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Unleash the potential of programmatic in B2B

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Introduction



Danielle Howe
Reports editor
B2B Marketing

If you're a user of the internet, you've undoubtedly been a recipient of programmatic advertising at some point. You're probably most familiar with those retargeting adverts that seem to follow you around the internet – but the truth is, they can be highly effective (yes, even in B2B) and only a few of us (marketers included) really understand how those adverts get there in the first place.

A mere 15-20 years ago, online advertising was simple – a brand (let's say Coca-Cola) would work directly with a publisher (let's say dailymail.co.uk) and visitors of the publisher's website would all see the same Coca-Cola advert. Now, however, all your online activity is stored and used by brands and publishers in order to put the most relevant adverts in front of you.

The trouble is, the process by which adverts end up in front of buyers – whether you're talking about B2B or B2C – is murkier than ever, and marketers can be forgiven for finding the whole rigmarole confusing and unreliable. What's the difference between a DSP and a DMP? How do you know if your ads end up in front of real people? How do you know that your adverts won't appear on all sorts of seedy or morally questionable sites?

This guide is here to clear up the world of programmatic for you – helping you to understand what it is, how it works and how you can use it to your advantage. We'll also be helping you to navigate some of the risks associated with programmatic, such as brand safety, and clearing up what all those mysterious acronyms actually mean. By the end of this guide you'll be left with a clear idea of whether or not programmatic is for you, how to go about putting a programmatic campaign together, and the results you can expect when the wheels are in motion.

Section 1
What is programmatic?

1.1 Defining programmatic

Programmatic is simply another word for 'automation', most commonly referred to within the world of display advertising. In essence, programmatic advertising allows brands to target audiences online more efficiently and directly than ever before.

In the past, a brand might have advertised on a particular site in the knowledge that their audiences broadly matched. Now, however, programmatic means brands are able to target a specific audience, regardless of where they spend their time online – this might be ft.com, but it could might also be anywhere ranging from facebook.com to gumtree.com.

> ***"Programmatic, in its simplest form, is the automation of buying and selling media online, layering data and technology to get the best results."***
>
> Gareth Neville, UK head of programmatic, Hitwise

Most of us will know programmatic as consumers, in the form of those (sometimes) pesky adverts that follow you around the web. But for many B2B brands it's increasingly being used as an effective way to generate traffic, leads, conversions and even sales.

While programmatic is most often spoken about in the context of online display advertising, programmatic TV advertising and programmatic outdoor do exist – although, we'll be focusing on digital display advertising and social media for the purpose of this guide. It's worth noting that much of social media advertising is now programmatic, although you wouldn't necessarily realise this when using different social media platforms.

> ***"When people talk about 'programmatic', they actually mean 'programmatic display'. A lot of marketers and agencies talk about programmatic, and don't realise that they're already investing in programmatic buys through exchanges such as Twitter, Facebook and LinkedIn."***
>
> Jon To, media platform manager, Pulse

The whole programmatic ecosystem is, admittedly, a little complex, but it's not really necessary for marketers to know all the ins and outs of programmatic to make full use of its potential. Having said this, it does help to have an idea of how programmatic works, if only to understand what it can do, the pros and cons, and where it could be used effectively to achieve the results you're looking for. Also, the more you know as a marketer, the better informed you can be when selecting and working with agencies or other providers (e.g. trading desks).

> ***"Marketers should have a solid understanding of the mechanics behind programmatic, and how it all ties together. That will then lend itself to a greater understanding of the benefits and challenges associated with programmatic."***
>
> Kenneth Kulbok, programmatic sales lead EMEA, LinkedIn

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"Programmatic was originally used as a way for publishers to sell their unsold inventory at cheap prices"

1.2 A brief history of programmatic

In the earlier days of the internet (the 90s and early 00s), digital advertising space was bought directly: much as a brand would buy an ad spot in a newspaper, it would also negotiate and buy inventory from individual online publishers.

However, as the amount of ad inventory available continued to rise, maintaining multiple individual agreements was no longer sustainable. As a result, ad networks were developed – these allowed brands to access multiple inventories at once, which was considerably easier than negotiating those individual deals. The downside is that these were 'blind networks', which meant that it was a cheap way of buying lots of media, but it was impossible to know where your adverts would end up (essentially a case of throwing mud at the wall and seeing what would stick).

Programmatic – the ability to sell and purchase inventory automatically – was originally used as a way for publishers to sell their unsold inventory at cheap prices. However, since about 2007 (the same year that Facebook launched its own ad exchange) it has become a more mainstream way of investing in digital advertising, and even premium publishers (those which users tend to actively seek out, such as news sites) are now jumping in on the action.

> ***"Programmatic emerged to help marketers better understand the consumer journey and collect signals that can help them make better decisions. This combined the ability to reach consumers across an expansive media landscape with the opportunity to measure and optimise campaigns in real time."***
>
> David Gosen, GM global platform solutions and SVP international, Rocket Fuel

Key

Ad exchange: An online marketplace that facilitates the buying and selling of inventory, often run automatically and auction-based.

Ad server: Technology used by publishers, networks, and advertisers to store adverts and deliver them to website visitors or users.

DSP (demand-side platform): A platform used by advertisers to buy inventory programmatically and manage their online media campaigns.

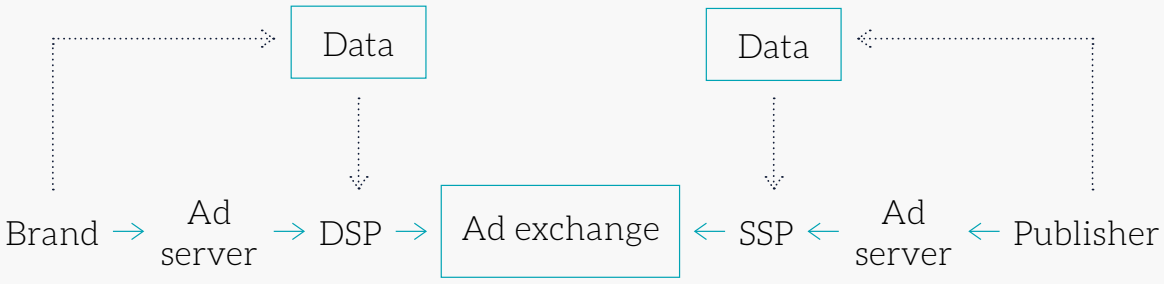
SSP (supply-side platform): A platform used by publishers to manage their inventory and maximise their revenue.

DMP (data management platform): A platform that allows advertisers, publishers or agencies to store and manage data (e.g. audience or campaign data). It's plugged into a DSP or SSP to allow advertisers and publishers to target and segment audiences more effectively.

1.3 The programmatic ecosystem

The world of programmatic does appear complex at first – and individual elements of the process are indeed complicated – however, the ecosystem as a whole isn't actually as confusing as some may have you think.

In the knowledge that programmatic is simply an automatic way of putting an advert in front of a particular user, let's look at the whole system, bearing in mind that really there's the buy side, the sell side, and the broker in the middle (the ad exchange or ad network).



Buy side **Sell side**

The buy side

On the buy side, a brand/advertiser wants to buy impressions (importantly, it's not buying the advertising space itself, but views of its adverts, wherever its audience may be). To do this, it inputs its creative into an ad server. This is then plugged into a demand-side platform (DSP) – usually managed by a trading desk or agency – along with any other relevant data, such as customer interaction data collected by the brand, which is used in order to target users more effectively. The DSP is connected to an ad exchange (or ad network) which then decides which inventory to buy, and how much to pay for it, depending on the parameters input into the DSP.

> ***"For a marketer or brand running programmatic campaigns as a managed service, the specifics of the DSP shouldn't matter. There are subtle differences between each of the many DSPs available and, ultimately, it's the people 'inside' the platform on a daily basis who it impacts – e.g. the traders and ad-ops guys.***
>
> ***For a marketer or brand, the most important thing is the service, transparency and performance they get from their supplier. Who's giving you the answers to your questions, and how transparent are they? Can they get under the hood of your campaign and really help you understand what it costs and how well it performed?"***
>
> Gareth Neville, UK head of programmatic, Hitwise

The sell side

On the sell side, a publisher wants to make as much money as possible by generating ad revenue. To do this, it uses a sell-side ad server, which allows it to create placements within its web pages (at various standard sizes). These placements are also overlaid with audience data collected by the publisher.

The ad server is then plugged into a sell-side platform (SSP), where the price of the inventory is set, and the inventory is made available to the ad exchange, where DSPs can bid on it.

For example:

Guardian.co.uk would use an ad server to create ad placements (inventory) within its web pages, and matches these with data it possesses on its audience, which would come from registered and non-registered users. This inventory is pushed into an SSP (sell-side platform), which determines which inventory is available and how much it should sell for, depending on factors such as traffic to that particular page.

The inventory is then made available to be bought on the ad exchange, where it's 'matched' to the advertiser willing to pay the best price (in the case of an auction-based algorithm, which is the most common method of programmatic buying).

The ad exchange

This is where the magic happens. The ad exchange is where inventory is sold and purchased – most importantly, this is done automatically, and very quickly, in the case of real-time bidding.

It's worth bearing in mind that not all DSPs are connected to all ad exchanges, and neither are all SSPs. This is why trading desks (which we'll come to later) may work with multiple DSPs to get results, while publishers would work with multiple SSPs.



"It's also possible to go a step further by personalising adverts according to a user's unique interests and behaviours"

Behavioural targeting versus contextual targeting

How do a brand's adverts arrive in front of the right audience? With programmatic, there are two ways of targeting users – either via behavioural targeting or contextual targeting.

Behavioural targeting means displaying an advert to somebody based on their demographic data (e.g. age, gender, location, interests, time of day, weather, etc.).

Contextual targeting, on the other hand, means displaying an advert to somebody based on the context of the page they're looking at – for instance, displaying a car advert on a page where there is content related to cars or driving.

It's also possible to go a step further, by personalising adverts according to a user's unique interests and behaviours, to both increase the chance of making a sale and generate insights for future campaigns.



1.4 Types of programmatic buying

'Programmatic' being the umbrella term for all sorts of media buying, it's important to understand that there are various types of programmatic, which, depending on your needs, might be more or less relevant.

Importantly, there are two ways to buy inventory programmatically, either via an auction or at a fixed rate.

Auction-based

In the case of auction-based media buying, there are two types of arenas – invitation-only/private auctions, and open auctions.

Invitation-only/private auctions

A private auction means the seller has made the inventory available via a private network, so only members of that network will be able to bid on the inventory. Premium publishers such as vanityfair.com might do this in order to guarantee the adverts appearing on the site are in line with their own brand – so, for example, Gucci might have access to the network, but non-luxury brands might not.

Open auctions

Open auctions, as the name indicates, are open to anyone. This is where real-time bidding takes place – different advertisers bidding, in real time, for the same inventory. Auctions usually operate on a second-price basis. This simply means that the winning bid only pays as much as the next highest bid. Open auctions are probably the most common type of programmatic buying, and the most cost-effective, especially if you're looking to reach a large audience.

Fixed rate

Automated guaranteed/programmatic guaranteed

Automated guaranteed is, simply, an automatic way of selling reserved inventory – essentially an automatic version of what used to happen with direct buys. It provides buyers and sellers with a quick solution to the direct sales process.

Programmatic guaranteed is an alternative to private marketplaces, and guarantees the ad buyer a certain number of impressions and reach among a specific target audience. It could mean, for example, that you could exclude your existing customers from an acquisition campaign.

Unreserved fixed rates/preferred deals

Buyers are offered a right of first refusal at a fixed cost per mille (CPM, cost per thousand impressions) before the impression goes to open auction. The advantage for publishers is a controlled and stable revenue stream, while advertisers benefit from access to more exclusive, reliable inventory with no surprises price-wise.



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1.5 The question of data

How is data used?

Data is used on both the buy side and the sell side to help target adverts more effectively. On the sell side, publishers use audience data to add value to their inventory, while on the buy side, advertisers can use a mix of first-party, second-party and third-party data to create audience segments and carry out better targeting.

What's a DMP?

A data management platform – or DMP – is the software that's used to store and manage any type of data. A DMP can't do much on its own, but once it's plugged into the rest of the programmatic ecosystem (specifically, a DSP or SSP), it's the key to targeting precise audience segments. (It's worth pointing out that some DSPs now have their own DMPs, too). The most common type of data stored by a DMP would be cookie IDs, which allow marketers to create audience segments and target their adverts more effectively.

> *"Some DMPs sell demographic information, contextual information, and information about quality of advertising (ad verification – where the ad is actually seen, etc). There are lots of data inputs that are available. Then you'd typically have a trading desk purchasing data from these providers, or collecting data and doing the analytics themselves."*
>
> Kenneth Kulbok, programmatic sales lead EMEA, LinkedIn

> *"Fundamentally, it's about the quality of data. If a brand is basing its marketing strategy on weak, rented data, they are not empowered to make the smartest decisions. They are therefore unlikely to see the return on their investment in programmatic."*
>
> David Gosen, GM global platform solutions and SVP international, Rocket Fuel

What's a cookie?

According to the internet advertising bureau (IAB), a cookie is: "Information placed on a visitor's computer or mobile by a web server that can be stored or retrieved when the site is accessed. It's used to record a user's unique behaviour during each visit."

First-, second- and third-party data

First-party data

First-party data is the data that you own, as a brand. This can be used in two ways – for retargeting or lookalike modelling, both of which we'll explore in more depth later.

Second-party data

This is the data that's collected and managed by a second party (for instance an agency you might be working with), and is exclusive to the company that manages that process.

Third-party data

Third-party data comes from companies that acquire and sell vast amounts of data (e.g. Experian or Bombora). They possess huge amounts of data that can be 'sliced and diced' (e.g. based on salary, career or job title) and then plugged into your programmatic campaigns to enable you to target users more effectively.

"Third-party data companies possess huge amounts of data that can be 'sliced and diced' and then plugged into your programmatic campaigns to enable you to target users more effectively"

Section 2
Understanding programmatic in B2B

Programmatic and B2B aren't seen as natural bedfellows, but why is this? Here we'll explain why some marketers have reservations about programmatic, and clear up the real advantages and disadvantages of using programmatic in your B2B campaigns.

2.1 Programmatic misconceptions

There's no denying that in B2B programmatic hasn't yet taken off fully. Some marketers are still unclear about what it is, how it works (both of which should hopefully be clearer if you've read this far) and what it can do. There are a considerable number of misconceptions surrounding programmatic, so here are some of the key ones, and whether or not there's any truth to them.

It's a cheap route to market

Programmatic is seen as a cheap route to market, which some are keen to warn is not necessarily the case. While an initial investment in programmatic can be low cost – and it's not necessary to spend millions to get results – it shouldn't always be seen as a cheap option, as any initial investment will need to be supplemented with enough allowance for testing and optimising.

> *"It's not one thing – it's not just a low-cost, response-driving tool. And I think some clients do approach it like that. They see it as cheap and driving leads. You can do that, but that's not the only reason you use it."*
>
> Paul Cowin, director, marketing operations and technology, Pulse

It's all automatic

Yes, programmatic is automatic at heart, but this isn't the case with every aspect of the process, and you'll still need programmatic experts to get your campaigns up and running, whether this is via agencies, trading desks or inhouse. You can't remove people altogether – quite the opposite.

> *"I think that's the biggest fear with clients that we speak to – they think everything's automated and don't know what's going in. But this is why it's really important to have third parties either verifying data or verifying where your ads are."*
>
> Jon To, media campaign manager, Pulse

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It's only useful for reaching huge audiences, not highly targeted ones

Many B2B campaigns are targeting pretty specific audiences, and programmatic is best known for its ability to reach large-scale, broad audiences, so B2B marketers can be forgiven for believing it wouldn't be much help to their efforts. But while it's true that it's particularly well suited to large-scale campaigns, it's also possible to target precise audiences with programmatic and limit wastage.

> *"A big misconception is that it's not accessible to all marketers. The industry has really matured to the point that it's now quite easy to get started. Any brand can get involved."*
>
> Kenneth Kulbok, programmatic sales lead EMEA, LinkedIn

It's not safe or reliable

It's true that the industry faces issues when it comes to transparency, brand safety and ad fraud, but this doesn't mean programmatic isn't worth trying. We'll revisit these issues in more detail, but it's important to be aware that there are ways to combat these issues, and it is possible to bring programmatic inhouse, which is something an increasing number of advertisers are doing.

It's not creative

The idea that programmatic isn't a creative channel is misguided. Admittedly, some brands' creative can be lacklustre, but programmatic can actually provide new opportunities to be creative and think laterally about how to engage your audiences.

It's just a means of buying low-quality inventory

It's true that in the early days, programmatic was a means for publishers to sell their unsold inventory in bulk at cheap prices. But an increasing number of premium publishers (e.g. telegraph.co.uk or nytimes.com) now sell their inventory programmatically, often via private marketplaces (PMPs). This means high-quality inventory is now available programmatically, which can be exciting for B2B brands looking to reach high-level decision-makers.

> *"There's often a view that it's a one-size-fits-all approach. The reality is that it's just another channel for digital marketers. You can work on a direct basis with publishers, or you can leverage technology."*
>
> Kenneth Kulbok, programmatic sales lead EMEA, LinkedIn

2.2 Programmatic opportunities

While many B2B brands go about their business quite happily without giving programmatic a second thought, others are starting to realise the value it can bring. So let's have a look at some of the ways in which programmatic – when used in the right way – can actually be a rewarding approach for brands in B2B.

Among other things, programmatic can allow you to:

- Reach existing visitors to your website (via retargeting), potentially increasing conversions.
- Target users who have similar attributes to your existing customers (via lookalike modelling), allowing you to reach new, potentially untapped audiences.
- Reach small, specific audiences by overlaying your existing data (e.g. email data).
- Target broader B2B audiences based on the content they're already consuming (for instance, you can place ads next to content about a topic your audience is interested in).
- Target broader B2B audiences based on behavioural data (for instance, you can target users based on age, gender, job title, seniority and location).
- Use geotargeting to reach audiences in a specific place – for instance you could target attendees of a particular event using the local postcode.
- Use a range of advert types (e.g. display banners, video or native) and test and learn to focus on those that work best.

"Many B2B brands are starting to realise the value programmatic can bring"

Targeting

B2B brands often do have a more specific idea of who their customers are, and this is actually an advantage with programmatic, as the more you know about your audience, the more targeted your efforts can be – it's not all about scale.

Reach

While programmatic allows marketers to target specific audiences, it can also be used to reach previously untapped audiences. The reach of programmatic can be huge, and while many B2B brands may not see this as a priority, the ability to reach new audiences can, naturally, be invaluable.

Efficiency

When done in the right way, programmatic an efficient approach to digital advertising – obviously a priority in B2B. By using data in the right way, it's possible to be incredibly targeted (for instance if you use geotargeting to reach people in a certain postcode near an event).

> *"In B2B you want to eliminate as much waste as you can, and programmatic allows you to do that – whether that's by layering data to define the salary bracket for a particular job type, or even drilling into particular inventory sources and sites to ensure you're advertising within your chosen sector."*
>
> Gareth Neville, UK head of programmatic, Hitwise

Adaptability

Programmatic is the perfect platform for testing and learning – in fact, many would argue that a programmatic campaign wouldn't be worthwhile unless you continued to test and learn. It's an extremely adaptable way of advertising, which means tweaking a campaign as you go isn't just a benefit, it's actually recommended.

> *"For B2B marketers, there's a great deal of flexibility in how they can operate programmatically. They can leverage data they have on their side to target users they already know, across publishers. Equally, if they have any gaps in their data sets or want to work on top of the funnel prospecting, they can work with publishers that have those data sets available to fill the gaps with their own data."*
>
> Kenneth Kulbok, programmatic advertising lead EMEA, LinkedIn

2.3 Programmatic risks

The downsides of programmatic are well publicised, and they aren't actually specific to the world of B2B – B2C marketers face just as many challenges as their B2B counterparts. There are three main drawbacks and challenges that tend to rear their head in the world of programmatic:

Transparency

Transparency is an ever-debated problem in programmatic land. The issue has come about as a result of vendors (such as trading desks and agencies) taking advantage of the complexity of programmatic, and being less than transparent about the way in which they operate. Some agencies, for instance, own their own trading desks – but this means that some have been culpable of spending just a proportion of a client's budget on media itself, with the rest going on 'operational costs'. The best way to combat this is to ask any agencies or trading desks you work with as many questions as possible – if they don't provide absolute clarity, that should be a red flag.

Brand safety

The issue of brand safety has come to a head in the past year or so – with some mainstream consumer brands finding that their adverts have been displayed against highly questionable content. However, trading desks should have their own brand safety measures in place, and be clear about what these are. Other ways to combat brand safety, especially in B2B, is to use PMPs (private networks) or create whitelists or blacklists: lists of publishers where you do want your adverts to appear/ not appear.

Ad fraud and viewability

The issue of whether or not an ad is actually displayed in front of an actual human is a real problem, and it's not a new one. It remains an industry-wide issue and there's currently no overall solution. However, one thing marketers can do is ensure there is language about non-human traffic in their contracts. Otherwise, advertising with sites that require a login can also combat this issue, to an extent. It's also worth considering pre-bid verification software, which can help to evaluate the quality of impressions you're bidding on.



Section 3
Implementing programmatic in B2B

You should now have an understanding of how programmatic works, what it can do and some of the pros and cons associated with it. But how do you go about implementing a programmatic campaign? Here's your step-by-step guide.

3.1 How programmatic are you?

Depending on where you are on your programmatic journey, you'll find yourself at one of the following stages. Here's what to do, depending on where you find yourself on your programmatic journey:



Level of sophistication	Current activity looks like	Steps to take to improve
None	No use of programmatic at all.	› Discuss and explore potential of programmatic with media/marketing agency. › Make sure you have a good understanding of your target audience(s) – this will be crucial to targeting users precisely and successfully. › Make sure your data is in order – good data is often the key to programmatic success. › Launch small, experimental programmatic campaigns – social media is a good place to start, as it's possible to use the integrated platforms provided by the likes of Facebook and Twitter.
Experimental	Experimental use of programmatic for short-term campaigns. Small campaigns, typically run for a few weeks at a time.	› Look at the role of programmatic alongside the rest of your digital activity – is it really helping to meet strategic marketing goals, and is it performing as well as other channels might? › Consider what might be limiting your results, including data quality and the context of your messaging (where are your ads appearing?). › Start looking at different sources of data you can use (e.g. third-party data) to improve the targeting of your campaigns.
Consistent	Programmatic is used regularly and strategically alongside other marketing activity.	› Look at taking an always-on approach – programmatic could be a permanent source of leads, especially if you're targeting new markets and demographics. › Keep investing in the programmatic skills of your team: the better your knowledge, the more sophisticated an approach you'll be able to take.
Advanced	Programmatic is used as part of an always-on programme, completely integrated within the wider marketing strategy.	› If you haven't already, consider bringing programmatic capabilities inhouse, especially if it's something you're consistently getting results from. You'll require specialist inhouse expertise and a good handle on your data, but it's likely to be a more efficient option further down the line.

3.2 Decide who you're going to work with

Once you've decided to give programmatic a go, the first step you'll need to take is selecting either an agency or a trading desk to work with, as they will be responsible for the use of the DSP(s). Essentially, they'll help you run your programmatic campaign. It's possible to bring programmatic inhouse, and you could run DSPs yourself, but this is unusual (for now) and requires a good understanding of the programmatic landscape, as well as long-term commitment to make programmatic part of your digital marketing strategy.

Agencies

First things first, find out if your existing B2B agency(ies) offers programmatic themselves. Some agencies will own their own trading desks, while others simply work with independent trading desks. Agencies with a knowledge of programmatic are, naturally, more likely to be able to assist with the bigger picture, enabling you to figure out how your use of programmatic will fit into the wider marketing strategy.

Independent trading desks

Independent trading desks effectively provide a 'managed service', so they're unlikely to be able to provide the same level of creative support as an agency. However, if you want to dip your toes in the programmatic waters, it could be a good option.

Review your current suppliers

Working with a new programmatic agency – whether you engage them to manage the whole process for you, or just part of it – could mean re-examining your existing relationships. Who, for example, will be handling the creative of your adverts? It's important to be clear about which aspects of the process will be managed by whichever third parties you work with.

Ask the right questions

Asking your agency or trading desk plenty of questions before you get started is absolutely paramount in order to avoid some of the issues discussed earlier around brand safety and transparency. There are some key questions you should be asking before you get started – if your supplier can't answer or refuses to answer the following questions, this should immediately raise a red flag:

- Which DSPs do you use?
- What brand safety measures do you have in place?
- Which verification tools do you use?
- How do you ensure transparency? In other words, where is your money being spent? How much would be spent on media, how much on technology, how much on a management fee?

3.3. Setting your objectives

As with any marketing activity, determining your objectives at the outset is paramount if you want any programmatic campaign to succeed.

One-off campaigns versus an always-on strategy

While it's absolutely possible to run a short-term programmatic campaign – say, for example, if you wanted to generate downloads of a new whitepaper, or generate sign-ups to a particular event – the test-and-learn nature of programmatic means that it's often better used in a long-term context.

Because it takes time to optimise a programmatic campaign – whether this is by overlaying new data or experimenting with new creative and messaging – it will always take some time to achieve optimal results. Additionally, when measured alongside the rest of your marketing activity – for instance, any social media activity – it's possible to gain a bigger picture and produce much more powerful reporting.

> *"With the right data, you can start to tie together your social and your search and track users between different channels, where those audiences are crossing over. That means reporting is much more powerful, as you can match it across activity with multiple channels."*
>
> Paul Cowin, director, marketing operations and technology, Pulse

> *"Programmatic is sold as the one-to-one conversation between the consumer at the end of a laptop and the brand or the product – and the same for B2B, the offering or the service. But it does take time. It's a longer play than search, and you can't just switch it on or off."*
>
> Neil Eatson, CEO and founder, Appraise Digital

How much should you budget?

The cost of any programmatic activity will vary wildly according to the audience that you're targeting and a number of other aspects. However, the absolute minimum you can expect to pay is £5000 to £10,000 for a short campaign (maybe a couple of weeks), although it's important to allow extra, however, as you'll need to allocate spend (and time) to testing and learning. If you don't do this, you won't have enough time to optimise your campaign and get the best results.

Your objectives

Of course, setting the objectives of your programmatic campaign is step number one. What is it you want to achieve by using programmatic – is it conversions, increased brand awareness, or perhaps a rise in sales from a particular audience segment? It's also important to know whether you want to influence online or offline behaviour as a result of programmatic (online naturally being easier to measure, although third-party solutions can help to evaluate the impact of programmatic on offline behaviour).

Whatever your objectives are, make sure they're clear before you start working with your agency or trading desk. They'll be able to help you determine the best programmatic approach for reaching your objectives, however, if these are not clear, the success of your campaign will of course be limited.

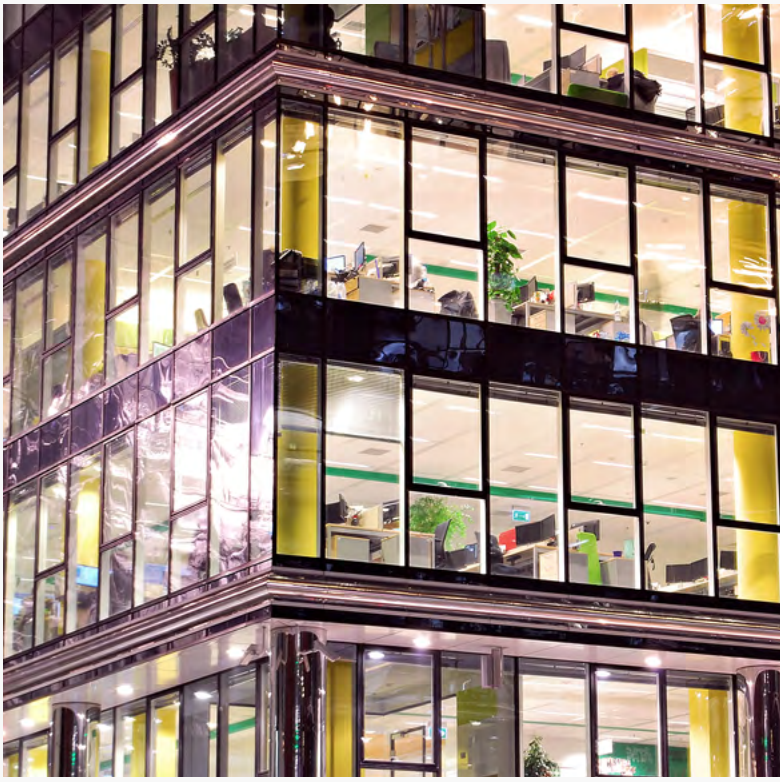
Your metrics and KPIs

Once you've set your objectives, you'll be able to work with your trading desk or agency to identify the best metrics by which to judge the success of your campaign. However, a few standard performance campaign metrics could include:

- CTR (click-through rates): The ratio of users who click on an advert link to the total number of users who view the advert.
- CPM (cost per thousand impressions): The amount paid per thousand impressions. For example, one million impressions at £10 CPM would come to a total price of £10,000.
- Completed views: Users who view an entire video advert.
- Conversions: The number of sign-ups, inquiries, registrations, subscriptions or purchases that take place as a result of programmatic advertising.

Now you'll need to set performance targets against each of these (or any other metrics you choose to focus on), by defining a number or range to hit. This will become easier after you've run your first programmatic campaign, as you'll have a better idea of what success looks like.

Another key aspect to consider is the frequency at which you'll be reviewing the performance of your campaign. Your agency or trading desk should be able to help you evaluate when this should be (e.g. daily, weekly or monthly), according to the length of your campaign and the KPIs that are most important to you.



3.4 Run your campaign

You've got your objectives set out and your agency on board – this means you can now set the criteria for your campaign: who are you going to target, how, and what will your budget be? Your selected agency or trading desk should be helping you to determine the best programmatic approach to take based on your objectives, but make sure you at least consider the following:

- Audience: what will your key audience segment(s) be? As mentioned earlier, this is why it's important to know who your prospects are – or what your customers look like in terms of demographics (e.g. age, gender, job title, etc.) and behaviour (where they spend their time online, what type of content they're interested in, etc.).
- Budget: knowing your budget is naturally key, both in terms of how much you're prepared to pay for the whole campaign, and how much you'd pay for individual KPIs to be met (in other words, your maximum bid for each piece of inventory).
- Length of campaign: how long do you plan for your campaign to run? This will, of course, be determined by your budget, but also make sure you allow enough time for testing and optimising.

> *"You have to remember that no-one goes online to click on banner ads. We go on to consume content and do all this great stuff that we do online. Ads have got to work extra hard to get someone to click through. It's the same with all advertising."*
>
> Gareth Neville, UK head of programmatic, Hitwise

Which type of campaign to run?

Based on all of the objectives and criteria above, your agency or trading desk will be able to help you evaluate which type of programmatic campaign(s) will work best for you. However, here are a couple of key examples to give you an idea of the type of campaigns programmatic allows you to run:

Lookalike modelling

Lookalike modelling means using a lookalike algorithm to identify customers who look like your existing customers – this is particularly effective if you have good customer data, as the algorithm will identify users who have a similar profile to your existing customers (e.g. same job title/location/age, etc.).

Retargeting

You could well be familiar with retargeting adverts as a consumer – for instance, when you visit a website to buy a pair of shoes, but don't complete the purchase. You'll then see an advert for that particular brand (or even the pair of shoes) on the next website you visit. Retargeting can be an effective way to boost conversion rates, as you're targeting users who are already engaged and have already visited your website.

"Testing and optimising should be absolutely fundamental to any programmatic campaign"

3.5 Test and optimise

> ***"Optimisation is key. You'll set a campaign up to the best of your ability, using the best technology and targeting the best inventory and all the things you think are going to lead to performance, and once that campaign goes live then the DSP's algorithm will optimise everything on the fly. If you see something's underperforming, you can cut it or reduce the spend (and the opposite is true if something is really working)."***
>
> Gareth Neville, UK head of programmatic, Hitwise

As Gareth says, testing and optimising should be absolutely fundamental to any programmatic campaign – without testing various areas and optimising accordingly, you won't be getting the most out of your spend. This should, in part, be the job of whoever is managing your DSP, however, it helps to have an understanding of the key aspects of a campaign that can be tested:

- **Audience:** Experiment by targeting different audience segments – you can then focus on those that produce the best results.
- **Data:** Think about trying multiple sources of data to create new audience segments.
- **Inventory:** Make sure you try different publishers and types of inventory – for instance you might find that video performs better than banner ads, or vice-versa.
- **Time of day/week:** Just as you would with email marketing, make sure you experiment by targeting users at different times of the day/week, then focus on those that produce the best results.
- **Frequency capping:** This refers to the frequency at which you show certain users an ad (or multiple ads). Make sure this is adjusted to the optimum level – bombarding users with adverts is likely to put them off, rather then engage them.
- **Creative:** Changing small things within your creative (such as colours or imagery) can be an effective way of boosting results (see the Door-Stop case study).



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3.6 Reporting on success

If you're working with a good agency or trading desk, you should have clear visibility over your metrics and how your campaign is performing. But here are some key questions you should ask when evaluating the success of your campaign:

- How successful were you at reaching your intended audience?
- Did you hit your original KPIs, and thereby the overall objectives of the campaign? Were there parts of the campaign that performed better than expected, or worse than planned?
- Which tests were most effective? How would you approach testing and optimising differently next time?
- What about the 'viewability' rate of your ads? Were you able to detect instances of ad fraud?

Section 4
Case studies

4.1. Door manufacturer Door-Stop generates impressive ROI using social media

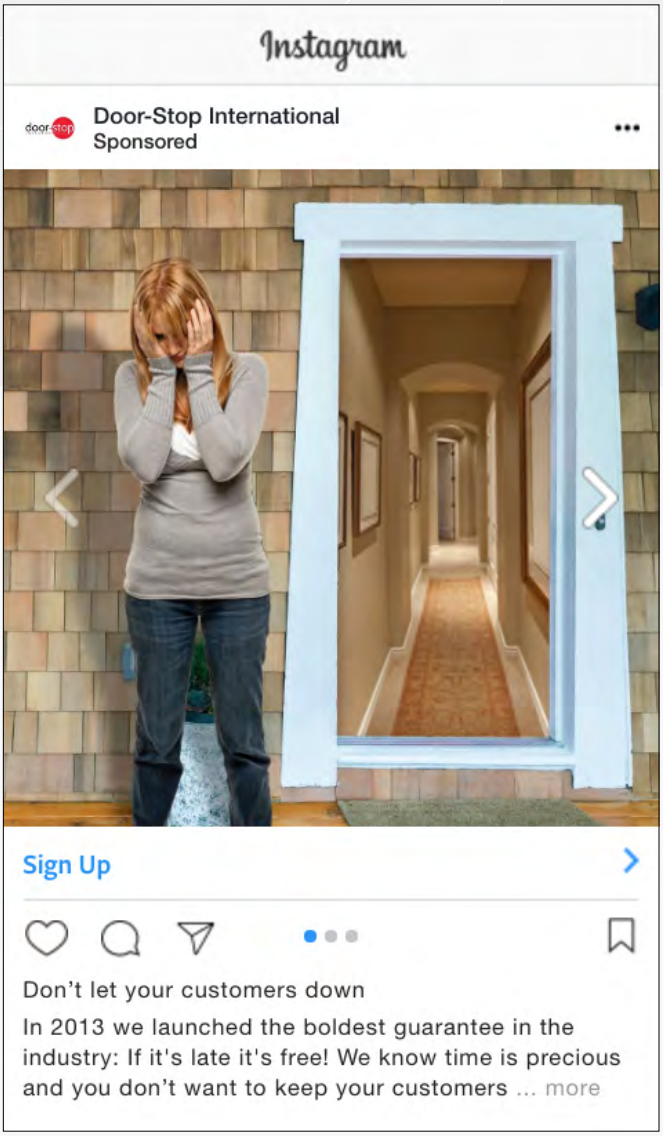
Door manufacturer Door-Stop successfully used Facebook's programmatic exchange to reach its audience of tradesmen

About the business

Door-Stop is one of the UK's leading composite door manufacturers, and today, 90% of Door-Stop's orders are placed using its one-minute, five-step, online ordering system, and it's the only composite door manufacturer that delivers doors nationwide in just three days. It sells directly to the trade and provides marketing collateral to help grow its customers' businesses.

Following the launch of its new custom door configurator and the most advanced interactive website in the door industry for homeowners, which delivers leads straight to its partner installers via the new plug-in, Door-Stop wanted to increase the number of registered installers on its system to facilitate business growth.

It worked with agency CIB, which developed a programmatic social media advertising campaign to generate new trade account sign-ups through the website, on a limited budget, with the objective of a 10% year-on-year increase in new accounts.



Why programmatic?

Working within tight budget constraints and with an ambitious target, it was essential to squeeze the greatest return from every penny spent. As a result, social media advertising was selected due to the flexibility and tight budget control programmatic advertising allows.

Starting with a custom audience created from existing Door-Stop email addresses, Facebook's DSP was used to create lookalike audiences to expand the campaign to those tradespeople Door-Stop had not previously been able to reach.

"With the worst performing ads paused and budget shifted to the best performers, a final ROI of 843% was achieved"

The campaign

The campaign's initial launch consisted of Facebook and Twitter advertising with a variety of ad creative, all playing on Door-Stop's 'If it's late it's free' slogan – the guarantee that Door-Stop will deliver within three days, or the door is free.

The first round of testing showed some immediate results, with Twitter coming in at a much higher CPC (cost per click) and lower conversion rates than Facebook, budgets were quickly paused, and the campaign's focus shifted to Facebook only.

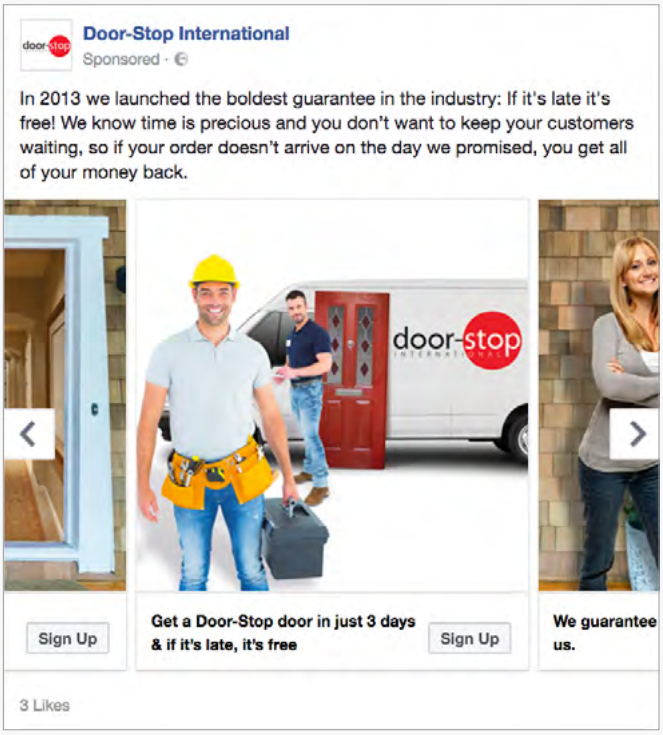
Working closely with Facebook's ad team, CIB further optimised the ad delivery by identifying the audience most receptive to the campaign. The lowest CPC and highest conversion rate were determined as coming from the 45-54 year-old male demographic. All other audiences were dropped in favour of a highly targeted and personalised campaign aimed at this demographic.

This involved revising the ad creative and updating the picture of the installer from a younger man to an older tradesman to better connect with the targeted demographic. The results were immediate, with the new creative delivering an average decrease in CPC of 50%.

The functionality provided by Facebook's DSP to programmatically reach the target audience any time they were on Facebook and across all their devices allowed CIB to measure and refine the campaign on a consistent basis, across the three months in which the campaign ran.

Impressive results

With the worst performing ads paused and budget shifted to the best performers, a final ROI of 843% was achieved. Based on the average yearly value of a trade account for every £1 spent, the return was £9.43. Year-on-year Door-Stop saw new account signups increasing significantly by 33%, 20% higher than the original target. This was attributed to the direct results of the campaign and the additional generated awareness.



4.2. npower targets SMEs with programmatic for the first time

Cassandra Oliver, campaign manager at npower Business, explains how the brand used programmatic for the first time to drive retention sales among its SME audience

Who are npower's B2B customers?

Cassandra: npower Business is one of the leading energy suppliers to the UK business market, serving gas and electricity to more than 195,000 small-to-medium-sized businesses (SMEs).

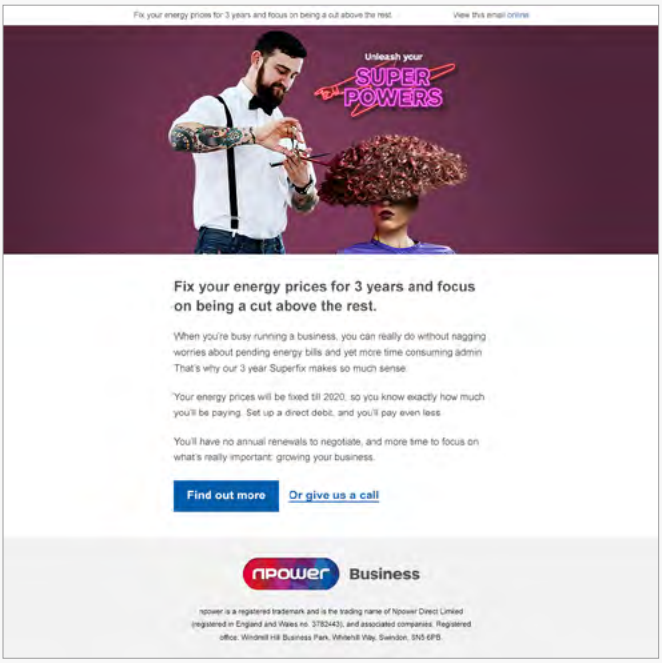
There's not really any such thing as a typical customer, as we serve customers in all kinds of industries, but we have a high concentration who are based in the Midlands and North of England.

Was this the first time you used programmatic?

Cassandra: Yes, this was the first time we included programmatic advertising in one of our multichannel campaigns. Our 'Business Superpowers' campaign also ran on email, radio, digital display and social ads.

What were your main objectives?

Cassandra: Our main objective was retention sales. With UK customers being encouraged to shop around for the best deal on their energy, our industry is a competitive place. Targeting the right people with a campaign is the first challenge, but the timing is also critical. Programmatic ads allowed us to target customers who had visited our website…showing adverts to people who have indicated an interest is bound to be more successful, and the idea was to target those businesses at the right time when they're considering renewing their energy contract.



"For each new campaign we try to include one new method or channel and at least one that is tried and trusted, so we're not putting all our eggs in one untested basket"

What did the campaign look like?

Cassandra: We wanted to reflect in the campaign that our domestic division was already running – it made sense to spin the 'Family Superpowers' theme to showcase British businesses that go over and above every day. It's hard work running a business, and we try to do all we can to support small businesses and make their lives easier, so the idea behind this campaign was to celebrate them.

The ad agency we work with on all our ad campaigns showed us how programmatic ads could work for us, and explained that retargeting would work best with our business audience – this means visitors to npower.com/business were then targeted with digital ads.

For each new campaign, we try to include one new method or channel and at least one that is tried and trusted, so we're not putting all our eggs in one untested basket. I'd heard about programmatic before, so was keen to try it out based on their recommendation.

The creative was produced by our digital agency. A lot of our customers run hands-on businesses like hairdressers and garages, so it felt natural to represent them in this campaign. The hairdresser image stood out, and the baker was created to reflect the radio adverts we had running alongside the digital ads. It was important that the campaign had the same feel across the various channels.

npower's written style is informal, so I wanted to make sure that came across in the copy. We certainly had a lot of fun brainstorming the hairdressing and baking puns until we hit on the right wording!

The core campaign ran during February and March 2017.

How did the campaign perform?

Cassandra: Results have been generally good – the digital advertising has performed above its benchmark so that's been good to see. It's part of a whole campaign so we don't just analyse each part but look at it as a whole. It's definitely a method we'd explore for future campaigns.





Examples of display ads used during the campaign

4.3. Humanly relevant content and context equals success for Makino

How America's premier machine tool company used the power of programmatic to increase its leads by 800%

About the business

Makino is the premier machine tool company in the Americas, serving the automotive parts manufacturing, aerospace and die/mould industries. Because the manufacturing space is very competitive and Makino offers premium products, the company was looking to position itself as an industry thought leader, by sharing informative content with prospects throughout the year-long-plus purchase cycle.

The 2016 programme was a full-funnel approach, bringing awareness and information to the marketplace as well as generating marketing-qualified leads. With these objectives in mind, Makino turned to its agency partner, gyro, to develop a highly targeted and humanly relevant campaign entitled 'Make What Matters'.

Why programmatic?

Traditionally, Makino had used direct trade publication buys to reach its target audience of manufacturing engineers and decision-makers. However, not everyone browsing those sites is in the market for a machine tool.



That meant gyro looked to programmatic targeting to reach specific audience sets and nurture these people as they browsed relevant content across the web throughout the entire sales cycle. This continual presence was designed to ensure Makino was top of mind for audience members making purchasing decisions. 'Make What Matters' content also positioned Makino as a company dedicated to educating audience members and helping the manufacturing industry grow as a whole.

Furthermore, programmatic's efficiency enabled Makino's campaign to not only be highly targeted but also reach its key audience at the right time and at the right price.

The campaign

Because of Makino's uniquely targeted audience, gyro worked with several programmatic partners to find the optimal targeting mix. The 2016 campaign (January to December 2016) consisted of programmatic IP targeting,

site retargeting, competitive conquesting and cross-device geofencing. Each of these tactics was chosen for various reasons, but ultimately, they had the same goal – to ignite engagement with key audience members by delivering a powerful message at the right place and time. Specifically, two vendors were used for IP targeting as a test to see which approach would be more successful in targeting a particular set of accounts with industry-specific messaging. Site retargeting was picked to nurture audience members who had previously interacted with the Makino site and offer these people content relevant to the Makino web pages they had previously visited.

Similarly, competitive conquesting (the practice of displaying adverts next to the editorial content of a competitor) was chosen to reach audiences who had shown previous behavioural interest in one of Makino's competitors and serve them messaging that showcased how Makino's quality, reliability and production could outshine the competition. Finally, cross-device geofencing was selected to capture audience members who attended the International Manufacturing Technology Show (IMTS) in Chicago and drive them to Makino's exhibition stand or back to the Makino website for additional information.

All of these tactics worked together to surround Makino's key audience set throughout the year. Because programmatic targeting data enabled Makino to precisely reach its audience, it was able to deliver relevant and useful messaging to them based on its known industries and behaviours. This approach gave the audience a reason to feel and act, which made the 2016 campaign relevant and compelling.

Impressive results

The programme was measured through conversions, which comprised content engagements and content downloads from Makino's website, as well as cost-per-conversion. These KPIs were picked to showcase audience interaction with the Makino brand (awareness) and educational content (thought leadership) while producing marketing-qualified leads from gated content forms.

Compared to the 2014 campaign, which did not use programmatic targeting tactics, the 2016 campaign contributed to 800% more conversions at a cost-per-conversion that was 80% lower than in 2014. Programmatic tactics led to 86% of the total conversions in 2016, whereas direct publication buys contributed to just 14% of the total. Additionally, programmatic tactics saw a cost-per-conversion decrease of 92% compared to direct trade publication buys. Overall, the top-performing tactic was the IP targeting approach, which drove 55% of the total 2016 conversions at the second lowest cost-per-conversion.

4.4. Intercontinental Hotels Group (IHG) uses programmatic to inform future audience strategies

Location: USA
Brand: Hotel Indigo Savannah
Background: Having used programmatic extensively to reach consumer audiences, IHG understood that programmatic could be used to effectively reach specific B2B audiences too.

Objectives:

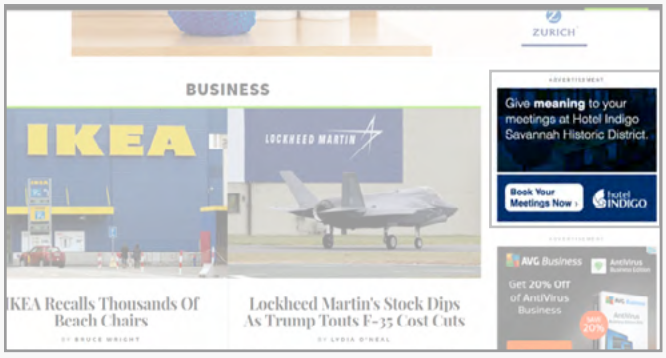
- Position the Hotel Indigo Savannah as the go-to hotel for business travellers, events and conferences.
- Drive awareness and interest in the hotel's events and conferencing rooms among both inhouse and outsourced travel agents/planners.
- Shape future audience strategies based on results of testing throughout the campaign – specifically, measuring whether inhouse travel planners or outsourced travel planners were more engaged with the brand.

The campaign

- It ran for eight weeks during February and March 2017.
- With the aim of pushing highly targeted traffic through to specific landing pages, a range of premium publishers were manually selected, alongside a combination of open exchange and private auction, although, there was no automated process for site selection. The campaign targeted strong business-relevant sites (e.g. Forbes, NY Times, WSJ), alongside reputable local sites (to support the local feel of the campaign). The campaign also ran across some specific sites dedicated to corporate travel/events.
- Vetted third-party data was used alongside some second-party data sourced from the agency's (Encore Digital Media) exclusive publisher partners. This allowed the agency to test the resonance of the messaging with inhouse travel-bookers/events organisers against external/dedicated travel agents and events companies. The data therefore needed to be separated into those two distinct buckets.
- The agency worked with content verification tools to evaluate the quality of placements (ensuring ads were displayed across the right sites).
- The agency also provided weekly optimisation reports, allowing experimentation and optimisation across creative sizes, varying messages, platform and time of day/day of week.

Results

- Viewable impressions helped drive awareness and more than 6000 clicks through to the campaign landing page.
- Insight from the campaign found that lunchtime (11.30-13.30) and the early evening commute (16.30-19.00) were the most likely times for the audience to engage.
- Outsourced travel and event planners were the most likely to be engaged with the brand, information that helps shape future audience strategies.

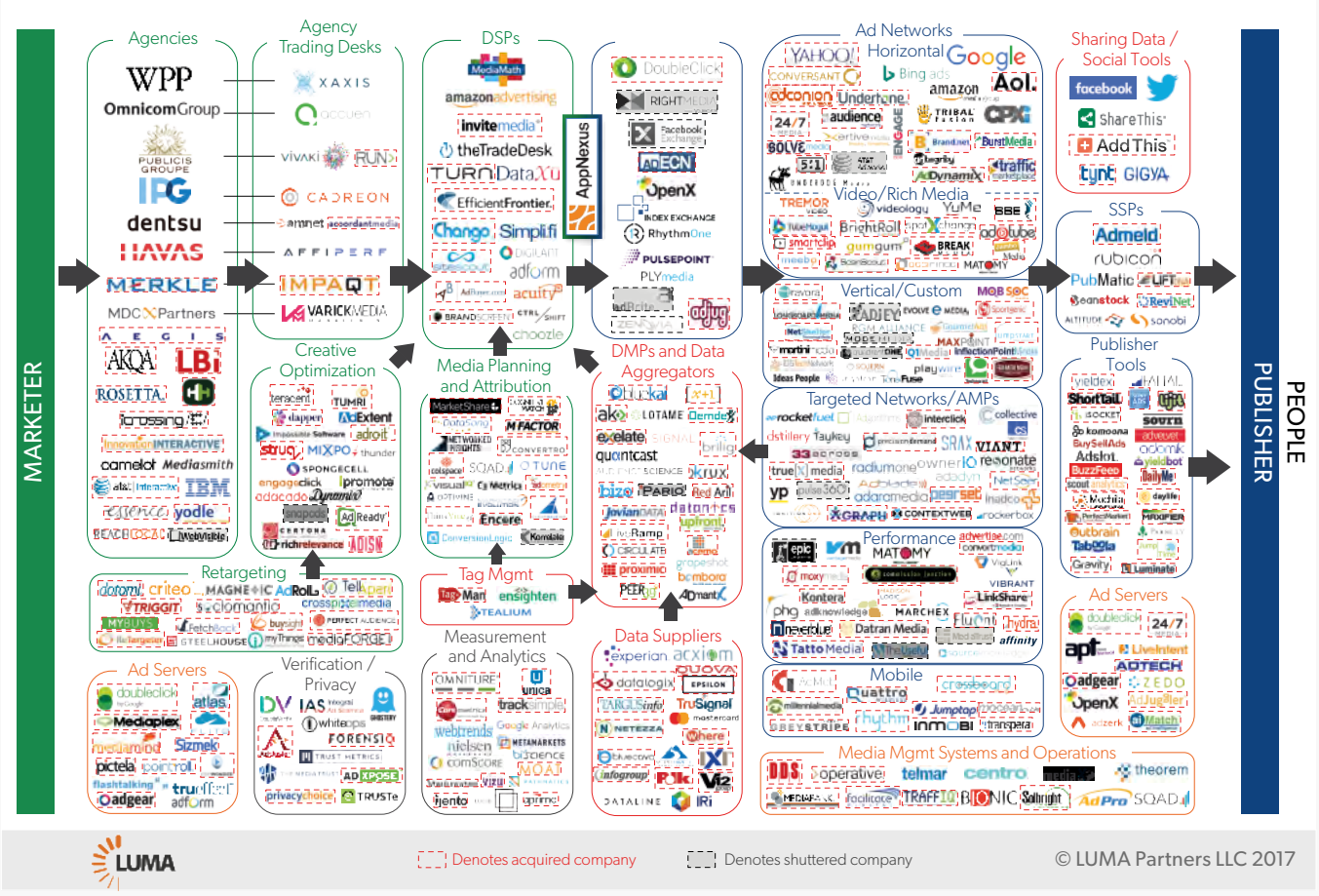


Display ad on ibtimes.com

Section 5
The landscape and the future of programmatic

5.1 The programmatic landscape

The programmatic landscape is complex, and marketers can be forgiven for feeling confused over the role of different companies and who does what. However, this picture of the landscape, produced by LUMA Partners, provides a good overview of the players within each part of the landscape at the moment:



5.2 The future of programmatic and its implications

While many B2B marketers are starting to tap into the potential of programmatic, the industry itself is going through a turbulent time as a result of some of the issues mentioned earlier (e.g. ad fraud). But programmatic isn't going anywhere – so how is it likely to evolve in the coming months and years?

Expertise will continue to spread…

…and marketers themselves will start to possess the kind of knowledge that is currently shared among programmatic specialists.

Whether you use programmatic a lot or just a little right now, continue to develop your own programmatic knowledge and skills. This will be valuable in terms of knowing the right questions to ask your agency and really understanding programmatic potential/limitations.

Programmatic will increasingly come inhouse…

… as a growing number of advertisers look to avoid some of the traps set by less-than-transparent agencies and trading desks.

Much as marketers did with search a few years ago, programmatic is increasingly moving inhouse, as demonstrated by moves by brands such as Procter & Gamble and L'Oréal. However, most brands – especially in B2B – aren't ready to do this yet. Some brands are looking at creating their own trading desk in order to deal directly with DSPs, while others are creating dedicated units or creating their own internal programmatic teams. However, considerable preparation is required to move programmatic inhouse successfully, including assessing business capabilities and hiring the right talent, so it's a big step for many to take, especially if programmatic isn't a major part of a brand's marketing approach.

Spend will become more targeted…

… as according to research by Forrester, just 20% of programmatic spend will be invested in open ad exchanges (versus 65% today) by 2021.

B2B brands' spend on programmatic is already likely to be considerably more targeted than the vast majority of B2C brands (as seen in the IHG case study), so this is unlikely to be a trend that drastically affects B2B marketers. In fact, B2B marketers would be advised to always keep spend as targeted as possible, given the specificity of most B2B audiences and the unlikely need to reach millions of users at once.

More unique ad formats will become available…

…as advertisers look for better ways to engage audiences.

B2B marketers should remember that programmatic is not limited to 'traditional' display adverts. More interesting (and potentially engaging) ad formats, including video and native advertising, are available and becoming more sophisticated as the industry continues to explore the best ways to keep audiences engaged. B2B marketers using programmatic should keep an eye on the type of programmatic advertising available, especially among premium publishers.

More marketers will look at an 'always-on' approach…

…rather than simply operating within the silos of individual campaigns.

While programmatic can be incredibly effective for short-term campaigns – and short-term activity is the best way for B2B marketers to evaluate its potential without spending huge amounts – adopting an always-on approach to programmatic will allow for the best level of optimisation and better integration with other marketing channels. If you are experimenting with programmatic at the moment, this could be a long-term goal, and certainly something B2B marketers should be asking their agencies or trading desks about.

Artificial intelligence will play a part in the evolution of programmatic…

…allowing marketers to anticipate when prospects are most likely to notice them, rather than simply reacting to online activity that's already happened.

As artificial intelligence starts to take on more significance across marketing, programmatic is unlikely to be left behind. This isn't something B2B marketers should be particularly concerned about yet, but it's important to keep an eye on trends within the industry, not least because as it'll shape what different agencies and trading desks offer.

Premium inventory will become more popular…

… as advertisers put the quality of impressions ahead of quantity.

An indiciation that we could be moving back towards old-school advertising, this trend is especially one that B2B marketers are likely to embrace, given that B2B audiences tend to be smaller in scale. It's also potentially good news for B2B marketers, as premium publishers are more likely to recognise that B2B brands could be key buyers of their inventory.

" As artificial intelligence starts to take on more significance across marketing, programmatic is unlikely to be left behind"

Section 6
Conclusion and key takeaways

By now you should have a clearer idea of the opportunities that programmatic presents in B2B, and how to go about getting started with your own programmatic campaigns. But here are some of the key points to remember:

› Programmatic should simply be understood as an automatic way of displaying adverts in front of certain audiences. While parts of the ecosystem are complicated, this does not mean it should be dismissed as an unviable option in B2B – it can prove to be an effective way of meeting a number of marketing goals.

› In terms of what the ecosystem looks like, it's important to understand that DSPs are used on the buy side by brands, and SSPs are used on the sell side by advertisers. In the middle there's the ad exchange, which is where adverts are matched to the right inventory.

› Data is very important – the better the data you have access to, the more effective your programmatic campaigns can be. It's possible to use first-party, second-party and/or third-party data to power your programmatic campaigns.

› There are some key misconceptions about programmatic in B2B, but it can be used effectively, and more and more B2B brands are discovering its potential.

› The biggest opportunities for programmatic in B2B include targeting, reach and adaptability.

› The key risks to be aware of are ad fraud, transparency and viewability – there are ways to overcome these, however, they are still problems the industry is struggling to tackle.

› Before launching a new programmatic campaign, you'll most likely need to work with either an agency or a trading desk who will be responsible for managing the technical aspects of the campaign. Transparency is absolutely crucial, so make sure you ask any potential providers plenty of questions before you commit, including where your money will be spent and what brand safety measures they have in place.

› As with any marketing initiative, make sure you set out your objectives and KPIs before getting started – clear objectives will also ensure your trading desk or agency is able to fully support you and deliver the results you're looking for.

› Testing and optimising is absolutely fundamental to programmatic – in fact, it's one of the biggest advantages, so don't hesitate to tweak various aspects of your campaign in order to optimise your results.

› Ideally, programmatic shouldn't be seen as a short-term activity; it can take a while to see results, and taking an always-on approach may be worth considering in order to get the biggest bang for your buck.

Your programmatic glossary

- **Ad exchange:** An online marketplace that facilitates the buying and selling of inventory, often run automatically and auction-based.
- **Ad network:** Often used in the same sense as an ad exchange, although, ad networks are typically a pool of unsold ads from publishers, allowing publishers to buy inventory at a cheap rate.
- **Blind network:** An ad network that does not allow publishers to see where their ads have appeared – often used to buy media in bulk.
- **Cookies:** A piece of information placed on a user's computer or mobile device that can be retrieved when a site is visited. It allows advertisers and publishers to track aspects such as a user's length of time on a page or how many different pages they visited on a site.
- **DMP (data management platform):** A platform that allows advertisers, publishers or agencies to store and manage data (e.g. audience or campaign data). It is plugged into a DSP or SSP to allow advertisers and publishers to target and segment audiences more effectively.
- **DSP (demand-side platform):** A platform used by advertisers to buy inventory programmatically and manage their online media campaigns.
- **Inventory:** Advertising space that a publisher makes available to purchase.
- **Lookalike modelling:** A practice by which advertisers use information on their current customers to target those with similar profiles.
- **Pixels:** An invisible tag that's placed on an advertiser's web page(s) that indicates a user's browsing activities. These often work in conjunction with cookies.
- **PMPs (private marketplaces):** A private ad exchange, where selected advertisers have access to the inventory of selected publishers.
- **RTB (real-time bidding):** A protocol within an ad exchange that allows advertisers to bid on individual impressions, in real time.
- **Retargeting:** The practice of displaying adverts to particular users who've already visited an advertiser's website.
- **SSP (sell-side platform):** A platform used by publishers to manage their inventory and maximise their revenue.
- **Trading desk:** A company (or part of an agency) that's responsible for managing an advertiser's campaign – they'll be responsible for directly using DSPs.
- **Viewability:** A metric that shows how many impressions were seen by users. An ad is usually considered 'viewed' if at least 50% of an advert is displayed to a user for at least one second.

Unleash the potential of programmatic in B2B © **B2B Marketing 2017**

The experts

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