Budget Tracker (In-Depth)

- *Refer to video '**Search Optimisation**' by JB (length: **1:16:56**): [URL of video removed to maintain confidentiality]*
- *Training explained and demonstrated by **TS** on the budget tracker (**PlayStation Search Budget + Performance Tracker_FY20.xlsx**), running through search optis & guiding me through near the end.*
- ***BT** = **Brand Title** & **BC** = **Brand Category***

- On the **Local** side, we've got **Local Software**, **Local Hardware** & **PS5**.
- The **Amazon tab** on the **budget tracker** is where **all** the **AMS campaigns are** and they **split it out by tactic** (i.e. the **portfolio**). The **Local - Software** tab **contains all** the **Google software campaigns**.

- In terms of the **Local - Hardware** tab, this contains their Always On Hardware campaigns with these markets: **DE, AT, CH, PL & IT**. TS said to **ignore IT** as they used to run it and it's not live anymore.
- **DE, AT & CH** are **all under one account** on **Google** but it's **split into separate rows** here as we have certain **amount of budget** we want **to spend**.
- **PL** isn't in **EUR** as their **currency** is **Polish Zloty (PLN)**. The **PS5 tab** is all the **recent PS5 campaigns** that we run (now it's **just Anthem** here).
- On **Anthem**, the **tactics** are **based** on **PS5 terms** and **multiple different audiences**.
- For **Software**, the **tactics** (**campaign types**) are **Brand Category**, **Brand Title** & **Discovery**.

Columns

- **Spend To Date** - this gets **pulled in everyday** when you **click on Data > Refresh All** (pulls in the data **from SA360**) in the **mornings**. It should take a couple of **minutes to load**.
  - For some of the campaigns, you might need to **do this manually** as it gets confused and it **starts pulling in more money** than you **actually spent**.
    - o As there's **2** different **Germany hardware campaigns** (**1 for Hardware** & **1 for PS5 (Anthem)**), and it starts to **collate both amounts**.
    - o There's **only a few** that you **have to do manually**.
  - For the **4 markets on Hardware**, you'll need to **do this manually**.
  - For the **Software campaigns** (referring to **SM:MM**), there's **some you need to do manually.**
    - o **AU, RU, PL & UA** are the **markets not pulling in** here & TS told **** to try and sort out.
  - **Amazon** doesn't pull in automatically because **SA360 doesn't contain AMS data** and it has to be **done manually**.
  - You'll just have to **update** the **Spend To Date** column and **everything** else should **update automatically**. You can skip **Yesterday's Spend** as it takes a bit longer.

- **Media Spend** - is the **net budget**
- **Budget Spent** - is basically the **Spend To Date divided** by the **Media Spend** giving you **how much** you **spent so far**.
- **Ideal Spend %** - is **how much** you **should be spending** (**desired amount**) at this **point of time in** your **campaign**.
- **Projected Spend** - is **how much you will spend by** the **end of** your **campaign** if you **continue spending** the **way you are** (what your projected to spend at the end).

- You want this **column to be all Green** and you want it to be pacing between **95% and 104%**.

- **Yesterdays Spend** - this is what **gets pulled in from SA360** as well and this is what you **spent yesterday** for that campaign.
- **Future Daily** - is **how much** you need **to set your budget caps** (daily amounts) **as**, so **how much** you need to **spend each day** to **spend** all **your budget by** the **end of** the **campaign**.
- **FD +10%** & **FD +20%** - these columns are essentially the **FD amount** but **increased by 10% and 20%**.
  - So that **when** you're **underpacing**, you can **upweight** your **budget** to a **higher amount** so that it picks up in pacing.
  - And then once it goes to **90%** (on the **Projected Spend**), you can **put** it **back** to your **FD amount**.
- **Days Elapsed** - is just there to **help with the formulas** and isn't a necessary column.

Formulas

- We change some of the formulas only because the previous formula didn't take into account different end dates.

- The **Ideal Spend %** and **Future Daily** columns used to take information from the **Weightings - Software** tab. On these square sections, you'd put in:
  - **Start Date** - which would be the earliest date for all markets.
  - **End Date** - which would be the latest date for all markets.
  - It wouldn't take into account markets which **end earlier than that end date**, and it would give you an amount that takes into account the **longest end date**.
  - The amount given would be a lot less than what you should be spending which shouldn't be the case if the campaign is ending earlier.
  - **RU Anthem** is ending on the **10th of Jan** and **AU Anthem** is ending on the **27th of Dec**.
  - If the AU campaign was taking the formula from the **Weightings - Software** tab, the **FD amount** would be a lot less because it would consider **AU's end date** to be the **10th of Jan**.

  - The new formula we use for **Ideal Spend %** is: **=[@[Media Spend]]/([@[End Date]]-[@[Start Date]])*[@[Days remaining]]/[@[Media Spend]]**
  - The new formula we use for **Future Daily** is: **=([@[Media Spend]]-[@[Spend To Date]])/([@[End Date]]-(U8-1))**
  - This formula basically takes into consideration the date on the **End Date** column.
  - **RU SM:MM** for **Brand Title** & **Brand Category** is where they use the **old formula** for **FD** only because they have different weightings they want to implement for certain time periods (on the **Weightings - Software** tab). Different time periods with number of days in between and weightings with budgets calculated accordingly (@08:00 on video).
  - **Before you start inputting these campaigns on the budget tracker, just ask **** if there are certain markets that have weightings (clients will give us that).**
  - **Otherwise use the new formula as it's just easier.**

Budget Tracker Extra Column

- Created by TS which takes into account how much you're away from spending 37% (what you should be pacing at). In this example, you'll need to spend 57.72 as your FD amount to get to 37%.
- **Media Spend * Ideal Spend (37%) - Spend To Date** (to see the difference between what we spent so far to how much we would want to spend).
- **Excel > Local - Software: (Table15[@[Media Spend]]*Table15[@[Ideal Spend %]])-Table15[@Spend To Date]]**
- TS said don't always take this into account as this is what she did because she really needs it to pick up in its pacing as everything seems to be underpacing quite a bit.
- Once I've updated the latest spends, I should be able to just drag that formula down or it should just automatically update those figures.

The below contains information on adding new campaigns on the tracker…

- *Refer to video '**Call with ****** ******'** by JB (length: **7:18**): [URL of video removed to maintain confidentiality]*
- *Training explained and demonstrated by **TS** on the budget tracker (**PlayStation Search Budget + Performance Tracker_FY20.xlsx**).*

- It's split by **Central** and **Local**. **Overview** tab is mainly towards **Central** side because on Central you get **1 PO for all the markets**, whereas on **Local** you get a **separate PO**.
- The **Overview** tab is **pulling in information** from **Google Ads** of **how much your spending** on the different campaigns.
- **Ideal Pacing** is how much you should be **pacing at this point of time**.
- **% Budget Spent** is **how much** of your **budget** you've **spent**.
- **Projected Spent** is what you'll be **spending by** the **end of the campaign** if you **continue spending the way you are**.

- Not sure which tab TS is referring to here. **Future Daily** is what you should **set your daily budget caps as** on Google Ads, so it's like **how much** you **should be spending each day** for you to s**pend all your budget**.
- **KPIs are just about checking if you meet them**. For Central it's usually CPA and we have a benchmark.
- On the **Local** side, we've got **Local Software**, **Local Hardware** & **PS5**.
- If a **campaign** on the tracker **isn't showing up certain tactics** or even the **market** itself, that may mean that there **could be 2 different naming conventions** and that you'd **need to create another** if it's not there already and if it is, **select** the **filters** for **both variations**.
    - On SM:MM, some markets like **PL, AU, RU, UK & UA** has just 'Spiderman' in the campaign naming convention and not 'Spiderman MM'.

The below information is demonstrated at the 20th minute of the AMS Optis video:

- You can add in a new row on the budget tracker where all the columns will automatically have their formulas dragged down.
- The problem is with the **Budget Spent**, **Ideal Spend %** & **Projected Spend %** columns that **wouldn't populate unless** you **add** in **on both** of the **Weightings tabs**.

- **Weightings - Amazon tab:**
    - **Copy and paste one** of the **boxes** with **all** the **details** to **capture** the **formulas**.

- **Add** in the **Campaign name** and **Tactic** (on **AMS** it would be the **portfolio**).
- **Start & End Dates:** would be the **overall for** the **campaign** so the **earliest** and **latest dates** (**taking into account all** of the **markets**).
- **Net Budget:** usually TS just inputs 100 here as doesn't really matter how much you input here.
- **Details for Period below:**

1. **Days:** formula that calculates this from the start and end dates
2. **Weight:** this is usually 100% unless **** says otherwise
    a. **Some markets** have **particular weightings** for **how much** they **want to spend during** certain **time periods** of the campaign.

- The **above details** should then appear onto the **Weightings - Amazon Overview tab** and then **that's what** the **budget tracker takes on board** with the **formulas** for those **3 columns**.
- It should start giving you your **ideal spend** once you start adding it onto the **Weightings - Amazon** tab.
    1. It's **not doing** it **automatically** for me so I've had to **populate** the **Weightings - Amazon Overview** tab **manually** (**adjusting** the **formulas** to **match the indexing** of the **respective columns** on the **Weightings - Amazon** tab).

- Creating the box with the details you don't need to do it for every market as you just do it once for that campaign but for each tactic.
- The formulas pull in the data from the Weightings - Amazon Overview tab.
- For each market, you create another row and then input the data and then it should be good to go.
- If you were looking to add in a new campaign on the budget tracker for the first time, then yes you'd have to do the above steps with populating both of the Weightings tabs.