



# **Sprinklr Modern Advertising**

**STRATEGIC HANDBOOK**

# INTRODUCTION

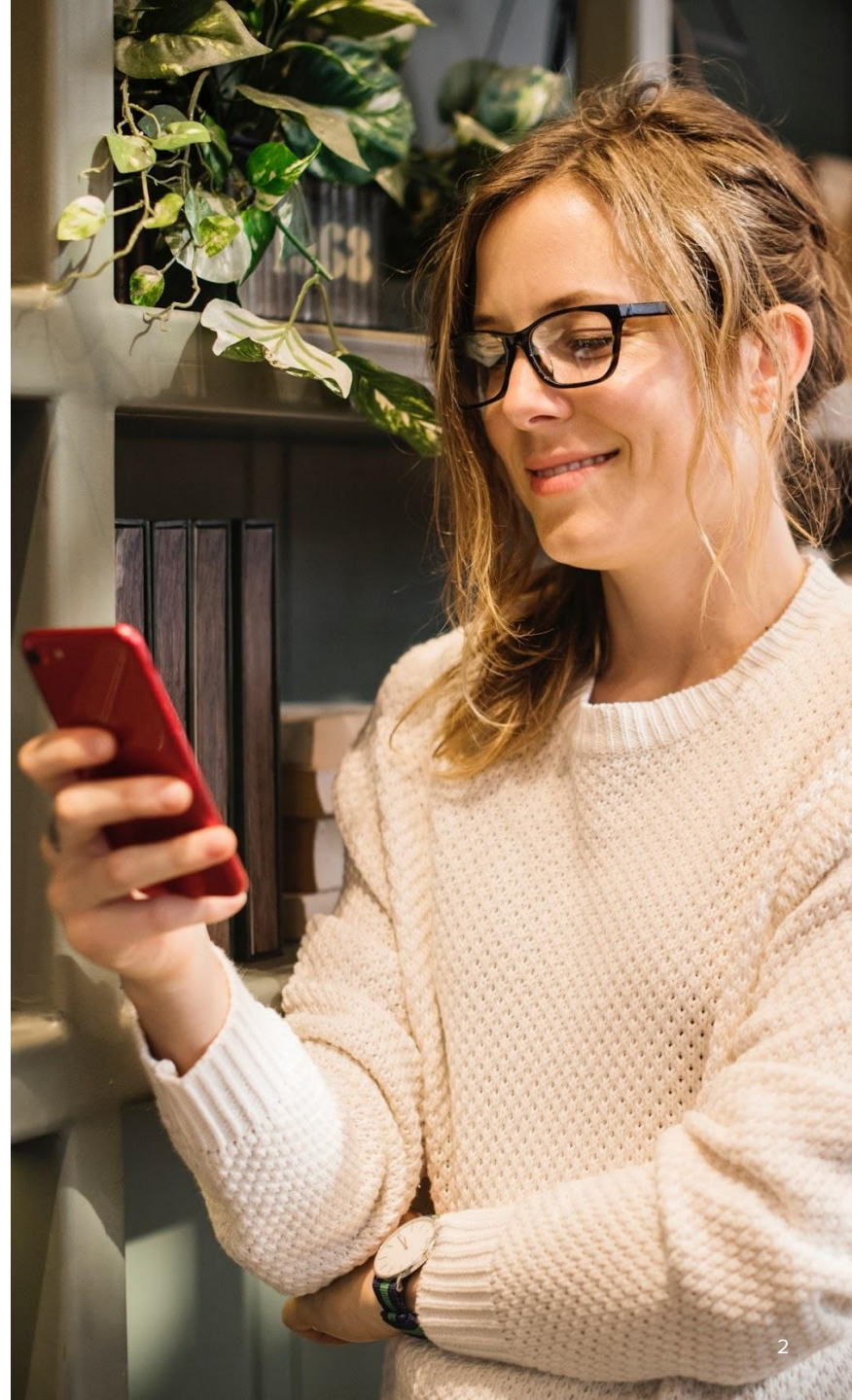
## Advertising can be personalized.

**Modern customers want to be recognized as people, not data points – advertising must feel personal.**

Over three billion people are connected using their real identities across social – there are no more strangers. Advertising is no longer about making as many impressions as possible. It's about seeing a real person with a real need, and reaching them wherever they are.

To thrive in a the world of the modern customer, brands need to advertise to a segment of one.

The **Sprinklr Modern Advertising Strategic Handbook** is designed to empower brands to craft and execute a strategy for Advertising that increases return on ad spend by planning, executing, analyzing, and optimizing advertising across owned, earned, and paid.



## According to the 2018 CMO Survey:

Which best describes how you show the impact of social media on your business?



34% Unable to show the impact yet



42% Good qualitative sense of the impact, but not a quantitative impact



23% Prove the impact quantitatively

## PAID SOCIAL MEDIA CHALLENGES

The following three main challenges face paid social media buyers, managers and practitioners today:

### Am I achieving **ROAS** in social?

- How is social media impacting campaign goals (engagement, click-throughs on calls to action, attributable revenue etc)?
- How effectively is automation driving performance?
- How effectively is automation decreasing costs?
- How does each channel contribute to an overall promotional strategy?

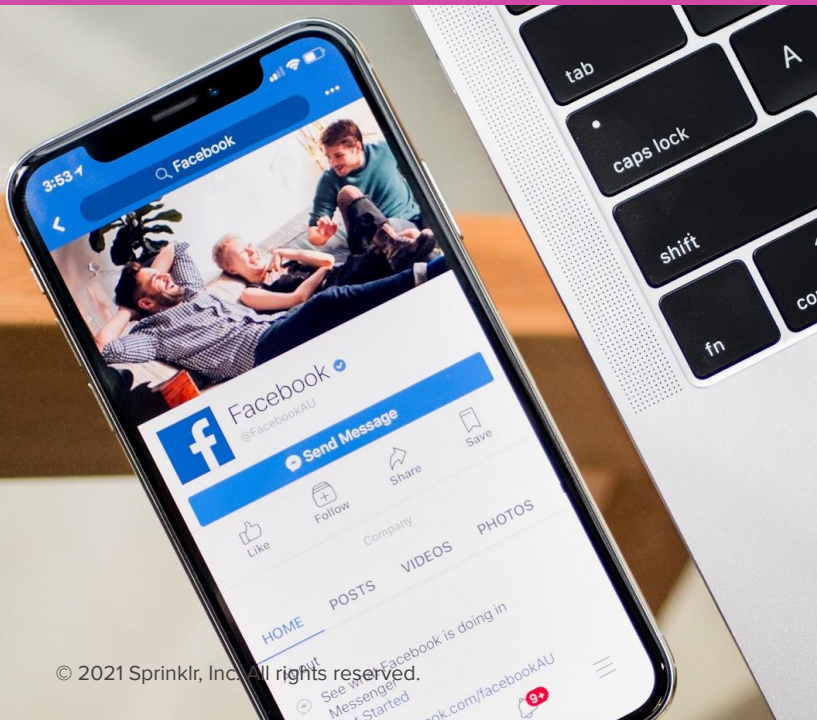
### Do I have **Governance** and **Visibility** over all of my ad spend?

- Do I have control of my advertising accounts?
- Are my ads going through the proper approval paths?
- Do I have full visibility into all my campaign's KPIs in real time?
- Do all the stakeholders have full visibility into performance reports?

### Am I **Productive**?

- How efficiently can I build an ad?
- How efficiently can I measure and report my ad's performance?
- How efficiently can I optimise my ad based on what I learn?

**We'll address these challenges in this Handbook, but first let's understand some principles.**



# THE EVOLUTION OF ADVERTISING

## How Social changed the landscape of Advertising.

“Where consumers go, advertisers will soon follow, and the world of social media is no different. Nearly every area of business has been disrupted by social media’s rise, but perhaps none has been impacted more than the advertising industry. Over the past several years, what began as a space for people to gather and connect has become an ideal landscape for advertisers. With social media, advertisers can reach a bigger audience than ever before.

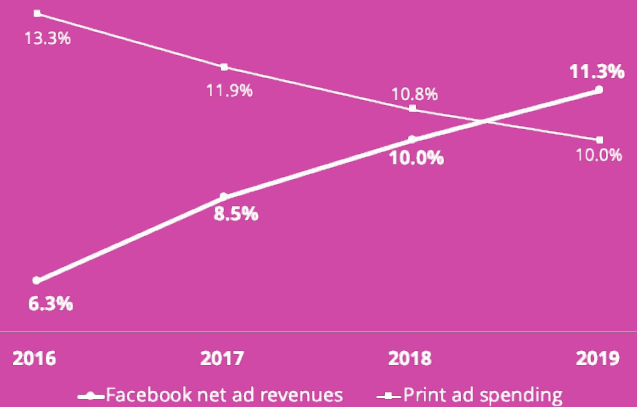
When social media advertising first arrived on the scene, marketers used it to simply connect with their audiences. However, today’s marketers have had to change many traditional ad approaches to keep up with consumer behavior and technological trends. Social media is here to stay, and advertisers must adapt in order to engage customers.”

Mdq

Let’s unpack the key areas of evolution, or in some cases, revolution in the Ads space:

1. Media
2. Automation and AI
3. Transparency
4. Agency/Brand partnership

US Facebook Net Ad Revenue Share vs Print Ad Spending Share 2016-2019



**Major Milestone:** In 2018 Facebook overtook print in the US for \$ spent on Advertising. Facebook’s US ad revenues was twice the amount spent on newspaper advertising and nearly as much as advertisers spent on the entire print category.










eMarketer



# PRINCIPLES OF MODERN SOCIAL MEDIA ADVERTISING

In the revolutionary *post-social* world we live in, successful brands need to adapt to new realities that exist for advertising.

We'll bring the following principles to life with real brand examples throughout this Handbook.

-  People first
-  Objectives second, technology third
-  Advertising can be personal
-  Content is king
-  Context is queen
-  Let data drive decisions
-  Test and test again
-  Automate wherever practical
-  Begin with reporting - and don't stop





## Media

“Media fragmentation has massively impacted the way practically every single brand and marketer must think about advertising today. Rather than sitting on a couch and watching traditional TV for hours at a time, people are constantly shifting their attention across a variety of channels. Consider for example that 40% of millennials watch zero live broadcast TV and you begin to understand the new landscape. This shift has made it that much more difficult for an advertiser to reach their target consumer. So there is a need for brands to **adjust their understanding of consumers and develop the right media mix strategy** to reach and engage where they are now spending the majority of their time - online and on mobile devices...”

[Forbes.com](https://www.forbes.com)

Finding the right media mix, the right audience, the right content for that audience, the right timing... and constantly optimising marketing performance to drive engagement and return on ads spend, is the challenge facing media teams today.



## ADVERTISING CAN BE PERSONAL

“Since the dawn of radio and TV networks, we’ve been broadcasting to broad demographic target audiences with massive waste. It’s time to change. Don’t get me wrong, we still need to reach a lot of people because billions use are brands... but data and analytics is facilitating greater precision to remove waste and increase effectiveness.”

### Mark Pritchard

Chief Brand Officer,  
Procter & Gamble



## Automation and AI

We are still at a very early stage of the impact that AI will have on the world. We're hearing every day of new contexts in which AI is being applied, ranging from AI outperforming the best physicians in diagnosing disease, to more adept and autonomous warehouse robots, to faster chipsets designed to allow AI to run at the edge of our computing networks, such as mobile phones, retail kiosks, cars, and voice computing devices like Amazon Echo and Google Home.

A world animated by AI. Estimates of the impact of AI on the economy can set some context: Gartner calculates that **AI is expected to generate a total of \$1.2 trillion** in global business value in 2018, up 70% from 2017, with AI-derived business value forecast to reach \$3.9 trillion by 2022.

We expect automation and AI to impact the following areas of Paid Media:

1. **Smart Audience Creation:** Social DMP that recommends audiences based on ad performance
2. **Smart Content Recommendations:** AI-driven content suggestion based on content performance for audience segments
3. **Smart Budgeting:** automated budget optimization across ad sets
4. **Smart Queries:** AI-drive query suggestions for ads targeting
5. **Smart Campaigns:** journey planning that includes automated Paid Media execution at points of experience.



### AUTOMATE WHEREVER PRACTICAL

“Many CEOs feel they need to bring AI into their organisation. There's this fear factor that if you're not on the AI bandwagon, then you're going to lose out to competitors that are going to be eating your market, because they're using technologies to make decisions faster and better than you.

They may ask the chief information officer, “What are we doing in AI?” And the CIO will then hire or try to hire data scientists, whose work represents a kind of proxy for AI. But data scientists only have a certain type of skill. They understand how to use statistics and machine learning to find patterns in data. They're not necessarily good at building production-grade systems that can make decisions or that can adapt themselves.”

*PwC, 22nd Annual Global CEO Survey, 2019*

In 2015, the desire for greater transparency in Advertising led to the creation of the **Business Transparency Committee** - a cross-industry accountability program of brands, agencies and platform companies.

Their mission is: to “build trust, transparency and accountability throughout the digital supply chain by developing and promoting the adoption of standards, protocols and technologies that recognize honest industry participants and help combat illegal activity.”

Many brands, agencies, media and channel partners are now being certified by this group.



## Transparency

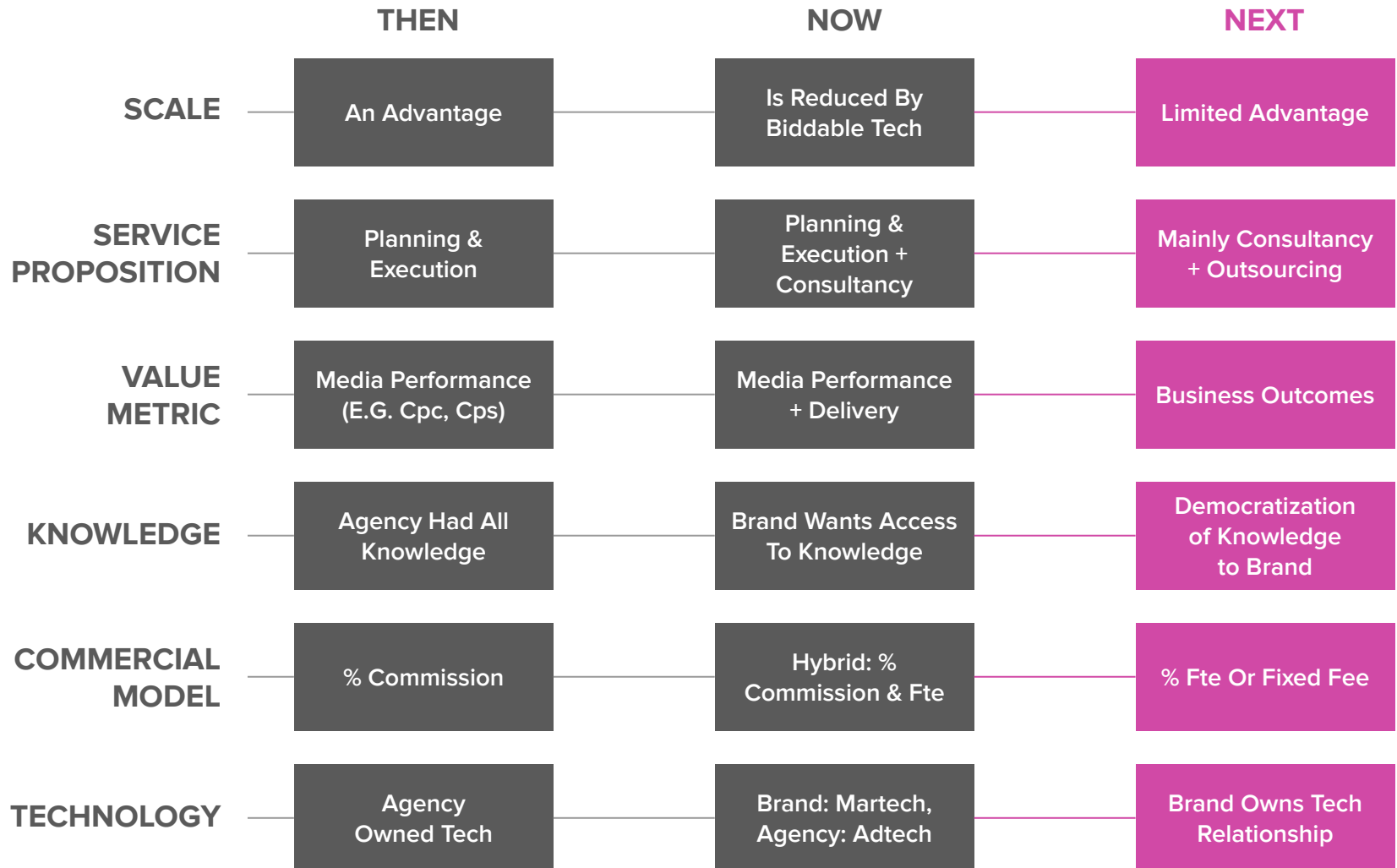
According to *McKinsey*: “Transparency is a hot topic in the advertising world today. Many large advertisers have long felt a lack of clarity in their relationships with media agencies. Companies that make sizable media buys often find themselves asking: What are we paying for? Are we getting all we are entitled to from our spend? Advertisers currently have concerns about agency transparency—or the lack thereof—in three primary areas: media rebates, programmatic fees, and data and tech sharing/ownership.

- **Media rebates.** Agencies often don’t disclose or pass along to their clients rebates (also known as agency volume bonuses, or AVBs) they receive from media companies.
- **Programmatic fees.** Programmatic digital-media buys often carry difficult-to-understand and at times opaque agency fees whose face value is small—pennies per activation—but can add up when the numbers involved reach into the millions.
- **Data and tech sharing/ownership.** Agencies typically share only the data generated by ad tech platforms, which may not provide an optimal view for clients. They are also sometimes in charge of parts of a client’s tech stack, even though advertisers can achieve more data transparency and greater control by running the stack in-house.”



## The Agency / Brand relations

This brings us finally to the evolving relationship between Brands and Agencies. To be clear: brands need agencies. But their needs may be shifting over time. Here's our point view on how this evolution is occurring and what may be next:





# **What & Why**

## **STRATEGY HANDBOOK**

a step-by-step guide for creating  
your Ads Strategy

## ABOUT THE HANDBOOK

A Handbook defines how people use processes and technology to achieve a desired outcome with consistency. It's more than a plan. It's a series of guidelines and guardrails that enables teams to execute with excellence.

The **Modern Advertising Strategic Handbook** was crafted on a framework built based on our experience engaging with enterprises across industries and geographies, including in-depth experience brands and agencies across the globe.

The **Sprinklr Modern Advertising Strategic Handbook** is critical to the coordination of paid media activities across social media and other digital channels. A successful Handbook details how to engage and collaborate internally and externally to enhance your customers' experience.



### 5 C's of a Great Handbook

#### Collaboration

written by the team, owned by the team

#### Clarity

breaks down the complex into repeatable processes

#### Clarity

trains new members of the team on how to operate within guidelines and become part of the desired culture

#### Contribution

enables the sharing and adoption of best practices

#### Creativity

fosters innovative thinking as a living document



## ADVERTISING PHILOSOPHY

**How you reach your customers determines what they say about you.**

With the rise of social and messaging, customers are connected and empowered like never before. They expect to be known and served – on demand and on their terms. For big businesses, that’s a big change. And it’s disrupting everything they once knew to be true.

We’re in a new world of business where the old rules don’t apply. Connected and empowered customers control the conversation. They expect companies **provide personalized, relevant, timely and authentic content** – and to do so on their preferred channels. To get to the customer-first future of modern advertising, all brands – especially those entrenched in legacy systems and strategies – must overhaul their approach to people, processes, data, and technology.





## PEOPLE FIRST

“Put simply, the job of advertising is to make something desirable. You can make something desirable by changing perceptions. You can change perceptions by persuasion. So the ad industry is basically in the business of persuasion.

People are persuaded when they're convinced something has been demonstrated. That's why Aristotle described persuasion as a form of demonstration. There are three ways to persuade someone, he observed. Demonstrate something that appeals to the **character** (ethos). Demonstrate something that appeals to the **context** (pathos). Demonstrate something that appeals to the **logic** (logos).”

Medium

As you contemplate your one or two sentence advertising philosophy, consider:

- Be **true to your values**. This should guide your honesty, transparency and authenticity in targeting audiences
- and managing customer data. E.g. if you chose “Make customers’ lives better” or “Experiences that people love” think about how that affects your actions around data acquisition, or social listening for targeting.
- Be **congruent with your social media philosophy**: consider e.g. what P&G’s CEO said “Exceptional brand messaging is advertising that makes you think, talk, laugh, cry, act and buy.” This is congruent with P&G’s social media approach.
- This should **guide your strategy and tactics**: for example, if your advertising philosophy is to “Inspire and connect”, what kind of content would you expect? How is this different from say “Start with social. Build with digital. Grow with us.”?

## Now it's your turn.

**What is your business’ advertising philosophy?**

Document your philosophy for Advertising in the **workbook**.

# ADVERTISING OBJECTIVES AND GOALS

## Beginning with the end in mind.

We suggest that companies follow the OKR model for this stage. OKR stands for **Objectives** and **Key Results**.

**Objectives** drive alignment throughout the organization. So the first questions to ask are:

- What are the objectives of the organization/division?
- What objectives should your work in paid advertising have to support the objectives of the organization/division?

**Key Results** are the **SMART** actions that will tell you that you've achieved your goals:

- Specific** - clearly defined and unambiguous
- Measurable** - quantifiable and trackable
- Attainable** - ideally a stretch but not impossible
- Relevant** - aligns with business objectives
- Time-bound** - start date and target date











“We can see within Pinterest Ads Manager an autoplay video next to a Facebook video, and say, ‘Let’s look at their performance against each other, what is the benchmark, is this outperforming this, is this underperforming?’ Being able to look at that in one view is such a game-changer.”

**Brittany Neish**  
Senior Social Strategist  
MOEN



# MODERN ADVERTISING USE CASES

Here are the typical primary business use cases (PBUC's) seen in the Paid Advertising market today.

Increase Return on Ad Spend									
<p><b>PBUC</b> Improve performance with AI-powered, real-time optimizations across campaigns using standard channel metrics, custom brand calculations, and third-party analytics.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Smart Budget Allocation</li> <li>• Smart Bidding</li> <li>• Smart Ad Rotation</li> <li>• Integrations</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Improved buying power / ROAS</li> <li>• Decreased cost per action</li> <li>• Increased number of actions</li> </ul>	<p><b>PBUC</b> Deliver personalized, compelling content to users based on their stage in the customer journey using integrated, dynamic first-party audience data.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Smart Audience Engine</li> <li>• Twitter Firehose</li> <li>• Listening Insights</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Improved buying power / ROAS</li> <li>• Decreased cost per action</li> <li>• Increased number of actions</li> </ul>	<p><b>PBUC</b> Drive better campaign performance using research and insights from voice of the customer and external signals to inform campaign strategy and execution.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Benchmarking, Location, and Product, and Listening Insights</li> <li>• Weather, TV, Sports Triggers</li> <li>• POE Dashboards</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Improved buying power / ROAS</li> <li>• Decreased cost per action</li> <li>• Increased number of actions</li> </ul>	 <span style="font-size: 24pt; font-weight: bold;">10</span>
Improve advertiser productivity									
<p><b>PBUC</b> Streamline campaign production using channel-agnostic automation and workflows that drive real-time collaboration between internal and external teams.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Ad Creative Library</li> <li>• Naming Conventions</li> <li>• Paid Pre Publishing Rules</li> <li>• Click Tags &amp; Web Analytics</li> <li>• Ads Composer</li> <li>• Smart Audience Engine</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Time saved in end-to-end campaign building process</li> <li>• Time saved per click tracker built</li> <li>• Time saved per UTM tracker built</li> <li>• Time saved per custom audience built</li> </ul>	<p><b>PBUC</b> Reduce time and manual effort required to manage and optimize campaigns using AI-powered tools across modern channels.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Ads Manager Tools</li> <li>• Smart Optimization Tools</li> <li>• Paid Rules</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Time saved per budget optimization</li> <li>• Time saved per bid optimization</li> <li>• Time saved per day part optimization</li> <li>• Time saved per creative optimization</li> <li>• Improved buying power from utilizing smart optimizations</li> </ul>	<p><b>PBUC</b> Review real-time, automated reporting dashboards using standard channel metrics, custom brand calculations, and third-party analytics to uncover timely insights, monitor pacing, and compare performance to benchmarks to improve advertising strategy.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Pacing Groups</li> <li>• Performance Benchmarks</li> <li>• Reporting Dashboards</li> <li>• Custom Metrics</li> <li>• Integrations</li> <li>• Custom Fields</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• Time saved per campaign using pacing &amp; benchmarks</li> <li>• Time saved with automated reporting</li> </ul>	 <span style="font-size: 24pt; font-weight: bold;">13</span>
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<p><b>PBUC</b> Govern every ad dollar with creative- and campaign-level approvals as well as budgetary controls.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Approvals</li> <li>• Account Access</li> <li>• Budget Sources</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• % of creative approved (vs. total creative)</li> <li>• Time saved per creative approval</li> <li>• % of campaigns approved (vs. total campaigns)</li> <li>• Time saved per campaign approval</li> <li>• % of campaigns with budget sources applied (vs. total campaigns)</li> <li>• Time saved per budget source applied</li> </ul>	<p><b>PBUC</b> Eliminate the risk of unauthorized advertising with an auditable governance structure that manages user access based on roles and responsibilities.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Account Access</li> <li>• User Groups &amp; Roles</li> <li>• Audit Trails</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• % of users governed in Sprinklr</li> <li>• Time saved per user</li> </ul>	<p><b>PBUC</b> Minimize brand risk through comprehensive dark post comment moderation and the ability to quickly stop advertising across channels during PR crises.</p>	<p><b>Features</b></p> <ul style="list-style-type: none"> <li>• Ad Comments Moderated</li> <li>• Stop Publishing Rules</li> </ul>	<p><b>KPI</b></p> <ul style="list-style-type: none"> <li>• % of ads moderated</li> <li>• Time saved per ad moderated</li> <li>• # of ads paused automatically</li> <li>• Time saved per occasion "stop publishing rules" is applied</li> </ul>	 <span style="font-size: 24pt; font-weight: bold;">14</span>
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Protect your brand's reputation									
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# PRIMARY BUSINESS USE CASES

Here are the typical primary business use cases (PBUC's) seen in the Paid Advertising market today.

## Increase Return on Ad Spend

Improve performance with AI-powered, real-time optimizations across campaigns using standard channel metrics, custom brand calculations, and third-party analytics.



10

Deliver personalized, compelling content to users based on their stage in the customer journey using integrated, dynamic first-party audience data.



11

Drive better campaign performance using research and insights from voice of the customer and external signals to inform campaign strategy and execution.

12

## Improve Advertiser Productivity

Streamline campaign production using channel-agnostic automation and workflows that drive real-time collaboration between internal and external teams.

13

Reduce time and manual effort required to manage and optimize campaigns using AI-powered tools across modern channels.



14

Review real-time, automated reporting dashboards using standard channel metrics, custom brand calculations, and third-party analytics to uncover timely insights, monitor pacing, and compare performance to benchmarks to improve advertising strategy.

15

## Protect Your Brand's Reputation

Govern every ad dollar with creative- and campaign-level approvals as well as budgetary controls.

16

Eliminate the risk of unauthorized advertising with an auditable governance structure that manages user access based on roles and responsibilities.

17

Minimize brand risk through comprehensive dark post comment moderation and the ability to quickly stop advertising across channels during PR crises.

18

## Tips for setting objectives:

- Pick just three to five objectives - more can lead to over-extended teams and a diffusion of effort.
- Avoid expressions that don't push for new achievements, e.g., "keep hiring," "maintain market position," "continue doing X."
- Use expressions that convey endpoints and states, e.g., "climb the mountain," "eat 5 pies," "ship feature Y."
- Use tangible, objective, and unambiguous terms. It should be obvious to an observer whether or not an objective has been achieved. Research shows more specific goals can result in higher performance and goal attainment.

## Tips for developing Key Results:

- Determine around three key results per objective.
- Key results express measurable milestones which, if achieved, will directly advance the objective.
- Key results should describe outcomes, not activities. If the KRs include words like "consult," "help," "analyze," "participate," they're describing activities. Instead, describe the impact of these activities, e.g., "publish customer service satisfaction levels by March 7th" rather than "assess customer service satisfaction."
- Measurable milestones should include evidence of completion and this evidence should be available, credible, and easily discoverable.

*rework.withgoogle.com*

## Now it's your turn.

**What are your brand's objectives and key results for Advertising?**



# ADVERTISING STRATEGY

**How you reach your customers determines what they say about you.**

Now that you have your objectives and goals defined, you can lay out your strategy to achieve them. Your strategy is not the specific tactics you'll use but the high level plan of attack.

A strategy for advertising typically involves ten components:

1. Campaign objective
2. Channels
3. Benefits, Offers and Call-to-Action
4. Copy
5. Creative
6. Story Arc
7. Audience
8. Localization
9. Budget
10. KPI's



## Campaign Type

There are basically two types of campaigns in paid social media: **Reach** and **frequency**.

**Reach Campaigns:** Media planners use reach to set their objective for the total number of people exposed to the media plan. Reach is one of the most important terms in media planning and has three characteristics:

1. First, reach is a percentage, although the percentage sign is rarely used. When reach is stated, media planners are aware of the size of the target audience
2. Second, reach measures the accumulation of audience over time. Because reach is always defined for a certain period of time, the number of audience members exposed to the media vehicles in a media plan increases over time.
3. Reach doesn't double-count people exposed multiple times if the media plan involves repeated ads in one media category or ads in multiple media categories. Media planners use reach because it represents that total number of people exposed to the marketing communication.

**Frequency:** Frequency is the number of times you touch each person with your message. In contrast to high levels of reach, high levels of frequency can be effectively achieved through advertising in a smaller number of media vehicles to elevate audience duplications within these media vehicles. Frequency

In a world of unlimited resources you would obviously maximize both reach and frequency. However, since most of us live in the world of limited resources we must often make decisions to sacrifice reach for frequency or vice versa. When faced with decisions of reach vs. frequency remember this rule of thumb: Reach without Frequency = Wasted Money. Ultimately you are going to have to touch the same customer along their customer journey a number of times. We'll come back to that when we review the "Story Arch".

*Sources: admedia.org, businessknowhow.com*



## CONTENT IS KING

“We’ve been impressed with Facebook and Instagram as a full-funnel advertising platform for our brand. With the PLAYBASE launch, we built buzz around our newest product and then followed up with a promotion to drive sales among engaged audiences. It was a perfect one-two punch.”

### Donna Queza

Global Paid Social Media Lead  
SONOS

## Channels

Consider the following 5 questions when selecting the channels on which your business will engage customers through Paid Media:

1. **Audience:** Marketing is a conversation. Social media is all about conversations: starting them, sustaining them, sharing them. Conversations start with people. Knowing your audience and what channels they use is critical.
2. **Objective:** Look back at the previous section. What objectives are you trying to achieve? How will a specific paid social media channel help you achieve them?
3. **Content:** You really need to consider what kind of assets you have or will have at your disposal – and how suited they are to the formats that perform best on each channel. To make this decision easier you should think about what kind of content resonates with your audience and what kind of content your brand is known for.
4. **Resources:** Budgets for Paid Media aren’t limitless. Costs for content production have to be considered along with advertising fees. Many brands will therefore pick a few channels to focus their paid media activities.
5. **Reason to be:** Do you have a clear reason to be on the channel? This is one of the hardest questions. And you really need to be honest with yourself. Does your brand belong on a specific channel? For example, even though millennials are all on SnapChat, do you have a reason to be there?



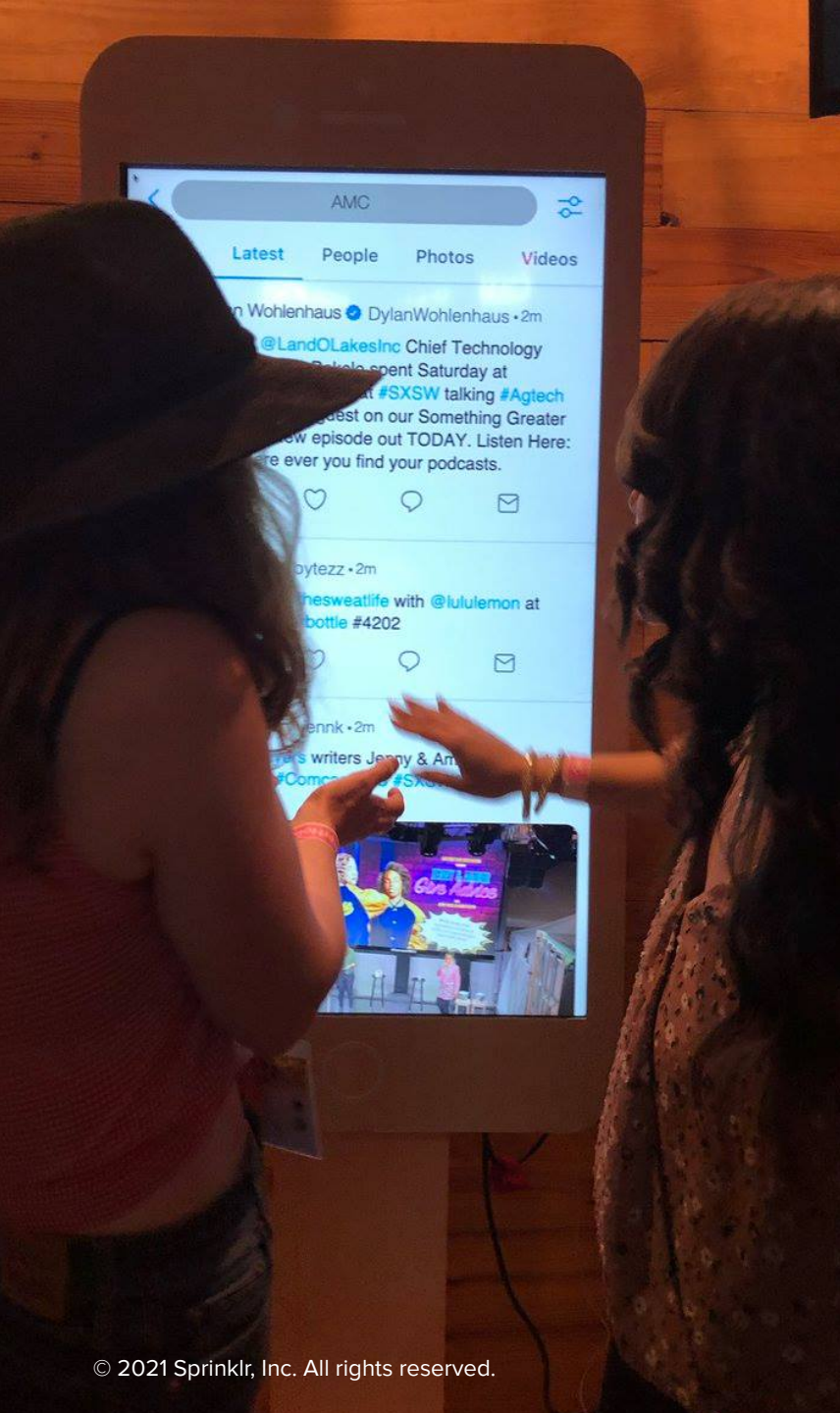
## Channel Tiering

Once you've identified the best-fit channels for your brand, the next step is to prioritize channels for investment and resource allocation. This may be done at the global or local brand level. Often brands will bucket channels into tiers with **Tier 1** channels being the top 3-4 channels, **Tier 2** being the secondary channels of choice, and **Tier 3** containing lower-priority channels on which you'll be engaging.

Now it's your turn.

Which channels represent your brand's best fit and how would you tier them?





## Benefits, offers and calls-to-action

A good way to think in a customer-centric, modern way is to start with the benefit. A benefit could be “early access”. The offer is tied to a benefit. A benefit can have many offers. So in the “early access” example, the offer could be extended to different audiences in slightly different contexts and at different times. The campaign really hinges on the offer and call-to-action (what you want the targeted recipient of the content to do). When it comes to a Call to Action or CTA, there some simple guidelines to follow:

- **Consistency:** the CTA should clearly follow the copy or imagery
- **Action and benefit:** it’s a call to Action so make sure that the CTA has a clear action and an intended benefit. There’s a huge difference between “Click here” and “Watch Right Now”
- **Narrative:** make the CTA part of the overall story
- **Measurable:** to be able to test multiple CTA’s make sure, like all links, that the CTA link is tagged on the backend.

Now it’s your turn.

What are your benefits, offers and calls-to-action?

## Copy

While a picture is worth a thousand words, the right words can paint a pretty good picture. Your copy is often key to the narrative and call-to-action. The appropriate use of hashtags enables breaking through the noise and getting discovered by target prospects, looking for interesting new info about exactly what you've touched upon. And tagging is useful to increase engagement and reach, affirm an influencer, build a personal relationship or engage with a broader consumer community. And finally refer to your Social Media Handbook for point-of-view, persona and tone guidelines – if you don't have a Social Media Handbook, now's the time to consider getting one done!

## Creative

Creative refers to the graphic elements of your ad: the image, video, or carousel images. Good creative communicates your message visually in just a second or two - it supports and enhances your copy. With the advent of stories and video advertising, the creative freedom is very broad. Let's take a look at an overview of details/best practices for the following most common paid media platforms: Facebook, Instagram, Twitter, Pinterest, Snapchat, YouTube and LinkedIn.



## CONTEXT IS QUEEN

One of the most controversial - and successful - paid media campaigns in 2018 was Nike's "Just Do It" 30th anniversary campaign with Colin Kaepernick. Nike's online sales grew by 31 percent over 2018 during the Labor Day weekend period, compared to a 17 percent increase in 2017. The company compared 2017 and 2018 online sales and found an increase corresponding with the controversy and release of an associated video ad campaign.

This campaign was clearly a) in the spirit of the ongoing "Just do it" b) aligned to Nike's values and c) in line with Nike's vision to inspire people to move.



## Best Practices

While this is ever-evolving, based on multiple sources and experiences with brands, here's a summary “cheat-sheet” table for channel best practices for the top paid social media channels:

CHANNEL	CAMPAIGNS	PHOTOS	VIDEO <sup>1</sup>	HASHTAGS <sup>2,3</sup>	TAGGING <sup>2</sup>	STORIES <sup>4,5</sup>
<b>Facebook</b>	Brand Awareness Engagement Video Views Website Traffic and Conversion App Installs Lead Generation	Use storytelling to interweave your posts. Increase the interest with each post. Studio- created content is ok.	Use close-ups of happy faces, animation, brand colors and logos; and music and/or subtitles where appropriate.	3-4 max per post	Very important	Experiment and get creative.  Crosspost your story from Instagram to Facebook on mobile and engage a wider audience.  Understand your audience.
<b>Instagram</b>	Brand Awareness Reach and Frequency Shopping/Website Conversion Video Views	Real photo/video, relevant to places/ moments in time, no logos or lock-ups or over-treatments. Choose a theme and one filter - and stick with it. Keep backgrounds clean.	Use animation, music, brand colors and logos, bright, attention-grabbing visuals and include a CTA.	Multiple hashtags are great, but do not exceed 10 or 11	Critical for influencer and advocacy - remember to tag photos too	Tell the whole story. Be concise.
<b>Twitter</b>	Brand Engagement Brand Awareness Website clicks App Installs	In the moment content.	Use mobile-friendly bright, impactful imagery, music and captions where appropriate, and include a CTA.  Hook your viewer in the first few seconds.	2 per tweet is ideal	Critical for influencer and advocacy - tag people or businesses whenever possible	N/A
<b>Pinterest</b>	Brand Awareness Video Views Traffic App Install	Product-specific and focused. Consider context of imagery.	Use how-to, product, and DIY videos, close- ups of happy faces and brand colors and logos.  Keep your visuals bright, but simple.  Focus on the product you're featuring.	Limited use - only use hashtags in Pin descriptions	Not very important as people search on keywords	N/A

1. <https://www.lemonlight.com/cheat-sheet-video-advertising-specs-for-every-social-media-channel/>

2. <https://www.orecreativedesign.com/using-hashtags-tagging-social-and-messaging-media-strategy/>

3. <https://pluggingroup.com/social-and-messaging-media-hashtags-2017-best-practices/>

4. <https://www.facebook.com/help/publisher/324798284973916>

5. <https://www.advertisemint.com/snapchats-creative-best-practices/>

6. <https://www.socialmediatoday.com/news/snapchat-outlines-snap-ads-best-practices-in-new-video/524741/>



## Best Practices (continued)

CHANNEL	CAMPAIGNS	PHOTOS	VIDEO <sup>1</sup>	HASHTAGS <sup>2,3</sup>	TAGGING <sup>2</sup>	STORIES <sup>4,5</sup>
Snapchat <sup>5,6</sup>	App Installs App Engagement Web Traffic and Conversions Lead Generation	Use front (selfie-style) for personalized content vs rear (direct style) for focus on user experience. Only vertical content and use emojis and doodles in your ad appeals to the native user experience.	Build top Snaps for five seconds or less – “The first two seconds matter the most”  More like TV or cinema ad.  Keep objective in mind.  Feature a singular message - Use purposeful sound design – “Almost 60% of Snapchatters have sound on, so use this to advantage”	Use but make sure to use Snapchat’s geofilter option. Snapchat Geofilters for businesses are one of your cheapest social media paid marketing options, so it’s worth giving it a try if it fits with your target audience.		Inherent in the content - see “Photo” and “Video” best practices
YouTube	Brand Awareness thru Video Views  Shopping  Mobile App Installs	N/A	Remember the audience you’re targeting.  Keep an eye on success metrics.  Include an attractive thumbnail.  Embed and share your YouTube video links everywhere you can.  Publish consistently.  Remember to optimize for search (title, description)	Not used	Tag in the tag box, not description.  Keep them minimal and avoid having irrelevant taglines. Insert the target keyword among tags.	N/A
LinkedIn	Lead Generation  Job Applicants  Website Visits  Video Views  Engagement	Headlines are key. (40-49 characters). Prioritize multiple images over video.	Use close-ups of happy faces, bright, impactful visuals; and music and/or subtitles where appropriate  Pack the first 10 seconds of your video with the most important details.	2 or 3 hashtags – to achieve exposure and engagement balance..	Critical for influencer engagement	N/A

1. <https://www.lemonlight.com/cheat-sheet-video-advertising-specs-for-every-social-media-channel/>

2. <https://www.ocreativedesign.com/using-hashtags-tagging-social-and-messaging-media-strategy/>

3. <https://plugingroup.com/social-and-messaging-media-hashtags-2017-best-practices/>

4. <https://www.facebook.com/help/publisher/324798284973916>

5. <https://www.advertisemint.com/snapchats-creative-best-practices/>

6. <https://www.socialmediatoday.com/news/snapchat-outlines-snap-ads-best-practices-in-new-video/524741/>

## Story Arc

Someone once said that a social media campaign is like driving down a highway being presented with a series of billboards where each builds on the one before it and entices you to want to see the next one – or at least you recognize each one as belonging to the one before it. According to [Digital Marketer](#): “story arc (or “ad scent” as they call it) refers to congruence, or “sameness,” throughout your campaign. This matters because trust is a huge conversion factor. If people feel comfortable that your offer is valid, they’ll seriously consider your offer. Do anything to create doubt or fear, and they’ll exit without taking action.

Every time we click, we use simple visual cues to ensure we’re in the right place. If we lose the cues at any point, we begin to feel we’re in the wrong place or that we’re being tricked. As soon as that happens, we exit and go back to where we started. Your visitors should always feel like they’re on the right path. You do this by creating a flow—visually, in your messaging, and in the presentation of your offer—from your ad to your landing page, and every other piece of your campaign.

### To create congruence, focus on 3 elements:

- **Design:** Use similar imagery and colors on each piece of the campaign.
- **Messaging:** Use similar phrases and benefits.
- **Offer:** Your offer should be the same throughout.

The right story arc is a low-hanging fruit in digital advertising. Get it right, and you’ll boost your conversion rate and lower costs.”

“Americans alone consume more than 100,000 digital words every day, and **92 percent say they want brands to use those words to tell stories.**”

*[ADWEEK](#) on the future of brand storytelling*

**Now it’s your turn.**

**What’s your story arc, copy and creative?**

## Audience

The ability to target is what differentiates Paid and Organic Media. Understanding the purchase history, previous engagement and behavior attributes of the audience enables brands to personalize their content. Personas should be built based on 1st party data or behavior / activity. So the motto here is: **Know your audience.**

The type of benefits and offers needs to be tailored against the relationship you have with the audience:

RELATIONSHIP	AUDIENCE	OBJECTIVES	KINDS OF OFFERS (EXAMPLES)
Unknown	<ul style="list-style-type: none"> <li>• Look-alikes</li> <li>• Based on 1st party data</li> <li>• Demographics</li> </ul>	<ul style="list-style-type: none"> <li>• Aim to build trust and establish credibility by sharing valuable information for free.</li> <li>• When they arrive on your content, pixel them so you run more ads to them and warm them up.</li> <li>• If they click on a blog post about email marketing, we know they're interested in that topic, so we can make them a more relevant offer later.</li> </ul>	<ul style="list-style-type: none"> <li>• Blog posts</li> <li>• Social media updates</li> <li>• Content videos</li> <li>• Podcasts</li> <li>• Lead magnets</li> <li>• Quizzes</li> <li>• White papers</li> <li>• YouTube ads to content</li> <li>• Twitter ads to pillar content</li> <li>• Infographics</li> </ul>
Known	<ul style="list-style-type: none"> <li>• Leads that opted into your email list. (You'll upload that list to a traffic platform.)</li> <li>• People who have visited your website and been pixelated.</li> <li>• Facebook fans, Twitter followers, YouTube channel subscribers, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• CTA completion</li> <li>• Brand engagement</li> <li>• Generate leads</li> <li>• Drive low-dollar sales</li> </ul>	<ul style="list-style-type: none"> <li>• Lead magnets</li> <li>• Quizzes or surveys</li> <li>• Free or paid webinars</li> <li>• Flash sales/low-dollar offers</li> <li>• Product demos</li> <li>• Branding videos</li> <li>• Books (free or paid)</li> <li>• Free trials</li> </ul>
Well Known	<ul style="list-style-type: none"> <li>• These are your buyers.</li> <li>• They may be people who have opted in and are on the fence about buying from you.</li> <li>• They may have added products to the shopping cart but never purchased.</li> <li>• They may have purchased something from you in the past but haven't responded to recent offers.</li> </ul>	<ul style="list-style-type: none"> <li>• Engagement: serve them to grow them with your brand</li> <li>• Activation. If they haven't purchased in a while, remind them that you're still there.</li> <li>• High-dollar sales. Upsell buyers of lower-priced products.</li> </ul>	<ul style="list-style-type: none"> <li>• Events</li> <li>• Paid webinars</li> <li>• High-dollar offers</li> <li>• Done-for-you services</li> </ul>

Source: [Digital Marketer](#).

## Localization

Don't forget to consider localization needs for global campaigns. This can include local paid social platforms, new creative/copy and local benefits and offers.

## Budgeting

Optimising ad performance begins with understanding what budgets should be used per each ad set - and how you will be testing, learning and optimising.

## KPIs

We covered this in the front section (OKRs). It's important to ensure that metrics and reporting are contemplated at the outset of the campaign and not at the end in an attempt to prove value after-the-fact.

**Now it's your turn.**

**What are your localization needs, budgets and KPIs?**



## AUTOMATE WHEREVER PRACTICAL

Transcosmos uses rule engines to automate bidding across multiple qualifications including weather, audiences, and time of day. By setting performance-based conditions and actions for specific time windows, campaigns are managed through automated intelligence designed by Transcosmos consultants and operators.

# Marketer's Checklist for Campaign Launch

## Set Campaign Goals

- I defined what the desired outcomes of the campaign are and how they contribute to department and company goals.
- I defined leading and lagging indicators sufficient for success based on desired outcomes.
- I have reviewed similar campaigns in learnings log to gain insights that would help planning of this campaign.
- I have listed all of the assumptions taken in the planning of the campaign and have tracking in place when those assumptions change.

## Targeting

- I have defined what audience we intend on targeting and why.
- I have calculated cost tradeoffs to targeting breadth vs depth based on cost elasticity and simulated the optimum efficient frontier based on weights from historical data.
- I have Identified preference to type 1 or 2 error based on cost assumptions of targeting.
- I have Identified and quantified the downside risks of type 1 and type 2 errors.

## Define Customer Journey

- I've created an activity diagram of the customer journey and known user-experience paths and exits.
- I've simplified the customer journey to only what is necessary to reduce the workload and friction on the prospect/customer.
- I've made an effort to think about ways of taking on more of the workload for the customer/prospect based on the value of the opportunity and cost of operational load.
- I've tested to provide more incremental value than perceived cost in each step of the customer journey.
- I've not made any unreasonable asks in any stage of the customer journey.



## Marketer's Checklist for Campaign Launch (continued)

### On Data

- I have identified the instrumentation needed to capture data throughout the customer journey
- I have identified the specific data type(s) and graded the data quality being captured at each step of the customer journey
- I have identified tradeoffs in campaign measurement vs campaign performance when it comes to data capture
- I have shared our data strategy of the campaign with ad-operations, project management, and business intelligence as well as the stakeholder. Model Performance & Initial Budgeting
- I have modeled the anticipated performance of the campaign by using similar campaign historical campaign conversion rates
- I have received buy-in from my stakeholders that the modeled performance is acceptable prior to launch
- I have a range of potential results and have the operational capacity to pause and iterate on each area (tactic, targeting, ad, customer journey, product) of performance
- I have anticipated the pacing and buffer needed to optimize while maintaining statistically significant budget to effectively fund each tactic at the ad, ad group, and campaign level. if Manager and also at program level.

### Finance & Initial Budget Governance

- I have created and shared media projections with stakeholders and marketing operations.
- I Have the approval on budget from business/campaign owner.
- I have submitted SOWs (template available) for each media partner to client.
- I have checked to see if all media partners and publishers are currently active and approved from marketing operations with master agreements in place.
- I have the systems in place to provide proof of execution (POE) on a regular basis to accounting/finance.

### Reporting

- I have defined KPIs and other important metrics.
- I have defined how often I need reports.
- I have defined how often I need detailed strategic analysis.

### Information Sourcing

- I have defined who is providing what information.



# **Sprinklr Modern Advertising**

## **STRATEGIC HANDBOOK**

For more information:

*[www.sprinklr.com](http://www.sprinklr.com)*