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Masterclass Series

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THEOREM MASTERCLASS — AUTOMATION



This Masterclass series from Theorem is designed to equip you with the knowledge you need to leverage purpose-built automation for business growth in Advertising Operations.

By reading this five-part Masterclass, you'll understand how automation can help turn Advertising Operations into a revenue driver. You'll learn how to future-proof operations by ensuring you've a resilient, agile, and robust foundation to support the ever-growing volume of generative AI-empowered creative developments. You'll know why automation matters, what it can achieve, how to gain C-suite backing, and how to set your business on a path to automated success.





CHAPTER 1

AUTOMATION: What Are The Macro Challenges Driving Automation?

Automation technology can help you scale up and speed up Advertising Operations without needing additional resources.

Therefore, as a senior leader with a responsibility for revenue, it should be a top priority. Should you be using it? What will its impact be? How long until ROI? These are the sorts of questions the C-suite and your team will want answers to.

But first, let's ground your knowledge in some wider market context. What's driving the demand for automation in the media, publishing, gaming, and Retail Media Network (RMN) sectors?

Macro-factors driving adoption of automation include:

- ❶ Generative AI maturity
- ❷ Challenging economics
- ❸ Omni-digitalization
- ❹ Ad fraud





Generative AI maturity

Generative AI maturity is causing ripples in business. Tools like ChatGPT and Midjourney are automation tools for content creation. Imagine creating thousands of personalized one-to-one rich media ads based on data from hundreds of customer journey touchpoints, in minutes. This is getting closer to being your reality. With such logistical complexity at the back end, the copywriter in Marketing won't be as critical to the campaign as the conductor in Advertising Operations.

Why does generative AI maturity create the right environment for automation?

Because generative AI creates content faster than ever before, you need lightning-fast streamlined IT and Advertising Operations to handle the volume.



Challenging economics

Challenging economics are slowing down consumer spending. Inflation in the US is higher than it's been for thirty years.¹ Interest rates and bills are going up; incomes are squeezed. Consumers are looking for places to cut costs. Conversely, this could be good news for media and gaming organizations as consumers trade nights out for nights in with a streaming service or video game.² However, cash-strapped customers will be savvy about selection and only keep the subscriptions that offer the best value.

It's not just consumers feeling the pinch. Businesses are managing rising costs too, especially as interest rate hikes make it more expensive to borrow. Boards are looking to business heads to find opportunities for new revenue streams and efficiencies. For many, this has meant moving from subscription-based revenue models to adopting advertising-based revenue models.

In addition, tighter privacy regulations and, in particular, the phasing out of third-party cookies in programmatic advertising, make targeted (and efficient) marketing more challenging. This has led to increased importance on first-party data: 88% of global businesses say that first-party data is more important than it was two years ago.³

Why do challenging economics create the right environment for automation?

Because everyone's looking for efficiency.



Omni-digitalization

Omni-digitalization is the recognition that every aspect of the business process has become/is becoming digital. This means that IT budgets must continue to grow, and the skills you need will continue to evolve. More data will be generated across the business, with more opportunities for cross-channel integration, deeper personalization, product innovations, customer journey optimization, and to build game-changing brand experiences. Tying all this data together for optimized Advertising Operations is a huge opportunity and a significant orchestration challenge.

Why does omni-digitalization create the right environment for automation?

If all business processes are managed with digital technology, that's a lot of data to connect and analyze and a lot of infrastructure needed. IT needs help streamlining it all.

Ad fraud

Ad fraud in digital advertising is underreported and under-discussed. In many businesses it's not even a topic of conversation — whether that's because people are ignorant of it or ignore it — yet according to Juniper Research, ad fraud cost advertisers a staggering \$84 billion in 2023.⁴ For example, impressions might be coming from ads stacked on top of each other in unviewable spots on low-quality sites. The ANA (Association of National Advertisers) estimates that 25% of programmatic ad spend is wasted, with 15% used up by MFAs (useless 'made for advertising' websites).⁵

For some in the business, the status quo is lucrative, and it doesn't pay to shine a light on ad fraud. But as a leader in Advertising Operations, knowing where you're leaking money will help save it.

"In 2024, marketers will spend over \$650 billion on online advertising. A substantial proportion of this – perhaps in the hundreds of billions – will be completely wasted."

Bob Hoffman - 'Inside the Black Box: How marketers waste billions on online advertising', 2024⁶

Why does ad fraud create the right environment for automation?

It must be acknowledged that programmatic media buying — the target of so much ad fraud — is automated. Yet automation is also the solution, for quality control and compliance checks at scale.



Automation in the market today is in an accelerated growth period

The software market is booming;⁷ McKinsey suggests automation will completely reshape how we work in the future.⁸

This suggests that if you don't use it already, automation will be coming to your business soon. Introduced correctly, it can take your Advertising Operations to a whole new level — and provide significant ROI. However, it'll need a leader to make sure it's introduced with a clear strategy for success. Prepare yourself; prepare your organization.

This world is speeding up and automation allows you to keep pace.

To navigate the challenges of the 21st century, businesses need to innovate using advanced technologies, such as automation, AI, and IoT, to stay relevant and maintain growth. In this chapter we explored macro-economic issues that affect all businesses. In chapter 2, we look at some of the challenges specific to your role in Advertising Operations.





CHAPTER 2

AUTOMATION: Solving Your Challenges In Advertising Operations

Automation isn't just a broad board-level strategic objective. It can help you, specifically, in your role.

For example, helping you manage scale, compliance, and the waste in programmatic ad budgets caused by ad fraud. With better technology at your fingertips, you could recoup some of this and help Advertising Operations to improve the bottom line and support your business's long-term strategic goals.

As a leader, it's important to be able to identify and articulate the challenges you face. It's critical for raising financial and operational support. If you can't, you lack a strategic business perspective; analyzing your challenges gives you the right foundation on which to seek solutions.

Automation can help solve Ad Operations challenges:

- ❶ Reduce the time you spend on manual tasks
- ❷ Speed up turnaround times
- ❸ Innovate with limited resources
- ❹ Connect siloed data
- ❺ Managing impact and training needs





Reduce the time you spend on manual tasks

55% of US Advertising Operations professionals state time-consuming processes as the biggest pain point, significantly slowing down their pace of work.¹⁰

Manual operations include updating campaigns, linking spreadsheets, moving data, and creating reports. Imagine scaling each of these by 10X — could you do it now?

Not only do manual tasks take time, but the humans that carry them out are error prone — they make mistakes which often result in workarounds and makegoods.

Speed up turnaround times

The complexity of the Advertising Operations tech stack can be a lot to manage. You must integrate and secure all the moving parts. Test it works. Make any necessary changes and test again.

Done manually, this slows down processes and can put a massive strain on the people working 'behind the scenes'. Automating workflows and processes allows them to do their best work — quickly. Combining human and computer intelligence can maximize productivity and effectiveness for fast turnaround times and the ability to react to sudden spikes in demand.

With new features and tools available all the time, keeping operations running seamlessly, securely, and speedily is a momentous challenge. Advertising Operations need to manage infrastructure sprawl before it becomes unmanageable.

Innovate with limited resources

To be the best, you don't just want to manage expectations, you want to exceed them. Too often in Advertising Operations, you're hamstrung by technical challenges, skills shortages, and limited time and energy. You might find yourself just about delivering for people who don't appreciate the amount of effort it takes to get advertising media in the right place at the right time.

The frustration is that your team can probably do more. Opportunities are missing for enthusiastic people who should be taking what you do to new heights. To do that you need time to play around and find out. That is, you need to create something new (and profitable). Right now, carving out time for 'play' is nigh on impossible.

83% of US Ad Operations professionals agree that integrating automation into existing workflows would **increase productivity and save time and resources.**¹¹



Connect siloed data

For a good reading of your customers, you need their data available in one place. However, with multiple platforms at multiple touchpoints creating terabytes of data, this is far easier said than done. You also must consider cybersecurity protocols and GDPR requirements.

Siloed data exacerbates the challenge of friction between departments, limits the combining and analyzing of data for richer insights, and gets in the way of delivering a seamless experience across all channels. If you could align teams and have everyone working with the same data and the same KPIs, you can work with much more focus. Effectively, all parties benefit: Your teams work quicker and more effectively while your customers receive more streamlined and personalized experiences.

Managing impact and training needs

As technology and customer needs evolve, you need help managing its impact and your team needs training to excel. Upskilling and moving with the times is a constant challenge as you try to maintain business as usual. And with so much operational admin to do, finding time for training and for practice is hard. Advertising Operations leaders need to find a way (time, money, energy) to release colleagues from day-to-day activities and free them up to become experts in what comes next.

Solving your everyday challenges requires a new perspective.

The common challenges you deal with on a day-to-day basis become normalized, as if they're just part of the job. In fact, Advertising Operations is a complex system of processes, platforms, and admin which, altogether, create a lot of inefficiency. And every system eventually gets replaced with a better way of doing things, and that time is now for Advertising Operations. Your day-to-day will change with a changed perspective about the possibilities of automation. In the next chapter, we'll look at some of these breakthrough solutions.





CHAPTER 3

AUTOMATION: Finding Your Breakthrough

In chapters one and two, we learned about the market context and the operational need for automation.

In this chapter, we'll look specifically at how automation can solve these challenges in order to turn Advertising Operations into an efficient revenue-driving machine, before considering the potential impact on your business as a whole — in terms of revenue, resource, and culture.

How can automation optimize Advertising Operations?

- ❶ Reduce turnaround time (TAT)
- ❷ Reduce errors and makegoods
- ❸ Work towards process consistency
- ❹ Centralize information
- ❺ Improve ability to scale
- ❻ Enable hyper-personalization





Reduce turnaround time (TAT)

Companies using workflow automation experience at least **50% faster turnaround time** and at least **2x increase in volume** with reduced manual effort.¹²

Time saved is money earned. Speeding up any process — e.g., the order-to-cash process, campaign set up and optimization, data entry, or reporting — will boost the bottom line. You can improve margins and lighten the load on your teams to allow them to focus on carrying out more valuable work.

A study by Aberdeen Strategy & Research reported that automated workflows lead to a 50% reduction in the time required to complete tasks.¹³ For example, eliminating the need for manual data entry.

Which Advertising Operations processes are most time-consuming?

Which processes have the biggest impact on margins?



Reduce errors and makegoods

Manual processes will always be susceptible to human error. Automation, by relying on the rules-based protocols and repeatability of digital technology, works to eliminate errors across a variety of tasks such as data entry, ad placement, and campaign tracking.

67% of US Advertising Operations professionals agree, saying that they see automation as a solution to reduce errors.¹⁴

The big advantage of sustained accuracy is reducing the number of makegoods.

Which common errors impact your bottom line?

How effective are your error-checking mechanisms and what improvements are needed?



Work towards process consistency

Consistent processes streamline your business in numerous ways. From ensuring that everyone's aligned, and technology is properly integrated to producing reliable reports and KPIs that are agreed upon. This is of particular importance when working with remote teams in a hybrid workplace. With these consistent processes, you're on a path to success.

Automation is one way to improve consistency by standardizing and streamlining workflows for day-to-day activities. The industry is starting to see this: 56% of US Advertising Operations professionals believe automation builds process consistency across their teams.¹⁵

Which inconsistencies in Advertising Operations workflows impact performance?

How well do your current tools standardize processes and outputs?





Centralize information

The statistics suggest that centralizing data is effective: 78% of companies globally use centralized data as part of their customer data strategy, and of those 64% have improved efficiency and 57% have greater business growth.¹⁶

To maximize the effectiveness of process automation, businesses need to effectively collect, process, and analyze data in a centralized system. This gives you clearer visibility of processes and profitability. Not only does connected data help feed automation, but automation can help connect your data.

Additionally, working from a centralized dashboard helps employees to make decisions quicker as multiple teams have access to the same insights and reporting. This improves communication and collaboration between departments.



Where is your data and can you access it all through one platform?

How well do your systems integrate and share data across teams?

Improve ability to scale

Automated workflows are highly scalable. It doesn't take ten times as long to do ten times as much work; in many cases, it takes exactly the same amount of time. This allows you to handle an increasing volume of campaigns without a corresponding increase in operational costs — giving you the opportunity to lead an extremely profitable team.

With the flexibility to adapt to changing market conditions or an influx of orders, you can quickly adjust processes to accommodate new advertising channels, formats, or strategies, ensuring that your business remains competitive, and ROI remains high.



How effectively does your workflow manage more campaigns without increasing costs?

How adaptable are your processes to market changes and new channels?

Enable campaign hyper-personalization

With generative AI working at warp-speed, we have an opportunity to personalize campaigns to an extent never seen before. The only problem is orchestrating individual campaigns for each of your thousands or millions of customers. It sounds time-consuming, but it doesn't have to be.

As the opportunities to amaze customers with advanced technology proliferate, automation will be your assistant to make sure Advertising Operations are lean, fast, and can play their part.



To what extent can you currently personalize campaigns?

What is the time and resourcing cost of each new element of personalization?



Wider business impact



The six optimizations described here will improve the day-to-day effectiveness of Advertising Operations, but the impact is even bigger than that. Either directly or indirectly it will impact the entirety of your business. How?

Revenue: Automation will help you improve the bottom line both by reducing the cost of errors and improving your ability to take advantage of new opportunities. Crucially, you can increase customer lifetime value (CLV) and reduce customer acquisition costs (CAC) by utilizing these breakthroughs to improve the customer experience. This gives you ammunition (if needed) to gain extra budget and support from the C-suite and board — you can show that the work you're doing in your department is driving real business growth.

Resources: Automated Advertising Operations necessarily require a change in skills, which may require retraining and potentially new hires. Taking a long-term view on this will help you future proof your resourcing so there needn't be too many personnel changes. In light of this, you also need to pay attention to the morale of staff; change is hard, and resource restructuring can be unnerving for employees.

Of course, the advantage is that you should be able to give your colleagues more time to work on strategic projects rather than campaign setup and optimization. Additionally, automation makes it easier to work with hybrid teams. Make sure you clearly articulate and continuously amplify the advantages of this new way of working.



Culture: The culture of your company will change as automation becomes increasingly integrated into your processes, and you should try to lead the change rather than react to it. Communicate how you expect it to impact people's jobs and stay open minded and keep listening to see if the reality matches your expectations. As automation frees up time for your colleagues, you can use that benefit to steer the business toward being a more creative place to work or to improve the work/life balance of your team (both of which should improve employee retention and satisfaction).

In this chapter we looked at six ways you can apply automation to Advertising Operations to discover revenue breakthroughs.

But depending on your challenges, your skills, and your IT infrastructure, you may find different opportunities. [Get in touch](#) with Theorem to discuss what's possible for your organization.

Theorem worked with one of the largest publishers in Australia to automate Advertising Operations processes. This is what happened:

- Reduced trafficking time from 30 minutes to 3 minutes.
- 80% efficiency in volume: Completed 700 requests in 70 hours versus 350 manual hours.
- 100% Accuracy: Zero human errors and makegoods.





CHAPTER 4

AUTOMATION: Gaining The Support Of The Leadership Team

You know why and how automation can make a difference. So, how do you get the ball rolling?

The very first thing to do is gain the support of stakeholders in your business, for example the CEO, CFO, the board, and your team. The benefits won't be the same for different roles, so you need to tailor your pitch to your audience.

The C-suite wants to understand automation in terms of ROI and cross-business efficiency. The board wants to understand P&L and shareholder value. Your team wants training.

But whoever you're talking to, you must build a case for it. This blueprint could help with inspiration for your approach.

Answer the questions to think through your, your team's, and your business's needs:

- ① Describe automation's realistic impact in the short- and long-term
- ② Outline the drawbacks — to dismantle them
- ③ Connect automation to the other departments in your business
- ④ Manage expectations on ROI delivery
- ⑤ Keep communicating





1. Describe automation's realistic impact in the short- and long-term

Always align automation with business objectives — can you articulate your company's commercial goals and how automation helps achieve them?



Can you be specific about the challenges it will solve or revenue opportunities it will bring?

Which KPIs will you use to show it has impact on Advertising Operations?
How can you show the effect on customer lifetime value (CLV)?

How do you expect it to change individual employee experience and your work culture?

2. Outline the drawbacks — to dismantle them

Have you considered how much disruption process integration will cause — not just for Advertising Operations but also for Finance, Account Management, and the wider business?



Do you have a (multi-year) timeline for all costs, time to ROI, and are there any hidden costs that have the potential to multiply?

Does automation mean a skills shuffle is needed? How will you manage this change?

3. Connect automation to the other departments in your business

Can you show how automation in Advertising Operations supports Sales, Finance, Marketing, Customer Support, Security, and Logistics?



Do you have a specific understanding of the challenges those departments face?

Are you building relationships and creating opportunities for cross-business collaboration?

How does automation impact hybrid work?



4. Manage expectations on ROI delivery

The C-suite wants to know what the economic value of any new project or investment will be. The potential for improved profitability or long-term sustainability will be the deciding factor when gaining support for automation. How long will it take to improve CLV and drive revenue? And what is the forecast for how this will improve over time?

It's important to be clear that ROI won't be linear. One, because automation requires continuous reinvestment to keep up with competitors, and two, because automation development doubles every six months in terms of computational power. This means it's not a one-time investment.

The route to ROI depends on so many factors that it's unique for everyone. We'd be happy to discuss it with you. The following is a generalization:

YEAR 1-2: In the beginning, you're setting your business's automation process discovery and feasibility assessment, identifying immediate short-term efficiency gains, implementing the automation migration, and putting into place your automation measurement plan with success metrics. From just six months up to two years, you will start to see improvements in processes, efficiencies, time, cost, volumes, and account success.

YEAR 2-4: In years two to four, you'll start redefining Advertising Operations. This includes looking at new ways of working, skillset development plans, upskilling and cross selling, and cross functional collaboration to drive revenue growth and customer success.

YEAR 3-5: At this stage you'll start an ongoing discovery for continuous improvement and unlocking new automation opportunities with the OTC process and incremental ROI.

5. Keep communicating

Effective communication is key to gaining and maintaining support from colleagues and stakeholders. If they understand your vision, they'll know how they can assist you. And if they feel listened to, they'll be more inclined to help. How do you propose to keep them updated and enthusiastic about automation, while keeping yourself abreast of their challenges?

With their buy-in and support, implementing automation in Advertising Operations has more chance of success.

With everyone on board it's time to embark.

Understanding how to get stakeholder support for your automation project is a critical piece without which failure is almost certain. But while necessary, you're just getting started. The final chapter will outline steps to implement automation.





CHAPTER 5

AUTOMATION: How Do You Establish Automation In Advertising Operations?

Now that you've earned stakeholder support, how do you ensure your automation project is successful?

Because success depends on so many variables, there isn't a single blueprint for automation implementation, but we've outlined our methodology below to give you a head start. Get in touch to build one uniquely for your business.

Before you start, are you clear on your business's wider objectives? Do you have a well-defined future state? We've found that one mistake organizations make is putting the needs of IT teams before the goals of the business.

Adopting automation isn't a linear process, but this chapter outlines a methodology that can help you structure your approach:

- 1 Process discovery
- 2 Value stream analysis
- 3 Process characteristics analysis
- 4 Technology and data audit
- 5 Digital maturity
- 6 Integration with current culture
- 7 Planning, review, and execution





1. Process discovery

In order to improve your Advertising Operations processes you need to know them inside out. Process discovery x-rays your processes by defining and mapping all tasks from end to end, across the different teams and platforms involved. You'll be able to identify the repeatable tasks and see how a client gets from point A to point B.

You also need to conduct process discovery from the perspective of each person who is involved in Ad Operations processes. This is because two people with exactly the same role may execute a task in different ways. This needs to be documented. If a business is doing one thing in 15 different ways, standardization will have to come before automation.

Process discovery is a vital first step and gives you key information:

What is a good use case? Why is it a valuable project? Who's spending how much time on what? How quickly can we develop a minimum viable product (MVP)?

2. Value stream analysis

In the value stream analysis, you seek to understand how the given use case could add broader value or solve broader challenges for your organization. You should also seek to understand the relationships between people, processes, and technologies across the value stream, as well as how data is being passed in and out of different processes to create value.

You need to consider the activities happening upstream and downstream.

How will your project impact them and vice versa? What are the potential advantages and disadvantages? This will show you how different processes fit together to deliver a final product.

In doing so, the value stream analysis helps you separate activities that create value from activities that create waste — and identify opportunities for improvement, e.g., downsizing, outsourcing, sunseting technologies/ applications, relocation or redeployment, exiting facilities, etc.

3. Process characteristics analysis

The reason you should spend time identifying process characteristics is to better understand each process within the value chain at a deep level. You want to know, for example, how long the process has been in place, the documentation available, the people needed, the maintenance schedule, and the delivery cycle from the time a transaction is received to its completion. You also need to know the necessary conditions that power this process, and which processes are dependent on its completion.

This step will show you what can be simplified to save time or reduce complexity and if there are any rule exceptions that require human intervention. With this knowledge, you can give baseline estimates for tasks to see which characteristics are adding value and which aren't and seek to reduce waste and effort.



4. Technology and data audit

Of course, in order to implement automation, your technology and data infrastructure must be up to the task. So, you need to look under the hood.

How well integrated are your current applications, systems, servers, and devices?



Do you know where all your data is stored?

Are there any workarounds that may be causing processes to be completed in a non-ideal state, and therefore creating more hassle?

Are there any vulnerabilities or security concerns where your processes could be easily disrupted?

Is there useful insight hidden within your unstructured and unused data?

Doing this will help you understand your technology and data needs, whether off-the-shelf solutions will be adequate, custom developments are necessary, or you have the capabilities lying latent in existing applications.

5. Digital maturity

As well as your technology and data infrastructure, you need to consider the digital maturity of your organization. You may have the tools, but are you well-prepared to use them? Does your team have experience of implementing new technologies?

If you have a history of innovation, use analytics tools, or employ data science, **you may be closer to automation-ready than you think.**

You also need to consider other concurrent projects. Are there any strategic initiatives in discussion or underway that would impact the digitization of this process, such as small pilots or new digital services?

Your digital maturity audit should help you connect your program to ongoing digital transformation initiatives and understand whether you need extra resources, third-party support, or even organizational change.

6. Integration with current culture

In addition to being ready digitally, you must assess whether you're ready culturally. Is your organization enthusiastic about and receptive to technological change? Or has your organization changed so much in recent years that there's change-fatigue breeding opposition to automation?

Any change can be a cause for concern for a happy workforce. Nobody wants to disrupt business as usual. So, you need to ascertain the appetite for change and how then to lead it. It's important for leadership to engage with automation, to manage the change, and to keep your workforce motivated as you roll it out.



Break down internal team structures — get your team ready for action:

From a business structure and culture perspective, you'll need to be able to construct a dedicated Center of Excellence (CoE) to guide and govern the automation process. But a sound automation strategy isn't created in a vacuum; you need to collaborate with teams across departments.

The question is: Are there enough qualified executives within your organization to serve as Task Force members and Change Agents?



7. Planning, review, and execution

When you've been through all these steps and you are moving towards building a viable automation process, it's time for a thorough review of your plan. Keep in mind:



WHAT are the benefits you expect to reap as a result of your automation strategy?

WHY is automation the right choice for reaching these expected benefits?

HOW do these expected benefits align with your overall business strategy?

WHO will be responsible for overseeing the organization, education, and implementation of your automation strategy?

When it comes time to execute your plan, it won't happen all at once; it's a purposefully slow start. It can take many months to be "automation-mature".

Calculating ROI is critical for a comprehensive view of the impact of automation. It needs to be analyzed from a number of different perspectives to understand whether it's helping you deliver customer success and revenue growth.

Developing a set of metrics will help you determine which processes are most effectively streamlined by automation, to what capacity, and at what level (if any) humans may still need to be involved in the processes. It will also allow you to pull out and prioritize the processes that provide the best ROI.

What next?

Automation is going to unlock incredible opportunities. It's the right path for organizations looking to futureproof operations, especially if you want to transform Advertising Operations from a critical cost center to a cutting-edge revenue driver.

Use the Masterclasses text to inspire, review, and improve your own automation approach. And if you need any more help, designing and operationalizing technology systems is how we help our customers find their breakthroughs— **get in contact.**



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We're your breakthrough

theorem.digital/content

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