



# Tame the Media Monster With Better Management

*By Mindy Williams*

**T**here's nothing like a media client. In many agencies, especially the bigger shops, they make the big money. And while the future may be all about interactive advertising, there are still huge dollars to be made from the everyday print, radio, and television ads—and someone's got to plan, order, and track them.

If that someone is you, you're looking at a paperwork nightmare.

First, there's the planning process. Working back-and-forth with clients to produce the perfect media plan takes time. And with dozens of campaigns for dozens of clients, the hours really add up.

But the media plan is just the start.

Then there are the hundreds of insertion orders and broadcast orders ... media buys by the thousands ... the client billings ... and all those vendor invoices. Mess up at any point and the shop's reputation takes a hit—as well as its bottom line. That's why an organized, efficient media tracking system—like Clients & Profits—is essential.



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## MEDIA BUYING MADE EASY



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If you're an experienced media buyer, you probably have a proven system for planning and ordering media and need Clients & Profits less. But if you're new to the media buying process, (or it's suddenly a new part of your job) then Clients & Profits offers a system for managing the entire media work flow: preparing media estimates, creating insertion orders, billing media to clients, then reconciling billings with media vendor invoices.

### The right fit

So how do you know if Clients & Profits is right for your media department? Any shop that buys mostly tv, radio, or cable needs a media buying system like Strata, SmartPlus, or TAPSCAN. These systems provide updated rating and demographic data to help media buyers pick the right audiences and markets, but are expensive and complex.

But if your shop handles mostly spot buys and print advertising, then Clients & Profits' media capabilities are ideal. That's because it is designed to work with media buying systems (Clients & Profits can even import media buys from SmartPlus, TAPSCAN, and Strata, eliminating the double-entry you may be doing now.)

### Managing the work flow ...

Clients & Profits lets media buyers create detailed broadcast and print media plans for a user-defined list of times/programs and ad sizes. A media plan can contain buys from many different stations or publications,

which are used to create insertion orders without rekeying. Print and broadcast orders integrate with job tickets, so they're easy to traffic with the rest of production. The Media Recap window highlights the week's space closings, material due dates, and other important deadlines all in one place—and even notifies staff members via e-mail.

### On managing media with Clients & Profits:

*"Clients & Profits is very easy to use, especially compared to the previous program I worked with. At first I was a little suspicious because it was so easy to learn and use, but it's true."*

Rachel Laghi  
PUSH, Inc.

The media order is the start of the accounting process. So whether you buy media with Clients & Profits or import them from a media buying system, it must be billed to the client then reconciled with the vendor's invoices. Media invoices are self-reconciling with insertion and broadcast orders, so it's easy to see if the ads you ordered actually ran.

### ... from start to finish

Make goods can be added as needed, which are reflected on the clients' media billings. Since media orders are integrated with the accounting system there's no double-entry anywhere, including billing. Insertion orders can be prebilled instantly, or billed together in batches on the same

invoice. Each media invoice shows clients clearly and concisely how they spent their media dollars were spent.

### Insider knowledge

The benefits are greater than better communication between media, production, and accounting or a faster billing cycle. The media spending reports provided by Clients & Profits give the media department the facts

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## Mysterious media terms explained

Whether you're new to media buying or an accountant trying to help out the media department, speaking media is like speaking a different language. Key media terms include:

**Media plan** A detailed listing of the print ads or broadcast spots to run for a particular campaign. Media plans are created for clients to review and approve. Media orders are then created from media plans.

**Media order** A print insertion order or broadcast order created for a station or publication. The media order is the equivalent of a purchase order, explaining how and when an ad should run—and how much the ads will cost.

**Commission** The amount the shop earns by placing the ad with the station or publication, typically 15% of the ad's gross cost.

**Pub code** The pub code identifies the publication on media orders. It is usually an abbreviation of the publication's name.

**Spot** An advertisement that runs on tv, radio, or cable.

**Flight dates** An advertisement that runs on tv, radio, or cable.

**Print buy** Any advertisement that runs in a printed publication, such as a newspaper or magazine.

**Space closing** The deadline for which an ad can be ordered from a station or publication.

**Materials due** The deadline for which the station or publication must receive the ad from the agency for broadcast or publication.

## DON'T REKEY YOUR SMARTPLUS, STRATA, TAPSCAN MEDIA ORDERS

By Kent Richardson

If you're buying media with SmartPlus, Strata or TAPSCAN and re-typing those orders into Clients & Profits, you're working too hard. There's a better way, and it's called Media Link.

Media Link is an add-on for Clients & Profits that imports media buys and vendor invoices from your media buying system directly into your C&P database—automatically. Without it, each media order has to be entered into Clients & Profits manually, one at a time. Not only is this tedious, but it's easy to make expensive data-entry mistakes.

The C&P Media Link can be fully automated to import newly-created buys at selected intervals. Or, it can manually import new media buys one by one.

Here's how it works: Your media buying system—SmartPlus, Strata, or TAPSCAN—exports newly created orders into a special "media buys" folder on your server. The Media Link regularly checks this folder for new orders, then imports them automatically into Clients & Profits.

The imported buys appear as insertion or broadcast orders in Clients & Profits. As

media orders are imported, they update the right jobs and tasks. Once imported, they can be pre-billed individually or in a batch—which can vastly improve your media-related cash flow.

A detailed log tracks the date and time of every imported media order. Media Link will even notify you via e-mail whenever a new media order is imported.

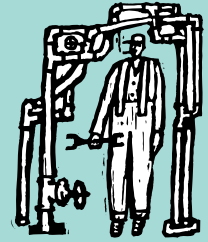
The C&P Media Link can easily handle hundreds of incoming media buys per day. It works on both Mac and Windows. So even if your media buying system runs only on Windows, its media buys can be imported by Media Link running on a Mac.

"For high-volume, broadcast-oriented shops like ours, this is the best setup," says Phyllis Beamer of Pepper & Associates, which buys its media with Strata.

For more information, visit [www.clientsandprofits.com/media/media\\_link.html](http://www.clientsandprofits.com/media/media_link.html).

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*Kent Richardson is a senior member of the Clients & Profits Helpdesk.*



### Media estimates— Quick, simple, practical

If media planning seems too complicated, there is a better solution: **media estimates**.

While media plans are elaborate and detailed, media estimates are concise, simple, and effective for clients who buy small amounts of print advertising. That's because media estimates are less structured and more customizable. They let even an inexperienced media buyer create a professional-looking presentation of a media campaign to a client.

Creating a media estimate is very easy (it's very similar to opening a new job, actually). All you need to enter is the client number, a job number and task, a description of the media campaign (i.e., objectives, target market, etc.), and each ad that's going to run in each publication. Each media buy on the estimate includes a publication name, issue date, close date (which is used by the media traffic report), an ad number or caption, size, and cost.

Media estimates can be created for any client. The printed media estimate has space to be approved by up to three different people, which gives the shop a paper trail to prevent disputes at billing time. Once a media estimate is approved, insertion orders can be created from it. The insertion order has all of the same information as the media estimate, so there's no double-entry. The entire process is very fast.

There's nothing to limit you from using media estimates with media plans. So it's possible to use media estimates for your small media clients, while creating detailed broadcast and print plans for your larger ones.

# CLIENT MEDIA CALENDAR

The best place to see where your clients' ads are running

The **Client Media Calendar** report is the best report for seeing at a glance what ads are running for each of your media clients. The report shows both print and broadcast media buys from the orders you've entered or imported from your media buying system.

The report can be printed for one client or all clients with media orders. A separate page is printed for each client, so it's easy to distribute the report to the right account executives.

The month's media buys are then sorted by close date and issue date. Each media buy shows its publication, issue date, ad name, ad size, space closing date, and materials due date.

Each media order shows its issue date (for print insertions) or flight dates (for cable, broadcast, radio, and interactive placements) to show when the ads were run.

Clients & Profits Sample DATA  
**Client Media Calendar**  
*Media estimates dated 11/01/99 to 12/31/99*

**American Bios/Integrated Systems (ABI)**

**Dec 99**

Publication/Station:	Issue Date:	Size/Ad Name:
AA	01/15/00	ad#/caption 1/4 vert, B&W
ADCP	01/31/00	Ad#/Caption 8x8
Adv Age	01/31/00	Ad#/Caption 7x7
DALY NONPRL	01/31/00	HAR080/EVERLY BROTHERS 2C X 7"
Adobe Mag	DEC 99	Christmas Savings 1/4 page, RH facing
Computer News	DEC 99	Christmas Savings 1/4 page, RH facing
3D World	DEC 99	Christmas Savings 1/4 page, RH facing
Database Adv	DEC 99	Christmas Savings 1/4 page, RH facing
Auto ID News	DEC 99	Christmas Savings 1/4 page, RH facing
Bank Tech News	DEC 99	Christmas Savings 1/4 page, RH facing
CAD Week	DEC 99	Christmas Savings 1/4 page, RH facing
Time	Jan '00	Ad caption FP, 4C bleed
Time	Feb '00	Ad caption #2 FP, 4C bleed
Time	Mar '00	Ad caption #3 FP, 4C bleed
Time	Apr '00	Ad caption #4 FP, 4C bleed
Time	May '00	Ad caption #5 FP, 4C bleed

**Closing Date:      Material Due:**

10/20/99	10/20/99
10/28/99	10/28/99
10/31/99	10/28/99
11/29/99	11/28/99
12/09/99	12/10/99
12/09/99	12/09/99
12/10/99	12/10/99
12/10/99	12/10/99
12/12/99	12/12/99
12/12/99	12/12/99
12/13/99	12/13/99
12/15/99	12/20/99
01/15/00	01/20/00
02/15/00	12/31/00
03/15/00	03/20/00
04/15/00	03/06/00

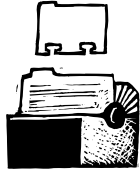
The Client Media Calendar lists media buys by billing period, which is based on your accounting periods. Media buys are grouped together by client, then subtotaled by month.

The station or publication's deadline for receiving the client's ad is shown for each print and broadcast buy.

Each ad's closing date is displayed for quick reference, helping the media buyer keep up with a large volume of media buys for many different clients.

Details about the ad's size, location, and specifications are included for each insertion or broadcast order. The ad name identifies the specific print ad or spot that will run for each order.

## MEDIA QUESTIONS AND ANSWERS



### Q. What's the difference between media estimates and media plans?

Media estimates are simpler. There are specially designed media windows and forms for plans; estimates are free-form. Customize information on estimates as needed. Each estimate can conceivably have different labels and headings, depending on the different kinds of media that you buy. Both plans and estimates create IOs by a button click.

### Q. How do media estimates and media plans affect jobs or tasks?

They don't. Media estimates and media plans function as a preview to a client's media order. They allow media buyers (and clients) to review and revise media buying strategy until clients approve. Jobs and tasks aren't affected until media orders are added or media invoices are posted.

### Q. How are insertion and broadcast orders numbered?

Clients & Profits numbers purchase orders, broadcast orders, and insertion orders separately. The starting number for each order type is entered in Preferences. For example, POs can be numbered starting from 1000, insertion orders and broadcast orders can start at 20000.

### Q. Is there a quick way to see the client invoice on which an insertion or broadcast order was billed?

Yes. First, find the media order then double-click on the media buy from the order. (This is important since each media buy can be billed on different invoices.) The Edit Media Buy window opens, displaying the buy's details. You'll see the media buy's A/R number at the bottom of the window.

### Q. Can insertion and broadcast orders only be created from media estimates or media plans?

No, they can be added directly into the Purchase/Insertion Orders window. If you're working to meet a deadline and need to submit orders in a hurry, or you've already been given client approval, adding them yourself is faster if there is no media plan. There's more double-entry, however.

### Q. How does Clients & Profits handle media accruals?

They're completely automated if the "automatically post WIP accruals" setting in Accounting preferences is checked. Media accruals are made whenever a media order is prebilled. Posting the prebilled invoice makes JEs

to account for the vendor's invoice, which isn't usually received until the next month (or two). The media accruals appear on financial statements until the vendor's invoice is posted into Accounts Payable, at which time the accruals are reversed. For more information on media accruals, visit [www.clientsandprofits.com/support/FAQs/FAQ\\_1001.html](http://www.clientsandprofits.com/support/FAQs/FAQ_1001.html).

**An easy way to see on which A/R invoice a media order was billed:**

**"Find the order in question. Double-click on the buy. You'll see details for what A/R invoice a buy was billed on and how much was actually billed.**

**Remember, different buys on the same order may be billed on different A/R invoices."**



## GUARANTEED GREAT IDEAS!

### Media Tips from Real Clients & Profits Users

These Clients & Profits users share their tips on how they manage media better:

**Clone media estimates and media plans to prevent duplicate data-entry** "Cloning media estimates and media plans cuts down on data entry time for new ones that are similar to ones you've already made. Nine times out of ten I clone insertion orders because it's so much easier to generate the IO that way," says Michelle Bussiere of DiBona Bornstein & Random. "It saves time."

**Clone broadcast orders for different stations from the same media plan** "For media annual contracts that need monthly broadcast orders, just clone the first BO twelve times and change the month. For a campaign with the same media buys with different vendors, just clone the first order and change the vendor," says Beverly Gamalinda of David & Usita Advertising.

**Use the media calendar and broadcast worksheets** "I make entries into the 7 Day Media Calendar to help me keep track of media buys. It lets me know when materials are due," says Amy Stamilio of Stray Cat Communications. "We also print broadcast worksheets instead of broadcast media plans because our clients demand a lot of detail. Worksheets print the total number of spots by program, and even print the plan's user-defined fields."

**Bill media costs separately from other work** "We think billing media costs separately from other creative, production, and PR is clearer for the clients," says Donna Belardi of Diccicco Battista Communications. "Most of our clients want to see the cost of media placement separately from the cost of production, so that's what we give them."

## C&P STEP-BY-STEP: FAST, EASY MEDIA BILLING

By Mary Peczeli



Media buyers track lots of very important details. They usually drink lots of coffee and worry about things like spot placement and materials due dates. And money. (Did we mention money?)

Media billings can represent the biggest chunk of income for many agencies. So overlooking even a small ad can get expensive—especially when there's no excuse to miss it. This makes it particularly important that the accounting department quickly and accurately bill clients for every spot or ad that runs.

How can media buyers be sure that accounting departments are not missing any orders that need to be billed? One good way is if billings are based solely upon information that is directly entered by buyers.

Since Clients & Profits integrates media with accounting, it's difficult to simply overlook an unbilled media order. Unbilled media buys pop up on the Unbilled Media report, where they're hard to miss. This report lists every unbilled broadcast, print,

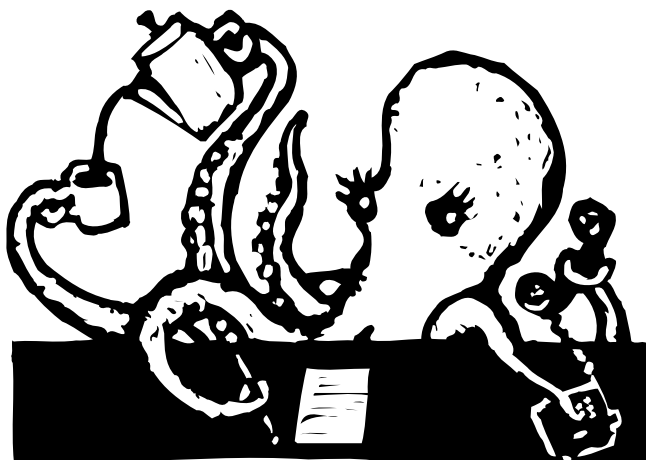
outdoor, interactive, or other media buy by client and order date. Some agencies use it as a checklist during billing time. "We use the Unbilled Media report to instantly see which orders have not yet been billed to clients," says Kelly Ruzich of Fruehling Communications. "With a billing process this easy, billing can happen early and often—as soon as the order is generated."

Orders entered by the media department flow automatically to billing, so there's no double-entry anywhere. And there's no limit to when a media order can be billed. In fact, a media order can be prebilled as soon as it is saved and printed. Or, all of a client's unbilled media buys (including make goods added by the media department for reruns, errors, etc.) can be billed at one time on a single media invoice.

It's enough to make the media department rest easy. They may be so relieved that they'll switch to decaf.

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*Mary Peczeli is a senior member of the Clients & Profits sales team and a media specialist.*



### Make Good Madness

What do you do when a media order needs to be changed, but has already been billed? The answer is make goods. Here's what to do when:

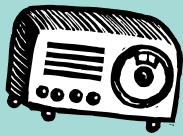
**The ad didn't run** You've scheduled an ad to run for a series of days, but the ad schedule was interrupted (e.g., you've ordered a week's worth of ads, but the ad only ran 6 days). How to fix this? Find the media order and add a make good buy for the date the ad didn't run, entering a negative gross amount of one day's advertising as a media credit. It will appear on the client's next media billing, so the client ultimately only pays for the days the ad actually runs.

**The media vendor raised ad rates** You've ordered and pre-billed media for your client, but in the meantime the vendor raises the ad's rate. And the media vendor enacts new advertising rates. You need to change the media order to reflect the new rates, then charge the client accordingly for their media buys. Find the media order(s) and add a make good buy for the difference. It will act as a debit, ensuring that the media's A/R and A/P reconcile.

**We're not running that ad anymore** The ad campaign has changed. How do you let the vendor know about the ad revisions after the media invoice has been sent, but before all the ads have run their course? Just add a make good reflecting the new ad's details. Since the ad's cost didn't change, just reprint the order for the ad rep.

**The ad ran, but things didn't go as planned** Say you were billed 25% more for a guaranteed position, but the ad ran somewhere else. Or you ordered color but the ad ran in black & white by mistake. The publication offers some sort of compensation (e.g., rerun, discount, etc.). Document it by simply adding a make good to record the vendor's accommodation.

## TAME THE MEDIA MONSTER (con't)



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they need to make their accounts as profitable as possible. Media spending and performance reports are based on up-to-the-minute media orders and billings, so they are always current. And they can be printed by media buyers and account managers whenever they're needed.

### Inside information

Media reports look at media traffic, spending, and performance from every angle. The **Client Media Calendar** is the first place to see which ads are running by month (see pages 4-5). It's a great report to print each Monday. The **Space Closing** and **Materials Due** reports list critical upcoming deadlines from broadcast and insertion orders. They're

ideal reports for both the production department and the media department. The **Unbilled Media** report lists insertion and broadcast orders that have not been billed to clients, grouped together by client and sorted by order number. It's a terrific checklist for the accounting department during billing time.

Account managers and media buyers can instantly see how clients spend their media dollars with the **Recap, Reconciliation**, and **Monthly Media Spending** reports. These reports can be printed for one client or for all clients with media orders for a selected time frame. The **Monthly Media Analysis** totals media spending for each month of the year by client and for each station/publication. The **Mix Analysis** report compares quarterly media spending by type of media (i.e., cable, radio, web, etc.) And the **Media Vendor Volume Analysis** ranks stations and publications by order volume to show media buyers who gets the highest dollars from the agency (and how they could possibly make a better deal next year). Together, they keep the shop focused on how clients are spending their media dollars.

You'll find examples of these media reports on the Clients & Profits web site: [www.clientsandprofits.com/report-omatic.html](http://www.clientsandprofits.com/report-omatic.html).

### The only way to handle volume

In the ad business, it's not unheard of for a large media account to seemingly fall from the sky—and double your shop's media billing almost overnight. Your agency's ability to handle a media-spawned surge in billings can mean the difference between keeping the account profitable or losing it completely. And you'll find no better tool to help manage media than Clients & Profits.

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*Mindy Williams is a senior member of the Clients & Profits Helpdesk. She teaches the new-user training classes and edits the quarterly newsletters.*

CLIENTS & PROFITS is job production and accounting software designed especially for creative businesses. Since 1986, more advertising agencies have chosen Clients & Profits over any other agency management software for Macintosh and Windows. Over 2,000 ad agencies, graphic design firms, and corporate marketing departments use Clients & Profits to track jobs, costs, and billings every day. For more information, send email to [info@clientsandprofits.com](mailto:info@clientsandprofits.com).

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