



DIGITAL ADVERTISING DIRECT SOLD SELLER WORKFLOW

This document has been developed by Beeler.Tech in partnership with the digital advertising community

intent, audience, use

The intent of this guide is to streamline the general workflow process for publisher direct-sold deals with an eye toward best practice. Our goal is to provide the industry with a commonly accepted process and shared language to discuss and improve existing processes.

For the scope of these discussions, the term publisher is meant to include all types of publishers including retail organizations that operate in the media space.

This document is expected to evolve over time to keep pace with changes in workflow and best practices. Since no two publishers will have identical processes, we won't be able to develop a definitive blueprint for these steps, but operational processes should be more similar than different. These common processes will help us to

work together to improve efficiency to the benefit of all of our organizations.

This version 2.0 of the workflow includes a few areas of enhancement:

1. The Product Development stage has been expanded upon based on feedback from our community.
2. Identifying the primary role responsible for each stage. During Base Camp: Newport Beach, we discussed and identified each role for each stage.
3. Some thoughts about holds or reservations.
4. Other small updates and enhancements.

role responsibility and standardization

Having the direct sales process outlined is step one. Step two is identifying who is responsible for each stage. We, the community, identified those roles at Base Camp: Newport Beach.

Roles and titles are tough. Each company uses different words and different title levels to describe the responsibilities of a person. The lack of standardization creates an environment where it is very difficult to discuss and compare responsibilities. To solve this issue, Beeler.Tech has worked with the community to come up with standardized roles and role levels. By mapping a particular role in your organization to the standards, you can then compare similar roles that are not titled the same.

We use this standardization for our annual Publisher Revenue Professional Salary Guide and are also utilizing it here to identify the role responsible for each stage of the workflow.

Role	Responsibilities
Ad Product	Product Strategy, Development, Configuration, Catalog Management
Ad Solutions	Vendor Selection and Management, Website Facilitation, Product Feasibility, Escalation, Process Development
Analytics	Pricing, Yield, Forecasting, Benchmarks, Insights, Sales Performance, Campaign Performance, Product Performance
Billing Operations	Billing, Reconciliation, Auditing, Compliance
Programmatic	Partner Selection and Management, Yield, Pricing, Strategy, Deal Setup, Troubleshooting
Sales Support	Client Facing, Campaign Reporting and Optimization, Inventory
Trafficking	Campaign Fulfillment, Troubleshooting
Leadership	Responsible For Two Or More Of The Above Areas

PRE-SALE	1. Product Development
	2. Proposal
	3. IO
POST-SALE	4. Campaign Kickoff
	5. Creative Delivery
	6. Trafficking
	7. Delivery & Optimization
	8. Reporting & Analysis
	9. Billing

phases and stages

The high-level process can be defined by two phases: *pre-sale* and *post-sale*. Within each of these phases, there are a variety of ways that organizations approach and assign responsibilities across the various teams. Across the two phases, we have defined nine distinct stages. The goal of the breakdown into stages is to be granular enough to break apart where functions or roles change, but general enough to cover the primary phases and stages for all teams and individual contributors. The size and staffing of your organization will dictate how many people or teams are involved in the overall process.

PHASE: PRE-SALE

Pre-sale includes all steps prior to the full execution of an IO. There are three stages of the pre-sale process: Product Development, Proposal, and IO.

>> stage 1: product development

This stage is handled by the ad product role. Supporting ad product may be ad solutions, analytics, and/or programmatic.

The product development stage of the pre-sales phase is largely about defining your digital products with regard to size, placement, targeting, and data use. In addition, product development is about establishing the business and sales rules for your overall catalog.

Product development is wholly or largely handled by the product team or the person with product responsibilities, such as the Product Manager or Director of Product. The product team or person with product responsibilities typically works closely with ad solutions (aka ad tech, or advanced advertising) and the analytics team or an analyst for feasibility, functionality, and measurement. Programmatic strategy likely comes from a combination of product and programmatic teams.

Being a subject matter expert (SME) in advertising is important to the ramp-up and success of a new product manager; understanding the terms, processes, and coding can be a challenge for someone new to digital advertising.

The balance between revenue and user experience (UX) tends to be a challenge in many organizations. It is therefore a good practice for all product managers to have some revenue responsibility to help temper differences in approach.

Key performance indicators (KPIs) used by product management vary across the community, but as a **best practice**, it is good to establish your organization's KPIs and utilize them for all new products to ensure consistency in measurement over time and across products.

The focus in this section is on non-custom products.

How you classify your products can vary, and there may not be one correct way. It is important to determine your approach so stakeholders can easily grasp the recommended product catalog. Once stakeholders decide on an approach, they can then focus on the important business of product decisions.



Examples of different decision-making approaches include:

- The environment in which they serve, including display, mobile, OTT, etc; and
- The capabilities they offer, such as shoppable, allowing video, surveys, etc.

Product development should be driven by data analysis and market demand, bringing your current and potential clients the products that best meet their goals while delivering maximum revenue and efficiency for your organization. There are many possible inputs for product ideas, and we recommend utilizing all, although how you weigh your efforts across the methods may vary from publisher to publisher.

Product idea inputs may come from:

- RFP (request for proposal) requests;
- Advertiser feedback;
- Sales feedback;
- Monitoring your competition and the industry;
- Input from the ad operations team; and/or
- Reevaluating and maintaining at your current product catalog.

Stakeholder feedback can be gathered in many ways. For example, methods of gathering input from the sales team can differ from team to team and yield varying degrees of success. Approaches can include monitoring RFPs, regular meetings, auditing of lost proposals, and recurring roadshows by product managers. We recommend you test various approaches and see what works best in your organization.

As you work through ideas with sales, keep in mind that their focus is to sell, in contrast to the ad operations and product development teams, whose focus is to fully understand the technology and data considerations. The teams should work together to bridge the gaps between these varying areas of focus. The feedback you receive may not create an exact picture of what the product should be, but it should build a view of what the existing products are not.

Concurrent with product development, you should work through product feasibility to determine how exactly the product will work in a live environment and in actual fulfillment at the scale you forecast to sell this product.

Also at this time, consider pricing even if products are not finalized. Since costs will be calculated in this phase, you must think about pricing to make sure the price makes sense financially.

Before launching a new product, determine what success should look like and the time frame you take to evaluate it. Measures of success include sell-through, performance, ROI, or some combination of these or other factors. The time to evaluate the success of a new product can vary from a few weeks to a year. While there isn't a lot of consensus in the community on the evaluation duration, there is consensus that success and evaluation periods should be established upfront.



Not all new products are actually new products. An existing product that has been repackaged or tweaked could provide you with products that meet the expectations of all the constituents without starting fresh. Sometimes no changes are necessary, but the sales org could benefit from retraining on the product to ensure everyone understands the unique value proposition.

Product catalogs can grow large quickly. Excessive product catalogs require upkeep that may not be justified from a revenue perspective. Product management should periodically review products and retire those that have yet to sell, perform poorly, or are poorly understood.

In addition to product development, organizations need to establish product management processes through the stages of the *entire product catalog lifecycle*, such as:

1. Development;	4. Monitoring;
2. Testing;	5. Optimizing; and
3. Packaging, pricing, fulfillment;	6. Product removal.

Whether the product team or another team is responsible for setting prices, that team will need to be intimately involved with the product development process.

Product development for non-custom products should happen before an RFP is received. By contrast, products created on the fly are custom products and are addressed in different stages of the overall direct sales workflow. Custom products can be a risky proposition and need their own process to mitigate potential failure. There are many ways to define failure and one oft-overlooked metric is ROI. The **best practice** is to make sure stakeholders are aware and bought in before anything is proposed to the client.

Tactics that can be applied during this stage include:

- Develop product catalog and business rules;
- Product taxonomy;
- QA of new products; and
- Specs development.



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>> stage 2: proposal

This stage is handled by the sales support role.

The sales support team has a variety of titles and responsibilities in our industry, but most often are client-facing and handle both pre- and post-sale non-operational functions. Some example titles include integrated sales planner, account manager, sales enablement, account executive, media planner, client service associate (CSAs), and sales strategist.

During this stage, the buy-side may have submitted an RFP or sales may proactively want to submit a proposal on behalf of a brand or advertiser for an upcoming campaign.

Tactics that can be applied during this stage include:

- Creation of a proposal and/or media plan.
- If not provided, get the goals/KPIs (key performance indicators) of the campaign from the buy side.
- Pull the creative specs for products being proposed and include with proposal; not everyone supplies specs at this point, but it is a **best practice** to do so.
- Note any placements that can not support third-party tracking.
- Request any campaign requirements such as block lists, viewability, IVT, etc. These need to be factored into pricing.
- Creation of a marketing presentation; not all proposals require a presentation, and another team may be involved in the creation of the presentation.
- Determining what numbers will be used for billing; it is a **best practice** to establish billing numbers at this phase, so products can be priced appropriately. Billing in the US often is on third-party numbers, whereas in the UK it is often on first-party numbers.
- Determining who's Ts&Cs (terms and conditions) will be used. Depending on terms, it could impact pricing. So, as a **best practice**, it would be established at this stage, rather than at the IO stage.
- Pull available inventory for products being proposed.
- Calculate pricing for products being proposed.
- Gather applicable approvals: products, inventory, pricing.
- Where required by the agency, put the proposal in the agency's format.
- Deliver proposal/media plan to AE or whoever is talking with the buyer.
- **BUY-SIDE STEPS:** buyer review, negotiation, and approval of proposal.

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If a proposal requires any custom products or features, there are additional steps, considerations, and typically, other teams involved. Custom can mean a variety of different things; for example:

- An existing product customized in some way, e.g. different targeting, addition of a data aspect.
- A group of products packaged together in a way to make them a custom package.
- A wholly new and unique product that is not part of the standard product catalog.

As a general **best practice**, new product offerings should be fully or largely developed and vetted internally, so they can be easily included into a proposal. Brand new ideas, while exciting, can be a challenge during the proposal phase as typically a RFP has a fairly quick turnaround, and that puts the publisher in a bit of a bind to respond in a timely manner. The publisher needs to vet the custom idea for feasibility and ensure full consideration of all aspects that can impact implementation, third-party costs, and reconciliation to ensure a seamless delivery.

Considerations and potential steps for a custom proposal:

- Ideation, feasibility, development
 - Not all organizations will completely build out a custom product at the proposal stage.
 - Some organizations will choose the ‘build if sold’ route to ensure development time is not spent on unsold proposals.
 - As noted above, it is important to consider all potential aspects of the product that can impact profitability or buyer satisfaction. Many times, unaddressed details come up after IO execution, which can lead to confusion, frustration, or less profit than was originally planned. A **best practice** is to resolve all of those details in this phase whenever possible, and determine the vendor or vendor type needed, if applicable.
- Setting proper expectations with the buyer as to the lead time for any custom work.
- Assess traffic acquisition requirements.
- Working with other teams for aspects of the custom program, e.g. product, pricing, editorial, social, marketing, etc.

holds

Also called reservations. As a **best practice**, publisher teams (sales, inventory management, ad operations, maybe others) should establish a hold process that everyone is familiar with. The hold process should outline what criteria to use to put inventory on hold and what conditions, other than a signed IO, would take inventory off hold. These may include verbals, letters of intent, allocations related to right of first refusal, or an upfront process.

Hold processes will vary significantly by organization, which will work from a process perspective, but what is important is that the process is established and, ideally, documented, and understood so that customers and sales reps receive fair treatment in regard to inventory holds.

A good hold process will find a balance between maximizing revenue, keeping healthy buyer relationships, and minimizing internal process friction.

>> stage 3: IO (insertion order)

This stage is handled by the sales support role.

Once the proposal has been negotiated and approved, it moves to the IO stage for full execution. The IO process can be simple or complex depending on a number of factors:

- Whose Ts&Cs will be used?
- Have the Ts&Cs been previously negotiated between the parties?
- Who will generate the IO?
- Are there one or more additional contracts involved?

Tactics that can be applied during this stage include:

- IO creation may be done in a few ways and impact who will create the IO.
 - In-house using internal systems, delivered to the buyer.
 - Internally using the agency system.
 - The buying team handles.
 - Determine whose Ts&Cs will be used.
 - As a **best practice**, the final version of the purchase should be reviewed to ensure it matches what was pitched and discussed.
 - As a **best practice**, the IO should not only include the commercial terms but the goals/KPIs of the campaign. This allows clarity, including all expectations in one place.
 - Who performs the internal review of the Ts&Cs will vary by organization and may include several teams, including sales, sales support, legal, finance, contract team, ad solutions, or trafficking team.
 - As a **best practice**, the internal Ts&Cs review process should be clearly defined.
 - Feedback is consolidated and delivered to the buyer for review.
 - Determine if another contract is required, such as an MSA or SOW/addendum.
 - Confirm contacts for all aspects of the campaign, such as an event, etc.
 - Execute IO. (both parties sign the IO)
 - Who executes the IO, and other applicable contracts, varies by organization.
 - As a **best practice**, the approved parties for contract execution should be clearly defined.
 - Once the IO is fully executed, the IO should be processed which will include a number of potential steps and approvals, such as:
 - CRM: move from proposal to IO;
 - OMS: move from proposal to IO;
 - Removal of any existing reservations;
 - Making sure all inventory has been booked, in whatever systems it is managed in; and
 - Making sure the executed pricing is reflected in applicable systems.
- Note that any or all of these steps may require approvals.
- **BUY-SIDE STEPS:** Review IO and Ts&Cs, negotiate, sign IO.

PRE-SALE

1. Product Development

2. Proposal

3. IO

4. Campaign Kickoff

5. Creative Delivery

POST-SALE

6. Trafficking

7. Delivery & Optimization

8. Reporting & Analysis

9. Billing

1. Product Development

2. Proposal

3. IO

4. Campaign Kickoff

5. Creative Delivery

6. Trafficking

7. Delivery & Optimization

8. Reporting & Analysis

9. Billing

PHASE: POST-SALE

Post-sale includes all steps after the full execution of an IO. There are six stages of the post-sale phase: Campaign Kickoff, Creative Delivery, Trafficking, Delivery & Optimization, Reporting & Analysis, and Billing. The last three are not linear and happen as many times as are necessary throughout the life of the campaign.

>> stage 4: campaign kickoff

This stage is split between the sales support and trafficker roles; 80% sales support, 20% trafficking.

The trafficking role has a variety of titles and responsibilities in our industry, but most often focus on the fulfillment and troubleshooting of campaigns. A few of the more common titles are ad operations, digital trafficker, and campaign manager. This can require some clarification as in some organizations other functions also live under the ad operations team.

Campaign kickoff could be a very informal process for a standard campaign with an existing client, where the internal team reviews and understands each of the campaign requirements, and approvals are easily given. A more formal kickoff generally requires a meeting with the internal teams and various buyer teams to review all parameters and proceed with executing the campaign.

The steps here are **best practices** regardless of what type of campaign is at play.

Tactics that can be applied during this stage include:

- Review campaign timelines.
- Request creative assets and share specs.
 - Ideally the buyer has received these during the proposal phase, but if they have not submitted all creative assets, now is the time to request in full.
 - This step may be handled by sales support, sales themselves, customer success, or trafficking.
- Review campaign requirements such as block lists, viewability, IVT, etc. These should have been negotiated earlier on and outlined in the IO.
- Determine if 3P creative services will be used by the buyer and if so, which one.
 - Agency ad server, verification, etc.
 - Request 3P reporting access, as applicable.
 - As a **best practice**, 3P reporting access would be received soon thereafter. In practice, access may not be received until later in the process.

1. Product Development

2. Proposal

3. ID

4. Campaign Kickoff

5. Creative Delivery

6. Trafficking

7. Delivery & Optimization

8. Reporting & Analysis

9. Billing

- Review any placement that can not support third-party tracking. As a requirement, this should have been negotiated and documented earlier on; this is just a review.
- Where applicable, request activity pixels from the buyer, e.g., floodlight.
- Identify what screenshot/tearsheets are required and when.
- Identify buyer reporting requirements, for example, timing, format, what should be included, who it should be delivered to, etc. Anything outside of organization norms should be reviewed with impacted parties, e.g., trafficking, analytics, etc.
- If the campaign is custom or includes unique aspects or products, reviewing the details of the campaign execution, so everyone is on the same page is important at this stage.
- Where applicable, discuss where approvals are needed and the required campaign turnaround time.

campaign kickoff goal

There should be no new requirements at this point in the process. All campaign requirements should have been vetted during the proposal stage. In practice, this is a common step where requirements are uncovered. Those requirements can impact all aspects of a campaign from timing to ROI. Publishers and buyers should work closely together to vet all requirements prior to execution.



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>> stage 5: creative delivery

This stage is handled by the trafficking role.

Once creative assets are received from the buyer, the publisher has processes they follow to ensure completeness and campaign accuracy.

Tactics that can be applied during this stage include:

BUY-SIDE STEPS: submit creative assets, which could include campaign creative, campaign ad tags, and creative assets for custom units.

- Review creative assets for completeness and adherence to specs.
- Where the publisher is using a 3P creative vendor:
 - Supply complete and in-spec assets to the vendor.
 - Receive creative tags.
 - Internal review and approval: Teams involved in approval will vary based on organization, and profile of the campaign.
 - External review and approval: Typically, any ad built by anyone except the buyer will require buyer approval.
- Where applicable, post to the test environment for QA and approval.
 - See considerations for custom programs, below.
 - Approvals required will vary by organization, products, and other considerations. **Best practice** is to have a clearly outlined approval process for standard products, defining which product needs to be approved by whom.
- **BUY-SIDE STEPS:** review and approve, where applicable.

Considerations and potential steps for a custom campaign:

Where a custom product or campaign is being developed, the campaign will need to be built out. This may or may not have been done previously, as many organizations go the “build if sold” route. The teams involved may be: trafficking, sales support, product development, engineering, design, audience acquisition, or editorial.

- The product could include not only ads, but custom content, event(s), research, etc.
- Selling organizations should have identified what teams or persons need to be involved for what type of products.
- For anything outside of the most straightforward of campaigns, a **best practice** is to include someone from project management or have someone act as a project manager for custom campaigns. Having a project manager will help move the campaign forward efficiently, while also keeping everyone, internally and externally, abreast of the status.

1. Product Development

2. Proposal

3. ID

4. Campaign Kickoff

5. Creative Delivery

6. Trafficking

7. Delivery & Optimization

8. Reporting & Analysis

9. Billing

>> stage 6: trafficking

This stage is handled by the trafficking role.

Once the creative is in and approved, it's time to set up the campaign in the ad server with the complete targeting.

Tactics that can be applied during this stage include:

- Traffic creative with targeting in the ad server. Ensure that any targeting aspects that were tested during the Creative Delivery stage are duplicated for the live campaign.
- QA of ad server setup.
 - Things to consider as part of the QA process: correct creative/tags, correct targeting, visual of creative, frequency, data use, and data collection.
 - QA requirements will vary by organization. As a **best practice**, an organization should have a well-defined QA process by product, 3P vendor, etc., to ensure consistent results across all resources.
 - Troubleshoot as needed.
- If applicable, live site QA post-launch.
 - Again, QA requirements will vary by organization. As a **best practice**, an organization should have a well-defined QA process by product, 3P vendor, etc., to ensure consistent results across all environments.
 - Troubleshoot as needed.
- Notification of live site launch, where applicable. Notification of launch will vary by organization, but should be a consistent process across team members.
- Generate screenshots/tearsheets, as needed.



1. Product Development

2. Proposal

3. IO

4. Campaign Kickoff

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6. Trafficking

7. Delivery & Optimization

8. Reporting & Analysis

9. Billing

>> stage 7: delivery and optimization

This stage is handled by the sales support role. Supporting sales support will be trafficking and/or ad solutions.

Delivery and optimization include a variety of steps that are not linear, but fall into this general categorization. Many of these steps will be repeated multiple times over the course of a campaign flight.

Tactics that can be applied during this stage include:

- Gain access to 3P reporting, if not received previously. This should be a one-time process.
- Monitor delivery and pacing. As a **best practice**, all first-party and third-party reporting should be reviewed and compared, in the first week of the campaign. For shorter campaigns, that might be less than a week.
- Discrepancy monitoring.
 - The most common discrepancies to monitor are ad server impressions and clicks, and verification metrics of viewability and IVT.
 - This step is especially important if billing on anything besides 1P numbers.
- Optimize delivery in the ad server based on the requirements of the IO and on any goals/KPIs. This is typically handled by trafficking.
- Recommend optimizations that require contract revisions.
 - This may include changes to the overall value of the IO, it could also include CPM changes, or changes to products booked.
 - This could be handled by trafficking, sales support, or the analytics team, working with the buyer.
- If traffic acquisition is needed for a campaign, whether having been known at the outset or identified during the campaign, there are a few primary approaches:
 - Internal: house ads, recirculation, site updates;
 - Social promotion; and
 - External: traffic from outside parties.
- Troubleshooting
 - When troubleshooting uncovers unexpected behavior, the team should then investigate further to define and resolve the issue.
 - Most often this will start with trafficking, but could involve an escalation team, ad solutions, engineering, or analytics.

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>> stage 8: reporting and analysis

This stage is handled by the analytics role, supported by sales support.

The analytics role can be widely or narrowly focused, depending on the organization. Teams may be called analytics, insights, reporting, and business intelligence, to name a few.

Reporting and analysis include a variety of steps that are not linear, but fall into this category. Many of these steps will be repeated multiple times over the course of a campaign flight.

Tactics that can be applied during this stage include:

- Establish automated reporting for the buyer, if applicable; a one-time process.
- Campaign impression and click reporting. Often handled by sales support, but can vary by organization.
- Campaign viewability reporting. Especially important if the campaign has viewability requirements.
- Measurement of delivery success by a campaign, which should translate to the success of inventory forecasting.
- Measurement of audience insights: who was engaged, who was reached, etc.
- Brand lift study execution and analysis of results.
- As a **best practice**, there should be regular communication with sales about their campaigns mid-flight including delivery, optimizations, and any risks.
- As a **best practice**, if there are automated client-facing reports in place, have the data reviewed internally first. This review allows issues to be identified internally rather than by client and it allows you to proactively communicate about anything that may generate concerns or questions.

Not related to specific campaigns, but in support of future campaigns, a selling organization should measure and monitor:

- Viewability by placement and in aggregate.
- Measurement of delivery success by looking at campaigns in aggregate. This analysis can provide valuable insight into your forecasting and sales processes. If utilized, can allow you to adjust forecast methodology or sales process to improve delivery in future campaigns.
- Creation of benchmarks: clicks, fraud, viewability, email open rate, and click-through rate, among others.

1. Product Development

>> stage 9: billing

This stage is handled by the billing operations role

The billing operations role may also be called business operations or could fall under a variety of finance titles.

2. Proposal

Many campaigns will go through the billing process multiple times. The process may repeat monthly, but campaigns could have another billing schedule. The primary team is the finance or accounting team, but they need support from the operations team for performance data and campaign specifics.

3. ID

As a **best practice**, publishers should identify timelines around the steps of the billing process.

Tactics that can be applied during this stage include:

- Identify placements to be billed.
- Obtain billing performance data, typically provided by the trafficking or analytics team.
- Perform reconciliation, which may need support from sales support or trafficking for discrepancies.
- Generate invoices.
- Resolve disputes with buyers. May need support from sales support or trafficking for discrepancies.

4. Campaign Kickoff

5. Creative Delivery

6. Trafficking

considerations for the direct sale process

While the process outlined above doesn't delve into the tools used, the direct sales process has always been very people- and process-heavy. It is highly recommended to use tools and partners to optimize your process.

7. Delivery & Optimization

Self-Serve

There are self-serve tools that can complement this process and offer both your buyers and your internal teams the ability to access information or processes themselves. These tools can empower the users to do what they want to do, when they want to do it.

8. Reporting & Analysis

Automation

There are opportunities for automation that can replace the manual processes that people may be doing today, making them both faster and less error-prone. Not every automation can replace 100% of the manual process, but even partial automation can free up your team from manual work which allows them to support your organization in a higher-value capacity.

9. Billing

Outsourcing or staff augmentation

There are organizations that can augment your team. While hiring has never been easy, now it takes longer to fill roles, and when you fill those roles, you may not be able to find candidates with the experience you need.



about beeler.tech

Beeler.Tech brings together a global community of over 2,000+ ad ops professionals. Members share best practices, job opportunities, recommendations for services and technologies, engagement in our community, and genuine support of one another as we navigate the ever-evolving digital landscape.

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