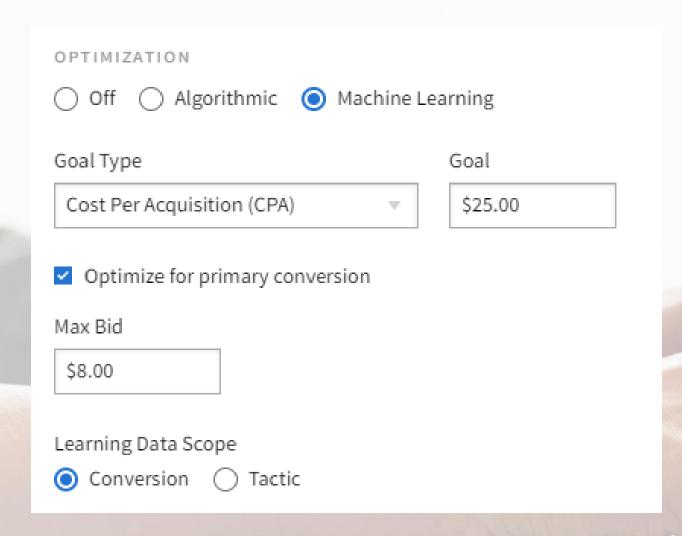
3

## **OPTIMIZE**

- Stage where model is available and is used to decide if the DSP should bid or not
- A green icon will come on saying it's being optimized



# MLO FOR CPA GOALS



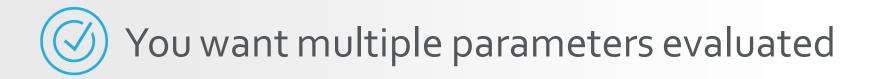
### **ADDED CONTROLS**

- Optimize for your primary conversion(s), creating unique conversion models to finetune performance
- Conversion Data Scope
  - Create brand-wide model for the specific conversions being tracked in this tactic
- Tactic Data Scope
  - Create a unique model that only leverages data from this specific tactic





# MLO USE CASES



You are going after the user, not necessarily the inventory

You have a longer flight date and a larger budget allowing the machine do the learning for you





# CONSIDERATIONS

- Optimizes at the brand level for all KPIs
  - \*CPA includes option to optimize at tactic
- Cannot change inventory bid prices but can do all other manual optimizations
- Cannot use MLO and Algorithmic
   Optimizations at the same time



# COMPARISON

### **ALGORITHMIC**

- ✓ Bid adjustments made within each placement
- ✓ Best performing inventory is rewarded
- ✓ Inventory is analyzed every 12 hours
- ✓ All optimizations are captures in real time

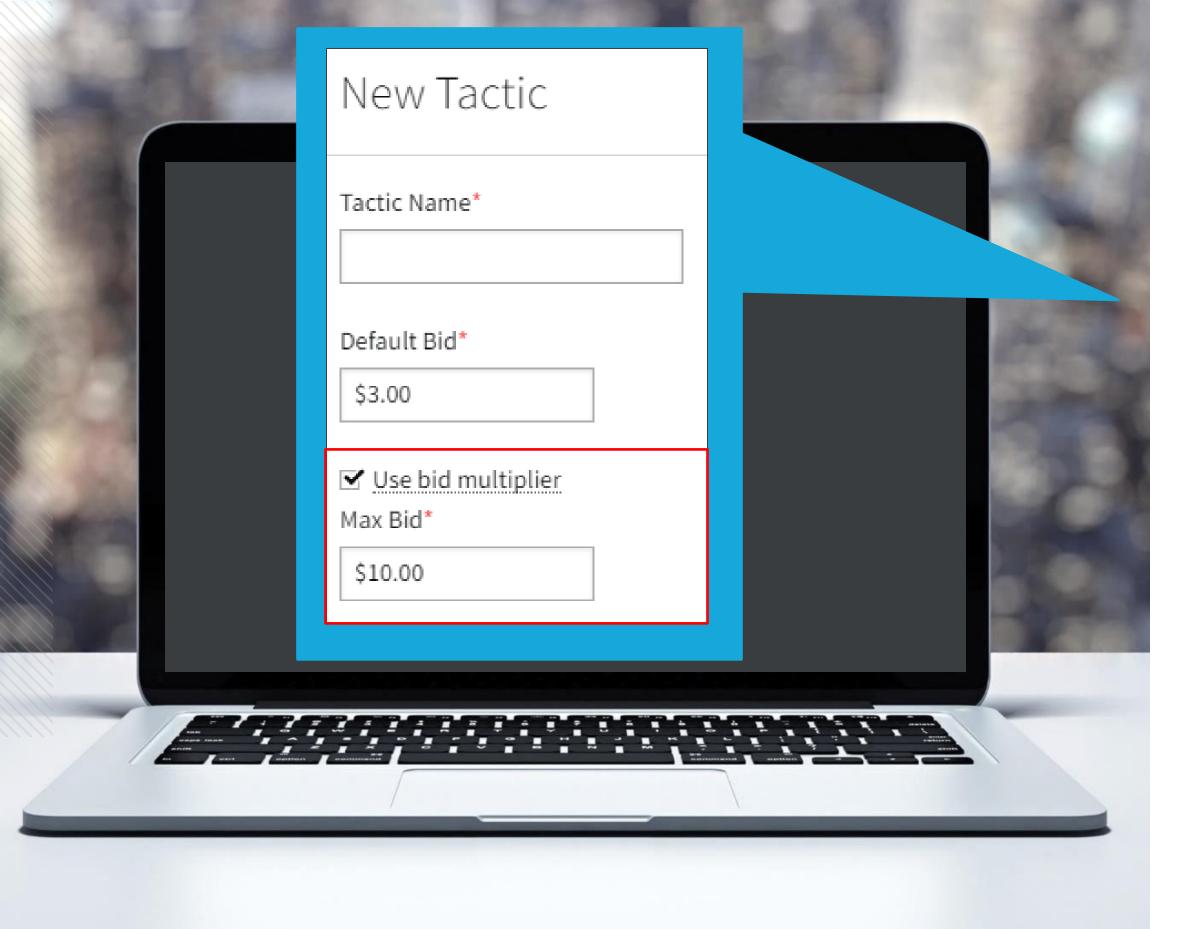
### **MACHINE LEARNING**

- ✓ Meet your goals through customized bids
- ✓ Over 30 different targeting parameters
- ✓ Analyzed every 6 hours to create a unique model for each brand

BOTH SHOULD BE USED ALONGSIDE MANUAL OPTIMIZATIONS



# SPOTLIGHT: BID MULTIPLIERS



# BID MULTIPLIER

A DSP optimization for setting bid prices for different targeting parameters within the same tactic

# **BENEFITS**

- + Provides new targeting options
- + Reduce the number of tactics that need to be configured
- + More optimization options

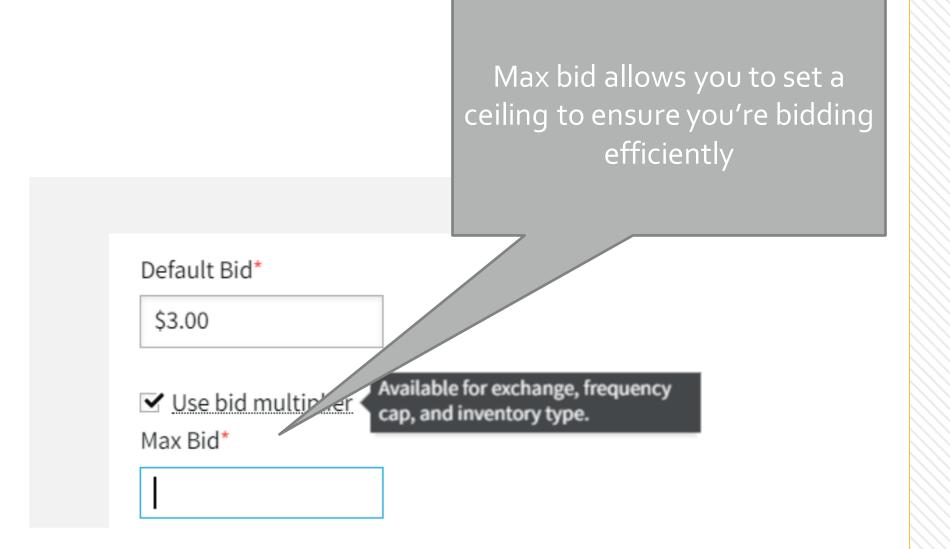


# **BID MULTIPLIERS**

Allows buyers to make bid adjustments to various targeting parameters of their campaigns

Multipliers are a manual way to optimize campaigns that allows users to bid higher when a campaign is performing well

BENEFIT: You don't have to create new campaigns to handle these changes





# CAN BE APPLIED TO:

### **FREQUENCY**

Give impressions a bid factor based on the frequency they are shown an ad

### **EXCHANGE**

Give impressions a bid factor based on the exchange

### **INVENTORY TYPE**

Give impressions a bid factor based on the inventory type

### **CREATIVE**

Give impressions a bid factor based on the creative being served



# **BID MULTIPLIERS**

# + CENTRO

# What are the technical specifications?

- Bid multipliers can be applied to all DSP tactics
- Bid multipliers can use values from 0.05 0.99 to decrease the bid of a targeting parameter
- Bid multipliers can use values from 1.01 20 to increase the bid of a targeting parameter







# CADENCE SUGGESTIONS

### CADENCE SUGGESTIONS

TASK	Daily	Weekly	Bi-Weekly	Monthly	Quarterly (or as needed if performance is struggling)
Budget Pacing & Adjust Bids	Χ				
Overall Campaign Delivery	Χ				
Line Item Performance Analysis	Χ				
Audience Data Performance Analysis			Χ		
Geo-Targeting Performance Analysis				Χ	
Creative Analysis		X			
Placement/Exchange/Domain Analysis			Χ		
Domain Level (Whitelist/Blacklist)				Χ	
Device Type				Χ	
Browser Type					Χ
Day-Parting					Χ
Frequency Capping				X	
A/B Tests & Analyze Results (included in Creative Analysis)		Χ			



# QUESTIONS?