WPP Essence Case Study

A streamlined prototype design for WPP Essence's self-driving campaign

The world we live in is rapidly evolving as more things become digitalised and driven by data. Future-focused companies know the importance of staying relevant and harness their ability to adapt and evolve as new technologies emerge. One such company is Essence.

By pioneering the use of analytics and technology in the advertising space, Essence helps 21st century business leaders identify sources of future growth. This case study showcases how I assisted Essence to streamline processes on their platform through simplified product designs for their product Yoda.

Optional Disclaimer: All information in this case study is my own and does not necessarily reflect the views of WPP or Essence.

The Challenge

For Essence, the time campaign managers spent on highly repetitive, manual tasks on their platform was becoming a problem as it diverted attention away from making the most of important campaign data points. However, their end-to-end campaign planning and management solution (later dubbed Yoda) aimed to reduce the time spent across the campaign lifecycle.

Forecasting is a key part of Yoda and in order for Yoda to produce a forecast, it needs to be given historical data points to model from. These data points are delivered through the selection of Olive Media Plans. Media Activation Managers and Executives are able to select media plans from Olive for Yoda to model the forecast from.

My brief was to help Essence reach their goal of streamlining processes, automating where possible, and adding intelligence to the system where it made sense. Essentially, I had to design a prototype for Yoda to make life easier for campaign managers when forecasting.

My Role

As the Senior Product Designer on this brief, my role was to do research the problem, find a solution, design wireframes, conceptualise prototypes and finally handover a final prototype to the team at Essence. More specifically, I worked on UX and UI Designs for the web application and focused on the dashboard.

Contrary to many other business-to-customer (B2C) briefs that I have done prior to this, these designs were geared towards Essence's business-to-business (B2B) side. Functionality over and above design statements was of utmost importance as this platform would go on to play an integral part in the everyday operation of advertisers, publishers and agencies.

Research

The foundation of my research for this brief was laid by conducting extensive research on self driving campaigns (SDC). I gathered requirements, researched the problem and developed a product/service strategy. After this, I consolidated all my research to finalise the UX and UI design and implement the solution.

My research journey started with a core group mapping the potential flow of a SDC to unleash its potential impact. Self driving campaigns (SDC's) refer to advertising campaigns that combine multiple services together to streamline media spend by delivering automated, data driven ads, that generate improved business learnings and workforce efficiency. In essence, a SDC was the product that I was tasked to work on.

How would it work?

Clients would be able to tell the app what budget they have and the outcome they want to achieve and the SDC would handle the rest. From budget allocation and campaign setup all the way through to optimisation and reporting, the SDC would cover every step of the journey.

Why is there a need for a product like this?

Large advertisers need consistency as they scale. They're often overloaded with new and important data points, but don't have the time to make the most them. People want to use their time to harness their intellectual capacity to think and not to do highly repetitive and manual tasks that could be automated. Because a SDC codifies best practice and continually learns from occurrence level data, it can take over boring, mundane tasks and free up people to focus on delivering real business outcomes.
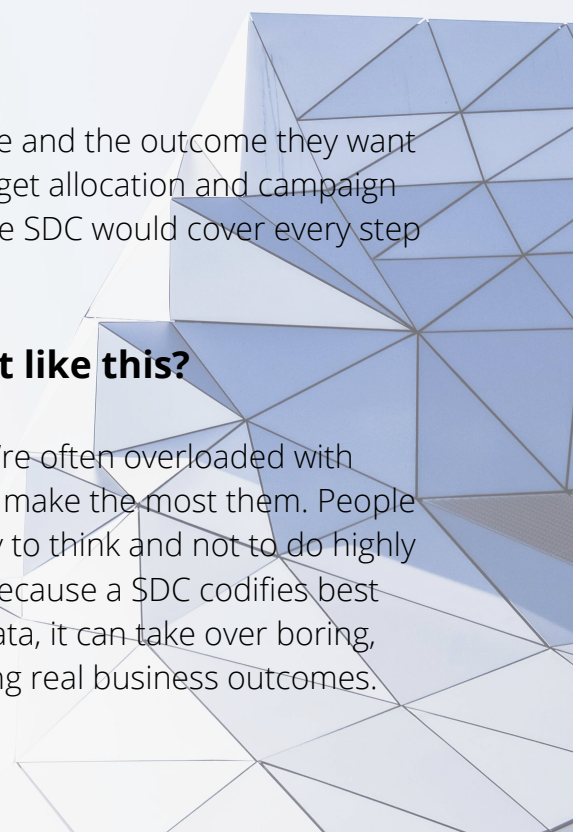
Interviews with clients and key accounts

As an external consultant, I took on the role of an impartial observer to the workings of Essence. I conducted over 70 hours of interviews with 25 people over 6 of Essence's client accounts. The accounts included DAZN, Financial Times, NFL and Google's B2B, B2C and Apigee.

After holding interviews across the business to understand the campaign lifecycle, I discovered some common themes about the misconception of what was originally the idea behind a SDC. Other than that the "SDC" would be a suite of lean services working seamlessly together across a single platform, I believed that it should trigger a piece change management that would initially include a series of improved processes across all Activation and Planning teams. These processes should be implemented across Essence initially, and should provide greater efficiency, improved data integrity, accountability and collaboration for both users and engineers.

Before I started working on it, this product was merely a proof of concept and the goal was to make a product that would be a separate service that sits alongside the already existing Olive. Understanding how clients navigate through Olive was integral to my understanding of the SDC (which we would later dub Yoda). I took time to familiarise myself with Olive and the way clients approve media plans.

The ins and outs of Olive

Olive is a digital marketing hub that delivers a unified view of campaigns, financial control and operational efficiency to enterprise marketers who have to juggle disparate platforms and inventory across global markets.Olive acts as a data spine through the campaign lifecycle.

Olive brings control and efficiency to any advertising campaign's brief, planning and set-up process through multi-currency, multi-market and multi-channel **media planning.**
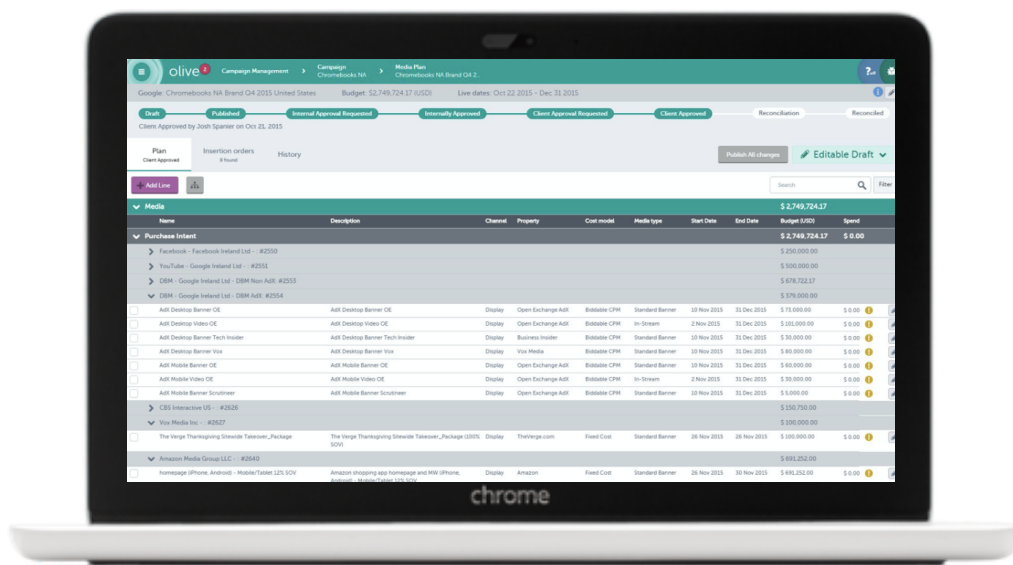
From a **trafficking** perspective, Olive uses the global standardisation of naming conventions and automates mapping with AdServers and DSPS that enables the fast and reliable setup of campaigns and experiments.
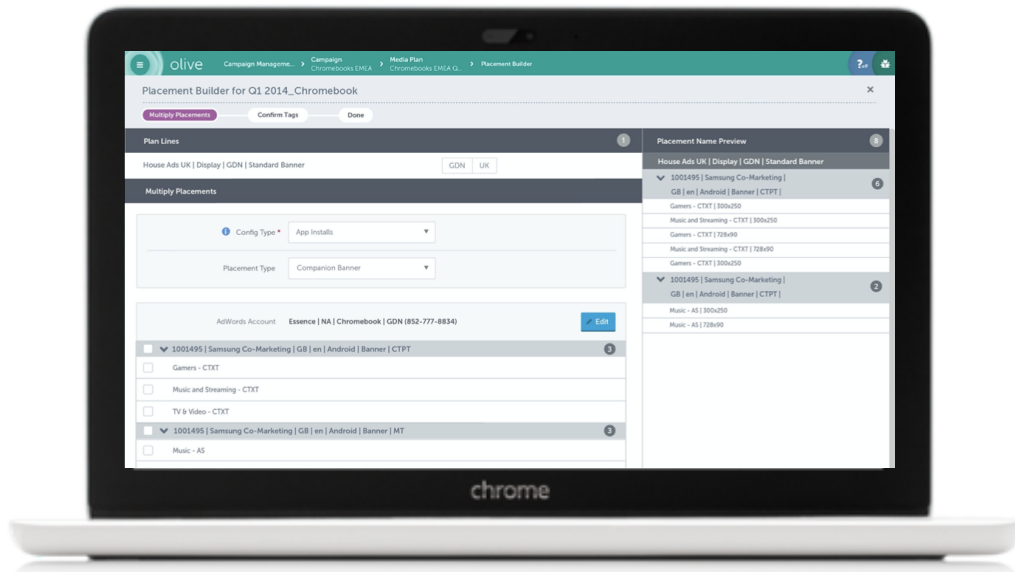

The **inflight performance reporting** is designed from the ground up to meet the needs of performance marketers and maximise the return on investment.
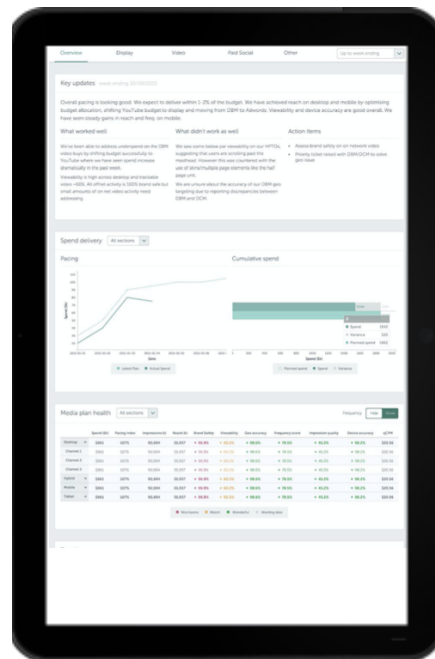
Additionally, Olive provides **inflight brand reporting** by summarising the metrics such as brand-safety and viewability that matter in winning hearts and minds of potential customers.

The **MediaView Investment dashboard** gives clients and campaign managers a bird's eye view of inventory across products, campaigns and markets.
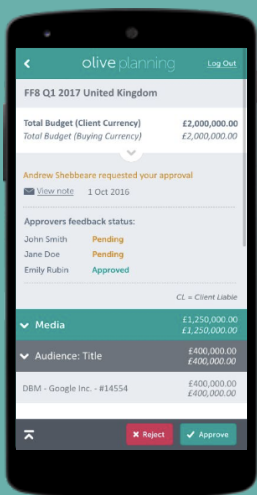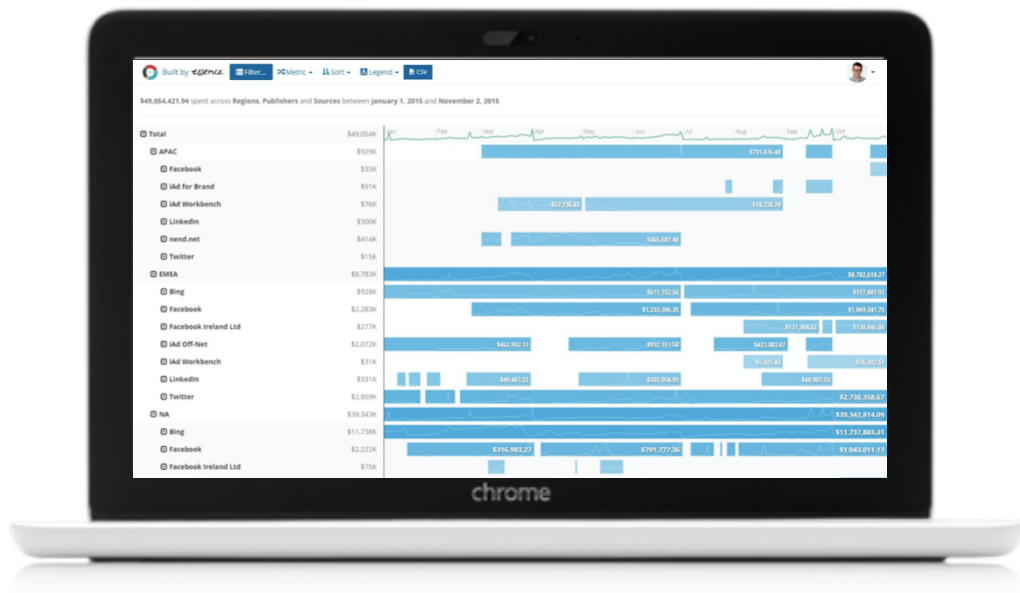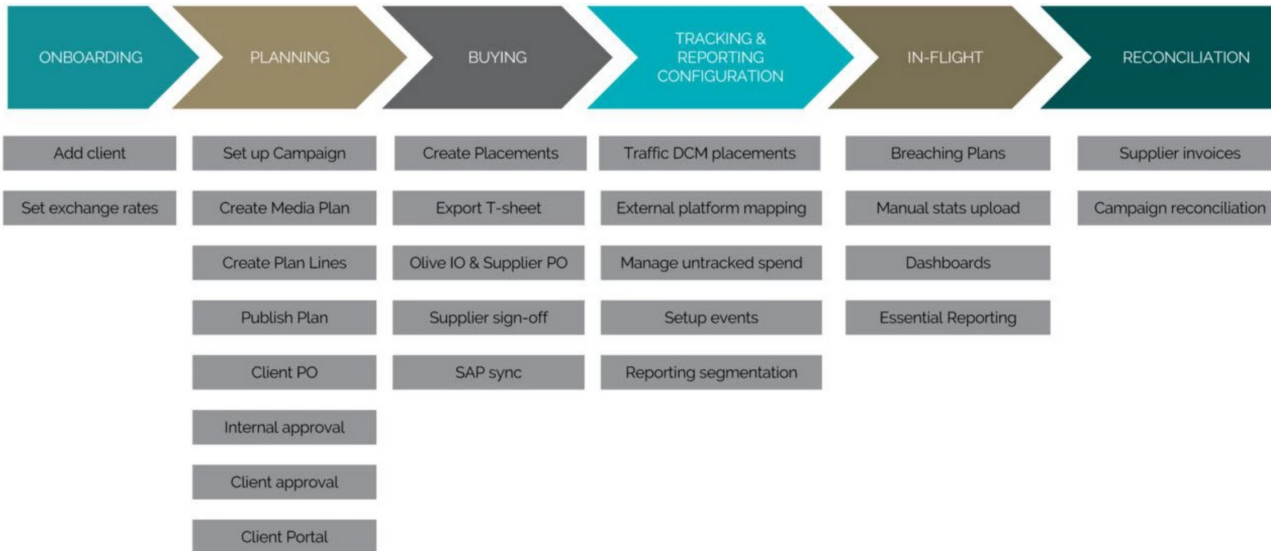

The centralised access to review and approve media plans, provides campaign managers with complete **financial control** and oversight of the approval process without having to rely on email searches.

Below is an example of a simple five step journey clients would typically follow on Olive 3.

1. **Email:** When Essence requests final authorisation of a media plan, clients will receive an email notification.

2. **Password:** Clients then follow the link in the email to set a password for their Olive 3 account. Their password must start with a number and have a mix of numbers and letters.

3. **Review Media Plan:** Upon pressing continue, they will be directed to their Olive 3 portal where they can review their media plan and budget.

4. **Approve:** If they are happy with the media plan, and give Essence final approval to buy media, they simply click approve.

5. **Reject:** If they are not completely happy with the plan and do not want to approve, they can provide commentary as to why not and click the reject button.

ONBOARDING	PLANNING	BUYING	TRACKING & REPORTING CONFIGURATION	IN-FLIGHT	RECONCILIATION
Add client	Set up Campaign	Create Placements	Traffic DCM placements	Breaching Plans	Supplier invoices
Set exchange rates	Create Media Plan	Export T-sheet	External platform mapping	Manual stats upload	Campaign reconciliation
	Create Plan Lines	Olive IO & Supplier PO	Manage untracked spend	Dashboards	
	Publish Plan	Supplier sign-off	Setup events	Essential Reporting	
	Client PO	SAP sync	Reporting segmentation		
	Internal approval				
	Client approval				
	Client Portal				

User Flow of Project Yoda

After familiarising myself with the integral relationship between Olive and Yoda, I mapped out the user flow journey. Below you can see the path that I followed from receiving the brief, starting to plan and familiarising myself with Olive.

Consequently, the user journey on Yoda would be receiving a brief, selecting a media plan, selecting a market, selecting a tactic and then have the ability to clean data by month and make manual adjustments to the self-driving campaign.
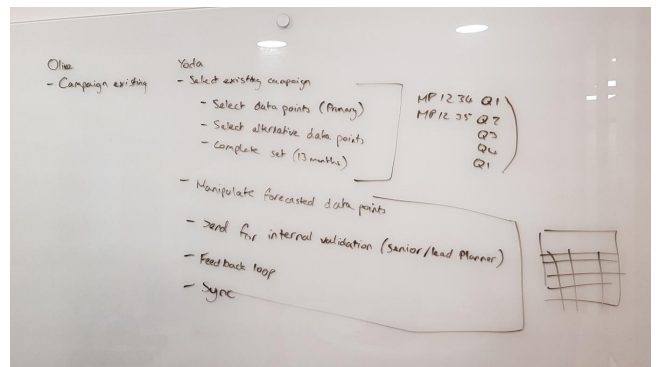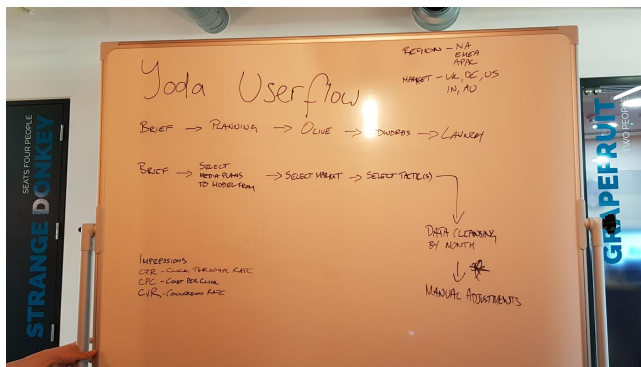
The Process

The modern digital marketer requires software that can unify disparate marketing data and processes. My challenge was to design a prototype that streamlines processes for campaign managers to save them time and energy usually lost on redundant, manual tasks that could be automated.

Wireframes

To ensure the new platform is very easy to navigate, I launched my design with a simple milestone bar/progress box at the top of the desktop view which shows campaign managers at which stage of the journey they are. The labels on each of these milestones are respectively campaigns, tactics, forecast, Olive sync and client review.
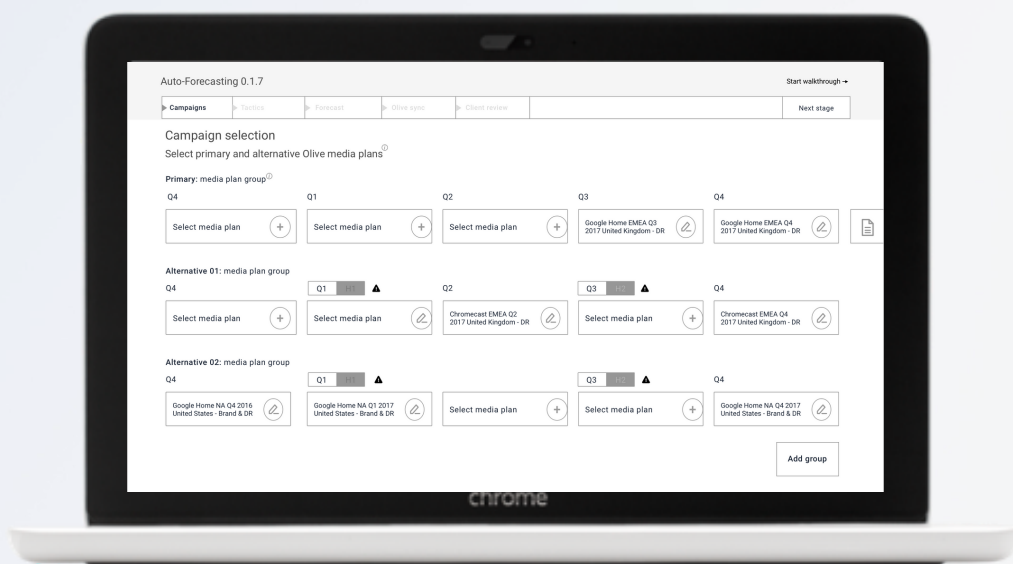
In the above wireframe, campaign managers will be met with the landing page of the SDC which will allow them to select a media plan and alternative media plans from Olive. They can also add new groups or plans where the '+' icon is indicated or edit plans where the pencil icon is.

On a more general note, they can again see where they are in the process by referring back to the progress bar at the top of the page. Once they have completed a step in the process, they can simply click on 'next stage' to be navigated to the next step in the process. In the top righthand corner, there is also a walk through option which will allow campaign managers to get a more information.

Additionally, in the wireframe below, you'll see a pop-up information block. These types of blocks will pop-up across the site to give campaign managers more information about the relevant step. This will also guide them to enter the correct information and aims to further contribute to one of the main KPI's of this campaign - to save time.

The below wireframe indicates the second step in the progress bar, tactics. Here, campaign managers can choose the metrics they want to measure such as impressions or pageviews as well as specify the dates to start a forecast of the campaign's performance.

After choosing the tactics of their choice, campaign managers will be able to view a forecast of the campaign. Here, as indicated below, they get a clear picture of how much budget they have left as well as how much they've already used on the campaign.
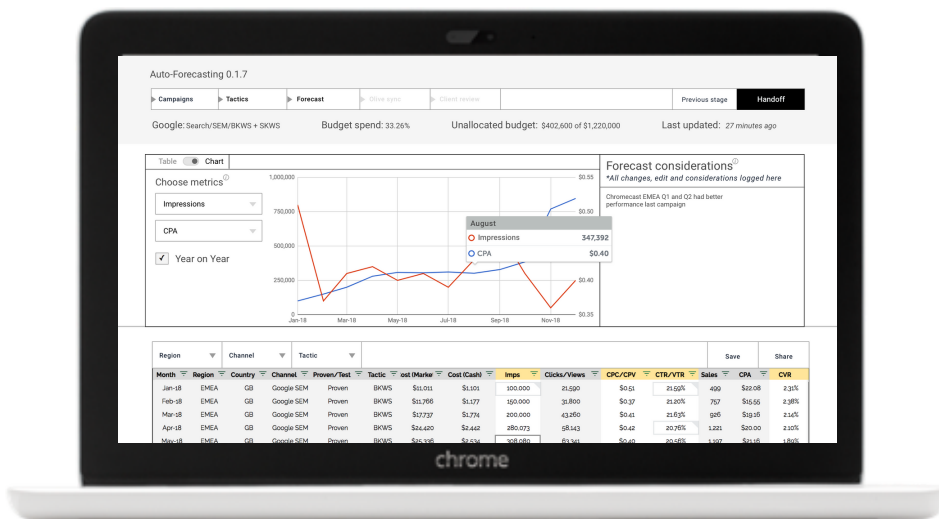
User Interviews

I conducted two interviews to test the user experience of Yoda. For the purpose of this case study, the interviewees will simply be referred to as interviewee A and interviewee B. I utilised the feedback they gave to make improvement to the final designs of Yoda. Some of the key takeouts of the user interview included:
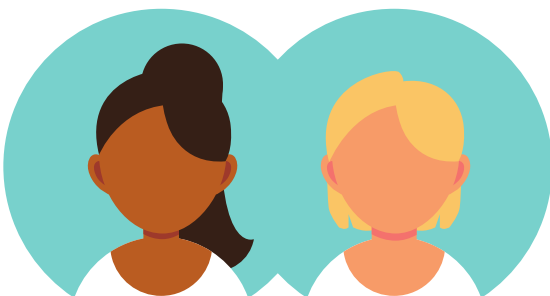
Interviewee A

- Interviewee A was initially was not sure what the progress box was intended for and would ideally like to see some more information explaining what the different sections mean.
- She thought that the alternative media group plan box was there for another forecast rather than alternative historical data so I needed to rethink the wording.
- She would have liked to see better filtering on the forecast table and see it split by market.
- She would like to export the forecast table in a variety of different formats.

Interviewee B

- From the get-go, Interviewee B was not sure what the 3 x's were in the top right hand corner.
- She stated that searching for another media plan in the 'add media plan' modal box was not clear and she would add media plans one by one, rather than searching for a media plan directly from the search box.
- She suggested that when you search for media plans, you get an an example i.e enter Google Home Q3 2018.
- She mentioned that it's very rare that they would have an alternative media plan.
- She said some some people might want to view the quarter by week especially in Q4.

Interviewee B

- Both interviewees mentioned that the data cleansing section needed more explanation and they would have liked to see notes or visual assistance for what to do on the data cleansing section.
- Both mentioned that after a few times of using the platform, the rules on the left would be redundant and suggested that they disappear after a while.

Final Protoypes

The user review gave me plenty of insights into where I could improve the user experience of the self-driving campaign. I used the constructive criticism of the two interviewees to fine tune my designs into something that would help all campaign managers load a campaign hassle-free.My original wireframes remained my framework, but I just slightly tweaked some features and enhanced the design for the final prototypes.
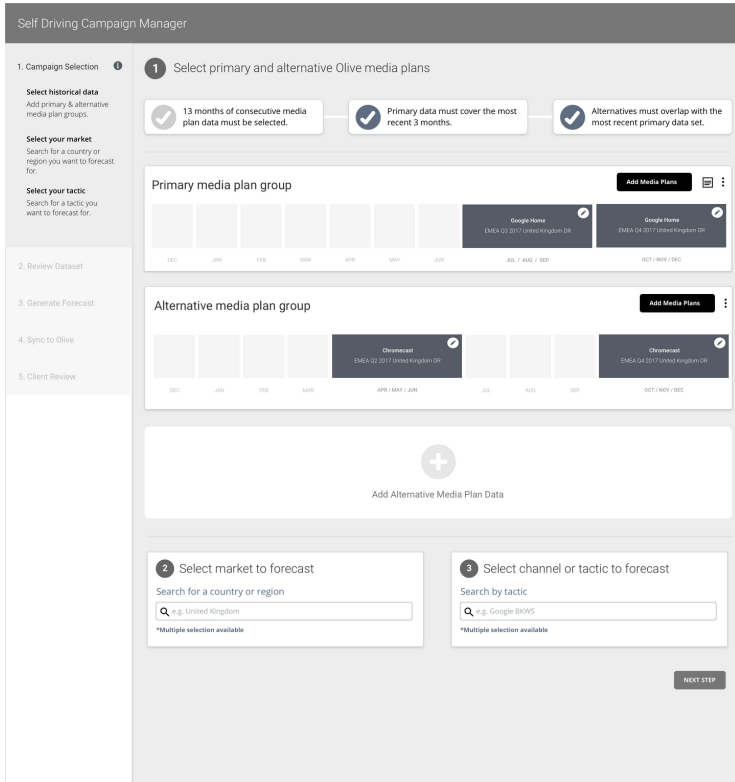

General Changes: I moved the progress bar from the top of the page to the left column. I also added more descriptions to each step in the process as one of my interviewees suggested. This layout provided a sleeker look-and-feel to the interface as a whole. I graded the background slightly to make different sections pop out a bit more which gives the page even more structure.
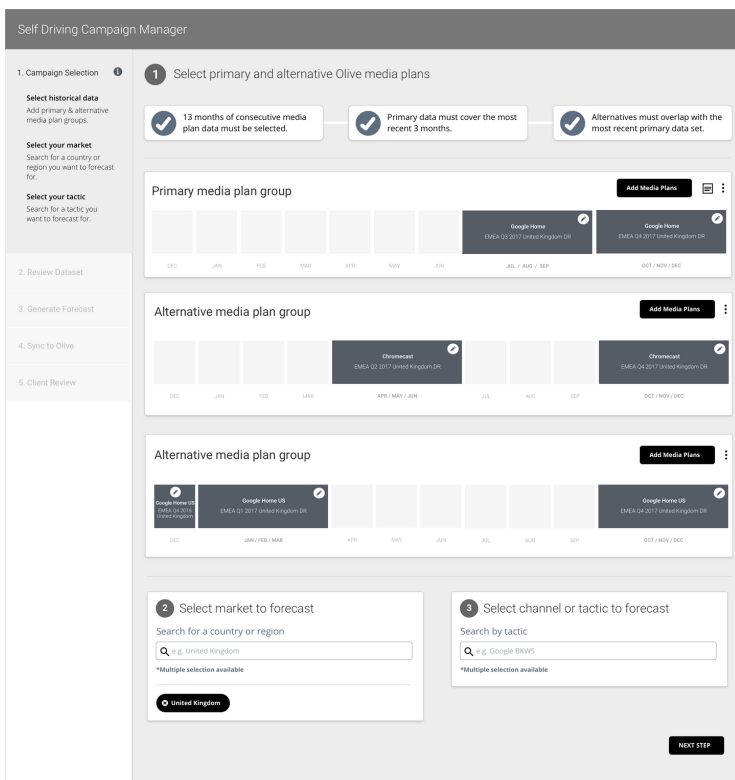

Campaign Selection: The campaign selection page consists of three basic steps that's also communicated in the lefthand progress column. These steps are:

1. Select your data from Olive.
2. Select your market.
3. Select your tactic to forecast

Both my interviewees mentioned that they needed more information around the data which I why I included three parameters at the top that the data needs to adhere to.
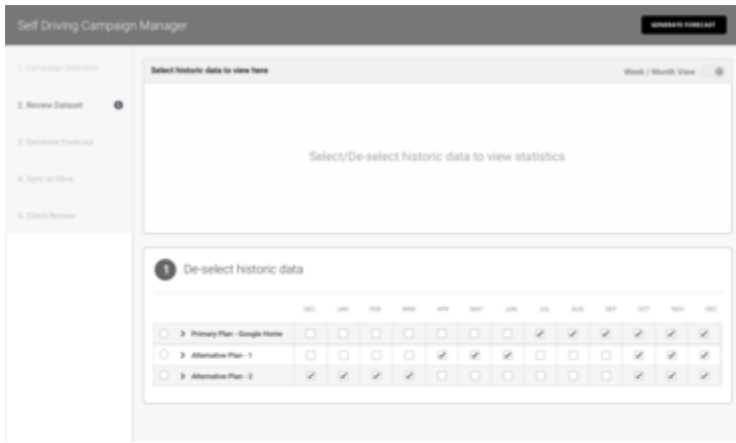
Review Forecast: This is what the forecast looks like before any data has been selected.
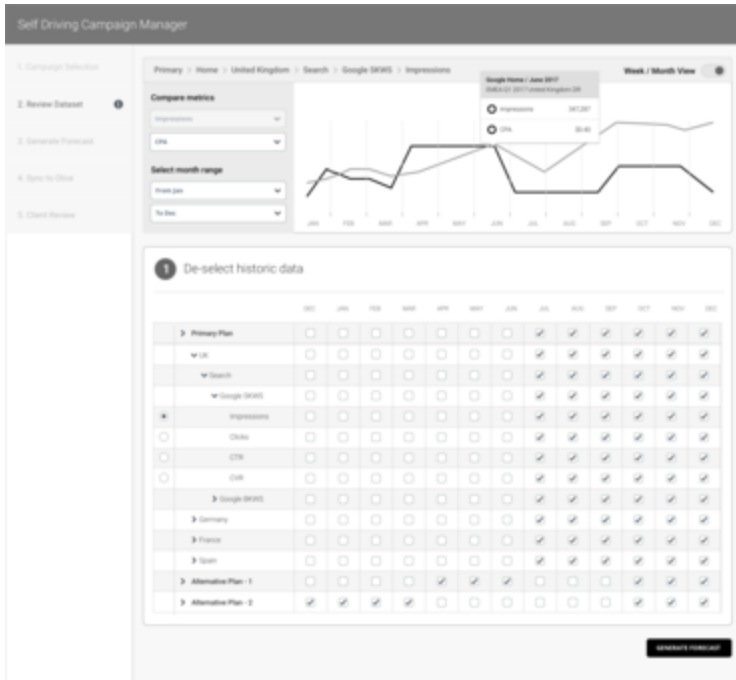
Review Forecast: This is an example of what the forecast looks like when data has been selected. I've also incorporated the functionality to de-select and re-select data points as it was something that my interviewees also brought up.
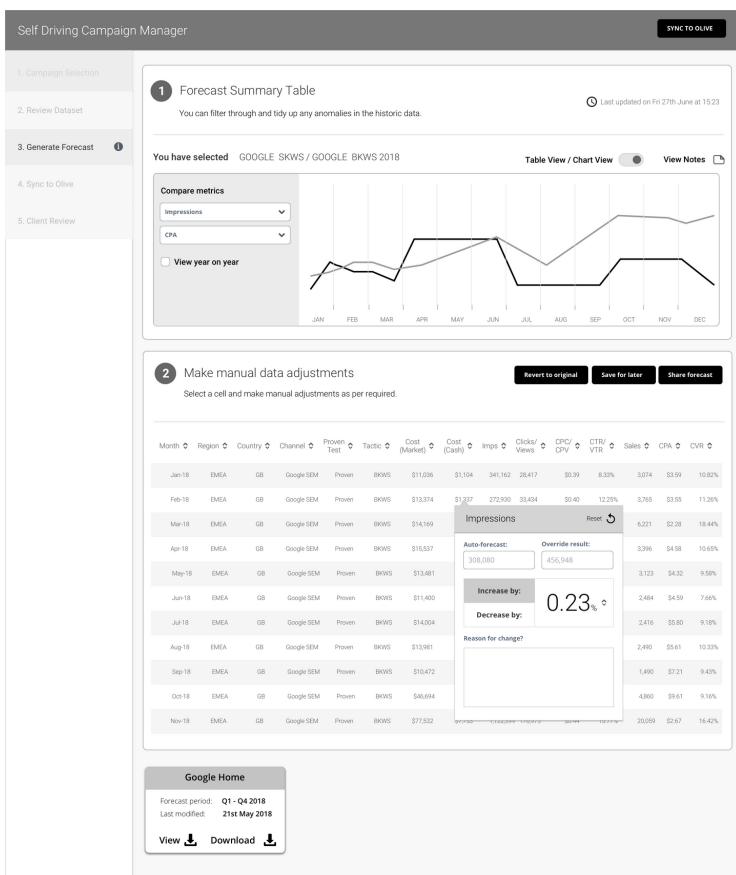
Forecast: Once the forecast is generated, users can export it to various formats. I also included the option to view the forecast in a table or chart view. The timestamp in the top righthand corner was also quite important for my interviewees, so I made sure that was included.

Handing over the Final Prototype

At the start of this project, I was briefed to create a prototype for a platform that would allow Essence, a leader in the digital advertising space, to help campaign managers to streamline their campaigns on one seamless platform. The digital advertising industry is a quick-thinking, fast moving space and it was important for me to use my skills in UI and UX design to help them save valuable time in the form of a self-driving campaign (SDC)

For this reason, and the fact that this platform would be B2B, I decided to prioritise functionality over and above design statements to meet the needs of my future-focused client. I was able to really delve deep into my research to lay a firm foundation of how this new SDC would fit into the larger Essence network. The platform from which the SDC would pull data, Olive, was a vital piece in this puzzle.

After my research, I designed various wireframes which I then had reviewed by two skilled campaign managers who would potentially use this platform. Their feedback helped me to finally design the final prototype which I could hand over to Essence for consideration.