Today's Agenda for Session 4: Brand Safety Incident Management, Governance, and performance Management

Opening Remarks
Background on work, about MMA and recent news

MMA & Webinar Series Context

Lou Paskalis,
President & COO, MMA Global

Brand Safety Strategy Guide
Presenting chapter 7 and chapter 8 from the strategy guide

Chapter presentation including Q&A

Jessica Ruscito
North America Brand Lead
Dorel Juvenile

Bryan Steele
Manager,
Connected Vehicle Brand Marketing
General Motors

Twitter's Take
Communicating in times of crisis, connecting with culture, & more

Panel discussion Speakers

Alex Josephson
Vice President, Global Head of Twitter Next

Stacy Minero
Global Head of Twitter ArtHouse

Beverly Jackson
Vice President, Global Brand and Consumer Marketing

Meg Haley
Global Head of Revenue Product Strategy

Concluding Remarks
What's BSI & how can it help you be a brand safety expert

Overview of BSI

Neal Thurman
Co-founder, Brand Safety Institute, Director Coalition for Better Ads

MMA is the Global Industry Association for Marketing

Started in 2003; turned around in 2013

Operations in 15 countries

Marketer led; plus media sellers, tech and agencies

MMA is 800+ Members strong

25+ conferences in 15 countries

55+ team worldwide

EMEA

- France
- Germany
- Middle East
- South Africa
- Spain
- Turkey
- United Kingdom

HQ

LATAM

- Mexico
- Brazil
- Colombia
- Argentina

APAC

- China
- Vietnam
- India

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Brand Safety

In partnership with: **BSI** Brand Safety Institute

LEADING MARKETERS TO BRAND SAFETY EXCELLENCE

BRAND SAFETY ADVISOR

15+ BRAND SAFETY EXPERTS

5 SESSIONS

9 CHAPTERS (55+ pages)

What is Brand Safety, why does it matter, and who are the stakeholders involved?	Determine Your Brand Safety Standards, Exploring Brand Safety vs. Suitability	Brand Safety Tool and Vendor Management Best Practices, Resources & Budgeting for Brand Safety	Brand Safety Incident Management, Governance, and Performance Management	The Impact and Future of Brand Safety: What Should You Lookout for?
August 25 2021, 11:00AM EDT	September 15, 2021, 11:00AM EDT	October 26, 2021, 11:00AM EDT	November 17, 2021, 11:00AM EST	December 8, 2021, 11:00AM EST
BSI Brand Safety Institute / BANK OF AMERICA / aPlaceforMom.	BSI Brand Safety Institute / BANK OF AMERICA / PMX	BSI Brand Safety Institute / BANK OF AMERICA / AT&T	BSI Brand Safety Institute / gm / CVS Health.	BSI Brand Safety Institute / BANK OF AMERICA / UNIVERSITY OF OXFORD

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MMA's SAVE Council Leadership & Partners

SAVE's Program Chairs & Expert Advisors

- Terri Schriver – SVP Media & Brand Safety Exec, **Bank of America**
- Lauren Radcliffe, SVP Marketing, **A Place for Mom**
- Joshua Lowcock, **UM Worldwide** – Brand Safety Expert & Advisor

Member Participants

SAMSUNG · JPMorgan Chase & Co. · gm · AT&T · TARGET · mastercard · P&G · Coca-Cola · LATAM · Beam SUNTORY · 1-800-flowers.com · MARRIOTT · ebay · Chobani · CVSHealth · Walmart · T-Mobile · AMERICAN EAGLE OUTFITTERS · AMERICAN EXPRESS · Match Group · MillerCoors · Ford · BANK OF AMERICA · RetailMeNot · Unilever · DUNKIN'
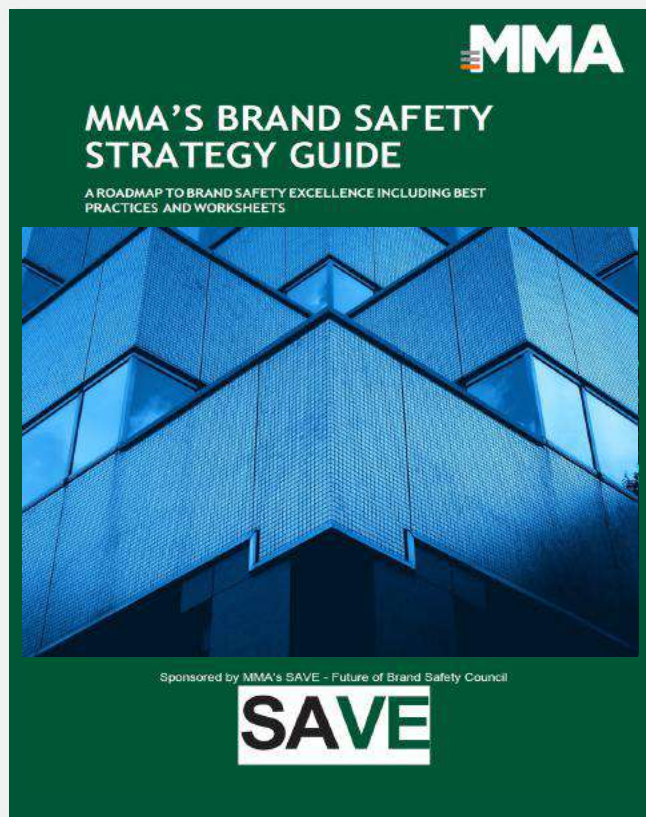
SAVE's Content Leads

- Brian Pokorny, **MolsonCoors**
- Cathy Hoag, **Marriott International**
- Shani Belisle, **AT&T**
- Bryan Steele, **General Motors**
- Jessica Ruscito, **CVS Pharmacy Inc**
- EJ Conlin, **Travelers**

Academic Team

- Andrew Stephen, Assoc. Dean of Research **Oxford University**
- Lauren Grewal, Assistant Professor of Business Administration, **Dartmouth University**

The Brand Safety Strategy Guide, created for Marketers by Marketers

MMA'S BRAND SAFETY STRATEGY GUIDE

A ROADMAP TO BRAND SAFETY EXCELLENCE INCLUDING BEST PRACTICES AND WORKSHEETS

Sponsored by MMA's SAVE - Future of Brand Safety Council

SAVE

MMAs Brand Safety Guide

Comprehensive 55+ page strategy guide for marketers, by marketers to:

1. Deepen Brand's knowledge around creating a corporate **brand safety** strategy
2. Formulating **proactive responses**
3. **best practices,** by leading marketers, and
4. **practical worksheets**.

Full guide **available to MMA Members** after webinar series is complete.

Chapter 1: What Is Brand Safety Ad Why Does It Matter?

Chapter 2: Stakeholder Roles & Responsibilities

Chapter 3: Determine Your Brand Safety Standards

Chapter 4: Resources And Budgeting

Chapter 5: Brand Safety Tool Selection

Chapter 6: Brand Safety Vendor Selection & Management

Chapter 7: Brand Safety Incident Management
i. Worksheet: Brand Safety Incident Tracker
ii. Worksheet: Brand Safety Incident Mgmt. Process Flow

Chapter 8: Brand Safety Governance & Performance Management
i. Worksheet: KPIs Dashboard
ii. Worksheet: Service Agreement and Terms & Conditions

Chapter 9: The Future Of Brand Safety?

The Strategy Guide: Chapter 7 and 8

Bryan Steele
Manager,
Connected Vehicle Brand Marketing
General Motors

Bryan holds the position of Manager, Connected Vehicle Brand Marketing, and joined General Motors in 2013. During his time at GM, he has overseen GM's Global Media Partnerships, Industry Group relationships, reviews of the Media Tech Stack, Gaming/esports Strategy, and Emerging Media efforts. Additionally, he established GM standards for enterprise-wide Ad Quality and authored GM's Responsible Media Principles.

Jessica Ruscito
North American Brand
Leader, Dorel Juvenile

A seasoned marketing professional with experience across a variety of industries, Jessica is committed to the adoption of innovation and the connections between media, marketing and technology. In her current role as North America Brand Leader, she oversees marketing strategy and execution across the full portfolio of Dorel Juvenile Brands in the US.

Incident Management Process

Prepare for the inevitable: an incident that can impact the brand's reputation.

Before You Implement Your Incident Management Process & Declare a Crisis

If an incident occurs:

✓ Determine if it requires a response at all and if the full process is even required.

✓ Give one team comprised of stakeholders from the agency, media, and corporate communications teams the autonomy to make decisions.

✓ Agree at the outset on who is **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed (the RACI model).

✓ Ask: what are the implications of pausing the media brand?

✓ Brief the CMO, their team, legal, risk, compliance, analytics and social teams as needed.

Incident Management Process Steps

For incidents considered a 'crisis' – risking brand reputation

1. Put out the fire

2. Initial communication steps

3. Understand the source of the incident

4. Measure the potential impact

5. Take action

6. Communicate your actions

Map Your Process Flow

- Determine the person and/or function responsible for each step in the process.

- Identify the time range between each of the steps.

- Establish estimated times for each step in the process.

Step 1: Put Out the Fire

✓ If your brand may be at risk, pause any/all activity that may have put it at risk.

✓ If the specific source is known, pause that media.

✓ If the specific source is not known, pause any media that might be causing the issue.

! **Error on the side of caution until details and root causes are determined.**

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Step 2: Initial Communications

Internal Stakeholders

Communications Team
Brand / Marketing Teams
Leadership, C-Suite

Explain that the offending media was paused.

External Stakeholders

Publishers, Platforms, Agencies, Partner Vendors
Consumers (if necessary)
Shareholders
Board
VCs

Explain that any media deemed at risk was temporarily paused while a mutually agreeable solution is pursued.

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Step 3: Understand the Source of the Incident

✓ Identify media partners with unsafe content.

✓ Ensure brand safeguards are functioning properly.

✓ Understand how the incident occurred and how to prevent it in the future.

- Was it preventable?

- Is this a media partner you want to continue to work with?

- Are other media buys vulnerable to the same situation?

- Do you have enough safeguards in place?

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Step 4: Identify the Potential Impact

Evaluate the Fallout

? What is the impact to the health of the brand if the media remains active?

? What is the business impact of pausing the media?

? Will this result in a temporary or permanent loss of an otherwise effective media partner?

? Will this result in a reassessment of the vendor(s) your organization works with?

Conduct an Assessment

? Is the situation affecting other brands, or only mine?

? Will returning to this publisher have a negative impact on my brand's image?

? Is the offending media partner critical to the campaign's success?

? Can my brand survive without this publisher in the short/mid/long term?

? Are there committed dollars at stake?

Step 5: Determine an Action plan

How much risk are you willing to accept if you think the media has benefits for the business?

- Do you have a long-term solution so that media can be reactivated?
- What data do you need to make a decision to reactivate?
- What steps can my media buyers take to ensure this never happens again?
- What steps can the publisher take to ensure risk mitigation?
- Is any partner uniquely critical to my brand's success?
- Can target audiences be found on other channels?
- How might a shift in media partners impact performance?

Step 6: Communicate Your Actions

✓ Align on internal messaging to offer a detailed explanation of what happened and the cause.

✓ Explain what additional measures were implemented and how there is an ongoing process in place for monitoring.

✓ If media has been reactivated, clarify the steps that were taken to ensure brand safety.

✓ If media remains paused, outline the existing process and what's needed prior to a reactivation.

✓ Offer ongoing updates if the situation remains uncertain.

✓ Offer a brief, curated recap of the internal message points to publishers.

Incident Tracking Template

Guidance

Implement an incident report system whereby brand safety incidents are documented, tracked, and archived to build an intelligence hub.

This also helps you gather the info you need to decide whether you need to proceed with hitting the panic button or not. Refer to the template within the guide.

Brand Safety Incident Process Flow Template

[Person/function Responsible]

1 Receive knowledge of incident

[Time]

[Person/function Responsible]

2 Verify this is a valid incident – assess impact & implications on Brand

[Time]

[Person/function Responsible]

3 Deploy Rapid response model – start with Putting out the fire

[Time]

[Person/function Responsible]

4 Reach out to internal & external stakeholders (part I)

Possible Brand Safety Incident

[Person/function Responsible]

5 Understand the source, learn to prevent from happening

[Time]

[Person/function Responsible]

6 Identify Impact and determine action plan

[Time]

[Person/function Responsible]

7 Reach out to internal and external comms again to clarify details/recap mitigating actions

Guidance

The process map above illustrates an incident process scenario. Determine the person and/or function responsible for each step in the process. Identify the time range between each of the steps. For example, about how long after being alerted to a brand safety incident should it take before the person with knowledge of the incident communicates with internal and external stakeholders about the issue? Establish estimated times for each step in the process.

Governance & Performance Management

How do I know my strategy is working?

Key Stakeholder Roles & Responsibilities

✓ Align on their respective piece of brand safety and the metrics they are responsible for monitoring (Chapter 2).

✓ Establish and maintain KPIs and holding people accountable to them, documenting and sharing the KPIs with the company at large (Chapter 5).

✓ Selection of brand safety monitoring partner (Chapter 5).

✓ Work with legal counsel to embed brand safety guidelines into partner contracts.

✓ Ongoing check-ins with vendors/partners (Chapter 6).

Performance Measurement

Accountability should be established with agency partners based on:

- KPI Program [Quality & Visibility].

- Savings Validation [of Media Costs].

- Service Assessment [Brand Safety Management].

Industry Insights

Keeping your company informed on the topic of brand safety and leveraging insights from other companies or case studies in the news are important steps to staying ahead of the curve. As such, stakeholders should lean on resources that can keep them abreast of timely insights on this topic. Sample tools can include the following:

- Industry trade publications.
- Google News Alerts.
- Industry Associations.
- Social Media Listening Tools.

KPI DASHBOARD

KPI	Unit	Monthly Target	Monthly Actual
Total number of campaigns	#		
Total number of media partners	#		
Total Impressions	#		
• Brand safe impressions	#, %		
- Breakdown by channel	#, %		
- Breakdown by ad format (display, video..)	#, %		
• Non-brand safe impressions	#, %		
- Breakdown by channel	#, %		
- Breakdown by ad format (display, video..)	#, %		
- Breakdown by failed reason (failed by black-list, keyword, unsafe content...)	#, %		
• Breakdown of unsafe content failures	#, $		
Brand Safety Savings (mainly with vendors)	$		
• Blocked	$		
•Flagged	$		

Create your own Dashboard

- Complete a dashboard with your brand's KPIs as outlined here.

- Set the target and measure the actual results on a monthly basis.

- Use a dashboard like this to assess your efforts or vendor performance.

Service Agreement and Terms & Conditions

Once Brand Safety KPIs and parameters have been put into place, it is important for this to be legally documented in either MSA agreements or the Terms and Conditions (T&Cs) set forth with agency and/or media partners.

Working with legal counsel to embed these will further assist you in protecting your marketing efforts and partner performance. Below are samples of both MSA and Terms and Conditions where your custom brand safety language should be included:

Sample Master Service Agreement (ANA): https://www.ana.net/miccontent/show/id/ii-media-buying- services-agreement-template-2018

Sample Digital Marketing Terms & Conditions (IAB): https://www.iab.com/guidelines/standard-terms- conditions-internet-advertising-media-buys-one-year-less/

Summary

1 Craft a brand safety incident plan for and with relevant stakeholders

2 Identify the root cause of the problem and discuss how it could have been prevented

3 Remain engaged in ongoing monitoring and assessment.

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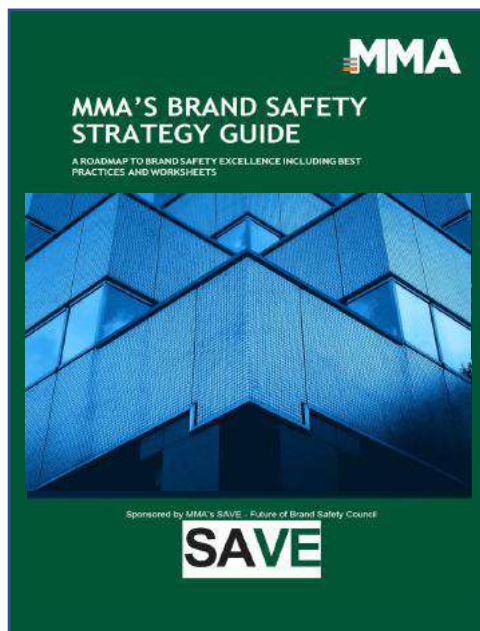
4 Align stakeholders on KPIs, benchmarks, and performance management.

5 Establish protocols for ongoing stewardship and responsibility for performance and stick with them.

6 Revisit your KPIs, metrics for brand safety, performance management tools, and processes on a regular basis.

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Brand Safety

Q&A

Twitter's Take

Alex Josephson
Vice President, Global Head of Twitter Next, Twitter

Alex Josephson leads Twitter Next - a global team of strategists, technologists and designers who partner with the industry's most recognized brands to create ideas "worth talking about" on Twitter and beyond Twitter. His team focuses on identifying behavioral insights to inform campaign activations that drive conversation and make a cultural imprint.

Stacy Minero
Global Head of Twitter ArtHouse, Twitter

At Twitter Stacy leads a creative team that partners with Fortune 1000 brands to earn outsized attention and drive business impact. Her team works closely with brands to develop content marketing strategies and launch break-through creative ideas on Twitter. She recently oversaw the launch of Twitter's in-house editing service, which helps brands and agencies optimize video assets for the feed.

Beverly Jackson
Vice President, Global Brand and Consumer Marketing, Twitter

Beverly Jackson is a groundbreaking pioneer in the area of social media, content strategy and brand campaigns. Her creative campaigns for some of the world's most iconic brands have been nationally recognized for their innovative storytelling and business impact. Her work has been responsible for exponential growth and data driven results at every organization where she has led a team.

Meg Haley
Global Head of Revenue Product Strategy, Twitter

Meg Haley leads Twitter's Revenue Product Specialist organization, overseeing our GTM and Commercialization efforts. Her team focuses on supporting our revenue teams and our partners in finding success across Twitter's products and solutions. Prior to Twitter, Meg worked at The Coca-Cola Company in Brand Management working across key flagship brands driving business strategy, innovation, marketing and customer engagement efforts.

Key Messages for Discussion
1. Communicating in times of crisis
2. How to authentically connect with culture
3. Proactive ways to engage with and build up the community ahead of time
4. Get guidance from Twitter as the brand, as a marketer...we consider these things in the work that we do

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Brand Safety

Q&A

Concluding Remarks

Neal Thurman

Co-Founder of the Brand Safety Institute

Neal Thurman is the Co-founder of the Brand Safety Institute and Director of the Coalition for Better Ads. Mr. Thurman's career has been intertwined with the evolution of digital technologies for more than 20 years.

He is also the Co-chair of the Education Committee of the Global Alliance for Responsible Media (GARM).

BSI
Brand Safety Institute

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About The Brand Safety Institute

The Brand Safety Institute was founded to professionalize and advance the executive capacity needed at every company in the digital advertising supply chain to protect their brands and the brands they steward through research, accreditation, networking, and education.

Our Mission

STUDY AND RESEARCH

Study and research around the emerging field of Brand Safety and best practices for executives who work in brand protection.

FELLOWSHIP

Fellowship with a large and growing community of other Brand Safety leaders across the industry to network and share knowledge, experience, and best practices.

ACCREDITATION
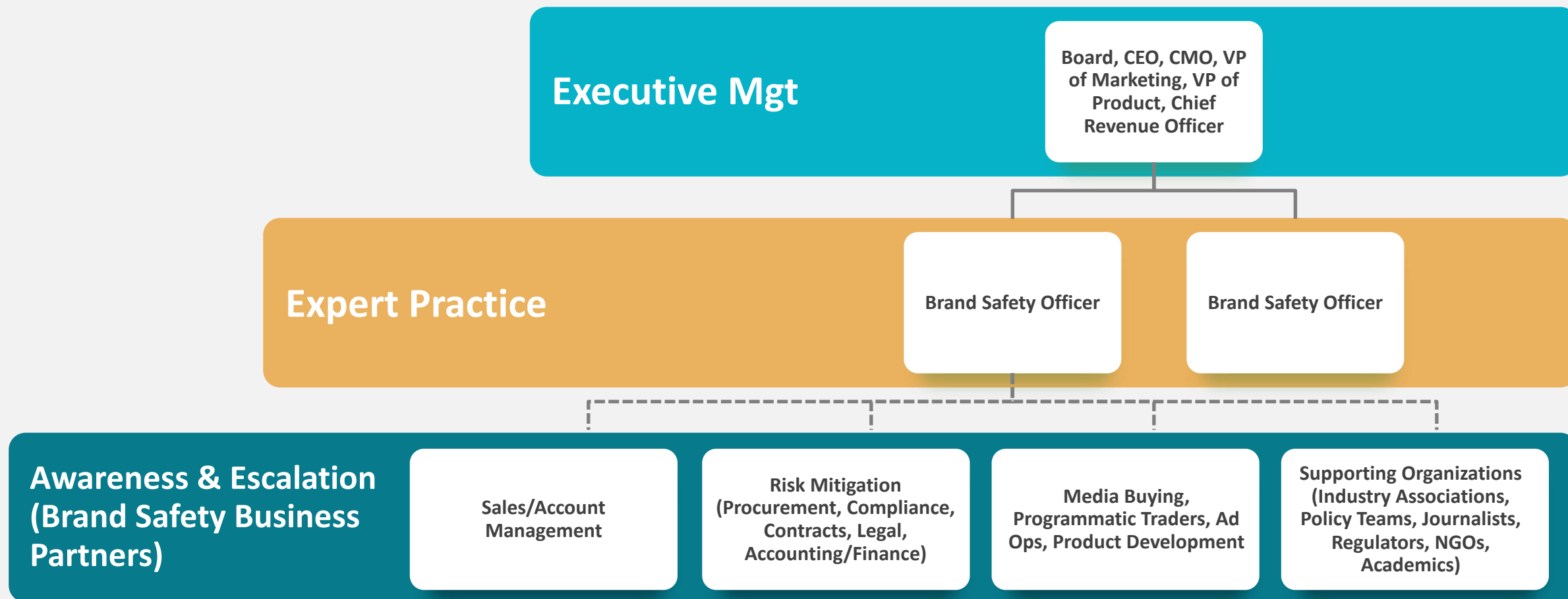
Accreditation of Brand Safety Officers to provide industry recognition for leaders in the field who have achieved expertise in the complicated and quickly-evolving challenges in the space

EDUCATION

Education for brand safety professionals around the tools, tactics, and technologies available to help protect their organization's brand and contribute to a Brand Safe ecosystem.

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Three Layers of Brand Safety

Executive Mgt

Board, CEO, CMO, VP of Marketing, VP of Product, Chief Revenue Officer

Expert Practice

Brand Safety Officer

Brand Safety Officer

Awareness & Escalation (Brand Safety Business Partners)

Sales/Account Management

Risk Mitigation (Procurement, Compliance, Contracts, Legal, Accounting/Finance)

Media Buying, Programmatic Traders, Ad Ops, Product Development

Supporting Organizations (Industry Associations, Policy Teams, Journalists, Regulators, NGOs, Academics)

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What is a Brand Safety Officer?

A certified professional who has undertaken education to deepen their expertise in key areas of brand safety

Is responsible for leading the safeguarding their own firm's brand

Contributes to the community of BSOs to help safeguard the broader digital ad supply chain.

MMA/BSI Partnership
- Exclusive 25% discount on BSO Certification – CODE: MMABrandSafety
- Launching the Certified Brand Safe Workforce Program for leading brands