

The Programmatic In-Housing Readiness Quiz

There are plenty of reasons marketers may be looking to in-house their programmatic media buying—increased transparency into media placement, better control over data, more efficient execution, improvement in workflow management, and consolidated analytics, to name just a few. But how do you know if the move makes sense for your organization, and how do you know when the time is right to initiate the process?

Well, we're here to help! Answer these 15 simple questions, tally up your score, and see where you fall on the readiness scale.



Granular Campaign Optimizations

Check the box that best applies to you.

1 Organizational Buy-In

Does senior management understand the value of bringing programmatic media buying in-house?

Yes, we have enterprise-level advocacy—leadership fully buys into the vision **(5 points)**

Yes, but they can't justify the move without evidence it will be successful in the long term **(3 points)**

We're experiencing some resistance to the proposed changes from different parts of the org **(2 points)**

No, we're struggling to get the necessary backing **(0 points)**

WHY IS THIS IMPORTANT?

Transitioning to in-house programmatic involves many departments. The level of initial buy-in is a good gauge of how much stakeholder management (and expectation setting) you'll have ahead of you in the process.

2 Buying Power

What is your annual programmatic media spend (including technology costs, staff salaries, agency fees, etc.)?

More than \$20M **(5 points)**

\$10M – \$20M **(4 points)**

\$5M – \$10M **(3 points)**

\$1M – \$5M **(2 points)**

Less than \$1M **(0 points)**

WHY IS THIS IMPORTANT?

In-housing can be expensive on many levels. The size of your annual spend can indicate your technology and staffing needs and offer a clue as to whether or not in-housing is a cost-effective business move right now.

3 Media Execution

How do you currently manage and implement your programmatic campaigns?

We control all key programmatic media tasks in-house with some occasional input from our agency partners **(5 points)**

Our agency advises on strategy and then we take the reins and pull the levers in-house **(3 points)**

We tee up the overarching strategy before passing it on to our agency to deliver it in the market **(2 points)**

We lack digital acumen internally, so we leave both strategy and tactical execution to our agency **(0 points)**

WHY IS THIS IMPORTANT?

Programmatic media buying can be complex. If you haven't historically managed or used programmatic, then jumping right into the driver's seat with a fully in-house solution (instead of, say, getting your learner's permit and taking a good driver's ed course, aka a hybrid approach) may prove overwhelming.

4 Near Future Goals

Over the next year or two, how would you most like to enhance your programmatic operations?

More Agility: faster decision-making with a streamlined tech stack and increased investments in innovative ad spaces like connected TV (CTV) **(5 points)**

More Control: improved integration between our customer data and media platforms for better execution **(3 points)**

More Transparency: smoother campaign deployment and deeper reporting on performance to help drive superior investments **(2 points)**

More Support: more endorsement internally backed by a strong business case and clear timelines **(0 points)**

WHY IS THIS IMPORTANT?

The scope of your programmatic ambition and your future-looking priorities can be a good indicator of where you are on the in-housing readiness scale.



Technology Readiness

Check the box that best applies to you.

5 Current Technology Contracts

Who owns your contracts with your advertising technology partners (think: DSPs, DMPs, ad servers, analytical platforms, financial reconciliation tools, etc.)?

Us—everything is in-house (5 points)

A combination (some are managed by us, some by our agency) (3 points)

Our agency owns the contracts, but we have our own seats (2 points)

Our agency (0 points)

WHY IS THIS IMPORTANT?

The level of integration you already have in place with tech partners offers some insight into the amount of investment required to get your in-housing project off the ground.

6 Vetting Processes

Do you have a robust process in place for vetting new technology?

Yes, we have all the resources we need to research and purchase new tech internally (5 points)

We keep abreast of emerging trends, but it's not a priority (3 points)

We do research ad hoc, whenever we have bandwidth (2 points)

No, we don't have a procurement department and we are stretched too thin to do it ourselves (0 points)

WHY IS THIS IMPORTANT?

Understanding your vetting process helps establish how easy (or hard) it will be for your organization to properly acquire all the items and services you'll need as part of any programmatic in-housing efforts.

7 Agility & Adaptability

How hard is it for you to change technology partners and make major changes to your customer-facing infrastructure?

Easy: everything is under our control, and our CFO will simply sign off on our recommendations (5 points)

Feasible: we have strong relationships with the relevant teams, but requests must go through multiple channels and the approval process takes time (3 points)

Challenging: it's definitely possible, but implementing any requested changes will be difficult (2 points)

No-go: we are pretty low on the pecking order, and getting new tech or onboarding new platforms is all but impossible (0 points)

WHY IS THIS IMPORTANT?

The digital marketing ecosystem is forever changing and evolving. Your capacity to adapt quickly in the market is an important consideration.



People Readiness

Check the box that best applies to you.

8 Talent Recruitment

Are you well-positioned to increase headcount / replace departing talent?

Yes, the relevant leaders in finance and HR will grant us what we need to succeed **(5 points)**

We have strict business procedures, but if we present our case well, we feel good about our chances **(3 points)**

Hiring additional talent will take months—we have many hurdles to overcome **(2 points)**

No, we have a fixed headcount number and there is no room for new hires **(0 points)**

WHY IS THIS IMPORTANT?

“It takes a village” is a fitting mantra for in-housing programmatic buying. Your ability to hire is a critical factor in gauging whether you are ready to start the process

9 Talent Retention

What plans do you have to retain your programmatic talent?

We’ve created a clear (and obtainable) path for both personal and professional growth **(5 points)**

We offer several programs, career development plans, and opportunities to diversify professional skillset **(3 points)**

We only provide limited support when it comes to educational endeavors **(2 points)**

We don’t have any specific initiatives in place **(0 points)**

WHY IS THIS IMPORTANT?

Programmatic talent is often in short supply. Once you have the right people in place, you’ll need to nail down how you’re going to handle employee retention and promote job satisfaction.

10 Ongoing Training

Do you have dedicated internal resources to help your team stay on top of (and capitalize upon) industry trends?

Yes, we have established processes for carefully evaluating our team’s needs and empowering them to optimize campaigns for the moment **(5 points)**

We only have one or two tools inside the company, so we typically solicit training and education from outside organizations (such as DSP partners and Google) **(3 points)**

We are totally dependent on our agency to ensure our campaigns adhere to current best practices **(0 points)**

WHY IS THIS IMPORTANT?

Even the best talent needs constant industry education. Without agency expertise on tap, organizations must be willing to invest in ongoing formal training.



Strategy Readiness

Check the box that best applies to you.

11 Real-Time Optimization

How confident are you when it comes to making critical real-time optimizations to your programmatic campaigns?

Very: our organization has efficient and effective workflows, so we're able to tweak campaigns in the moment and quickly validate hypotheses through A/B testing *(5 points)*

Moderately: we can adapt to unplanned events and unexpected volatility, but we could probably be a bit more efficient in our processes *(3 points)*

Hardly: we often get bogged down in things like spec sheet management, ad tag communication, ad tag verification, and revision implementation *(2 points)*

Not at all: we don't have the knowledge to do that, so we rely on our agency partners *(0 points)*

WHY IS THIS IMPORTANT?

Your knowledge of optimization practices is a good gauge of how drastic the transformation will be. You don't want to take on too much too soon—upskilling takes time.

12 Seasonality

Is seasonality a huge factor in your business?

No *(5 points)*

We have some mild fluctuations *(3 points)*

Yes, our budget can quickly grow or shrink from one month to the next *(0 points)*

WHY IS THIS IMPORTANT?

Agencies traditionally offer more flexibility with budgets and payment terms, while in-house staff is a fixed expense.

13 Experience with Data

Does your team have any experience handling and extracting data-based insights?

Yes: we can read and interpret data ourselves to empower smarter, faster decisions *(5 points)*

Moderately: we have a pretty good grasp on our analytics and know how to tie asset components to user engagement/down-funnel KPIs *(3 points)*

Hardly: we're able to do basic things like segmentation, but for anything beyond that, we look to our external partners to do the number crunching *(2 points)*

Not at all: our agency does all our data analysis and synthesizes it for us *(0 points)*

WHY IS THIS IMPORTANT?

On-going programmatic success relies upon getting the most out of your data-driven knowledge. Your team's aptitude for analytics is a good indication of how ready you are (or where you might need additional training and/or headcount).

14 First-Party Data

Your programmatic advertising is powered by:

A wide range of data sources, including our own vibrant first-party data stockpile *(5 points)*

Widely available data sources (from places like Google, Facebook, etc.) supplemented by some first-party data and specific partnerships and integrations *(3 points)*

Don't ask us! Our agency takes care of all this data stuff *(0 points)*

WHY IS THIS IMPORTANT?

Knowing the make-up of your data sources can help indicate the sophistication of your program.



Reporting

How are you reporting on your campaigns?

We automatically consolidate, aggregate, and store both historical and current campaign data in one platform *(5 points)*

We're able to get a holistic view of performance, but it still involves some manual merging *(3 points)*

Our analytics lies scattered between spreadsheets, email chains, and chat channels, so it's difficult to surface any key insights *(2 points)*

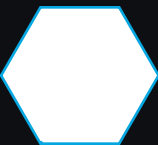
Our agency does all our reporting for us *(0 points)*

WHY IS THIS IMPORTANT?

Siloed analytics and measurement can lead to inconsistent strategies. Ideally, you'll want to get your data house in order before you proceed with any programmatic in-housing efforts.

Scorecard

YOUR SCORE



Here's where your points tally falls on the readiness scale:

0-15
POINTS

OUTSOURCING

You currently have several major barriers that will make the process of in-housing programmatic media a significant challenge. The scale of this transformation may be too much for your organization to take on at this time, so you should probably focus on developing the capabilities of your existing in-house team while starting to dig deeper into the business case for change before revisiting the matter.

16-38
POINTS

HYBRID

You have an agency-dependent culture, but there are indications you can start to bring some of your programmatic operations in-house. Build your foundations gradually, concentrate on getting your systems and strategies set up effectively, and know that you may not need (or even want!) to in-house all off your programmatic media buying right away—you could initially adopt a path to self-service model where you tap dedicated in-housing consultants to run your campaigns while you onboard new technology at a pace that makes sense for you.

39-60
POINTS

PATH TO SELF-SERVICE

While there are still a few elements that need strengthening, you have some solid building blocks in place as you look to evolve how you manage and execute your programmatic media buying. A hybrid model probably represents the best option right now, and a path to self-service approach would likely be a great way to help you make the next leap. With on-going training and strategists on standby, you can develop your internal operations with far greater ease.

61-75
POINTS

ALL-IN ON IN-HOUSING

You no longer need the support of an outside agency. The all-in model is still relatively uncommon in the industry, given what's required to launch and maintain it, but you appear to have many of the right processes and tools already in place to make this massive digital transformation a true success.



Next Steps

In-housing programmatic comes with the promise of big benefits, but the journey is long and there is an array of factors that can derail progress. Basis Technologies offers a combination of technology, education, and support that is designed to help brands smoothly navigate the process and move their business forward. If you're interested in learning how we can partner with you as you take on this digital transformation, get in touch.



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