Global Scorecard

Process Retrospective & Action Plan

The client shifted from a regional view of the Scorecard to a global one starting in Q3'22, with globalization work being done in earnest in 2023

To date we have been making incremental improvements QoQ to the overall process & deliverable but we are still facing major challenges in getting the scorecard delivered **on time** & with **trustworthy data**

We will outline these challenges over the next few slides with a proposed action plan for us to implement in 2024
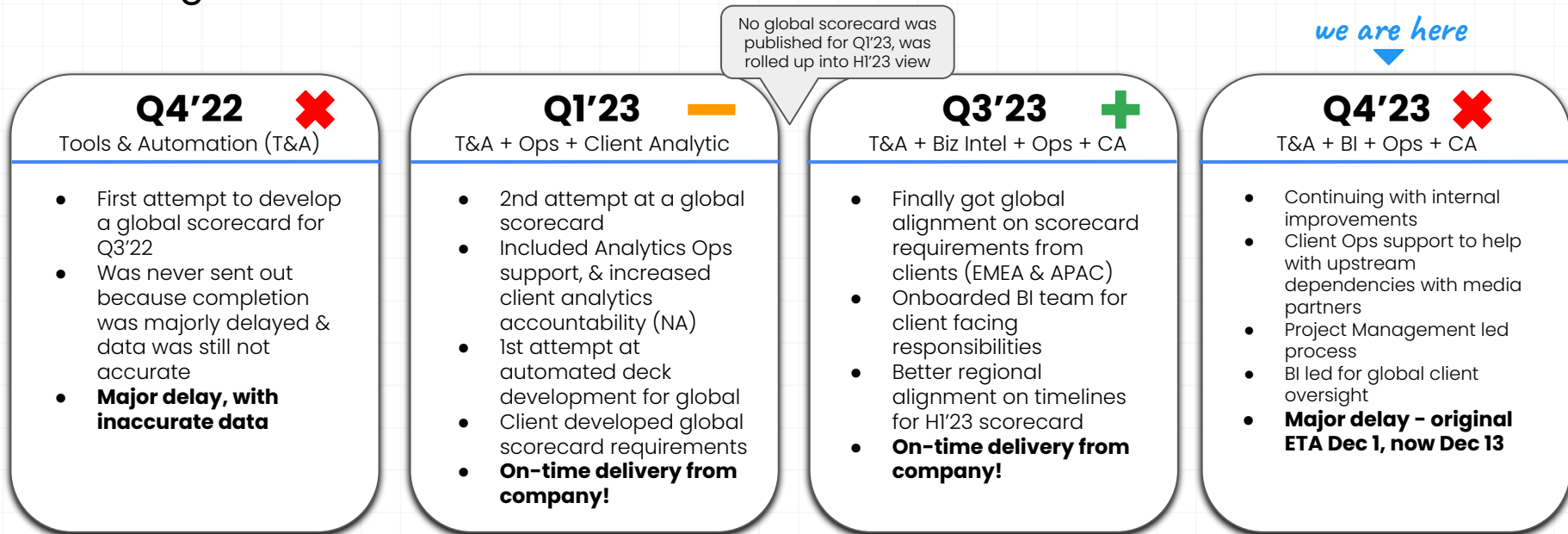
2023 Overview
What's worked & What's not

Globalizing the Scorecard
Progress To-Date

MFG

> No global scorecard was published for Q1'23, was rolled up into H1'23 view

we are here

Q4'22 ❌
Tools & Automation (T&A)

- First attempt to develop a global scorecard for Q3'22
- Was never sent out because completion was majorly delayed & data was still not accurate
- **Major delay, with inaccurate data**

Q1'23 ➖
T&A + Ops + Client Analytic

- 2nd attempt at a global scorecard
- Included Analytics Ops support, & increased client analytics accountability (NA)
- 1st attempt at automated deck development for global
- Client developed global scorecard requirements
- **On-time delivery from company!**

Q3'23 ➕
T&A + Biz Intel + Ops + CA

- Finally got global alignment on scorecard requirements from clients (EMEA & APAC)
- Onboarded BI team for client facing responsibilities
- Better regional alignment on timelines for H1'23 scorecard
- **On-time delivery from company!**

Q4'23 ❌
T&A + BI + Ops + CA

- Continuing with internal improvements
- Client Ops support to help with upstream dependencies with media partners
- Project Management led process
- BI led for global client oversight
- **Major delay – original ETA Dec 1, now Dec 13**

Challenges:

- No global standards/requirements from client
- Client still required regional scorecards
- Single point of accountability (one person at company)

- EMEA & APAC scorecard timelines differed from global (client)
- EMEA & APAC clients not aligned on Global views (NA led)
- Data infrastructure not globalized, very stitched up solution (company)

- EMEA data QA issues, largely upstream dependencies on media partners

- Data inaccuracies
- Process standardisation
- Communication
- Work prioritization

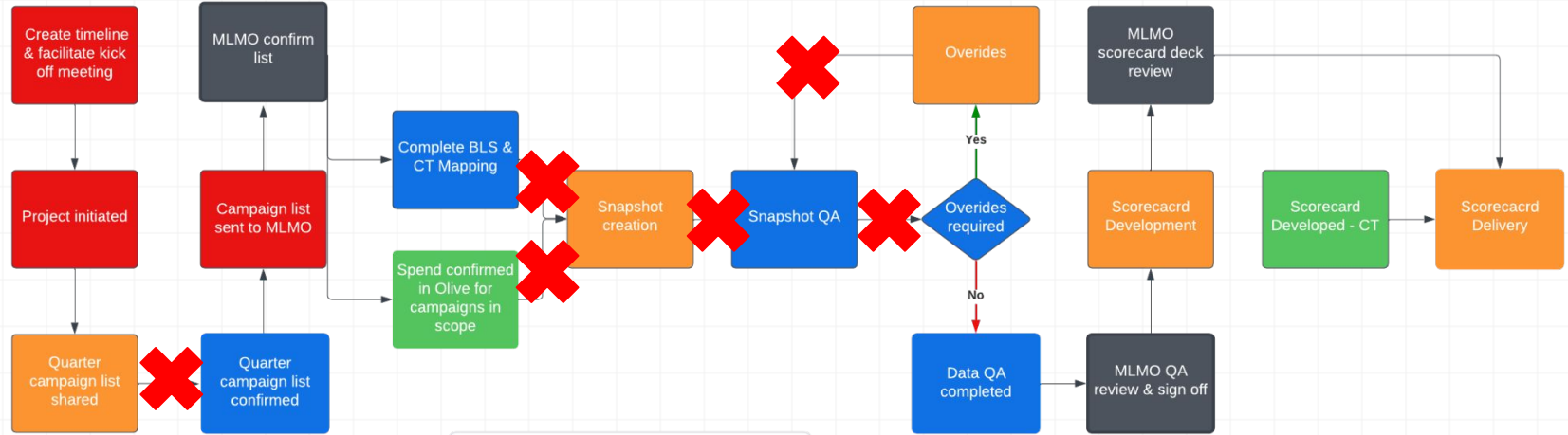# Current process flow & Breaking points in Q3 scorecard process

Process flow boxes:
- Create timeline & facilitate kick off meeting (PM)
- Project initiated (PM)
- Quarter campaign list shared (Core Solutions)
- MLMO confirm list (MLMO)
- Campaign list sent to MLMO (PM)
- Quarter campaign list confirmed (Analytics)
- Complete BLS & CT Mapping (Analytics)
- Spend confirmed in Olive for campaigns in scope (CS / ACT/ CT / PLA)
- Snapshot creation (Core Solutions)
- Snapshot QA (Analytics)
- Overides required (Analytics) — Yes / No
- Overides (Core Solutions)
- Data QA completed (Analytics)
- MLMO QA review & sign off (MLMO)
- MLMO scorecard deck review (MLMO)
- Scorecacrd Development (Core Solutions)
- Scorecacrd Developed - CT (CS / ACT/ CT / PLA)
- Scorecacrd Delivery (Core Solutions)

Diagram key
- PM (red)
- Analytics (blue)
- Core Solutions (orange)
- CS / ACT/ CT / PLA (green)
- MLMO (grey)

Summary of Issues & Proposed Action Steps

Issues	Impact on Scorecard	Proposed Action Steps
Lack of clear accountabilities outside of Core Solutions & Client Analytics	• Lengthy QA process which requires multiple touchpoints between various teams during an already busy post campaign reporting period • Leads to either late delivery of scorecard or many adhoc data correction requests post delivery	• Bring in CS, Planning, Activation partners early into the process via an expanded internal kickoff meeting • Insert key check-in points with Planning & Activation during data collection & QA phases
Spend discrepancies between Olive & FFS/Datalinks/PCAs	• Creates a very lengthy & manual process for QAing the scorecard • Results in multiple & time intensive requests to Core Solutions for manual overrides in scorecard data	Short term: • Expand/reinforce the Olive Spend training/info packet EMEA Client Solutions has developed, to NA & APAC Mid term • Create a data collection/QA/reporting ecosystem for all post-campaign Brand deliverables in PA timelines • Enforce SLAs with tech team for platform issues (i.e. manual spend uploads) outside of our control Long term • Data infrastructure improvements • Automate post campaign deliverables
Singular dependency on one engineer	The scorecard continues to rely solely on Core Solutions (people) support for development & any shift in priority can put the deliverable in jeopardy of being delivered on time	Short term: • At least for the Q4'23 scorecard, recommend dedicated Core Solution support for EMEA & NA Longer term: • 2024 Core Solutions roadmap projects related to scorecard to come to fruition

Issue Resolution Details

Lack of Accountabilities Outside of Analytics

Resolution: Bring in x-functional team members early in the process

Why this matters:

The Global Scorecard is a high-visibility deliverable which should require a x-functional effort, similar to other post-campaign reporting

Improvements Made:

- Expanded Project Management support for this workstream
- Successfully increased Client Analytics accountability to the scorecard

Current Challenges:

- Scorecard development sits outside of PA specific campaign timelines so not prioritized appropriately
- Planning & Activation support not yet formalized so scorecard work is seen as adhoc work

Proposed Action Plan:

- Develop x-functional comms plan with key stakeholders across CS, Planning, Activation, Analytics & Core Solutions (PM) Example here
  - Will include:
    - Expanded RASCI
    - Key milestones for internal checkins throughout scorecard dev process

Google

Spend discrepancies in platform

Resolution: Reinforce upstream spend reconciliation tasks & enforce SLA with Tech Team

Why this matters:

Currently we have an issue with differences in spend reporting across key post-campaign deliverables, including the scorecard, which leads to client distrust in the data we provide

Improvements Made:

- EMEA Client Solution outreach to EMEA CS & Activation leads at scorecard kickoff enforcing accurate spends in Olive - connected with NA & APAC client solutions teams as well

Current Challenges:

- Continued spend discrepancies in NA & EMEA
- Continued challenges with manual spend uploads accurately showing up in platform - Tech team area of control

Proposed Action Plan:

- Short term (1-3 months)
  - Formalize & deliver spend reconciliation training globally (Client Solutions)
  - Insert formal platform spend checks throughout campaign lifecycle *(not sure if this is possible but we need spend QA to start happening earlier than scorecard dev time)*
- Mid term (3+ months)
  - Include scorecard as part of PA post campaign deliverable tasks/timelines (Client Services)
  - Enforce data reconciliation in Olive as part of post-campaign reports development (Client Services)
  - SLA review & enforcement with Tech team (TBD)
- Long term (6+ months)
  - Completion of data automation workstream (Core Solution)
  - Automate post campaign reporting (Core Solutions)

Google

Singular dependency on Core Solutions
Resolution: Shift dev responsibilities away from team

Why this matters:
Core Solutions responsibility is to empower & enable internal teams to produce client reporting as needed, not to develop reporting themselves

Improvements Made:

- Brought in BI support to offload day-to-day client management from Core Solutions (Tools & Automation)

Current Challenges:

- Still highly dependent on Core Solutions (T&A) for scorecard development & delivery

Proposed Action Plan:

- Short term (1-3 months)
  - Assign dedicated Core Solutions (T&A) support for scorecard in EMEA & NA, for the Q4'23 scorecard (Chief Data Officer)
- Mid & long term (3+ months)
  - Align future scorecard development expectations with Core Solutions project(s) in service of improving scorecards/post campaign deliverables (Ops/PM/Core Solutions)

Google

Next Steps

MFG

we are here

Q4 kick-off

Q4 delivery

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6

Phase 1
➤ Review and refine spend confirmation process

➤ Develop scorecard guidelines

➤ Define project stakeholders

➤ Develop comms plan

Phase 2
➤ BLS DB audit for 2023 reconciliation

➤ Deliver scorecard training

➤ Enforce clear R&R's

➤ POA for post campaign synergies

➤ Client & internal kickoff for Q4'23 scorecard

Phase 3
➤ Cross training within Core Solutions T&A (i.e. how to create scorecard snapshot)

➤ Enforce spend reconciliation in Olive (Client Solution training)

➤Key milestones check-ins with xfunctional team

➤ Deliver Q4/2023 scorecard

TBD but need to align with Core Solutions roadmap specifically for work concerning scorecard improvements

Dec   **Jan**   **Feb**   **Mar**   **April**   **May**

Meetings | Purpose, Attendees, Cadence

#		Description	Attendees	Frequency	Output
1	**Daily Stand-ups**	• Track progress toward milestones • Every one understands their tasks /responsibilities • Highlight tasks that have been completed and anything that might be blocked	Analytics POC Core Solutions POC Planning POC Activation POC Client Solution POC PM	Weekly from kick off Daily during the QA phase	Plan for the next 24 hours / next working day
2	**Steerco**	• Project status • Timeline review • Risks & issues • Action items	Analytics Lead Core Solutions Lead Planning Lead Activation Lead Client Solution Lead PM	Weekly	Action items
3	**MFG + Google**	• Project status • Timeline review • Risks & issues • Next steps	Client PM Core Solutions POC Discipline POCs	Weekly	Action items

One Month Update

REMINDER:
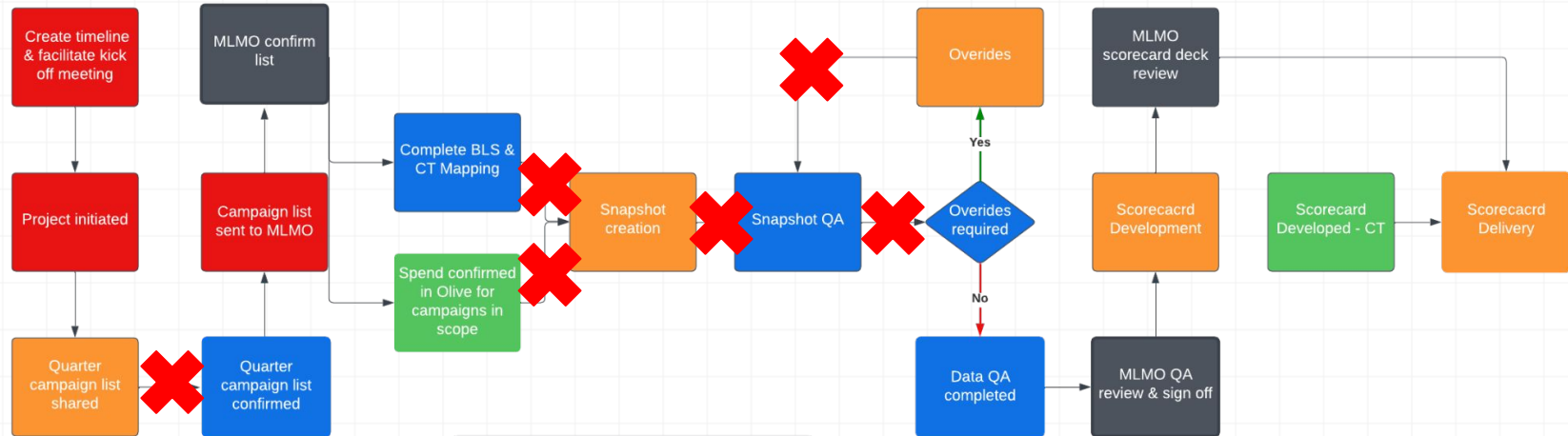# Current process flow & Breaking points in Q3 scorecard process

MFG

```
Create timeline          MLMO confirm
& facilitate kick        list
off meeting

        ↓                      ↑

Project initiated        Campaign list          Complete BLS &
                         sent to MLMO           CT Mapping

        ↓                      ↑              Spend confirmed
                                              in Olive for
Quarter        ❌  Quarter                     campaigns in
campaign list      campaign list               scope
shared             confirmed
```

Snapshot creation — Snapshot QA — Overides required (Yes → Overides) / (No → Data QA completed)

MLMO scorecard deck review — Scorecard Development — Scorecard Developed - CT — Scorecard Delivery

Data QA completed → MLMO QA review & sign off → Scorecard Development

Diagram key

- 🟥 PM
- 🟦 Analytics
- 🟧 Core Solutions
- 🟩 CS / ACT/ CT / PLA
- ⬛ MLMO

Lack of Accountabilities Outside of Analytics

Resolution: Bring in x-functional team members early in the process

1 Identified key stakeholders across regions for Analytics, Core Solutions, Planning, Activation, Client Solutions, & Client Services

2 Conducted formal kickoff with EMEA & NA x-functional teams
   a. 150+ attendees in EMEA!
   b. 30+ attendees in NA

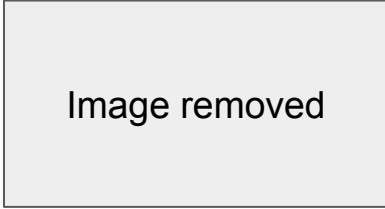**3** Developed formal comms plan which includes 2x touch bases with x-functional Steerco group during critical data QA phase

1

Image removed

2

Image removed

3

Image removed

Spend discrepancies in platform

Resolution: Reinforce upstream spend reconciliation tasks & enforce SLA with Tech team

Partnering with EMEA Client Solutions team to develop/scale spend checks reporting across EMEA, NA, & APAC

1 Platform Performance Spend
  a. Guidance on Olive spend fields & how they impact post campaign reporting

2 Misaligned spends reporting
  a. New report that identifies & rectifies any discrepancies between Olive confirmed spend (MSC numbers) & performance spends (platform numbers) - latter being used for VP Scorecard

1

Image removed

2

Image removed

Google

Summary of Issues/Proposed Action Steps/Actions Taken

Issues	Impact on Scorecard	Proposed Action Steps	Actions Taken For Q4'23 Scorecard
Lack of clear accountabilities outside of Core Solutions & Client Analytics	• Lengthy QA process which requires multiple touchpoints between various teams during an already busy post campaign reporting period • Leads to either late delivery of scorecard or many adhoc data correction requests post delivery	• Bring in CS, Planning, Activation partners early into the process via an expanded internal kickoff meeting • Insert key check-in points with Planning & Activation during data collection & QA phases	• Conducted formal internal kickoff with EMEA & NA x-functional teams on Jan 24th, sharing newly developed guide • Identified x-functional steerco for EMEA & NA; scheduled formal checkpoints in February
Spend discrepancies between Olive & FFS/Datalinks/PCAs	• Creates a very lengthy & manual process for QAing the scorecard • Results in multiple & time intensive requests to Core Solutions for manual overrides in scorecard data	Short term: • Expand/reinforce the Olive Spend training/info packet EMEA Client Solutions has developed, to NA & APAC Mid term: • Create a data collection/QA/reporting ecosystem for all post-campaign Brand deliverables in PA timelines • Enforce SLAs with tech team for platform issues (i.e. manual spend uploads) outside of our control Long term: • Data infrastructure improvements • Automate post campaign deliverables	• EMEA Client Solutions shared new "Misaligned Spends" report for EMEA ○ Developed NA version and reviewed it with NA Client Solutions & Finance teams • We broadly shared platform spend checks guide during internal kickoff to help teams better understand how to update platform for post campaign reporting
Singular dependency on one engineer	The scorecard continues to rely solely on Core Solutions (people) support for development & any shift in priority can put the deliverable in jeopardy of being delivered on time	Short term: • At least for the Q4'23 scorecard, recommend dedicated Core Solution support for EMEA & NA Longer term: • 2024 Core Solutions roadmap projects related to scorecard to come to fruition	• Engineer is leading global development & delivery of the scorecard, with resource supporting APAC • Engineer is cross-training BI in parallel

Singular dependency on Core Solutions

Resolution: No change in the short term

| Global | Aishah Iqbal
Analytics Ops | X
Tools & Automation | X
Business Intelligence |

| Regional | X
Tools & Automation
(APAC) | X
PM - EMEA | X
PM - NA |
| | X
Central Analytics
(APAC) | | |

Google
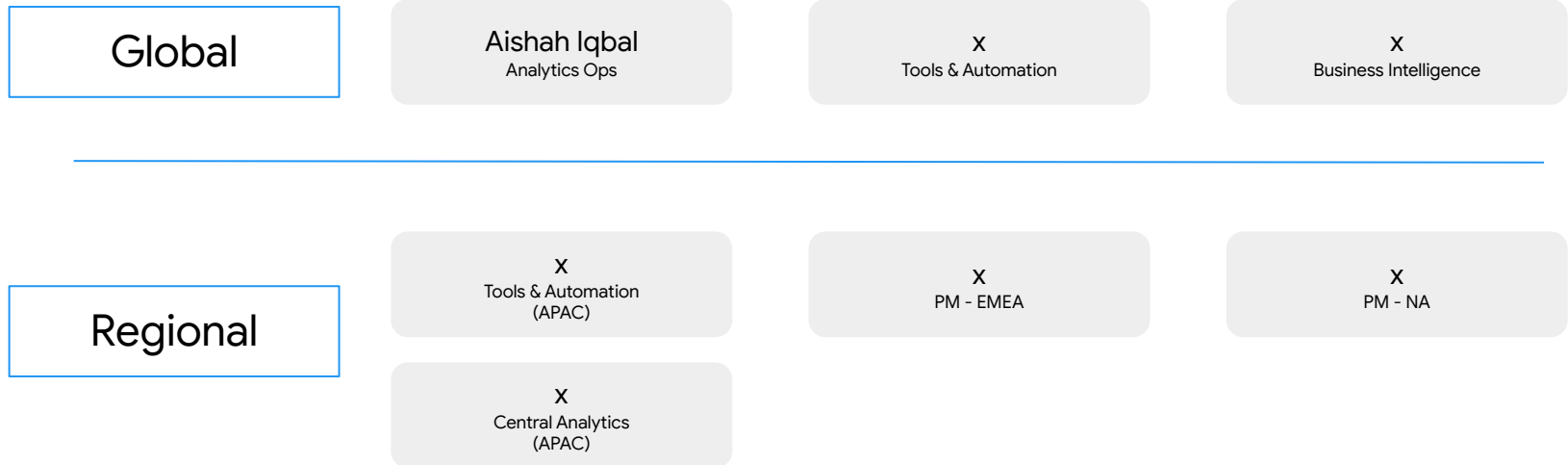
BONUS
Additional Process Tweaks

In an effort to keep all stakeholders informed of the ongoing process, & to help set/maintain expectations, we have made additional tweaks to the scorecard process

1 Weekly status email
   a. Details regarding progress against set milestones, sent to clients on Friday, & internal teams on following Monday

2 Client adhoc request form
   a. To manage the additional analysis requests we get from clients that rely on scorecard data, we have asked them to list them in a central doc by deadline & allowing usto provide response within 3 business days

1

Image removed

2

Image removed

Google