

Digital advertising

Management principles

The key principles in
managing high performing
B2B digital ad campaigns



B2B digital advertising is at an inflection point. Now's the time to rethink your strategy.

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About this guide

B2B digital advertising space is changing rapidly. Spend is increasing year-on-year and ad tech is proliferating. What was once focused on B2C is now opening to B2B and catering for the niche audiences and lower budgets.

This guide will cover the following:

- » Basics about key performance indicators
- » Optimisation
- » Test and learn approaches
- » Creating the environment to learn
- » Tracking
- » Multichannel approaches

This guide has been written by Nicola Ray, CEO and Founder of Modern, and Dax Patel, Head of Digital at Modern.

This guide is a sub-section of **Master technology. Define advertising: Breaking boundaries in B2B digital advertising**, which explores the subject in more detail. Other guides in the series include:

- » **Optimisation techniques in B2B performance marketing**
- » **B2B ad technologies that deliver**

KPIs are critical to evaluating performance, setting benchmarks and constantly improving.

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Getting started: set KPIs

With performance-based campaigns, it's easy to set it up, set the bid structure and let it roll. A good management process will review the performance regularly to check in, but the challenge is, is the campaign performing as you expect and how do you manage to prevent the mediocre?

Basics first. Know your performance indicators

When you set a campaign and it starts running, how will you know if it is meeting your target?

As with most things, if you don't predict performance and set some key performance indicators (KPIs), you'll never know if the campaign is delivering as expected.

When you know what you're looking to achieve, then managing the campaign becomes simpler.

To give you an example, we've had Google Ads accounts we've taken over from other agencies, and it's clear that the basic principle of running against a KPI wasn't being adhered to. There was no knowledge of the target cost-per-acquisition, or whether the bid strategy delivered as intended – as long the client was getting a few leads - the agency didn't really care.

But the client not caring (or knowing) doesn't mean you should sit on your laurels and certainly means you shouldn't try to improve and beat past performance.



**You can't
optimise if you
don't know your
KPIs – otherwise,
what are you
optimising for?**

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Optimise, optimise, optimise

There's plenty to say about optimisation. The first is clearly related to the previous point. You can't optimise if you don't know your KPIs – otherwise, what are you optimising for?

Some campaigns perform well from the get-go, which is great. It allows you to focus on the ones that aren't doing quite as well as expected. When things don't look quite right, there are some basic things to check-in on first, then we'll cover more in-depth tactics later:

- » **Check your settings**, there may be an obvious clanger that you've missed. Once you've checked them, get someone else to give them the once over too
- » **Check the bid strategies** are right for what you're trying to achieve and don't be afraid to test them
- » **Check the audiences** are tight enough to prevent superfluous clicks and are wide enough to ensure your campaigns can run
- » **Automate the process to fix simple** things like negative keywords, maximum bids and managing overall budgets

[Learn more about optimisation techniques](#)

Without taking controlled risks, there's no opportunity to learn and no opportunity to improve.

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Test and learn

Testing is critical to ensure ongoing optimal performance. The whole thing about sitting on our laurels never sat comfortably with us. It's always about ongoing incremental improvements that lead to big changes across the board.

B2B digital advertising is no different and without the permission to test and the culture that supports it, it's very likely that your marketing performance will be at best stagnant and at worst subpar.

We strongly support a test and learn approach. As outlined at the start of this guide, advertising technology, and particularly B2B ad tech, is proliferating at a rate of knots. What was once only for those in B2C is now available for those targeting niche B2B audiences. The kind of technologies available include optimisation algorithms right through to automated content creation, but unless you have strong account management, processes and clear KPIs, there's not much point in investing in the next shiny new thing. You need a sense of purpose and a good strategy.

Always allow for testing

Setting aside 10% of budget for testing is a good way to assess if new settings, audiences, targeting or optimisation strategies will work. Typically, there's enough budget there for micro-tests that can give way to greater test budgets and a business case for change.

Without taking controlled risks, there's no opportunity to learn and no opportunity to improve.

**You need a mix
of skills and
approaches for
successful
management.**

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Create the environment to learn

Consider team dynamics

Digital advertising is heavily task and process driven. There are lots of steps in the creation, set-up and management of ad campaigns. This tends to lead to performance marketing teams made up of individuals who enjoy a structured, task-based approach.

This is hugely important for the ongoing management of digital advertising, including running tests and optimisation, which requires a measured, focused and steady approach.

But for coming up with ideas that could improve performance, you often need to think about how you can break the rules, be creative and not be afraid to change things. This doesn't tend to sit well with those who like to follow the rules and comply to a process.

Culture matters too

It's therefore important that the team culture enables individuals to think creatively and be innovative without breaking their spirit with hugely task-based activities. Likewise, if you have a team of rule abiding conformists, it's unlikely you'd run many successful experiments or be able to problem solve when things go awry. You almost need that balance of a mad scientist with creative flair blended with the laboratory researcher focused on specificity and rigorous process.

The point here is that the people running your ad campaigns need to be a mixed group of people types and be given the space and permission to try out new things to challenge the status quo. This must come from the team leader as well as the organisational culture – and the client.



Nomenclature and conversion tags are essential. (It may be obvious, but it's often broken).

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Tracking must be robust

Tracking is critical

Sometimes I feel that we bang the drum on this one too much, then I'm reminded that we need to keep going with it because too often we see B2B accounts where the tracking either isn't implemented, not fully functioning or completely broken. So, I'll say it here again:

Tracking is critical.

In its simplest form UTM tracking should be set-up and have a clear naming convention that can be understood and implemented across the whole marketing function.

Multinational companies

For multinational businesses, this means global co-ordination in naming parameters and in-depth discussions with the operations team in terms of reporting from the CRM and other third-party platforms. The UTM data (and any other custom parameters) must be passed from URL to marketing automation platform and then into the CRM. Must, must, must.

**Don't just ignore
the hard stuff.**

**Get to the bottom
of issues and
correct them.**

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Triggering pixels (and finding pixies)

Recheck pixels and conversion tags

It's not just naming, it's conversion tracking pixels too. Marketing isn't just about the fun stuff like copy and creative graphics, it's about the ability to know that it's working too. Often, we see conversion pixels missing, Google Tag Manager configured incorrectly, and Google Ad accounts not connected to Google Analytics accounts. This creates only a partial picture leading to half-baked insights.

Yes, you can always revert to reporting on what you see within the ad platforms, but that doesn't tell you what converted and how they then travelled down the sales funnel, moving from stage to stage. It also doesn't give the value of the conversion or allow you to know which campaigns, keywords or tactics delivered over the long term.

In effect, by not seeing the tracking and getting the data into the right systems as paramount, you could be throwing your marketing dollars at the wrong channels for the wrong purpose – and you certainly can't optimise for conversion or sale effectively.

This stuff is complicated, but someone needs to own it so you can get the right reports and insights necessary to improve performance for the long term.

Don't bid against yourself across platforms. Control the journey.

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Channels should work together

It's so easy to look at each channel separately with one person focussed on Google Ads and another focussed on social advertising. Whilst the platforms are very different, and how you target is fundamentally different, the buyer is one buyer.

One buyer, one buying journey

By thinking about one buyer and the journey they take means you can't think about the channels in isolation. They need to work together. But when they're disparate systems, how is it possible to get a seamless journey across and between the different platforms?

This isn't just a B2B problem, it's a marketing problem focusing around the connection of data across different channels and then using that data effectively to advertise to your target audience.

Define the journey

The simplest solution is to think about your customer on their journey at the specific point in time and do your best to advertise to them. But what happens when you're doing lead generation using 1, 2 or 3 assets and using those same assets across the other platforms?

Not only are you advertising to people who have potentially converted, you're also raising your costs as you're bidding against yourself – it just happens to be invisible as you're doing it across different platforms.

Don't just ignore the hard stuff. Get to the bottom of issues and correct them.

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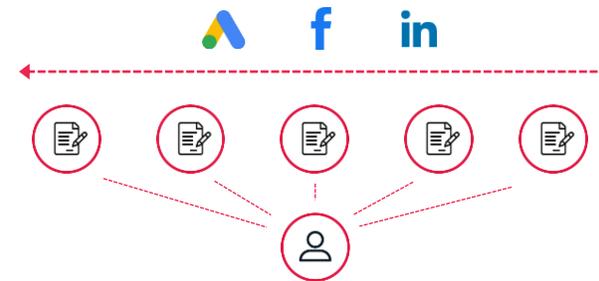
More than multichannel, it's omnichannel

Think of the channels as one unified channel

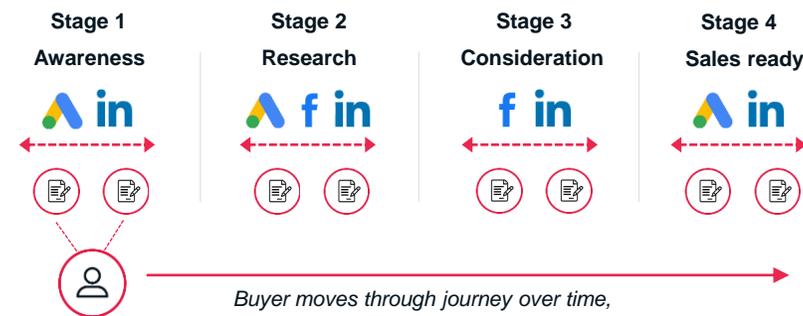
At the very least, use a platform for a purpose or stage and separate out the assets by each different platform. For example, asset 1 and 2 are only used on Facebook and asset 3 and 4 are only used on LinkedIn.

For this to work effectively, even at this basic level, you need a good content strategy that aligns content format and message to stage and then aligns that with a platform.

All assets, seen all the time, across all channels



Staged approach, controlling assets shown to buyer



Assets aligned to buyer stage.

Buyer can enter at any point based on intent level.

Channels are connected through unified remarketing lists to control the content across the journey.



Your buyer just sees you again, and again, and again.

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Stages to the journey

Identify the purpose of the channel

We all know that one channel isn't simply right for one buyer stage. For example, Google Search has its place in brand advertising and remarketing as much as it does in high intent conversion traffic at the bottom of the funnel. But that same person may have converted on LinkedIn on a brand ad or lead gen form, so in effect, you've wasted half or part of your marketing budget.

Create a cohesive strategy

Channels need to work together so that you're not wasting marketing dollars, and the only way you can do that is by having a centralised, cohesive strategy designed around the buyer – not separated by each channel. One way you can do this is through unified audiences where you share audiences across platforms and use conversions at different stages as exclusions cross-platform.

**Make a step
change today.**

Ready to optimise?

B2B isn't simple

With B2B digital advertising, the complexity of the buying journey creates challenges. Taking onboard the techniques outlined here along with the ad management strategies will make a difference to your performance.

To help you make a step change, start to map your next few moves.

Plan your next steps

- » **Review your KPIs:** are you measuring what you really should be measuring
- » **Monitor and optimise** regularly, question anomalies and fix
- » Create a **naming convention** that can see you through to revenue reporting
- » **Review tracking parameters,** conversion triggers and tracking pixels
- » **Start to think about the journey** rather than the just the channel in isolation

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[Learn more about optimisation techniques](#) →



What's next?

Ready to make that step-change? Let's talk about your next move and where you want to improve.

[Email us](#) or call us today on **+44 (0) 117 332 6700**.

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About the authors



Nicola Ray

Client Partner, Founder

Over 20 years digital experience, with 10 years working with high growth innovative technology businesses across UK and US markets. At Modern, Nicola provides strategy and insights for markets, buyers and digital techniques, including digital demand.



Dax Patel

Head of Digital

Technical and analytics lead for digital projects, including data analysis, data modelling and visualisation. Before Modern, Dax previously headed up the Vodafone global digital team and managed performance marketing for Omnicom Media Group.





About Modern

Through our wiser, faster, stronger mantra, we deliver marketing-led business solutions that enable the global leadership teams we work with to achieve their vision for growth.

By collaboration and partnership, from simple, singular campaigns to complex systems integration, our international team of technical, creative and commercial experts provide the perfect hybrid of marketing agency, consultancy and outsourcing partner for the world's most innovative businesses.

Founded in 2011, we work with some of the world's best high-growth innovators to accelerate their growth.

Contact

Talk to us today

+44 (0) 117 332 6700

info@modernb2b.co

modernb2b.co



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