User Experience Research & Design
Users and content in context.

AdPortal Campaign Setup

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Each Campaign is created once a Kick-off call or a request for work has been designated. The Campaign Setup is the first step in creating a Campaign. Below are a list of findings and points of pain about the Campaign Setup Process…

Findings

1. Many, if not most, of the sections and piece of the Campaign Setup screen are for internal workflow that help Operations work on the Campaign.
2. There are a few select sections such as Tasks, Agencies, Publishers, Subscribers that are actually used for Campaign Setup
3. IOs are usually created by the finance team but associated to a Campaign.
4. There is nothing that tells the user that a Campaign is completed. Nothing is required to complete a Campaign. It is all manual and up to the discretion of the Campaign Manager.
5. The tracking of the tags are what tells the status of the ads inside the Campaign, but the status of the Campaign is not updated.
6. There is no way to delete a Campaign. There is also no way to not show a Campaign from a client. This could be done with a simple Active/Inactive solution.

Points of Pain

1. Project Managers state that moving from silo to silo in AdPortal slows their process down because of performance issues and stoppage of workflow.
2. It is difficult to know when a Campaign is active, running, complete etc. because the status is not system generated. In AdPortal it is a manual process.
3. Most of the communications are done through email across the operations team working on a specific Campaign.
4. Many fields in the system that have been abandoned or replaced but still exist on the screens that contribute to slow performance and workflow.
5. Tasks label is not intuitive on this screen since they really are not Tasks. They are points of contact for the Campaign that serve as credit for sale and responsibility of the Campaign.
6. PMs and CMs wish there was the ability to delete a campaign prior to generating tags. Once a tag is generated the ability to delete a campaign is no longer available.

Placements, Creative Assignment, Task Assigning and Tag Generation are all parts of, but just associated to a Campaign. Users will need to go to a different silo in the system to upload, enter details and assign work to 'build' and 'complete' a Campaign Setup. There are several parts of the Campaign setup page that exist in the system today.

1. **General Information**
   A. Campaign Name (Required to create Campaign)
   B. Status (Manual Selection)
   C. Expected Start Date
      - Option for ASAP
   D. Expected End Date
      - Option for Specific/Relative
   E. Expected Impressions
   F. Actual Start Date (Read Only)
   G. Actual End Date (Read Only)
   H. Vertical (the category)
   I. Region (refers to the geo that the Project Manager is assigned to)
   J. Purpose (Type of Campaign)
   K. Redirect Source (Where the redirect request came from)
   L. Pod (team)
   M. Site Events (assignable)
   N. Open Insights Vendor Data (assignable)

2. **Additional Information**
   A. IOs (finance assignable)
   B. Tasks (People assigned to the Campaign who are credited and responsible for the work)
   C. Agencies (assignable)
   D. Publishers (Assign, Manage, View Specs)
   E. Subscribers (manage)
   F. CPM (rules per publisher)
   G. Media Plans (assignable)
   H. Kick-off Docs (assignable)
   I. Campaign Threshold Monitor
   J. Comments (general)