

The logo for choozle, featuring the word "choozle" in a white, lowercase, sans-serif font on a red background.

choozle

Easy Digital Advertising®

A background pattern of orange circuit board lines and dots on a white background.

PLATFORM ENABLEMENT GUIDE

Three Step Guide for Self-Serve Programmatic Platform at Agencies

Executive Summary

The successful adoption of the Choozle self-service advertising platform will enable your business to scale its digital media operations while capitalizing on the key trends currently driving digital media automation:



An effective transition from a managed service provider relationship (vendor) into a self-service platform operation model (in-house) requires thoughtful planning and application of internal resources. In turn, this investment generates tangible business returns and strategically positions your agency/business as a leader in digital media ecosystem.

Leveraging insights and best practices from over 300 Choozle partners, the Choozle Platform Enablement Guide provides the practical foundation and clear steps for successful platform implementation:

- Alignment of platform operators and team leadership
- Implementation of processes and standards for efficient platform operation
- Installation of sustainable business and revenue models





Index

03

Align with Leadership & Identify Operators

Engagement of leadership is crucial to establish a permanent offering, identify business opportunities, and gain resources. With leadership onboard, identifying operators should focus on folks with digital enthusiasm, experience with tools such as Facebook, or those interested in career advancement by taking on these skills.

04

Establish Product/Service Offerings

Outlining standards that dictate what you're willing to take on at certain budget levels and time allocation of your team, will bring clarity to your Sales/Ops teams and better facilitate profitability.

06

Make Money

Evaluate the different monetization models commonly used; media percentage, billable hours, and fixed CPMs.

1

Align with Leadership & Identify Operators



Key Considerations

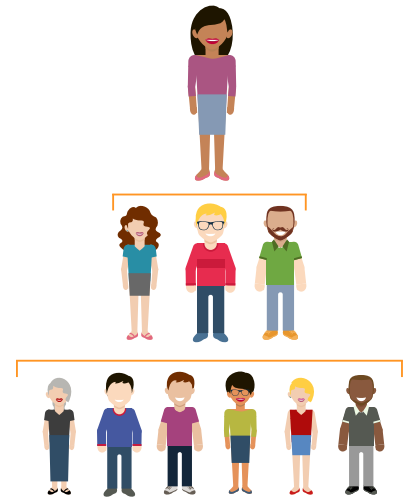
Who will be involved with strategic decisions?

Who will be in charge of day-to-day operations?

Are you able to train multiple operators and create operational guidelines for implementation?

Leadership

With the business potential of taking programmatic operations in-house, it's important to include leadership in planning discussions and status check-ins. The operator down in the weeds may not be the same person identifying and pitching new business opportunities, so leadership can help fan the flames, so to speak. In addition, the retention rate for young marketers is low compared to that of leadership. Having that level of the business investment will help real-time bidding (RTB) take root at the organization.



Teams

The Media and Digital teams are good places to start looking for platform operators. Operator(s) of the platform don't need years of experience in programmatic. Find employees or new hires with any type of digital or better yet, system experience in tools such as Facebook or Google AdWords, which can easily translate to RTB operations. Remember, no one went to school for this, so look for aptitude and curiosity when the resume isn't there. For young marketers, this means a new area of expertise and from that, a point of job differentiation and upward opportunity.

Having folks understand the benefit of taking on this new responsibility helps change the perception of it just being another thing on their plate.

Have the chosen operator(s) practice documentation and task redundancy with team members when possible. Turnover happens; it's good to be prepared so you don't lose as much ground if/when it occurs.



Unsure of What Roles You Need to Run a Self-serve Programmatic Platform?

View our infographic about key roles and the skills/responsibilities needed to successfully manage a self-serve digital media buying strategy.

[VIEW NOW](#)

2

Establish Product/Service Offerings



Key Considerations

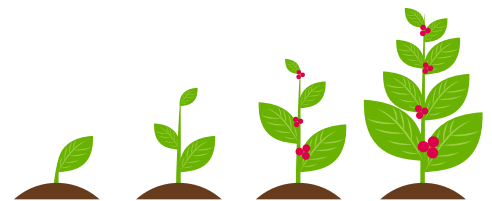
Defining products/ services around your resources

Developing campaign planning and strategy practices

Setting optimization practices and reporting standards

Establishing the types of campaigns (e.g. tactics, budget levels) you will run and the resources assigned respectively will help set realistic expectations internally and externally, as well as focus operators to profitable practices.

It's common for operators to spend too much time and make campaigns too complex given the budget level. To help combat this outcome, you can productize your RTB offering; even create different "tiers" for different budget ranges. Our [Campaign Planner Guide](#) outlines the type and how many tactics you should be employing based on budget level and objective. This guide can be used to establish standard offerings for the business or for each unique opportunity.



Planning & Resources FAQ

How Much Should We Spend and for How Long?

» It depends of course, but generally speaking we recommend allocating \$5,000/month+ for a 3-month duration. Also plan to budget about \$2,000/ad group (order line item).

» Ideally sell 3 month+ campaigns (no less than 1 month). Two-week campaigns are fun for no one!

How Many Campaigns to an Operator?

» Choozle campaign operators run about \$150K/month for approximately 15 clients each. They also generate about 10 proposals per month on the pre-sale.

» For established campaigns, operators spend about 1 hour per week analyzing and reporting results back to each client.

How Much Time Should We Expect to Spend in the Platform?

» Determining how much time an operator spends will be based on several factors, but mainly we base this on budget and number of clients. The average client in Choozle spends approximately 30 minutes to 1 hour per week in the platform.

What Do I Need Minimally to Launch a Campaign?

» ABC: Audience, Budget, Creative

How Often Should I Optimize Campaigns?

» We advise waiting 4–7 days after a campaign launches to make any changes. Thereafter, most clients will check back in 1–2 times a week to review progress.

Optimization & Reporting

Establishing Goals:

Prior to the campaign launch, the operations team should have a clear idea of what will make the campaign successful. This is usually tiered based on importance (e.g. #1: 25% increase in online sales, #2: Drive traffic). Before launch, determine if those goals are realistic based on available 1st and 3rd party data.

Many campaigns “fail” before even launching by not having realistic performance expectations.



EXAMPLE

For a CPA goal, what is the value of the end conversion? You can reasonably back into a goal by asking this type of question and then, from the first campaign, establish your own benchmarks for future flights.

Optimization Made Simple:

There are many levels of optimization but the simplest, most accessible options usually make the biggest impact in comparison to the more advanced tools. For example, **reallocating budget** to higher performing ad groups is a no-brainer that most people overlook. **Diversifying** your campaign from the start across multiple tactics will make for more agile optimizing instead of starting over with new targeting should your “sure bet” tactic fall through. Getting into optimizing for “time of day”, for example, is usually not going to move the needle substantially and may not be a good use of the operators’ time to dig that far in.



Reporting:

With transparency into campaign details becoming increasingly more important, you’ll likely be presented with many reports from your RTB system. Consider how the client will digest this information. Sometimes providing too much data will pull focus from what really matters and present a network of rabbit holes. Unless your client is sophisticated in the space or otherwise loves a good spreadsheet, keep it simple.



Know Which Tactics You Should be Employing for Your Campaign?

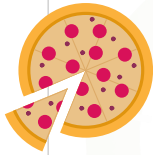
Check out our planning guide to see what tactics you should be implementing, based on your budget level and overall objective.

[LEARN MORE](#)

3

Make Money

No one is running a charity here. Well, maybe you are. In which case, we have some clients we can refer your way. For those of you looking to monetize your efforts, let's walk through the common models we see our clients using.



Percentage of Media:

Taking a cut of the media budget as your fee for managing the campaign. Typically we see around 20%, but this is of course flexible based upon the size of the budgets, the level of campaign management you'll be providing, etc.

PROS



- Flexible with different campaign types and budgets
- Allows for revenue upside with larger budgets
- Transparent model if you choose to share your percentage

CONS



- Not necessarily a con, but you'll likely input the net budget into your system and gross up the invoice so your ops team needs to be sure to base campaign expectations off the net budget, not the gross budget.
- Spend is projected, not actual so there's risk taken on by the agency until spend is realized.



Fixed CPM:

Sell at a fixed CPM (Ceiling) that is higher than what you will actually achieve so you can collect the difference as your margin. For example, sell a \$10 CPM assuming you can get between a \$3-5 CPM.

PROS



- Clients new to the programmatic space are more comfortable with fixed CPMs.
- Fixed CPMs can provide high margins in relation to actual CPMs realized and thus, higher profits for you.

CONS



- Your ops team will need to estimate the variable CPM potential relative to the sold CPM on each campaign.
We've seen issues when a sales team sells an unrealistic fixed CPM and the ops team, not a part of that sell, has to dig out of that expectation hole.
- More clients are being educated on the benefits of a variable CPM so they could view your model as too expensive and not transparent.
- This model builds in an artificial price barrier, which may prohibit testing new strategies (data, targeting tactic, inventory, etc.) in the campaign.



Hourly Rate:

Sell a scope of work with a set amount of hours at a set hourly rate.



PROS

- End clients like it because it's transparent and usually the cheapest option for them.



CONS

- It's very easy for your team to spend too much time on a campaign and end up in the red.
- Can significantly limit the amount of revenue you'll see from bigger budgets.

One method doesn't stand out? Test out these options with different advertisers and campaigns until you're confident you've found the best fit for your business.

Selling the Dream:

You have your operations teed up and now you need to consider how to translate this exciting new channel into your sales efforts...

If the end client is brand new to programmatic, you should spend time highlighting the benefits of this new channel (e.g. cost efficiency, targeting, etc.). Once you have your talking points down on the industry sell, highlight the benefits of you running these campaigns directly (e.g. control, cost efficiencies).

Consult our [whitepaper](#) for more takeaways!



Need Help Convincing Your Clients on Why They Should Make the Switch?

You should make a case study as early as possible to present to new or hesitant clients. Everyone likes to see tangible examples! Take a look at our case study to see how one of our clients took operations in-house.

[SEE THE PROOF](#)

Ready? Let's Go

Ready to jump in? Start by identifying a pilot campaign, ideally with a tenured client or one that is willing to try something new. It doesn't have to be the entire buy. Consider pulling budget from existing efforts to split test performance. If you're running managed services already, request the campaign details so you can mimic the setup on your self-service tool.



Given all the great advice we've given, we know you have:

- ☒ Involved leadership within ongoing regroupings
- ☒ A stellar operations team ready to channel their inner sponge and become experts
- ☒ A monetization model established
- ☒ Campaign standards set around targeting options, budgets, and reporting
- ☒ Realistic goals set based on data
- ☒ Regular optimization check-ins planned

You've got this.



Interested in Learning More About Choozle?

Choozle is transforming the way agencies buy digital media through the industry's easy to use programmatic advertising solution. Choozle provides a programmatic platform that leverages detailed consumer data to power real-time advertising campaigns across display, mobile, & video mediums—all from a single, simple interface. With simple set-up and superior support, the digital advertising world is yours.

[EXPLORE NOW](#)

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Founded in 2012 and based in Denver, Colorado, Choozle provides a programmatic platform that leverages detailed consumer data to power real-time advertising campaigns across display, mobile, & video mediums—all from a single, simple interface.