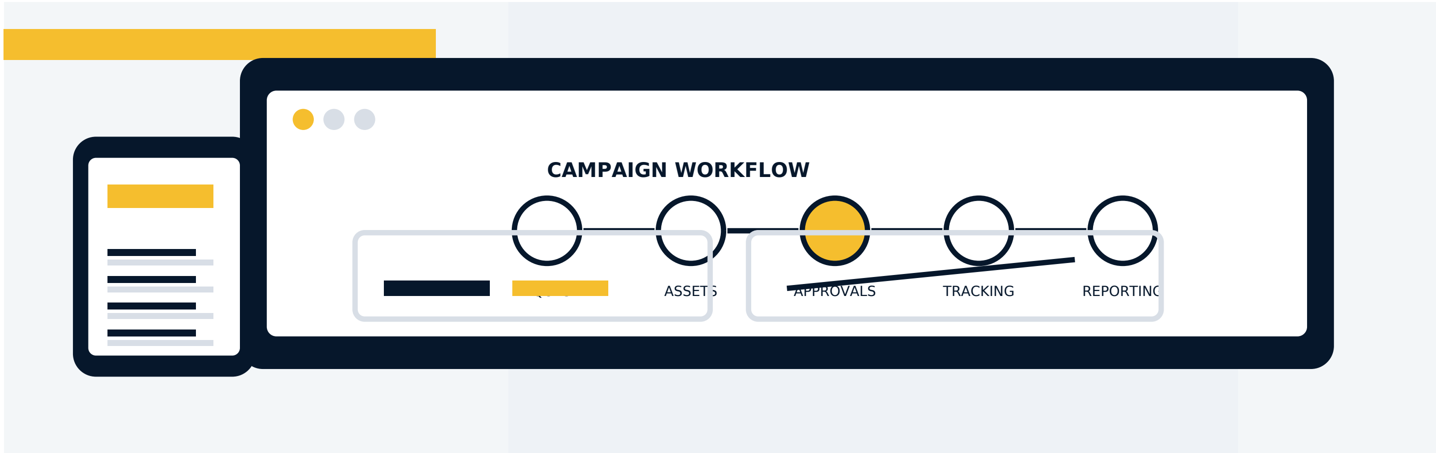
MEDIA
INTERCEPT

GUIDE 12 / AD OPERATIONS

THE NEWSLETTER AD OPERATIONS PLAYBOOK

A research-backed operating system for campaign requests, assets, approvals, tracking, proofing, reporting, reconciliation, and renewals.



RESEARCH EDITION

The Newsletter Ad Operations Playbook is built for teams managing newsletter sponsorships, dedicated emails, and performance-based placements across many publishers. It treats ad operations as a revenue-control system, not a back-office task. The goal is to reduce missed details, broken links, late assets, approval friction, reconciliation gaps, reporting inconsistencies, and renewal leakage.

How to use this guide

Use the strategy sections to design your operating model, the tables to standardize campaign execution, and the worksheets to build reusable internal SOPs. The guidance is written for a managed newsletter advertising workflow where advertisers, publishers, and internal teams need one clear source of truth.

Table of Contents

EXECUTIVE SUMMARY

The core argument

Newsletter advertising feels simple from the outside: pick a publisher, send creative, launch, and report clicks. Inside the operation, the work is much more fragile. A campaign can fail because one UTM parameter is wrong, one publisher receives an outdated asset, one proof is approved in a side thread, one link is tested after the send is already scheduled, one report mixes gross and validated clicks, or one advertiser never receives a timely renewal recommendation. These are not creative problems. They are operating system problems.

A strong newsletter ad operations workflow does three things at once. It protects campaign performance by making every placement launch with the right assets, links, specs, and expectations. It protects revenue by preventing makegoods, payout mistakes, reconciliation delays, and unnecessary manual work. It protects trust by keeping advertisers, publishers, and internal teams aligned around what was promised, what ran, what was measured, and what should happen next.

Old ad ops mindset	Modern newsletter ad ops mindset
Trafficking as a checklist after the sale closes.	Operations as the control layer for the entire campaign lifecycle.
Every publisher process is handled manually and differently.	Publisher differences are documented, normalized, and managed through standard fields.
Approvals happen in email threads and Slack messages.	Approvals are captured in one location with timestamp, stakeholder, and final proof.
Links are created ad hoc for each send.	UTM structure, redirect logic, and link testing are governed centrally.
Reporting starts after the campaign ends.	Measurement design starts during campaign planning.
Payouts are a finance problem later.	Payout readiness is built into campaign setup and reconciliation.
Renewal depends on memory or one rep following up.	Renewal triggers are built into post-campaign reporting and status workflows.

Media Intercept lens

Media Intercept positions newsletter advertising around planning, launching, tracking, and scaling sponsorships and dedicated emails across premium publishers from an organized workflow. This playbook translates that positioning into the operational rules, fields, statuses, QA gates, reporting standards, and templates needed to run that model reliably at scale.

01

OPERATING THESIS

Ad operations is the system that turns sold campaign intent into a measurable, billable, renewable campaign outcome.

Why newsletter ad operations matters more than it looks

In newsletter advertising, ad operations sits at the intersection of sales promises, publisher constraints, advertiser creative, tracking architecture, reporting expectations, and finance. When the workflow is loose, every campaign becomes a custom project. Custom work may feel flexible in the moment, but it usually creates hidden costs: extra follow-ups, broken links, late approvals, inconsistent reporting, payout questions, campaign delays, makegoods, and unclear accountability.

The purpose of ad operations is not just to get ads live. It is to create a repeatable operating system that makes campaigns easier to buy, easier to fulfill, easier to measure, easier to reconcile, and easier to renew. That operating system must be strong enough to handle three realities of newsletter advertising: publishers have different requirements, advertisers have different objectives, and measurement data can be noisy.

The four operating risks

Risk	What it looks like	Operational control
Execution risk	Late creative, missing assets, wrong run date, unapproved proof, or incorrect placement.	Status gates, asset validation, proof approval logs, run-date confirmation, and final pre-send QA.
Measurement risk	Broken links, missing UTMs, redirect stripping, link scanner inflation, inconsistent click definitions.	Tracking taxonomy, QA test plan, click validation, discrepancy thresholds, and reporting definitions.
Financial risk	Publisher payout disputes, advertiser invoice questions, unpaid/unclear campaign revenue, makegoods.	Rate card source of truth, payout rules, reconciliation log, invoice fields, and approval evidence.
Relationship risk	Advertiser loses confidence, publisher feels unsupported, internal team misses expectations.	Clear communication templates, SLAs, escalation paths, and renewal-ready reporting.

The ad operations promise

A mature newsletter ad ops function should be able to answer these questions without searching through multiple email threads: What did the advertiser buy? Which publisher was assigned? What format ran? What creative was approved? What tracking link was used? Who approved the proof? What date did the campaign send? What result was reported? Were any clicks filtered or disputed? What should the team recommend next?

If the answer to any of these questions depends on memory, side conversations, or manually reconstructing data, the operation needs stronger controls.

Research context

Industry measurement standards repeatedly emphasize clear definitions, filtration, transparent reporting, and documentation. Those principles are just as important in newsletter advertising, even when campaigns are managed manually or semi-manually.

02

OPERATING MODEL

A newsletter ad campaign should move through a visible chain of statuses, each with one owner, one next action, and one exit rule.

The lifecycle model

The best way to reduce chaos is to treat each campaign as a lifecycle, not a collection of tasks. A lifecycle has defined stages, inputs, owners, and exit criteria. A campaign should not move forward until the current stage is complete. This prevents teams from scheduling placements before creative is ready, building tracking links before the final landing page is confirmed, approving proofs without disclosure checks, or reporting performance without validating click quality.

Stage	Primary owner	Required inputs	Exit rule
Requested	Sales or account lead	Advertiser, campaign goal, budget, format, preferred timing, target audience.	Campaign is accepted into ops queue with missing-info list.
Placement Planning	Campaign ops	Publisher options, available dates, rates, ad specs, placement type.	Recommended plan is approved internally and ready for advertiser confirmation.
Creative Needed	Advertiser or creative lead	Copy, image, CTA, landing page, legal disclaimers, tracking needs.	All required assets pass validation and are stored centrally.
Tracking Build	Ad ops	Final destination URL, UTM naming, campaign ID, publisher ID, format ID.	Tracking URL is generated, tested, logged, and locked.
Awaiting Draft	Publisher	Final approved creative and tracking link.	Publisher sends proof or draft for review.
Approval Needed	Advertiser/account lead	Publisher proof, disclosure, link test, send date.	Final proof approval is captured with timestamp.
Scheduled	Publisher/ad ops	Approved proof, run date, final link, schedule confirmation.	Publisher confirms scheduled send and last-change cutoff.
Live	Ad ops	Send confirmation, live link check, campaign monitor.	Campaign has launched and live checks are complete.
Completed	Ad ops/reporting	Raw metrics, validated metrics, notes, incidents, screenshots.	Report is finalized, reconciliation status set, renewal recommendation created.

Status naming rules

Statuses should be plain English and action-oriented. A stakeholder should be able to look at a row and know what needs to happen next. Avoid ambiguous states like "In progress" or "Pending" unless they are paired with a next-action field. For example, "Approval Needed" is clearer than "Pending" because it tells the team exactly why the campaign is blocked.

Bad status	Better status	Why it is better
Pending	Creative Needed	Identifies the blocker.
In progress	Tracking Build	Names the active workstream.
With publisher	Awaiting Draft	Clarifies what the publisher owes back.
Ready	Scheduled	Shows the campaign is locked to a run date.
Done	Completed - Reporting Pending	Separates launch completion from reporting completion.

The one-next-action rule

Every campaign row should have one next action. If a row has five next actions, the operation has not prioritized the blocker. Suggested next actions include: Upload assets, confirm landing page, build tracking link, approve proof, confirm schedule, send report, reconcile clicks, issue invoice, confirm payout, or prepare renewal recommendation.

Implementation rule

A campaign should never be both "Creative Needed" and "Approval Needed." If creative is missing, there is nothing to approve. If a proof exists, the creative stage should be closed.

03

INTAKE AND TRIAGE

A strong intake form prevents half the downstream problems in newsletter ad operations.

Campaign intake is the first QA gate

Ad operations breaks down when the campaign enters the system with vague goals, missing landing pages, unclear pricing, incomplete assets, or unconfirmed run dates. Intake should feel disciplined because it is the moment when sales, account management, and operations agree on what has actually been sold or requested.

Minimum viable campaign brief

Field	Why it matters	Validation rule
Advertiser name	Needed for naming, reporting, invoicing, and publisher communications.	Must match CRM/billing record.
Campaign objective	Determines format, publisher fit, reporting, and renewal logic.	Select one primary goal: awareness, traffic, lead generation, revenue, trial, app install, survey, event registration.
Format	Controls specs and operational path.	Sponsorship, dedicated email, newsletter takeover, native inclusion, flat-rate package, CPC campaign, CPM campaign.
Budget and pricing model	Affects publisher selection, pacing, billing, and payout.	Must include CPC/CPM/flat rate, caps, minimums, overage policy, and payout basis.
Target audience	Supports publisher fit and creative strategy.	Must include role, interest, geography, industry, income/life stage, or intent criteria.
Landing page	Required before UTM build and link QA.	Must be final URL, not a placeholder, and must load successfully.
Creative assets	Required for proofing and trafficking.	Must match specs; missing disclaimers flagged.
Run date window	Required for scheduling and publisher availability.	Must identify fixed date, flexible date range, or priority month.
Compliance notes	Needed for regulated verticals and claims.	Required for health, finance, legal, education, sweepstakes, alcohol-adjacent, or sensitive categories.

Triage tiers

Not every campaign should move through the same urgency lane. Use triage tiers to decide which campaigns require extra review, leadership sign-off, or accelerated handling.

Tier	Definition	Ops handling
Tier 1: Standard	Single advertiser, standard assets, normal category, known publisher, normal lead time.	Standard workflow and standard QA checklist.
Tier 2: Complex	Multiple publishers, custom copy, varied specs, dedicated email, short deadline, or first-time advertiser.	Ops kickoff, asset tracker, proof calendar, and pre-launch review.
Tier 3: High risk	Regulated claims, large budget, sensitive advertiser category, first-time publisher, unusual payout terms, or strategic client.	Leadership visibility, compliance checkpoint, final link audit, and written approval trail.

Intake rejection criteria

A campaign should not enter trafficking until the following are resolved: no landing page, no advertiser approval path, no confirmed pricing model, no publisher availability, missing legal disclaimer, incomplete copy, unclear payout rate, mismatched campaign goal and format, or unresolved category restrictions. Rejecting an incomplete intake is not blocking revenue; it is preventing revenue from becoming operational debt.

Practical standard

The intake form should force a decision on goal, format, pricing, audience, landing page, run timing, and approval owner. Anything else can be improved later, but these fields must exist before operations begins.

04

INVENTORY AND PLACEMENT SETUP

Publisher inventory needs to be standardized without erasing the important differences between publications.

Why inventory setup is an operations problem

Newsletter advertising is often sold through premium, context-specific publishers. That is the value of the channel, but it also creates operational complexity. A sponsorship in one publication may require 50 words and one image. Another may require headline, body, CTA, logo, disclaimer, and a locked proof 72 hours before send. A dedicated email may have subject-line rules, sender-name requirements, suppression-list restrictions, or plain-text fallback requirements. If those details live in a deck or an account manager's memory, they will eventually break execution.

Inventory object model

Object	Examples	Operational fields
Publisher	The newsletter brand or media partner.	Publisher ID, contact owner, payment terms, audience overview, category restrictions, time zone.
Newsletter	A specific publication within the publisher portfolio.	Newsletter ID, cadence, audience size, editorial category, send days, deadline rules.
Placement	The sellable unit.	Placement name, format, specs, rate type, rate, availability, reporting metric, proof requirement.
Run slot	A specific date/issue/placement instance.	Run date, close date, available/held/booked status, reserved advertiser, cancellation policy.
Package	A bundle of placements or formats.	Included placements, pricing, discount rules, reporting aggregation, makegood rules.

Placement setup checklist

- Define the exact format label the buyer will see: newsletter sponsorship, dedicated email, native insertion, takeover, sponsored section, or custom package.
- Capture rate type and payout type separately. Advertiser pricing and publisher payout are related but should not be stored as one blended field.
- Document every required asset field. Separate required, optional, and publisher-controlled fields.
- Store character limits exactly as publisher uses them. Do not round or guess because small copy differences can delay approval.
- Document proof deadline, final-change cutoff, and cancellation window.
- Clarify whether the publisher or Media Intercept builds the tracking link into the final creative.
- Store reporting expectations: raw clicks, unique clicks, validated clicks, opens, sends, delivery, CTR, conversions, notes, screenshots.
- Document category restrictions and required disclosures for each publisher.

The inventory normalization problem

The goal is not to force every publisher to use identical specs. The goal is to translate every publisher's unique rules into a consistent internal data model. This lets the team compare inventory, avoid mis-selling, automate reminders, and reduce manual QA.

Publisher-specific detail	Standard internal field
"Sponsor blurb: 60-80 words plus square logo"	Body copy limit = 80 words; image = square logo; format = sponsorship.
"Native paragraph and one CTA button"	Headline optional; body required; CTA text required; image not allowed.
"Dedicated email proof due five business days prior"	Proof lead time = 5 business days; final-change cutoff = configured.

Publisher-specific detail	Standard internal field
"We do not run political or health claims"	Category exclusions = politics, health claims; compliance review required.

05

CREATIVE AND ASSET OPERATIONS

Creative operations should validate assets before they reach the publisher, not after a proof comes back wrong.

Creative ops is more than collecting copy

Newsletter ad creative must fit the publisher context, respect specs, include clear disclosure where needed, drive a specific action, and arrive early enough for proofing. A campaign with weak creative can underperform. A campaign with incomplete creative can miss a run date. The ad ops function must prevent both.

Creative asset schema

Asset	Required fields	Ops validation
Headline	Text, character count, claim review flag.	Fits publisher limit; no unsupported superlatives; aligned with CTA.
Body copy	Text, word count, claims, disclaimer dependencies.	Within spec; not overly promotional for editorial context; no missing disclaimer.
CTA	CTA text and final URL.	Verb matches landing page action; URL is final and trackable.
Image/logo	File, dimensions, format, alt/context note.	Meets publisher specs; not blurry; no hidden text too small for mobile.
Subject line	Required for dedicated email.	Accurate, non-deceptive, under publisher limit, no spam trigger concerns.
Preheader	Required for dedicated email.	Complements subject, does not repeat, fits mobile preview.
Legal/disclosure	Sponsor label, disclaimer, compliance language.	Present, clear, and placed where needed.

Asset validation rules

- Do not accept "copy coming soon" as a launch-ready asset state. Use Creative Needed until every required field is complete.
- Do not build final tracking links before the final landing page is confirmed. Placeholder URLs create reporting errors.
- Do not allow multiple live versions of creative in Slack, email, and a folder. Store the final approved version in one central campaign record.
- Separate advertiser-approved creative from publisher-edited proof. Both matter, but they are different artifacts.
- For dedicated emails, validate subject line, preheader, sender name, body copy, CTA, image, footer, unsubscribe behavior, and sponsor disclosure as one complete send package.

Creative QA rubric

Score	Meaning	Example
5	Launch-ready: clear offer, correct format, compliant, mobile readable, aligns to landing page.	Short headline, specific benefit, clear CTA, simple image, correct disclosure.
4	Minor edits needed: strong concept but small spec or clarity issue.	CTA is acceptable but not ideal; body copy needs trimming.
3	Usable but weak: likely to run, but performance risk is visible.	General copy, vague benefit, weak landing-page match.
2	Operationally incomplete or strategically misaligned.	Missing image, missing disclaimer, or product claim not supported.
1	Do not run.	Wrong category, broken landing page, deceptive subject line, or unapproved claim.

Publisher edit protocol

Publishers may edit copy to fit voice, compliance preferences, character limits, or layout. The ad ops team should separate acceptable editorial fit edits from material changes. Acceptable edits improve clarity without changing the offer. Material changes alter the claim, price, call to action, landing page expectation, sponsor identity, or compliance meaning and should be re-approved by the advertiser before launch.

Compliance note

Native and sponsored content should be identifiable as advertising when necessary. The FTC guidance emphasizes that disclosures should prevent consumers from being misled about the commercial nature or source of the content.

06

TRACKING AND LINK GOVERNANCE

The tracking link is the financial and measurement spine of the campaign. Treat it like controlled infrastructure.

Why tracking governance is critical

A newsletter campaign can launch perfectly and still become a reporting problem if the tracking setup is weak. The most common failures are predictable: missing UTMs, inconsistent source names, broken redirect chains, publisher accidentally swapping links, link scanners inflating click counts, destination pages not loading, GA4 not capturing campaign parameters, or conversions being attributed to a different channel. Tracking governance creates rules before campaigns go live.

Recommended UTM convention

Parameter	Recommended use	Example
utm_source	Publisher or newsletter name. Keep lowercase and normalized.	morning_brew, 1440, the_skimm
utm_medium	Channel or rate model. Keep controlled values.	newsletter, dedicated_email, cpc_newsletter
utm_campaign	Advertiser + campaign + month or unique campaign ID.	brand_launch_q2_2026 or mi_2461
utm_content	Placement, creative variant, issue, or format detail.	top_sponsorship_a, dedicated_email_v2
utm_term	Optional audience segment or offer identifier when useful.	finance_readers, trial_offer

Tracking build workflow

1. Confirm final destination URL and whether the advertiser requires specific parameters or affiliate tags.
2. Create or confirm campaign ID, publisher ID, placement ID, and run date ID before link generation.
3. Build UTM string using controlled naming rules. Never allow free-form source or medium names.
4. Generate tracking link or redirect link in the designated system.
5. Click-test the link from a clean browser and confirm final landing page, query parameters, and page load.
6. Test mobile rendering if the destination experience is mobile-sensitive.
7. Capture test evidence: test date, tester, link tested, final URL, screenshot or status, and notes.
8. Lock the link and store it in the campaign record. Do not send links through unstructured chat without attaching them to the campaign record.

Link QA checklist

Check	Pass criteria	Common failure
Destination loads	Final page returns 200-level success and visible content.	Landing page is unpublished, blocked, or redirects to homepage.
UTMs persist	UTM values appear in final URL or page location as expected.	Redirect strips query string.
Publisher link is correct	Proof uses the exact approved tracking URL.	Publisher uses old link from prior campaign.
CTA alignment	CTA text matches landing page action.	Ad says "Get quote" but page asks for purchase.
Mobile usability	Page loads and CTA is visible on mobile.	Pop-up or cookie banner blocks CTA.
Affiliate parameter	Affiliate/sub ID persists through redirect chain if required.	Network parameter is lost before destination.
Fraud/scanner awareness	Team knows expected security-click patterns.	Launch report treated raw clicks as validated clicks.

Raw clicks vs. validated clicks

Ad operations should define click categories before campaign reporting. Raw clicks are the first counted events from a tracking link. Validated clicks are clicks after known filters, deduplication rules, bot or scanner exclusions, geographic or timing exclusions, and agreed advertiser/publisher reconciliation rules. Billing and payout logic must specify which click definition applies.

Measurement principle
The IAB Click Measurement Guidelines and MRC IVT materials stress the importance of counting procedures, filtration, and documentation. Newsletter ad operations should apply the same discipline to campaign link reporting.

07

PROOFING AND APPROVALS

Approvals must produce evidence, not just a feeling that everyone saw the proof.

Proofing is the final pre-flight control

Proofing is where creative intent, publisher execution, sponsor disclosure, tracking, run date, and layout all come together. It is also the stage where many teams create risk by relying on vague email replies like "looks good" without capturing which version was approved or whether the tracking link was tested. A mature proofing process has a specific routing path, a clear deadline, a final version, and an approval artifact.

Proof checklist

Area	What to review	Owner
Advertiser identity	Sponsor name, logo, brand spelling, URL domain, disclosure label.	Account lead
Creative accuracy	Headline, body copy, offer, CTA, disclaimer, image, subject line/preheader.	Account lead + advertiser
Publisher fit	Placement location, template, formatting, editorial label, spacing, mobile view.	Publisher + ad ops
Tracking	Exact link, redirect path, final destination, UTMs, affiliate parameters.	Ad ops
Run details	Newsletter, run date, send time if known, time zone, placement type.	Ad ops
Compliance	Ad disclosure, CAN-SPAM-related footer expectations for dedicated email, restricted claims.	Compliance/account lead

Approval evidence fields

- Proof version number.
- Proof URL or file name.
- Approver name and role.
- Approval timestamp.
- Approved creative asset version.
- Approved tracking URL.
- Run date confirmed at time of approval.
- Any conditional approval notes.
- Any final changes requested after approval.

Revision loop rules

The team should not treat every revision as equal. Minor formatting changes may not require full advertiser reapproval. Material changes should. Use a simple revision classification model: cosmetic, formatting, copy, offer, compliance, tracking, or placement. Anything in the offer, compliance, tracking, or placement category should trigger reapproval before launch.

Revision type	Examples	Reapproval required?
Cosmetic	Line break, spacing, image crop that does not alter meaning.	Usually no, unless advertiser requested strict visual approval.
Copy clarity	Trimming text to meet character count without changing claim.	Sometimes; account lead judgment.
Offer change	Discount, trial, product, CTA, price, eligibility.	Yes.
Compliance	Disclosure, disclaimer, regulated claim.	Yes.
Tracking	Final URL, UTM, affiliate parameter, redirect domain.	Yes from ad ops; advertiser if destination changes.
Placement	Different newsletter, position, date, or format.	Yes.

08

LAUNCH-DAY OPERATIONS

Launch-day operations should detect issues while they are still fixable.

The send-day command center

Launch day is not the time to discover missing assets, old links, unapproved proofs, or unclear ownership. The send-day process should be short because the hard work already happened. It should focus on confirmation, live link checks, issue escalation, and immediate recordkeeping.

Pre-send lock checklist

- Run date and newsletter are confirmed.
- Final proof is approved and stored.
- Final tracking link is locked and matches proof.
- Publisher has confirmed the scheduled send.
- Advertiser is aware of run date.
- No outstanding compliance notes exist.
- Reporting owner is assigned.
- Payout rate and advertiser rate are captured.
- Campaign status is Scheduled, not simply "ready."

Launch-day monitoring window

Time	Task	Notes
T-24 hours	Confirm schedule, proof, tracking link, and no last-minute changes.	For dedicated emails, re-confirm subject line and sender if applicable.
T-2 hours	Check whether publisher has sent any issue update or delay notice.	Do not request non-essential edits inside the final lock window.
T+0 to T+1 hour	Confirm send occurred or is in progress.	Record send confirmation source.
T+1 to T+3 hours	Click live link from received issue or publisher confirmation if available.	Use live creative, not just pre-send proof.
T+24 hours	Review early click patterns for obvious link, scanner, or traffic anomalies.	Do not overreact to early data without context.

Incident response taxonomy

Incident	Severity	Immediate action
Broken destination link	Critical	Notify publisher and advertiser; assess makegood; preserve evidence.
Wrong advertiser creative	Critical	Escalate immediately; determine exposure and corrective send options.
Wrong tracking link but correct destination	High	Assess measurement impact; create reconciliation note; update reporting logic.
Late send or missed date	High	Confirm new date; notify advertiser; update schedule and expectation.
Minor formatting issue	Medium/Low	Log issue; determine if performance or brand safety impact exists.
Unexpected click spike	Medium	Check scanners, bot activity, publisher audience behavior, and validation vendor notes.

Incident documentation standard

Every incident should have a timestamp, owner, root cause hypothesis, affected campaign fields, client communication note, corrective action, and final resolution. If it is not documented, the team cannot learn from it or defend the reconciliation outcome.

09

REPORTING AND RECONCILIATION

Reporting should tell the advertiser what happened, explain data limitations, and prepare the campaign for renewal or reconciliation.

Reporting begins before the campaign launches

The report is only as strong as the measurement plan. If the campaign did not define goals, click counting rules, UTM conventions, publisher report fields, validation approach, and conversion windows before launch, the post-campaign report will be a reconstruction exercise. Strong ad operations builds the report structure during planning.

Minimum report fields

Field	Why it matters
Advertiser, campaign, publisher, newsletter, placement, run date	Establishes what ran and where.
Format and pricing model	Explains how performance should be interpreted.
Spend, rate, cap, and payout basis	Supports billing, margin, and publisher payout review.
Sends/delivered, if available	Context for CTR and audience exposure, with caveat on publisher data availability.
Raw clicks	Baseline tracking events before filtration.
Validated clicks	Clicks after agreed filtering or validation logic.
CTR or click rate	Useful directional metric when exposure data is available.
Landing page/conversion metrics	Shows downstream behavior when advertiser tracking is available.
Notes and anomalies	Explains discrepancies, link scanners, timing, or traffic-quality flags.
Recommendation	Turns reporting into the next action: renew, optimize, test, pause, or change publisher mix.

Reconciliation workflow

1. Collect publisher-reported metrics and internal tracking metrics.
2. Confirm campaign IDs, publisher IDs, run dates, and placement records match.
3. Compare raw clicks to validated clicks and advertiser-side sessions or conversions when available.
4. Calculate discrepancy percentage using a consistent formula: absolute difference divided by the agreed source of truth.
5. Review known causes: scanners, bots, redirects, duplicate clicks, time zone mismatch, attribution windows, blocked cookies, late reporting, or wrong link.
6. Classify discrepancy as expected variance, needs explanation, needs adjustment, or dispute.
7. Document final billable/payout number and basis.
8. Attach supporting evidence, notes, screenshots, validation reason codes, and final decision maker.
9. Update advertiser report and publisher payout record consistently.

Discrepancy thresholds

Discrepancy band	Suggested interpretation	Action
0-10%	Often normal, depending on systems and definitions.	Log but do not escalate unless there is pattern.
10-25%	Needs explanation.	Check UTMs, redirects, time zones, duplicate-click rules, and publisher source data.
25-50%	Material discrepancy.	Review validation data, scanner/bot patterns, advertiser analytics, and proofed links.
50%+	High-risk discrepancy.	Escalate; consider reconciliation hold, payout adjustment, or client-facing explanation.

Raw vs validated reporting language

Reports should not hide complexity, but they also should not overwhelm advertisers with jargon. A useful report might say: "We report both raw tracked clicks and validated clicks. Validated clicks remove traffic that appears inconsistent with normal human engagement, such as known bot patterns, rapid duplicate clicks, security scans, or traffic outside agreed campaign criteria. The validated number is the better basis for performance comparison and payout decisions."

10

RENEWAL AND LEARNING LOOP

The campaign is not complete until the next recommendation is clear.

The renewal system

Many newsletter campaigns under-monetize because the team treats reporting as the end of the workflow. Reporting should be the start of the renewal conversation. Ad operations can support revenue by creating a reliable campaign memory: what ran, what performed, what broke, what should change, and what should be pitched next.

Renewal decision matrix

Performance pattern	Recommended action	Ops note
High click volume and strong downstream engagement	Renew and test scale.	Confirm publisher availability and whether same placement can be repeated.
High click volume but weak downstream engagement	Optimize landing page or audience fit.	Do not blame publisher without checking message match and page experience.
Low clicks but strong conversion rate	Test dedicated email or stronger creative.	This may indicate high-intent but limited exposure.
Low clicks and weak downstream engagement	Pause or reposition.	Review audience fit, category, creative, and offer before renewing.
Strong raw clicks with many invalid/filterable clicks	Hold renewal pending quality review.	Review validation reason codes and publisher traffic pattern.
Operational friction but good performance	Renew with stricter deadline/QA rules.	Performance can justify renewal, but process changes should be required.

Post-campaign memo template

- Campaign summary: advertiser, publisher, format, run date, goal, spend, and offer.
- Performance summary: raw clicks, validated clicks, CTR if available, conversions or advertiser-side metrics if available.
- What worked: audience fit, creative, placement, offer, timing, publisher support.
- What did not work: creative mismatch, tracking issue, late approval, poor landing page, weak CTA, traffic-quality issue.
- Operational notes: proof delays, link changes, missing assets, reporting delays, publisher responsiveness.
- Recommendation: renew, retest, scale, pause, switch format, change creative, change landing page, change publisher mix.
- Next action owner and due date.

Makegood logic

Makegoods should be governed by written rules, not emotion. A makegood may be appropriate when the advertiser did not receive the contracted placement, the wrong creative ran, the approved link was not used, the send date materially changed without approval, or the placement was significantly misrepresented. A makegood may not be appropriate simply because performance was lower than hoped, especially if the campaign ran as approved and measured accurately.

Situation	Makegood likely?	Evidence needed
Wrong tracking link with correct destination but measurable data loss.	Maybe	Proofed link, live issue, click logs, measurement impact.
Wrong advertiser or wrong creative ran.	Yes	Approved proof, live screenshot, publisher confirmation.
Publisher delivered approved placement but clicks were low.	Usually no	Contract terms, audience estimates, reporting definitions.

Situation	Makegood likely?	Evidence needed
Send missed contracted date and timing was material.	Maybe/Yes	IO/run date, publisher confirmation, advertiser deadline.
High IVT/invalid traffic after validation.	Maybe	Validation report, reason codes, historical comparison, publisher response.

11

DATA MODEL AND PLATFORM REQUIREMENTS

Workflow maturity depends on clean campaign objects, required fields, permissions, and audit trails.

The data model behind good ad operations

A platform or Airtable-like workspace can only solve workflow problems if the underlying objects are clean. The most important objects are not just advertiser and publisher. Teams also need campaign, placement, run, creative asset, tracking link, proof, report, invoice, payout, issue, and renewal objects. Each object should have a unique ID and a clear relationship to the others.

Core objects and required fields

Object	Required fields
Campaign	Campaign ID, advertiser, objective, owner, format, pricing model, budget, status, start/end dates.
Placement	Placement ID, publisher, newsletter, format, rate type, rate, specs, availability, run date.
Creative Asset	Asset ID, campaign ID, version, type, status, owner, approval state, spec check.
Tracking Link	Link ID, campaign ID, placement ID, final URL, UTM source/medium/campaign/content, test status, lock status.
Proof	Proof ID, placement ID, proof URL/file, version, status, approval owner, approval timestamp.
Report	Report ID, campaign ID, metrics, source, validation status, notes, sent date.
Payout	Payout ID, publisher, campaign, payout basis, validated units, rate, amount, approval state.
Issue/Incident	Issue ID, campaign, severity, root cause, owner, resolution, impact, makegood decision.
Renewal	Renewal ID, campaign, recommendation, next step, owner, due date, status.

Required platform views

- Advertiser campaign dashboard with one next action per campaign.
- Publisher placement dashboard with scheduled campaigns and due dates.
- Creative-needed view filtered by missing asset type.
- Approval-needed view filtered by stakeholder owner.
- Tracking QA view with untested or unlocked links.
- Launch calendar by run date, publisher, format, and owner.
- Incident log view sorted by severity and unresolved status.
- Reporting queue by completed campaigns lacking reports.
- Payout readiness view showing campaigns with unreconciled publisher amounts.
- Renewal queue based on performance and recommended next action.

Automation opportunities

Automation	Trigger	Safeguard
Creative reminder	Campaign enters Creative Needed and due date is near.	Do not send if creative uploaded or campaign paused.
Proof reminder	Awaiting Draft for more than defined SLA.	Check publisher-specific proof timeline first.
Approval reminder	Proof waiting on advertiser/account lead.	Include proof link and approval deadline.
Link QA blocker	Tracking link created but not tested.	Block status move to Scheduled.
Report reminder	Completed campaign missing report after reporting SLA.	Suppress if metrics unavailable due to publisher delay and note exists.
Renewal prompt	Report sent and recommendation is renew/test/scale.	Assign to account owner with due date.

Platform principle

Automation should never hide uncertainty. If a data field is missing, the system should surface the blocker rather than guess.

12

SLAS, RACI, AND GOVERNANCE

A workflow is only reliable when owners, deadlines, escalation paths, and management cadences are explicit.

Service-level agreements for newsletter ad operations

Ad ops teams need realistic SLAs because newsletter campaigns depend on multiple external parties. SLAs should account for publisher proof timelines, advertiser approval speed, compliance review, asset complexity, and format type. The purpose of an SLA is not to punish the team. It is to create visibility into where work is stuck and what the next escalation should be.

Recommended SLA table

Workflow item	Standard SLA	Escalation rule
Initial campaign intake review	Within 1 business day.	Escalate if run date is inside 5 business days.
Publisher availability request	Within 1 business day of approved plan.	Escalate after 2 business days with no response.
Creative spec confirmation	Before assets are requested.	Block creative acceptance if specs are not confirmed.
Tracking link build	Within 1 business day after final URL confirmed.	Block proof approval if link is untested.
Proof review	Same day if received before internal cutoff; otherwise next business day.	Escalate if advertiser approval window threatens run date.
Launch confirmation	Within 1 business day of scheduled send.	Escalate if publisher cannot confirm send.
Initial report	Within agreed reporting window after campaign completion.	Escalate if publisher data is missing.
Reconciliation decision	Within 2-5 business days after complete data received.	Escalate material discrepancies.

RACI matrix

Activity	Responsible	Accountable	Consulted	Informed
Campaign intake	Account lead	Sales/account manager	Ad ops	Finance if custom terms
Publisher selection	Account lead	Sales/account manager	Ad ops	Advertiser
Asset collection	Account lead	Advertiser owner	Ad ops	Publisher when needed
Tracking link build	Ad ops	Ops lead	Analytics/reporting	Account lead
Proof review	Ad ops + account lead	Advertiser/account lead	Publisher	Sales
Launch monitoring	Ad ops	Ops lead	Publisher	Account lead
Reporting	Reporting/ad ops	Account lead	Analytics, publisher	Advertiser
Payout readiness	Finance/ad ops	Finance lead	Account lead, publisher	Leadership if disputed
Renewal recommendation	Account lead	Sales/account manager	Ad ops/reporting	Advertiser

Management cadence

- Daily launch review: campaigns scheduled in the next five business days, blockers, owner, and escalation needed.
- Weekly reconciliation review: completed campaigns with missing reports, discrepancies, payout blockers, and dispute notes.
- Weekly renewal review: top performers, campaign recommendations, and owner follow-ups.
- Monthly publisher quality review: reporting timeliness, proof accuracy, click quality, operational responsiveness, and renewal performance.

- Quarterly SOP review: update specs, templates, status rules, validation thresholds, and team responsibilities.

13

TEMPLATES AND WORKSHEETS

Copy-ready operating assets for building a stronger newsletter ad operations system.

Template 1: Campaign intake brief

Field	Response
Advertiser	
Campaign name / ID	
Primary objective	
Audience thesis	
Format requested	
Budget / rate model	
Publisher preferences	
Run date or date window	
Landing page URL	
Creative owner	
Approval owner	
Compliance notes	
Reporting requirements	
Renewal goal	

Template 2: Tracking QA log

Campaign ID	Publisher	Placement	Tracking URL	Tester	Test date	Pass/Fail	Notes

Template 3: Proof approval log

Proof version	Publisher	Run date	Approved by	Approval timestamp	Changes requested	Final approval?

Template 4: Launch-day checklist

Item	Owner	Status	Notes
Run date confirmed			
Final proof approved			
Tracking link locked			
Live link tested			
Publisher send confirmed			
Advertiser notified			
Reporting owner assigned			
Incident log reviewed			
Campaign status updated to Live/Completed			

Template 5: Reconciliation log

Campaign	Publisher	Raw clicks	Validated clicks	Advertiser sessions/conversions	Discrepancy %	Decision	Evidence

Template 6: Incident log

Incident ID	Campaign	Severity	Root cause	Action taken	Owner	Resolved?

Template 7: Renewal recommendation memo

Campaign summary: advertiser, publisher, format, run date, spend, objective, and offer.

Performance summary: raw clicks, validated clicks, CTR if available, downstream behavior, and benchmark context.

What worked: audience fit, publisher context, copy, CTA, timing, landing page, and format.

What to change: creative, publisher mix, offer, landing page, format, budget, timing, or measurement setup.

Recommendation: renew as-is, renew with changes, test another publisher, test dedicated email, test creative, pause, or escalate measurement issue.

Next action: owner, due date, and stakeholder message.

14

GLOSSARY AND SOURCE NOTES

Definitions and research references used to shape this ad operations playbook.

Glossary

Term	Definition
Ad operations	The function responsible for turning booked campaign details into live, measured, reconciled, and reportable placements.
Campaign status	A structured workflow state that tells the team what has happened and what needs to happen next.
Creative asset	Any copy, image, logo, subject line, preheader, CTA, or disclosure required to run the campaign.
Proof	The publisher or platform preview showing how the ad will appear in context before launch.
Tracking link	The URL used to measure clicks and preserve campaign parameters.
UTM parameters	Campaign parameters added to URLs to help analytics systems identify traffic source, medium, campaign, and creative context.
Raw clicks	All click events recorded before filtering, validation, or reconciliation rules are applied.
Validated clicks	Clicks remaining after agreed filtration, validation, or quality checks.
Discrepancy	A difference between two measurement sources, such as publisher clicks and advertiser sessions.
Makegood	A compensating placement or adjustment offered when the delivered campaign materially differs from the agreed campaign.
RACI	A responsibility model identifying who is responsible, accountable, consulted, and informed.

Source notes

The following public sources informed the research layer and operating recommendations. They are included so Media Intercept can update the guide over time as standards, privacy rules, and analytics platforms evolve.

Source	Used for	URL
Media Intercept website	Positioning around planning, launching, tracking, and scaling newsletter sponsorships and dedicated emails across premium publishers.	https://www.mediaintercept.com/
Google Analytics URL builder documentation	UTM parameters used to identify campaigns and campaign traffic in Analytics.	https://support.google.com/analytics/answer/10917952
FTC CAN-SPAM business guide	Commercial email requirements including accurate header information, non-deceptive subject lines, ad identification, physical address, opt-out, and honoring opt-outs.	https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business
FTC Native Advertising guide	Guidance on ensuring native ads and sponsored content are not misleading and include clear disclosures where needed.	https://www.ftc.gov/business-guidance/resources/native-advertising-guide-businesses
IAB Native Advertising Playbook 2.0	Native ad evaluation and disclosure considerations.	https://www.iab.com/wp-content/uploads/2019/05/IAB-Native-Advertising-Playbook-2_0_Final.pdf
IAB Click Measurement Guidelines	Minimum acceptable counting procedures for click measurement and related filtration principles.	https://mediaratingcouncil.org/sites/default/files/Standards/click-measurement-guidelines2009-2.pdf
MRC IVT Addendum	Invalid traffic detection and filtration guidance used as a reference point for quality controls.	https://mediaratingcouncil.org/sites/default/files/Standards/IVT%20Addendum%20Update%20062520.pdf
IAB/MRC Retail Media Measurement Guidelines	Reporting transparency, data quality, methodology disclosure, and comparability principles.	https://www.iab.com/wp-content/uploads/2024/01/IAB_Retail_Media_Measurement_Guidelines_January2024.pdf
Litmus Apple Mail Privacy Protection resources	Context on how Apple Mail Privacy Protection affects open-rate reliability and related metrics.	https://www.litmus.com/apple-mail-privacy-protection-resources
Mailchimp email marketing benchmarks	Benchmark context for open rates, click rates, and unsubscribes by industry.	https://mailchimp.com/resources/email-marketing-benchmarks/

Final operational checklist

Question	Yes / No / Notes
Do all campaigns have one current status and one next action?	
Does every campaign have a confirmed objective, pricing model, and run date?	
Are publisher specs stored in a structured placement record?	
Are all required creative assets validated before being sent to publishers?	
Are tracking links generated with controlled UTM naming?	
Are links tested after redirects and before proof approval?	
Are proofs approved with timestamp, version, and approver?	
Are launch confirmations and live checks captured?	
Are raw clicks and validated clicks clearly defined?	
Are discrepancies classified and documented before payout or billing decisions?	
Does every completed campaign have a report and renewal recommendation?	
Are incidents and makegood decisions documented in one central log?	
Are publisher quality and reporting timeliness reviewed regularly?	

Closing principle

The best ad operations systems are boring in the right way: the same fields, the same checkpoints, the same naming rules, the same approval evidence, the same reporting definitions, and the same renewal discipline. That consistency is what lets a newsletter advertising platform scale without turning every campaign into manual chaos.

Scenario playbook index

The following scenario playbooks are designed for real operating moments that happen in newsletter advertising. They can be copied into internal SOPs or used as training materials for new ad operations team members.

Advertiser sends final creative late

1. Confirm whether publisher cutoff has passed.
2. Identify whether the placement can still run as scheduled.
3. If not, present the account lead with reschedule, substitute placement, or creative simplification options.
4. Document the advertiser-side delay and any publisher fees or lost inventory risk.

Publisher sends proof with edited copy

1. Compare proof against approved creative.
2. Classify edits as cosmetic, spec-driven, copy-change, offer-change, or compliance-change.
3. Require advertiser reapproval if offer, claim, CTA, destination, disclosure, or meaning changed.
4. Store both the submitted creative and final proof.

Tracking link breaks after launch

1. Preserve live issue screenshot and link path.
2. Check redirect chain, destination page status, and UTM persistence.
3. Notify account lead and publisher quickly.
4. Decide whether correction, makegood, reconciliation note, or advertiser communication is required.

Advertiser says GA4 does not match reported clicks

1. Confirm whether advertiser is comparing clicks to sessions or users.
2. Review UTMs, redirects, consent/cookie limitations, bot/scanner traffic, and attribution windows.
3. Provide raw vs validated clicks and explain the click-to-session difference.
4. Create a reconciliation note and agree on source of truth for future campaigns.

Publisher reports late or incomplete data

1. Identify missing fields and reporting SLA.
2. Send standardized request with campaign ID, run date, placement, and required metrics.
3. Flag payout readiness as blocked until data is complete.
4. Review publisher reporting reliability in monthly quality review.

High click spike in first minutes after send

1. Check for security scanners and bot-like click patterns.
2. Compare user agents, IP concentration, timing, and click depth.

3. Do not immediately call it performance success.
4. Report with validation context and recommended review.

Advertiser requests last-minute landing page change

1. Determine if tracking link must change.
2. Test new URL, UTMs, load speed, mobile CTA, and claims/disclosures.
3. Require proof/link reapproval if link in proof changes.
4. Document the change request and timing.

Publisher asks to change run date

1. Check advertiser timing sensitivity.
2. Assess whether campaign is event-based, launch-based, or evergreen.
3. Get written advertiser approval if material.
4. Update run date, proof deadline, reporting calendar, and renewal timing.

Creative claim may be risky

1. Flag claim type: health, finance, legal, outcome, comparative, guarantee, or limited-time offer.
2. Request substantiation or revised wording.
3. Ensure disclaimer and disclosure placement are reviewed.
4. Do not approve proof until claim issue is resolved.

Campaign over-delivers clicks on CPC cap

1. Determine cap, overage policy, and click count definition.
2. Stop or adjust future placements if cap is active.
3. Clarify billing/payout treatment for over-delivery.
4. Log overage and update renewal/pricing notes.

Ad ops training exercises

Use these exercises to train new team members on the most common workflow decisions. Each exercise is intentionally practical and should be discussed with a manager or operations lead.

Exercise 1: Build the campaign record

A new advertiser wants three newsletter sponsorships across finance newsletters in June. They have a $25,000 budget, want qualified traffic, and are still choosing a landing page. Create the campaign record, identify missing fields, and decide whether this should be in Requested, Placement Planning, or Creative Needed.

Question	Answer space
What is the correct status?	
What evidence is required?	
What should be escalated?	
What is the next action?	

Exercise 2: QA the tracking link

The advertiser provides a destination URL that redirects through a shortener and then to a landing page. Build the UTM strategy, list what you will test, and define how you will document pass/fail evidence.

Question	Answer space
What is the correct status?	
What evidence is required?	
What should be escalated?	
What is the next action?	

Exercise 3: Review the proof

The publisher proof changes the CTA from "Get the Guide" to "Learn More" and removes a disclaimer. Decide whether this requires advertiser reapproval and what note should be sent.

Question	Answer space
What is the correct status?	
What evidence is required?	
What should be escalated?	
What is the next action?	

Exercise 4: Reconcile the report

Internal tracking shows 2,400 raw clicks, validation leaves 1,920 clicks, publisher reports 2,650 clicks, and advertiser GA4 shows 1,510 sessions. Calculate discrepancy bands and write a short explanation.

Question	Answer space
What is the correct status?	
What evidence is required?	
What should be escalated?	
What is the next action?	

Exercise 5: Decide renewal action

A publisher produced strong validated clicks but weak downstream conversion. List the five questions you would answer before recommending a renewal, creative test, landing page change, or pause.

Question	Answer space
What is the correct status?	
What evidence is required?	
What should be escalated?	
What is the next action?	

30-60-90 day implementation roadmap

This roadmap turns the guide into an implementation plan. The goal is not to rebuild every system at once. The fastest improvement usually comes from standardizing campaign status, creative intake, tracking QA, approval evidence, and reporting definitions first.

Timeframe	Operational focus	Key deliverables	Success measure
Days 1-30	Stabilize the basics.	Status map, intake form, creative checklist, tracking QA log, proof approval log, daily launch review.	Every live campaign has a status, next action, owner, and run date.
Days 31-60	Standardize reporting and reconciliation.	Report template, raw vs validated click definitions, discrepancy thresholds, payout readiness view, incident log.	Completed campaigns are reportable without reconstructing data manually.
Days 61-90	Automate and optimize.	Reminder rules, dashboard views, publisher quality scorecard, renewal queue, monthly SOP review.	The team reduces manual follow-ups and increases renewal-ready campaigns.

Campaign object data dictionary

A clear data dictionary prevents teams from naming the same thing multiple ways. The following fields are recommended for a newsletter campaign management system.

Field	Definition	Owner	Requirement
campaign_id	Unique campaign identifier.	System	Required
advertiser_name	Advertiser or brand running the campaign.	Account lead	Required
account_owner	Internal owner responsible for client communication.	Sales/account	Required
campaign_goal	Primary campaign objective.	Account lead	Required
format	Sponsorship, dedicated email, CPC campaign, CPM package, flat rate, or custom.	Ops	Required
pricing_model	CPC, CPM, flat fee, hybrid, value-add, or bonus.	Sales/finance	Required
advertiser_rate	Amount billed to advertiser or rate used for billing.	Finance	Required
publisher_payout_rate	Publisher payout amount/rate.	Finance/ops	Required
budget_cap	Spend or click cap if applicable.	Sales/finance	Conditional
publisher_id	Unique publisher identifier.	Ops	Required
newsletter_id	Specific newsletter/publication.	Ops	Required
placement_id	Placement or inventory unit.	Ops	Required
run_date	Scheduled date of send/placement.	Ops	Required
time_zone	Relevant time zone for deadlines and reporting.	Ops	Recommended
creative_due_date	Deadline for advertiser assets.	Ops	Required
proof_due_date	Deadline for publisher proof.	Ops	Recommended
final_change_cutoff	Last acceptable change time.	Publisher/ops	Recommended
asset_status	Missing, in review, approved, sent to publisher.	Ops	Required
tracking_status	Not built, built, tested, locked, issue.	Ops	Required
proof_status	Not requested, awaiting draft, in review, approved, rejected.	Ops	Required
approval_owner	Person who must approve proof.	Account lead	Required

Field	Definition	Owner	Requirement
approved_proof_url	Link or file path for final proof.	Ops	Required
final_tracking_url	Locked tracking URL used in proof.	Ops	Required
utm_source	Publisher/newsletter source value.	Ops	Required
utm_medium	Channel/format/rate model value.	Ops	Required
utm_campaign	Campaign value or campaign ID.	Ops	Required
utm_content	Placement/creative variant detail.	Ops	Recommended
raw_clicks	Unfiltered click count.	Reporting	Post-launch
validated_clicks	Filtered/validated click count.	Reporting	Post-launch
report_sent_date	Date report was sent to advertiser.	Account/reporting	Post-launch
reconciliation_status	Open, reconciled, disputed, payout ready.	Finance/ops	Post-launch
renewal_recommendation	Renew, test, scale, pause, change creative, change publisher.	Account/reporting	Post-launch
incident_flag	Whether a launch/reporting issue occurred.	Ops	Conditional

Risk register for newsletter ad operations

Use this risk register to identify the operational weaknesses most likely to create client issues, payout issues, or campaign-quality issues.

Risk	Early warning sign	Preventive control	Corrective control
Late creative	Campaign sits in Creative Needed inside final week.	Creative due date, automated reminders, asset checklist.	Reschedule, simplify creative, or escalate to account owner.
Wrong link	Link appears only in Slack/email and not campaign record.	Locked link field and QA log.	Incident log, proof comparison, makegood evaluation.
Unapproved proof	Proof shared but no timestamped approval.	Approval gate before Scheduled status.	Hold launch or secure written approval.
Spec mismatch	Publisher returns proof with major edits.	Publisher spec library and pre-validation.	Rework creative, update spec record, note publisher-specific rule.
Unclear payout	Finance asks how publisher amount was calculated.	Separate advertiser rate and publisher payout fields.	Reconcile with placement, rate, units, and approval evidence.
Reporting delay	Completed campaigns lack metrics beyond SLA.	Reporting queue and publisher SLA tracking.	Escalate to publisher; notify account owner with timeline.
Invalid traffic	Clicks spike in patterns inconsistent with normal behavior.	Validation tools, scanner checks, thresholds.	Filter clicks, document reason codes, hold payout if needed.
Renewal leakage	Strong campaigns close without a follow-up task.	Renewal recommendation field and renewal queue.	Weekly renewal review and account owner assignment.

SOP: Advertiser-to-operations handoff

This SOP should be used when sales or account management hands a campaign to operations. The purpose is to prevent verbal promises from becoming untracked operational obligations.

1. Account owner creates or updates the campaign record with advertiser, objective, format, pricing model, budget, and desired timing.
2. Account owner attaches IO, written approval, or campaign request context if available.
3. Ops reviews the campaign within the intake SLA and marks missing fields.
4. Ops assigns the campaign status: Requested, Placement Planning, Creative Needed, Tracking Build, or Blocked.
5. If the campaign is blocked, ops documents the blocker and assigns the next action to a specific owner.
6. When the brief is complete, ops confirms publisher path, specs, deadlines, and tracking needs.
7. Account owner communicates required assets and deadline to advertiser using the asset request template.

SOP: Publisher handoff

The publisher handoff should be specific enough that the publisher does not need to search for prior context.

- Campaign name and advertiser.
- Newsletter/publication and placement requested.
- Run date and flexibility window.
- Final approved creative or creative fields.
- Final tracking URL and destination domain.
- Disclosure requirements if applicable.
- Proof deadline and final-change cutoff.
- Reporting expectations and due date.
- Point of contact for urgent changes.

Communication template: advertiser asset request

Subject: Creative assets needed for [Campaign Name]

Hi [Name], we are getting the [Campaign Name] newsletter placement ready for production. Please send the final assets below by [date] so we can build tracking, submit to the publisher, and keep the run date on schedule: headline, body copy, CTA, final landing page URL, image/logo, disclaimer if required, and any approval notes. Once we receive the final landing page, we will generate and test the tracking link before the proof is routed for approval.

Communication template: proof approval request

Subject: Approval needed: [Publisher] proof for [Campaign Name]

Hi [Name], the publisher proof is ready for review. Please check the copy, CTA, image/logo, disclosure, landing page, and run date. We have also tested the tracking link. Reply with approval or edits by [deadline] so we can keep the scheduled send date. If the offer, landing page, or legal language needs to change, please flag that clearly because it may require updated tracking or publisher re-proofing.

Communication template: publisher reporting request

Subject: Reporting request: [Campaign Name] / [Run Date]

Hi [Name], can you please send the final metrics for the [Campaign Name] placement that ran on [date]? We are looking for sends or delivered count if available, raw clicks, unique clicks if available, any notes on unusual traffic, and confirmation of the final link used. Please include the newsletter name, run date, and placement label in the report so we can reconcile the campaign accurately.

Communication template: discrepancy explanation

Subject: Campaign reporting note: click and session variance

Hi [Name], we reviewed the campaign data and saw a difference between tracked clicks and advertiser-side sessions. That can happen because clicks and sessions are not the same event. Click tracking records the link event, while analytics tools may apply session rules, consent limitations, attribution windows, redirects, bot/scanner filtering, or duplicate handling. We are reconciling raw clicks, validated clicks, and downstream behavior so the final report reflects the cleanest view of performance.

Operational scorecards

Scorecards help make operational quality visible. They are not meant to punish publishers or internal team members. They are meant to make recurring problems measurable so the team can improve them.

Publisher quality dimension	5 = Strong	3 = Acceptable	1 = Risk
Spec clarity	Specs are complete, current, and easy to use.	Specs exist but require clarification.	Specs are unclear or repeatedly wrong.
Proof timeliness	Proofs arrive before deadline.	Proofs arrive close to deadline.	Proofs are late or inconsistent.
Proof accuracy	Proofs match submitted assets and links.	Minor edits or corrections needed.	Material errors recur.
Launch reliability	Sends run as confirmed.	Occasional timing changes with notice.	Frequent missed dates or poor confirmation.
Reporting timeliness	Metrics arrive within SLA.	Metrics arrive after reminders.	Metrics are late, incomplete, or inconsistent.
Traffic quality	Click patterns are normal and validation is stable.	Some anomalies but explainable.	Repeated quality concerns or high invalid share.
Internal ops dimension	**5 = Strong**	**3 = Acceptable**	**1 = Needs work**
Status hygiene	All campaign rows are current with next action.	Most rows current; some require cleanup.	Statuses are stale or unclear.
Tracking QA	All links tested and logged before proof approval.	Most tested; evidence inconsistent.	Testing often occurs late or undocumented.
Approval evidence	Approvals tied to proof version and timestamp.	Approval exists but details vary.	Approval is scattered in email/Slack.
Reporting readiness	Reports generated from structured fields.	Manual cleanup still needed.	Reports reconstructed from multiple sources.
Incident handling	Incidents logged with root cause and resolution.	Issues discussed but not consistently logged.	Issues disappear after launch.

Workflow examples by campaign type

Different campaign types require different gates. These examples show how the operating model changes based on format.

Workflow stage	Newsletter sponsorship	Dedicated email	CPC performance package
Intake	Confirm publisher, placement, run date, specs, offer, landing page.	Confirm subject line, preheader, send details, body copy, footer/disclosure, suppression considerations.	Confirm cap, payout basis, publisher mix, validation rules, and pacing expectations.
Creative	Short copy, image/logo, CTA, disclaimer as needed.	Full email creative, subject, preheader, sender, CTA, landing page, compliance footer.	Creative variants may differ by publisher; standardize field mapping.
Tracking	One tracking URL per publisher/placement/run.	Usually one or more links in dedicated email; each CTA should be tested.	Need campaign ID, publisher ID, click cap, validation pipeline, and payout rules.
Proofing	Placement proof in newsletter context.	Full email proof including subject/preheader if possible.	Proofs across publishers; ensure tracking link uniqueness.
Reporting	Clicks, CTR if sends available, notes.	Clicks by link if available, sends, opens with caveat, downstream data.	Raw clicks, validated clicks, invalid reason codes, cap status, payout-ready units.
Renewal	Repeat placement, test adjacent newsletter, or creative iteration.	Retest dedicated email if message depth performed.	Adjust publisher mix, cap, CPC, validation rules, or category fit.

Ad operations maturity model

Use this model to assess the current state of the operation and prioritize improvements. A team does not need to be Level 5 to operate well, but it should know where it is exposed.

Level	Description	What it looks like	Next improvement
1. Reactive	Work happens after problems appear.	Campaign details live in inboxes and Slack. Links and approvals are hard to verify.	Create one campaign tracker and define statuses.
2. Repeatable	Some checklists exist.	Most campaigns have briefs, but exceptions are common.	Make fields required and add QA gates.
3. Controlled	Workflow states, approvals, and links are documented.	Campaigns can be audited after launch.	Add automated reminders and dashboards.
4. Measured	Operational quality is tracked.	Publisher timeliness, discrepancies, incidents, and renewals are measured.	Use scorecards to improve partner and team behavior.
5. Optimized	Operations drives performance and revenue.	Reporting, renewal, reconciliation, and publisher quality data feed planning.	Continuously refine formats, pricing, and publisher mix.