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DIGITAL DATA BEST PRACTICE HANDBOOK

APRIL 2017

FOREWORD

Data is now so ubiquitous that it can often be overwhelming when looking to incorporate a strategy around data and how to go about it.

Having a strategy around what you and your business intends to achieve by being more data-driven is critical, whether you are a publisher, marketer or advertising agency. Thinking through what the business objectives are, the associated costs and resources required are critical initially. Then planning ahead post-implementation to ensure that your measurable outcomes and plans remain flexible, evolutionary and adequately supported in these ever-changing times is advisable.

What that in mind, this handbook has been written by us and our members to act as both an introduction and a supportive practical guide with regards to data collection, storage and usage. We will then finish off with a simple set of questions for you to consider when choosing a solution.

Lastly and critically, always ensure that you, your business and staff are aware of all current best practices related to privacy compliance throughout the process. Involve your Legal department as early as possible, request regular training on this and for more information please refer to the Australian Privacy Principles guidelines and the DAA (US based industry-body) Self-Regulatory Principles.

Jonas Jaanimagi
IAB Executive Consultant

This document has been originally developed by the Interactive Advertising Bureau Australia Technology Council in March and April of 2017.

ABOUT THE IAB TECHNOLOGY COUNCIL

The IAB Australia Technology Council comprises the following 16 members from IAB member companies:

Ben Sharp	Adroll	Premanjai Gupta	Criteo
Cat Prestipino	Adroll	Ben Maudsley	Exponential
Max Flanigan	Amobee	Carlie Young	Exponential
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The IAB Australia Digital Data Best Practices Handbook was compiled by the following Technology Council members:

Cat Prestipino
Marketing Director, JAPAC

Cat Prestipino (@catprestipino) is a B2B marketer with nearly 10 years experience of brand building, social media strategy and market communications. She relocated to Sydney in 2014 to help build the AdRoll brand shortly after it's Sydney launch. Cat now runs AdRoll's marketing strategy across Australia, New Zealand, Southeast Asia and Japan. Prior to joining AdRoll, she had helped establish regional marketing teams for a number of US-based tech start-ups in Europe including Tribal Fusion, Exponential and IgnitionOne. Earlier in her career Cat worked in marketing for the film and television industry. She holds a Bachelor of Liberal Studies from Sydney University.

Ayaan Mohamud
Marketing Team Lead, APAC

Ayaan has been working in the digital industry for nearly 7 years, with experience in both agency and client-side roles. Moving over from the UK in 2015, she currently heads up marketing for APAC at Sizmek, responsible for strategy development and execution in the region. Working closely with sales and product teams, Ayaan leads all marketing activities, including event management, PR, sales enablement and ongoing lead generation initiatives. Prior to Sizmek, Ayaan worked for DataXu managing PR and marketing in the EMEA region, with a special focus on the UK and Germany. Before this, she was part of the European marketing team at comScore.

Dylan McBride
Commercial Director

Dylan currently serves as Commercial Director for AppNexus overseeing growth strategies in Australia and New Zealand. Prior to joining AppNexus, Dylan spent five years at PubMatic in both NYC and Sydney, most recently as Country Manager for AU/NZ managing both publisher and advertiser relationships. After graduating from Ohio University, Dylan began his career with Microsoft Advertising's search group working on the launch of the Bing search engine.

Tim Sleath
VP, Product Management

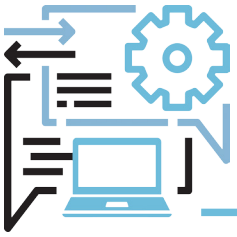
Tim oversees the direction of Exponential's ad serving platform and data capabilities as well as ensuring the product suite offers appropriate brand safety and data protection for clients, publishers and internet users. Prior to joining Exponential, Tim built the EU business solutions function and led product management at Specific Media. His product management experience outside adtech includes broadband networks at Regus, SMS infrastructure at Schlumberger and GSM systems at Sema Group. Tim holds an MBA from INSEAD, CIPP/E and CIPT from the International Association of Privacy Professionals and is Scrum CSPO certified.

Jonas Jaanimagi
Executive Consultant

Jonas has been working as a consultant for IAB Australia since January 2017. Prior to this he was Head of Media Strategy and Operations and also Head of Media at REA Group for almost 5 years. His digital career began in 1999 when he joined a start-up financial publisher with three people, which was sold eight years later having grown to an organisation of some 100 staff. Jonas then founded and launched WebAds UK, a specialist UK business and finance digital ad-sales house representing publishers exclusively as a niche high-net-worth proposition. After successfully driving the business to profitability, Jonas was head-hunted by Hi-Media, Europe's largest independent ad network with access to more than 150 million unique users. Prior to moving to Australia with REA Group, Jonas worked at Videology as the Director of Product Management for Europe.

Rhys Williams
Head of Media Technology Solutions, AU/NZ

Rhys Williams is Google's Head of Media Technology Solutions for Australia/NZ, where he works with large advertisers and their agencies to harness the power of the DoubleClick Digital Marketing suite. Rhys has led the DoubleClick team in Australia/NZ for the past 5 years, and throughout his career has worked across Australia, Asia and the UK in technology and media roles.



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DATA DATA EVERYWHERE: SO HOW DO I UNDERSTAND IT ALL?

CAT PRESPITINO
ADROLL

It's hard to believe that a decade ago data was not something that a marketer had to deal with. Since then, digital advertising spend has skyrocketed, analysts are now an essential part of the marketing department and our consumer behaviour is tracked and analysed on an hourly basis (if not more frequently).

Post-data revolution, many marketers still feel at odds with what various types of data are and how they are meant to capture, store and incorporate this data into their marketing plans. But marketers are also acutely aware of how important data is and the power it has to transform their marketing campaigns.

In this chapter, I want to shed some light on what data is available to marketers, how the different types of data are most commonly used and collected and what are its advantages and limitations.

Firstly, let's kill the term big data. Big data refers to a data set so large or complex that traditional data analysis methods can't deal with it. The reality is that most modern data sets, particularly if you're working for a large brand, would be considered big data. But the good news is most applications are now built for big data sets - so let's shelve that term straight away.

Once you do that, what you're actually left with are three types of data: first-party, second-party and third-party data which I'll go through below.

1 First-Party Data

What is it?

First-party data collected from your assets. In short, it's YOUR data. It might be collected from your customers' in-store purchasing habits and stored in a CRM or it might be behaviours people exhibit on your website. Either way, it is a unique data set to your business that you and you alone own.

It's argued that this is the most powerful form of data as it is a true indication of how people are interacting with your brand and what they really want from you.

What are its main uses?

First-party data has a number of different uses but it's primarily used in retargeting campaigns and customer marketing campaigns.

How do I collect it?

First-party data can be collected from any asset that you own but according to EConsultancy's 2016 whitepaper 'The Promise of First-Party Data', the most popular sources are your website or app (through a pixel or SDK) or at the point of sale (either through an email or customer loyalty card number).

What are the advantages and disadvantages of it?

Firstly, first-party data belongs to your brand and this gives it some strong advantages. There's no dispute on ownership, this is your data and you can do what you want with it (within the law). It's a completely unique data set to your company so this data will give you the best results for your company.

Be aware though it's incredibly difficult to scale your first-party data. It is taken from your assets so unless more people take actions with your brand (ie. visit your website or subscribe to your database) it's very difficult to grow your first-party data.

2 Second-Party Data

What is it?

Second-party data is first-party data that you're getting directly from the source. It's a relatively new type of data and most people think about it as data that isn't first-party or third-party. It is generally a unique data set (similar to first-party data), however, that data set isn't unique to your brand.

A great example here is an airline (like Qantas) might team up with an accommodation supplier (like

AirBnB) to share their first-party data sets with each other.

What are its main uses?
Second-party data is a great way to enrich your first-party data. By integrating first-party and second-party data, brands are able to scale their first-party data, find new customers and learn more about the behaviours of their current customers.

How do I collect it?
The majority of second-party data relationships happen through private deals and direct relationships with other brands. Data is collected in the same way as first-party data so a combination of pixels, tags and subscriber information.

Most brands, however, choose to employ a Data Management Platform (DMP) to allow them more flexibility when it comes to sharing and integrating different data sources.

What are the advantages and disadvantages of it?
Second-party data has the advantage of adding scale to your first-party data, however, it's a lot more work to make its collection privacy compliant. People need to know what you're using their data for and how it's going to be shared. Brands also need to make sure that the data they are collecting and sharing is being done so in a secure manner.

Second-party data can also be hard to come by. As most data partnership deals are done privately, they can bring a number of complications and take a long time to put in place.

3 Third-Party Data

What is it?
Third-party data is probably the most common type of data that marketers and brands are used to talking about and working with. Third-party data is collected from an external source that doesn't have a direct relationship with the people it's collecting data about. For example, a third-party data company might pay publishers to put their pixel on their site and then use that information to piece together online profiles.

What are its main uses?
Third-party data is a useful tool for finding new customers. If you know what your customer profile looks like, then you can purchase third-party data to match that profile and then integrate it into your marketing efforts.

How do I collect it?
To put it quite simply, you buy it or lease it.

What are the advantages and disadvantages of it?
Third-party data is readily available through a number of different companies like BlueKai, Experian and comScore. It's fantastic for helping businesses grow their customer base quickly and easily.

The quality of third-party data can vary widely though. While some companies do a really good job of matching profiles, there is always some form of wastage. Brands take a generalisation of who their customer is and try to match that with other profiles and that won't always give you a high success rate.

Third-party data is also subject to a number of different regulations. While Australia isn't as strict as Europe, marketers need to be mindful of what type of data they're using (usually health or financial data will attract tighter restrictions), how they're using that data, how they are storing that data and how they are informing their customers about the data.

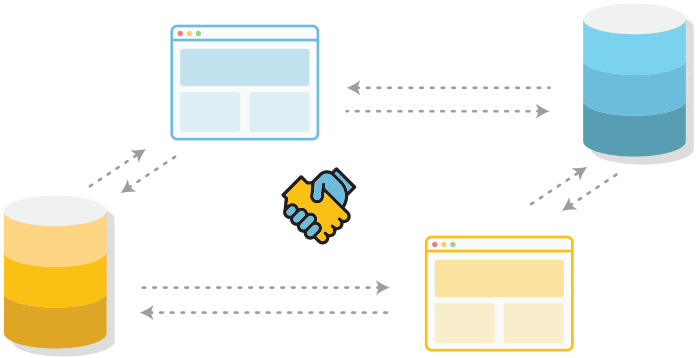
Understanding Data

1st Party Data

Highly relevant data acquired via user interaction with your website, marketing initiatives and CRM.

Sources

Website | Application | Loyalty Card | Email

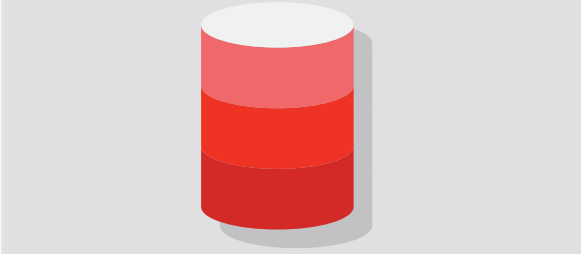


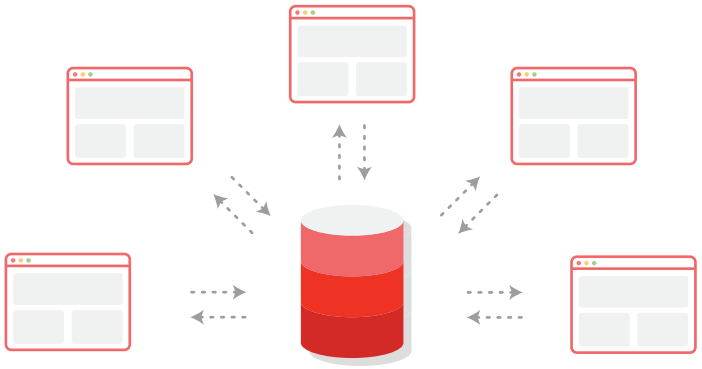
2rd Party Data

Direct access to a trusted and 2nd-party partner's 1st-party data.

Sources

Direct Relationship | Private Deals





3rd Party Data

Data aggregated through numerous external platforms and websites, provided by various sources.

Sources

Buy | Lease

So, you've collected the data, now what? Firstly, it is highly unlikely you'll just be using your own data and secondly, you'll need somewhere to store it where you can ensure it is properly protected and where you can cross-match between different pools of data to achieve the most comprehensive view of your users.

The Australian Privacy Principles require reasonable steps to be taken both to protect the information while it's needed, and to get rid of it when it isn't. Australia's privacy legislation has equivalence with the EU's, so you don't need to worry unduly if you're storing data collected from citizens in other countries (as EU has the toughest criteria in this regard).

Ultimately, the source of most data is either cookies (triggered by pixels or ad tags) or SDKs (for in-app environments). If you own an ad server or SDK, this data will be feeding directly into a database of user profiles and your log files. However, most people don't own these resources themselves, so are more likely to be leveraging a Data Management Platform which facilitates access to their own user's data (i.e. first-party data, where the DMP is taking care of cookieing users), and more likely than not, brings with it some off-the-shelf third-party data which can be layered in with that first-party data.

Here's where a common myth about big data needs exploding – pulling in large volumes of data doesn't magically bring sense to it. Certainly the range of tools that exist help to spot trends and there are some interesting advances meaning machines can spot interesting blips by themselves… but generally there is a significant piece of work involved in grooming the data, looking at patterns, inexplicable spikes or gaps – and often the result of this analysis is a realisation that a different cut of data, or a different granularity, or a logical combination that would be more usefully applied at a lower level of data production rather than in a UI, etc. Companies should definitely try and establish the level and combinations of data that they think they want – but keep their resourcing and processes flexible enough to cope with the inevitable changes later.

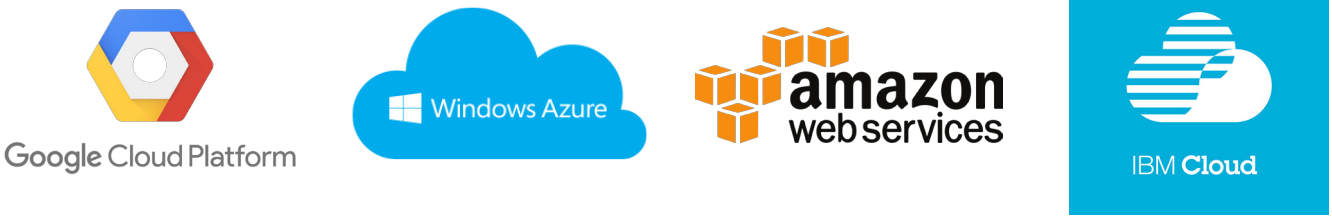
So even if you're working with a DMP which is taking care of a huge amount of the complexity, you will still need to apply dedication to understanding what the data segments are telling you – are they reflective of the audience you expected? Do you have a complete view of the user? And most important of all, what the heck are you going to do now you have joined some data sets together? The key options being: understanding the audience (insights) and reaching specific audiences with advertising (targeting).

At Exponential, we're finding that while skilled people are vital to develop insights using the available data, the targeting aspect is best left to machines. It is out of scope for this discussion to delve deeply into machine learning, but when you're considering data storage, reflect on whether only humans will be accessing it via a UI of some kind, or if you will have automated systems crunching thousands of permutations of data combinations to extract the best expected performance from users with certain attributes. This will impact where and how you will store the data and apply the processing that is required.

So while targeting and optimisation involves much higher processing requirements, insights may be relatively light in terms of processing, but much more demanding in terms of types of data. The key with insights is to be

able to look at different aspects of users, e.g. not just what ads they saw and clicked online and the sites they visited, but what they're reading about, what jobs they do, where they're located, what device(s) they're using and yes, maybe even the trusty demographics of age and gender. So insights imposes a heavier burden on third-party data integrations – which may in turn affect your decision on which DMP to use.

If you're doing significant processing yourself, you'll almost certainly end up using one of the major cloud providers (and indeed, all the major DMPs use at least one of these vendors).



As an aside, we have found that there are optimisations to be made in using these vendors as it may be cheaper to process data locally to where it was gathered and transfer the results, rather than transfer the raw data and process centrally. Something to look out for!

These cloud vendors make things very easy, but do beware of the temptation to gather everything and keep it forever – it takes discipline to review what data is contributing to business value and make sure it is deleted once it no longer offers a positive contribution.

Another headache you will have to wrestle with is matching data between two sources. Obviously, in order to match between two data sets, you need a "key", i.e. the same value in both sets. A simple example is the process of matching online to offline data, say cookied users with a company's CRM database. This is normally done via an onboarding company of some kind, which has access to a key – it can cookie users online for whom an email address is known… and match using the email address in the CRM data. Cookie matching itself is done when working with a vendor by each firm piggybacking the other company's pixel call, resulting in a pair of tables of users which are then merged to find cookie ids which have joint profiles. Matching is one key area where DMPs can lighten the load – this article gives a flavour of why this is not to be treated lightly!

As you'd expected from this description, matching is never 100% - there's always some loss, especially when combining multiple sources. The more links in the chain, the more losses. In our experience, expect 10-20% for each step along the way.

To summarise the key elements to consider regarding storage of data:

1. Make sure you know what you want to use the data for (and how long you'll need it).
2. Decide if you can achieve these objectives yourself, or better using a DMP.
3. If you're going to handle the DMP work yourself:
    - Assess if/how you'll be joining your data with third-party or other data – how will matching be done?
    - Validate cloud vs owned storage and processing – look at total cost of ownership vs time to market
4. If you're going to use a DMP:
    - Make sure you resource evaluating and testing the data to check it makes sense, not just at the start, but as an ongoing project.

Digital advertising and the process for achieving the correct application and activation of data can be complex.

The challenge is to ensure that digital campaigns are being tuned to reach the right audience segments across an array of web destinations - both on the media and creative level. The media buy needs to be targeted toward a sub-set of users who meet the buyer's criteria and then each creative message needs to be relevant to a subset of that brand's audience.

The overall goal is simple - improve audience targeting and boost the overall performance of digital advertising.

For this to happen, all components of your advertising technology stack need to work together. The audience data that sits inside the ad server and the data management platform must be interconnected and each linked to your programmatic media buying strategy and overall campaign.

The three key elements that brand marketers should focus on are: personalisation, relevance and context.

When you think about data, one of the last things that probably pops into your mind is creativity because there's a fundamental problem with how we, as an industry, approach creativity. We see it in a silo - and it's not.

Personalisation of ad creative and using data to have a one-to-one conversation with consumers is the biggest opportunity for brand marketers. People respond to advertising better if it is personalised to them as they are bombarded with more advertising messages each day.

For example, cruise liner holiday group P&O Cruises Australia wanted to improve the performance of its digital advertising in an extremely competitive market. P&O already had a robust retargeting strategy but wanted to secure more customers so it used Sizmek's dynamic creative solution to deliver personalised messages to consumers. By using a combination of dynamic retargeting and an XML real-time data feed consumers would now be shown the most up-to-date information on cruises they'd previously viewed. The cruise liner increased click-through rates by 60% and implemented an adaptive messaging strategy that allowed them to follow the customer journey based on a consumer's previous actions and ad exposure.

Dynamic creative allows advertisers to use data to deliver the right message at the right time. Ads can be altered based on seasonal trends and new insights gleaned from product feeds from a brand's e-commerce website. In addition, even better results can be derived from location, gender and demographic data.

Personalisation is closely tied to relevancy. Ad blockers wouldn't be as ubiquitous if ads were relevant and interesting. Another part of that equation is context, which is crucial to ensure the advertising campaign succeeds.

Context, however, is an area that sometimes gets overlooked when creating marketing plans resulting in odd, perplexing, and in worst cases, disastrous pairings of ads and content.

Context is about more than media targeting as well. Contextual data can be used with dynamic creative optimisation to inform post-buy creative decisions and help deliver the best message version for a placement. When used in combination with audience data, it's even more powerful, increasing the value of that unique audience data and allowing for even more precise targeting that matches a message to a consumer's present mindset.

By using data from a variety of sources and undertaking pre-bid contextual filtering, advertisers can not only improve the performance of the digital campaign, they can drastically reduce wastage. Verification allows advertisers to determine whether or not an ad has been delivered in the proper context. It's more than just a publisher enforcement tool. Rather verification should be viewed as a tool for holistic campaign insights. If an ad impression is not running in the environment intended by the advertiser or an ad isn't resonating within a specific environment, the dollars invested into that media are wasted.

If the brand marketer can derive insights into the consumer mindset – particularly their level of interest in a product – they have better information regarding the potential for an actual buying event.

Brands rely on their agencies and the agency technology partners to deliver seamless and efficient processes to apply data. If marketers approve systems and platforms that don't take advantage of the best data platforms, their digital campaigns will not meet their marketing goals.

Furthermore, programmatic advertising can help solve the problem of identifying and selecting the best inventory and enable true audience-based buying.

Here are some of the key tips that brands should take into account when planning a data-driven digital advertising strategy:

- Unify your data silos by bringing together multiple data sets from multiple partners.
- Make media relevance work for you by targeting the inventory you want and avoiding what you don't want.
- Use data to apply and test new audience segmentation strategies.
- Verify your delivery, keep your brand safe and protect against fraud.
- Access the best intelligence available to track your ads across nearly any channel and any screen.
- Take action on your data through a robust individualised dashboard that gives you control over every part of the campaign.

By focusing on these actions, brand advertisers can improve the return they get from their digital branding efforts. The key is to create a complete link in the data chain, and take the step towards the holy grail of advertising - personalisation.

By merging data with creative, advertisers can increase performance across a whole set of digital metrics from engagement rates to increased brand awareness. Instead of struggling to combine data across numerous sources, they can spend more time managing campaigns and gathering insights from the data with confidence.

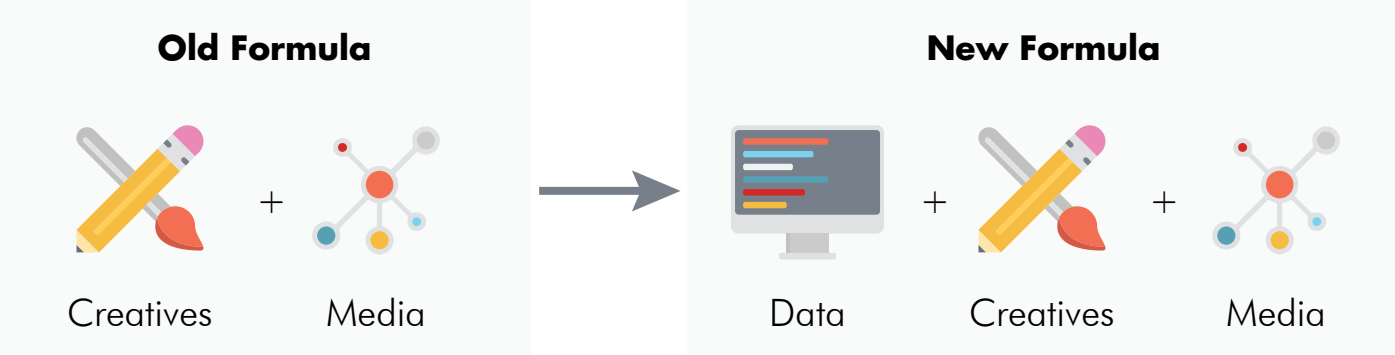
BREAK DOWN THE SILOS: COLLABORATE TO ACTIVATE YOUR DATA

RHYS WILLIAMS
GOOGLE

Not long ago, brand marketers relied on two distinct tools to reach consumers: a compelling creative campaign and a smart media plan. These were developed in isolation from one another by independent teams that rarely, if ever, synced up.

That strategy is no longer effective.

These days, savvy brand marketers are discovering a new ingredient. Fortunately, it's something that can make creative campaigns more relevant and impactful than ever: data.



Most brands now recognise that data and programmatic are helping them approach that holy grail of reaching the right person at the right time. But along with a better way to buy media, there's more to gain from data's inclusion in the marketing playbook.

Data is more than just an impenetrable string of ones and zeroes. Marketers are realising that by partnering with their digital and media teams early in the planning cycle, they can identify ways to use data to develop more relevant and engaging creative and deliver those campaigns with precision. This new formula also creates new opportunities to gather insights, helping advertisers to deliver greater impact over time.

Many brands are now using data to design, deliver, and measure high-impact campaigns.

Activate the new formula

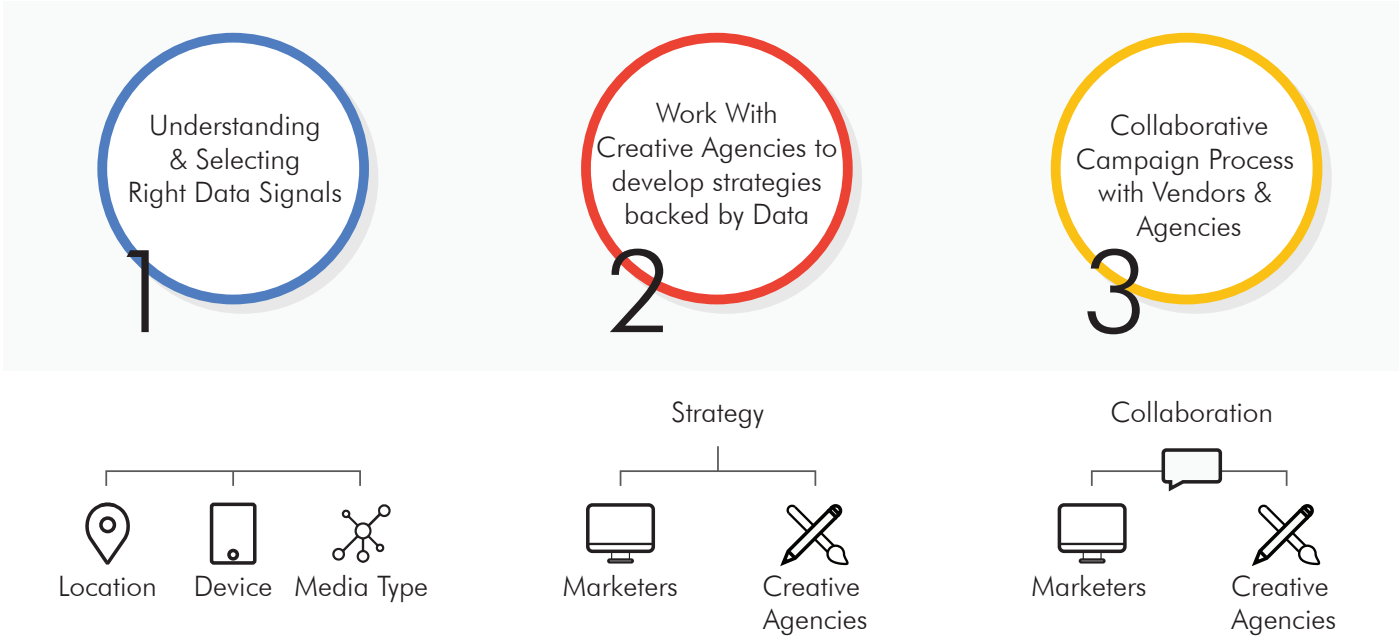
To really take advantage of what's possible with data, marketers need to work to break down silos between different teams.

The most innovative brands have marketing, digital, media and agency teams all sitting together at the start of the campaign to define objectives, brainstorm on insights, process data and create the right strategy to reach brand goals.

As a marketer, you should take the lead to bring teams together because nobody understands your brand better, nobody has a more nuanced understanding of your target consumer and nobody is better equipped to communicate your creative vision. Put data in your toolkit, and your brand becomes not just memorable, but unstoppable.

Here's three key mental shifts that can help marketers make the transition to data-driven marketing:

3 Key Mental Shifts to Transition to Data-Driven Marketing



1 Understand all the data that's available, then select the right data signals

Marketers may already be using data from CRM tools or market research to fuel campaigns. But a wealth of additional data signals are also available - from first-party analytics on company websites to third-party audience data to contextual inputs about device, location or media type.

For instance, when we worked with L'Oreal on their programmatic campaign for their Vichy sunscreen products, we used location data, audience lists and weather information as the data signals that informed the creative and gave us a solid basis for testing.

2 Work with creative agencies to develop sound creative strategies that are informed by data

Too often, the creative agency and production shop are brought into the process after the big decisions have already been made. Instead, marketers need to work with agencies to build creative strategies that are based on data from the beginning of the project.

When developing a programmatic campaign for ANZ, DoubleClick, the media agency and creative agency got together in a room with the bank's marketers to map out the campaign and align on targeting strategies, including data for 3rd party audience interests, time of the week, proximity to shops and location-based events to reach the right audiences, at the right moment, with relevant creative messaging. This resulted in a cross-agency team that was invested in the process and outcome from the start.

3 Drive a collaborative, agile campaign process that involves all vendors and agencies from start to finish

In today's campaign creation process, each party completes their portion and hands it off to the next with little feedback. This prevents communication and transparency between media and creative. To ensure success, marketers should involve all agencies throughout the campaign process and ensure everyone is talking to one another.

When DoubleClick worked with MBM New Zealand on a campaign for the loyalty programme Fly Buys, it was a collaborative process between media and creative teams. Data was used both pre and post campaign to deliver a highly effective personalised display creative. Moreover, the insights discovered from this campaign were then extended into a dynamic video campaign. All enabled by the brand being able to tap into the analytical capabilities of multiple teams.

Extra resources

For a quick glimpse of the five phases in the campaign process and the roles and responsibilities of each party across that process, check out the Creative Process for Programmatic infographic.

#InspiredByData

Great marketing isn't just efficient: it's memorable and personal, rising above the noise. The key to creating a standout campaign is data. Check out the real life examples at http://inspiredbydata.thinkwithgoogle.com/ to see what's possible in marketing.

Video: Steve Suppe, Product Manager, at the DoubleClick Leadership Summit 2016 in Australia, looks at how new approaches to data are helping advertisers create better experiences for consumers on all screens.

DYLAN McBRIDE
APPNEXUS

This concise yet comprehensive Data Best Practices Handbook has come about because pretty much every organisation that needs to reach and influence specific audiences is, quite literally, drowning in data. To help marketers make sense of it all, the handbook covers collecting, storing, using, protecting and collaborating to get the most from diverse data sets. Every chapter, to some degree, also reinforces the truth that the people most skilled in working with data know how to strike the right balance between science and art.

The science of course is understanding disparate datasets and being able to separate quality from the irrelevant. The art lies in interpreting the meaningful data to improve communications – not only between organisations, brands and their target audiences but also the agencies that support that process.

As any CMO will attest, finding those people is not easy. Accordingly, the 'skills gap' is a common lament throughout the marketing and ad tech industries. The good news though is people with the potential to become superb data-scientist-artists are more plentiful than it might appear. They aren't always the most experienced or senior people. They might not even come from an ad tech, advertising or marketing background. The trick is to know what skill sets to look for and then find and develop that talent.

So, how do you locate the people who can identify and harness the full spectrum of data available to them, and then apply deep understanding of that information to the real-world task at hand?

First of all, it helps to know what to look for.

Rather than focus on the technical skills a prospective hire might bring, AppNexus has had great success in focusing on types of people who thrive in data-driven environments. Often, we find a prospective candidate's values and, dare we use the cliché passion, make for a better hire than the person who on paper may be better qualified. We look for people who are problem solvers, bridge builders, creators or collaborators with a relentless curiosity about what makes things tick. Even our most specialised specialists have the ability to see the whole system, the role of various elements within it, and how they can empower others' success.

So from the general to the specific: knowing the values you seek, how do you actually find those people?

Again, taking the AppNexus experience, we look beyond the talent pool in our own sector – adtech and advertising – to industries that also navigate complex landscapes, service dynamic marketplaces, and work with large amounts of data. So our ranks include people who came from financial services, insurance, management consultancy, business and systems analysts as well as people with advertising, adtech and marketing backgrounds.

For example, when looking for an account manager, we don't just trawl our competitors' talent roster, we might look at business consultants who understand how to solve problems for clients. For more technical roles, we'll recruit people with base knowledge of the tech but more importantly have curiosity and a desire to make things work better – if not optimally.

Our university internship program has also been a tremendous source of talent. We don't always hire successful internists straight out of uni – often it helps if they get a year or two of real-world experience somewhere else first. We maintain those relationships carefully though and the short-term placements give both us and the candidate a chance to get to know one another and where the synergies lie.

Saying the ad tech industry is tough is an understatement. It's complicated, highly strategic and relies on well-trained data and media buying specialists who deploy sophisticated technology to execute an increasingly complex practice.

All the technology yet to be imagined is of little use, however, without the data-scientist-artists who can interpret data, make sense of the customer's often convoluted journey and help the teams bringing it all together to get the right message to the target audience at the optimal time.

In this section, we'll look at the various questions that one should ask when considering different vendors in the market and trying to make sense of all the various options available.

To remain consistent with the structure of the previous sections in this handbook we will list out questions related to data collection, storage, usage – as well as service as a fourth area of diligence.

Collection

Can the platform capture all the various types of data being generated by your organisation?

- This must include any interactions on your websites and mobile web via pixels. Mobile and tablet apps are increasingly a critical component of valuable audience interactions. Any data collection in-app will require an SDK (software development kit). Bring the requirements related to apps and SDK's up as early as possible and look to have your technical staff do some serious diligence on the work required for this.

Could the technology handle the anonymised collection of any declared data, email CRM or e-commerce transactions through the site?

- You'll want to collect more than simple user behaviour and being aware from the start around any potential issues related to privacy is important and understanding how the vendor can appropriately handle PII (personally identifiable information) whilst capturing key data attributes is important.

Can the vendor work seamlessly with any other data collection technology currently being utilised?

- Your organisation will already have plenty of data stored in different places and you may be already working with other analytics vendors, ad-serving vendors or email providers. Understand how easily any potential data vendor can integrate with all your other current vendors and if they already have working relationships in place. This will help with leveraging data that you already have (e.g. offline CRM data) and also reduce the risk of any issues with different technology partners not working well together post implementation. If you are working with one vendor for all of your solutions, then do your diligence on how seamlessly the various parts fit together as many businesses often take years to truly integrate different acquisitions across one full stack. Always try and test any claims made as thoroughly as possible, as you won't often find out until you truly get your 'hands dirty' with the technology.

Storage

How are all the different types of data stored into defined and anonymised attributes?

- It really helps to understand how each platform physically stores the data you want to make use of. Commonly these are different labelled 'buckets of cookies', which can then be overlapped to build out a story of a user related to the various behavioural touchpoints or declared information. Or else this can also be managed via persistent IDs which refer to CRM data authenticated by logged-in users.

How are all of these attributes then made manageable / segmentable with the platform?

- Seeing and testing out the UI (user interface) of any platform is always critical. Some may look a bit clunky but be incredibly flexible, powerful and user friendly. Every business is different and having the ability to customize as much as possible based upon your requirements is often vital. Others look amazing but aren't actually very useful in practice! So, it's always worth having your operational staff play around in a demo account and ask the dumb questions. If the vendor offers no UI at all and only a managed service, then you'll need to agree some very strict guidelines and SLA's.

How does the vendor manage cross-device matching?

- Understanding how the technology vendor tries to identify users on different devices and verify that this is one user not many. This is incredibly difficult to do technically, as it often requires combining known deter-

ministic data (logged-in interactions, device ids, email addresses etc.) and probabilistic behavioural data. Doing diligence on both the privacy concerns and the technology requirements on this is highly advisable.

Can the technology easily offer third-party data via ingestion or dedicated vendors to enrich any first-party data in the platform?

- Understanding how you can easily enrich your data segments with any available third-party data is worth checking in on. Also, confirm on any additional costs and how the protections work for both parties' data.

Usage

How many different execution platforms are the vendors currently integrated with?

- Knowing exactly which ad-servers, SSP's, DSP's or marketing platforms the vendor is currently integrated with is worth confirming. Try and speak to some of those mutual partners (on a confidential basis and with the permission of the vendor) in order to get as much feedback as possible. If there are integrations still to be done or not yet ready, then simply have your technical staff dig into the details and also try to understand if there are any API's (application programming interface) available as these can be very powerful in terms of both customization and easy integrations with other vendors.

  (The same approach should apply with any of the capabilities that sit within one full stack. Do your diligence and don't make assumptions. It's also worth noting here that many marketers currently leverage their existing data by running campaigns against verified user databases within Facebook Custom Audiences and Google Customer Match. Be aware that these campaigns all happen on and are managed within those particular companies' platforms.)

What are the analytical tools available within the platform and can the data flow both-ways in real-time with those external execution vendors?

- Empowering your in-house teams with powerful analytics (including custom analytics) from an audience data perspective is increasingly important. Rather than having to pull reports from other platforms and combining them externally, having everything within one platform (or exportable out to an analytics software) is very useful. Also, understanding whether the data flows in real-time or on a delayed basis (i.e. in regularly or overnight batches) is increasingly critical as recency is becoming a key part of providing relevant and personalised experiences both in terms of advertising and content provisionment. This obviously depends upon your specific requirements.

Support

Does the vendor offer best-in-class service and support during both implementation as well as on an ongoing basis?

- Entering into a relationship with a data vendor is a critical decision and much like in one's personal life, it's often more about how you are supported through any difficulties that arise than when everything is going well. The technical requirements for implementation should be properly planned for as this can cause a lot of strain and stress if badly resourced. Doing diligence with other current clients and pushing for full disclosure is always helpful. Locking down SLA's in terms of both uptime, response times and dedicated account management is advisable. It is standard to have 6-monthly reviews at least – if not quarterly business reviews and build these commitments into the agreements if you can.

How much insight into (or even influence on) will you have as a customer into the vendor's product roadmap?

- Having a close working relationship with your data vendor is not just about their current capabilities but also critically around what is coming next. Knowing (and technically testing out) the difference between the two when it comes to capabilities is advisable. Having some transparency on the related milestones and even involvement in the alpha, beta and full release versions of future enhancements is also an example of an excellent working relationship with any tech vendor.