



claravine

# An Agency Guide to Data Standards

[www.claravine.com](http://www.claravine.com)



## THE CHALLENGE

# Lack of Data Standards Leads to Poor Client Outcomes

There is no one-size-fits-all when it comes to agency clients. Each client, strategy, and campaign is unique. But managing each brand's individual nuances doesn't have to mean being burdened by lookup tables scattered across the agency's shared drive. While harmonizing requirements across platforms isn't easy, it is possible. And once you crack the code, the difference is tangible.



### Just picture it:

*It's the night before a big presentation. Instead of frantically combining spreadsheets, validating data, and unpacking why the spend by creative doesn't match the spend by campaign, you're putting the final touches on your big idea.*

If this sounds too good to be true, you're not alone. Many agencies rely on manual data entry, spreadsheets, exception management in analytics, and embedded product features in tools that don't speak to each other and make it hard to glean data-driven insights. Without the ability to successfully track campaign initiatives, agencies are left with unoptimized ad budgets, wasted time, and an inability to provide the strategic guidance clients expect.

### It's estimated that:

***\$.21 of every \$1.00*** \_\_\_\_\_

Spent on media is wasted due to **poor quality data**

***1/3 of marketer time*** \_\_\_\_\_

Is taken up by the management of **data quality**

David Ogilvy famously said,

*"Unless your advertising contains a **big idea**, it will pass like a ship in the night."*

The reality is a **big idea is made up of many little insights**, meaning Ogilvy could have said, that without data standards and strategic governance, these insights will pass like ships in the night. Don't let your data be the barrier to your big idea!

### Common Agency Approaches to Data Standards

There are two options for agencies looking to implement a data standards solution:

- 1 **Build Your Own Tool**
- 2 **Use a dedicated platform like The Data Standards Cloud supported by a team like Claravine.**

Regardless of the approach, this large-scale change requires strategic vision and tight-knit agency collaboration. There's a belief that moving from existing processes – even if they are manual, cumbersome, and hard to scale – will provide too much business disruption. And while some agencies have started to develop more complex customized workflows and homegrown solutions, none of these options are efficient, effective, or without risk.

Let's take a closer look at the pros and cons of each approach.

Funnel Stage ^

- Upper
- Middle
- Lower

**+Create Submission**

Submission Name

	Brand Campaign	Channel	Region	Country	Language	Campaign
1						
2						
3						
4						
5						

# 1 Build Your Own Tool

## ✔ Benefits

There is some benefit to an agency building its own tool. Mainly, it gives complete control over your workflow and application, while also allowing you to customize the build to the needs of your business and teams.

Integrations  
Coding  
Time  
Analytics  
Planning  
Updates  
Workflow  
Marketing  
Data  
Automation  
Strategy

## ⚠ Challenges

Building a robust, automated data governance tool is a serious commitment. In addition to being intimately familiar with the nuances of the team's workflows – from planning to analytics and everything in between – you also must understand the strategic products of that process AND have the coding skills to create meaningful automation.

To ensure a seamless connection among all your data and analytics tools, you need to know how to build and support bi-directional integrations. And it's not just one-and-done. You must continually update and improve the tool so that it can keep up with agency and client needs and the overall marketing landscape. Just like you would never consider building an in-house ad server, developing a data standards tool is best left to the experts.

Additionally, tools built in-house are often a black box to clients and lack the objective evaluation of data that brands expect. Even if the agency creates a tool that addresses data integrity and efficiency, consider whether it will address the client's need for transparency and oversight. Will it pass the CTO's tech audit or an audit from an external firm? If there is a data breach, is the app a liability for the agency? Does it conform and keep up with the latest security standards?

Simply put, the time and resources spent building a tool could be better used executing client work and generating revenue.

## 2 Partner with a Data Standards Technology Solution Provider

### Benefits

#### 1. Benefit from industry expertise

Data standards solution providers eat, sleep, and breathe this topic. It's all we do. Our single focus is building and maintaining data standards technology so your team can focus on your core business and revenue-generating activities. We continuously invest in building and maintaining our tool, improving our product, and ensuring it delivers the features and functionality that brands and agencies demand. This includes achieving **SOC 2 Type II compliance**.

#### 2. Increase client confidence and trust

Clients need confidence that your strategic recommendations are based on **clean, accurate, and trustworthy metadata**.

Without this trust, you're in a constant cycle of justifying your programs, which wastes time, slows progress, and risks client churn. We commonly see a direct correlation between the tenure and quality of brand-agency relationships and the quality of the agency's reporting. It streamlines the processes and improves the overall relationship. For example, one of our agency clients recently told us that after implementing Claravine, they went from having daily client check-ins to bi-annual data aggregation deep dives.

With accurate data as your source of truth, brands and agencies can partner to capitalize on what's working and make strategic changes to improve campaign performance. When a campaign launches, the agency and brand are confident it will deliver the highest possible impact, resulting in better performance.

#### 3. Mitigate risk and ensure data compliance

A platform like Claravine's adds important guardrails to help navigate the data regulatory and compliance landscape. *We find that nearly two-thirds of customer data sets uploaded into our platform have taxonomy or naming compliance issues that need correcting.* Leaning on our expertise gives both brands and agencies peace of mind that the tools in place to manage data are built with data regulations in mind. Just like many agencies employ solutions for viewability, brand safety, and privacy, Claravine can be a partner in navigating a constantly changing data landscape.

Webinar\_2020

- This field must contain a value.
- This field must contain at least 5 characters.
- Value must not contain numbers.
- Value must not contain symbols.

Data Submissions Integrations

Search Data...

- Ad Placement Name
- Creative URL
- Demographic
- IAB Categories
- IAB Products
- Placement #
- Persona

- prosp
- prosp
- rtg
- retarget
- prosp
- prosp
- rtg
- prosp

Enable AI Creative Classifications

Activities    Affinities

Objects    Places    Logos

Demographics    Emotions

IAB    IAB Ad Product

Team

- Content & Creative
- Marketing & Ad Ops
- Digital Analytics
- Data Collaboration

**1. Benefit from AI Advancements**

Advancements in AI are rapidly growing. We’re building **purpose-built AI technologies** to help manage and enrich your marketing taxonomy and metadata. This will continue to bring structure, consistency, and standards to your team to help you make better-informed decisions faster.

**2. Brand / Agency Collaboration**

A successful brand / agency relationship is an organized symphony where each player knows their part, and everyone is working off the same song sheet. But all too often, the roles and responsibilities across different steps aren't always cut and dry. This is exacerbated when multiple agencies are involved. The client expects everyone to work together seamlessly, but no agency wants to use another agency's tool or process.

Claravine provides a neutral third-party tool that helps everyone align. When all parties work from the same blueprint backed by data, collaboration is more seamless, and errors less likely.

**Don't just take it from us!**

**CASE STUDY**

Hear from **Saatchi and Saatchi** about how they use Claravine to create data-driven strategies for their business.

**CASE STUDY**

Learn how **this communications and media company** incorporated Claravine to improve campaign data quality and optimize marketing investments.

 **Challenges**

Implementing a new tool is not without its challenges. Getting a new tool implemented and ingrained in the team’s everyday workflow can be difficult. It takes time and concerted effort to build familiarity with a new tool and educate teams on setup and day-to-day management. People are set in their current ways of operating and there can often be resistance to change.

The good news is that we’ve helped hundreds of teams successfully make this transition and are prepared to help you navigate it every step of the way.

# How to Get Started: Implementation Steps

1

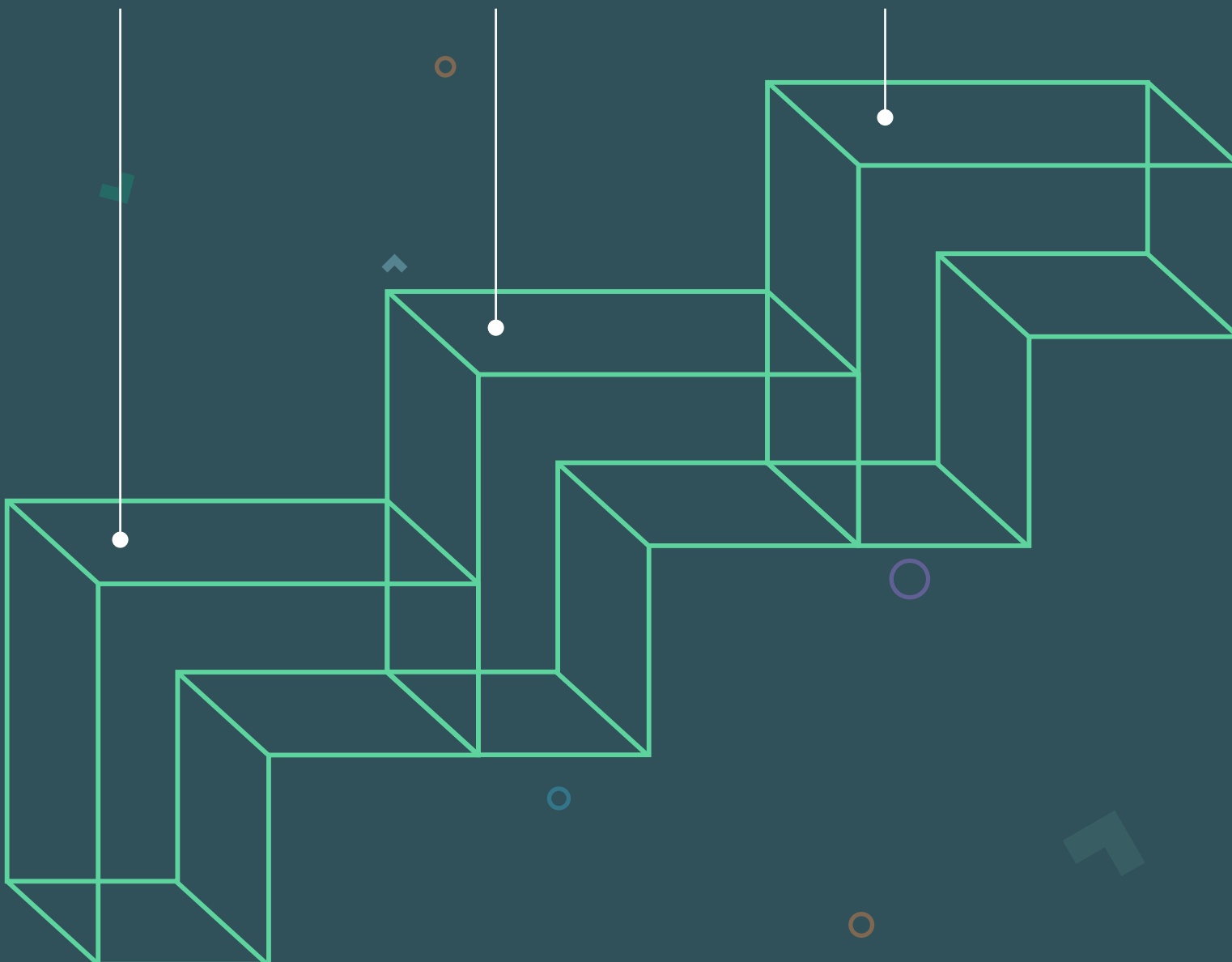
Enhance what you're already doing

2

Import existing data into the platform and improve it

3

Create quality standardized data and a robust data governance program



We understand change can create disruption. Too much disruption can lead to frustration among teams and missed revenue. We work with you to develop implementation strategies at your desired pace – moving quickly or taking the time needed for you and your teams to adapt. This doesn't need to be a full "rip and replace" project. Based on your goals and resources we can start small and grow as your team is ready. We aim to ensure we aren't disrupting your work but rather giving you the level of sophistication you want at the speed you want it.

Here is a 3-step approach to how to get started.

## Step 1

### Enhance what you're already doing

We can begin by simply improving what your teams are already doing, taking the necessary time to transition, and making changes as teams are ready. We'll work with your operations team to understand your current process and develop a strategy that builds gradually over time. The flexibility of our platform works with existing internal OS systems and tools to create a seamless integration.

## Step 2

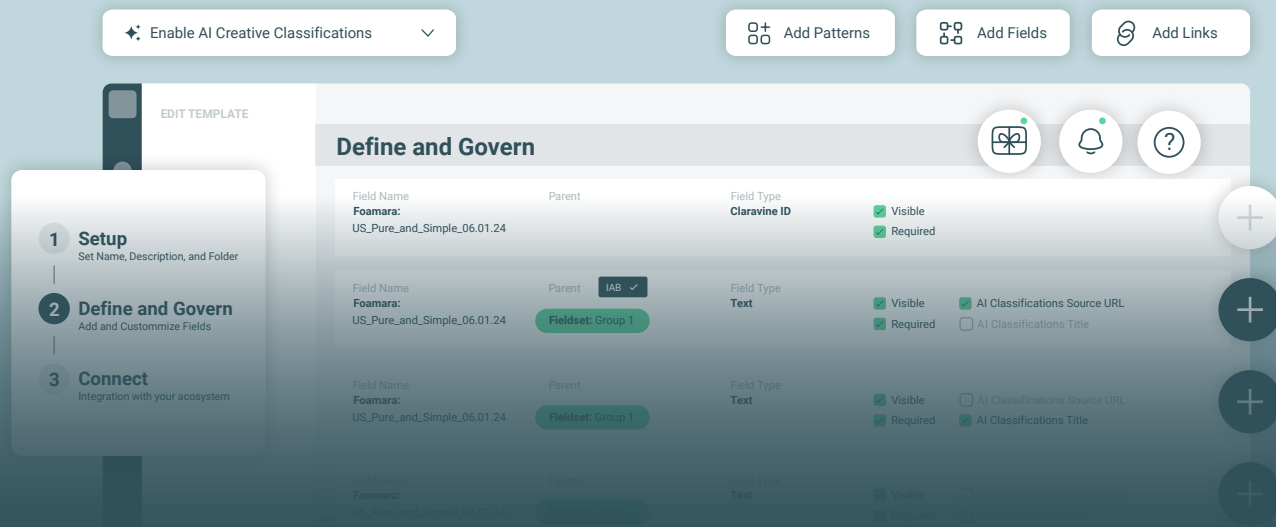
### Import existing data into the platform and improve it

Our platform improves existing marketing data by centrally storing and managing it across initiatives, campaigns, and clients. We don't need to move your entire workflow into the platform. We can start by improving the data already being created.

Simply put, our tool can identify your bad data in a platform like an ad server and correct it automatically. This can be done at scale by using bulk uploads and inbound integrations. Once imported, you can manage and correct errors at scale, send data directly to your analytics program and data storage systems, and write back to the platform of origin.

Claravine maximizes the utility, flexibility, and value of standardized data **using pre-built connectors**, including social channels like Meta and TikTok, ad managers such as Google Ads and Google Campaign Manager, and storage solutions such as Google Cloud, Snowflake, and Microsoft Azure.





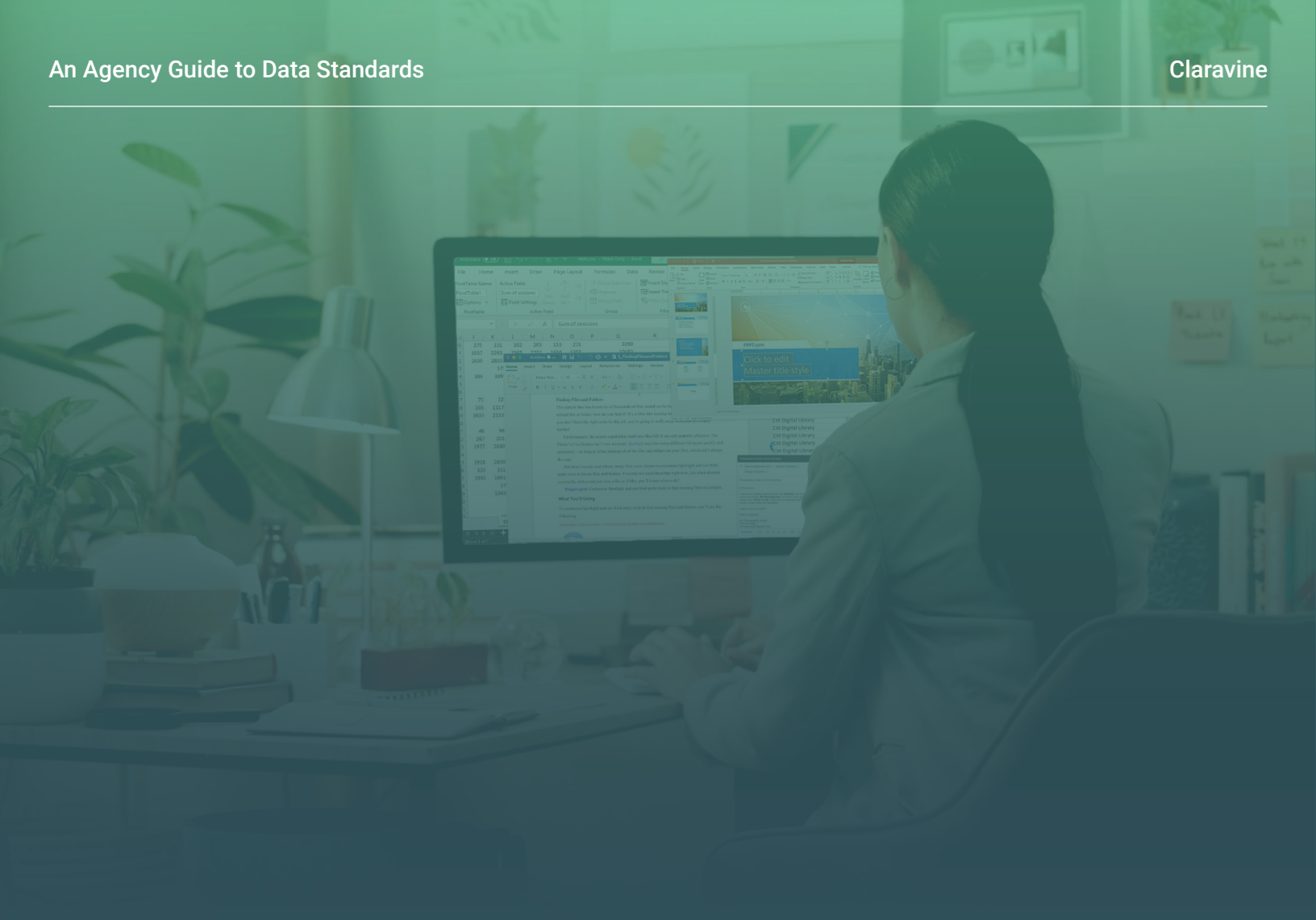
## Step 3

### Create quality standardized data and a robust data governance program

When the team is ready, data can be aligned and improved as it's created using trackable links, dynamic tracking codes, and naming conventions with defined guardrails that align with the brand and agency requirements. This ensures good data is created from the start and truly sets your team up for a strategic, optimized data standards program. Additionally, our team can help support change management as new processes are implemented across workflows. With ongoing support from Claravine, your operations and analytics teams will have an easier time adopting the new tool and processes, leading to a self-service support model.

Leadership maintains full control over permissions access, so team members only see what is relevant to their role while providing a single source of truth. Data that previously lived in disparate Excel tabs stored on individual drives now has a centralized home. This protects the agency from losing important institutional knowledge in the event of employee turnover.

The result is that teams feel empowered to adapt with future-proofed systems and processes. Data teams are clear on how they want data to be input and can easily control and change standards without disrupting operational workflows. Teams have the flexibility to make taxonomy changes by a single client, across multiple clients, or year-to-year. This data integrity provides a current source of truth and a historical record. All of this results in better data for decision-making and program optimization.



### A Day In The Life Of An Ad Ops Manager

Let's take a day in the life of an ad ops manager, for example. Commonly working with different advertisers across various markets, she likely relies on a mixture of notes, emails, and PowerPoint presentations as reference for the numerous campaigns she's managing. Having a central source of truth would allow her to build and launch campaigns with confidence knowing the work is informed by up-to-date data that is standard across programs and easily measurable. This not only informs more strategic campaign-level decisions but also ensures she can get credit for her successful work.

Compliance **100%**

Unspecified Campaign Tracking codes

We've helped customers achieve **100% compliance** with data formats, tagging, and campaign tracking, and continue to see a reduction in unspecified campaign tracking codes.

## 5 Reasons to Make the Change Now

### 1. Sustainable business operations

Agencies who want to win in the long run need a sustainable solution to data standardization with consistent naming conventions and taxonomies across global teams. This shifts the burden of proving value away from the individuals who happen to be on the pitch or assigned to the account to a system that endures and evolves beyond any single person or team. Client or institutional knowledge is no longer tied to a single individual, bringing important redundancies to your agency operations. It's the first step to robust accurate campaign measurement and true data-informed decision making.

### 2. Team members deliver more value

With data standardization, small tasks performed by each team member add up to a big impact. The key is to give team members an understanding of their role in the process. This helps individuals see how they can add value and contribute to developing and executing successful marketing campaigns. A foundational data strategy makes it easier to identify and break down silos and create collaboration and synergies across teams.

### 3. Reduce time spent cleaning

Establishing and enforcing data governance means data entry is right from the start. Bi-directional workflows make it easy to fix and automatically update data input into the system. URLs are made correctly, and the metadata is pushed to Adobe in real-time. This gives hours back in your day that were previously spent verifying data, cleaning up and standardizing data, and defending the accuracy of the data.

### 4. Improve measurement and insights

Rich, accurate metadata impacts decision-making and automation across the campaign development process. With standardized data, agencies and brands can generate real insights to accurately measure the success of their programs. Stakeholders can make informed improvements quicker, and reports can be automated and easier for everyone to pull together.

### 5. Create a better brand-agency working relationship

When an agency uses Claravine it builds trust among the brands they work with. Our platform encourages and facilitates collaboration across teams that are otherwise siloed. The more integrated the operations of the agency with the operations of the brand, the better.

# claravine

## Get Started Today

**Ready to take this important step to transform your data standards and create a truly optimized data-driven approach?**

We can review your current compliance score and do a compliance audit to make our best recommendations on how to begin.

[Connect with us today](#)