

Global plans – Features

This document provides a brief overview of Global plans features.

Media Plans

1. Plan Dashboard

The Plan Dashboard provides summary information about your media plan, such as the plan status, dates, costs, version and more. A customizable pie chart and table is also illustrated to display media mix.

2. Planning Capabilities

Global plans offers many features to help planners manage their plans, including:

- a. **Flighting** – Planners can quickly create flights by clicking and dragging, copying or importing.
- b. **Collaborative planning** – Multiple users can work on the same plan simultaneously and have the plan refresh in real-time.
- c. **Cost Methods** – Global plans offers multiple cost method options to choose from (*CPM, CPP, CPC, etc.*). Planners have the flexibility to enter their KPI, Cost or Rate and have Global plans calculate accordingly.
- d. **Percent mix planning** – Global plan's percent mix feature allows you to enter flight details, such as GRP and Cost, and allocate it across fields such as Daypart, Format, etc. You can specify how you want to mix your media spend, selecting which fields you want to mix, the percentage mix for each field, and general details for your mix.
- e. **Allocations** – Media planners can allocate data, such a Cost and GRP, over time (daily, weekly and monthly) to specify when the spending will take place. The allocation editor lets you distribute allocations evenly or weighted. The in-line flight allocation editor lets you click and drag an amount to other cells and copy and paste cells from Excel.
- f. **Split Flights** - Easily split existing flights into weekly, monthly, or quarterly segments. This helps when updating and actualizing.

3. Flowcharting

Flowcharts enable you to enter and manage media plans, flight and vendor information for all media types across budgeted, planned, booked and actual workflow steps. Global plans allows you to track flight and vendor information such as general details, KPI's, costs and creative information.

4. Flowchart Customization

You can customize the look and feel of flowcharts by changing what data is displayed on the screen. Standard customization options include:

- a. **Columns /Rows**– You can select which fields to show on the column/row display area of the flowchart.
- b. **Flight bars** – You can select which fields to show on the flight bars.
- c. **General Settings** – Options include customizing the calendar display and the start day of the week. Calendar types include Broadcast, Gregorian and the Nielsen national production calendar.
- d. **Filtering** – You can filter media plans using a number of filters, such as media type and workflow status. Filtering allows you to quickly view the flights you want to see.
- e. **Views** – You can customize the order of specific fields within your vendor or authorization details or simply save an entire plan view as Shared or Personal.

5. Plan versioning

You can create new versions of your media plans, enabling you to view previous versions and determine what actions have been taken throughout the life cycle of a plan.

6. Importing and Exporting

You have the option to export data to Excel in many areas of the application. You also can import data, such as detailed vendor information as well as certain data manager fields.

7. Plan comments

You and anyone with access to the media plan can comment on that plan. This enables you and other users to effectively collaborate on a plan and provide additional information that might be necessary.

8. Fact Sheets

Fact sheets provide a summary view of the plan's key details, offering a quick and easy summary directly from the media plan. Global plans also can provide custom fact sheets upon request.

9. Media Plan Groups

You can view multiple media plans together (up to 50 plans at one time) and save them as a Plan Group. Users can customize the appearance of Plan Groups just like individual media plans. Examples of plan groups include viewing all plans for one country or looking at all plans in one business unit.

10. Media Plan Approvals

The Plan Approval feature allows you to manage the approval of media plans ensuring that the plan is in line with the approver's expectations.

11. Media Buy Authorizations

The Media Buy Authorization feature lets planners manage the authorization process directly from the media plan. Features include:

- a. **Send/Authorize**- Planners can select the vendor rows they wish to get authorized and send to their client for signoff.
- b. **Custom workflows** – Site Administrators can set up the default workflow sequence for the authorization workflow. Authorization steps can be customized by client, geography, and business.
- c. **Email templates** – Administrators can set up the email notification template to suit your team's needs.
- d. **Purchase Orders** – Clients can enter Purchase Order #'s against the media buy authorizations to help with internal financial tracking. There are several features to help with PO management, including setting the currency for the Purchase Order, uploading a PDF of a physical PO and more.
- e. **Terms and Conditions** – Planners can manually enter their Terms and Conditions or have these set up by an admin user via a database.

12. Creative Executions

You can assign creatives to specific flights, tracking which assets are used in your campaign. The creative executions are displayed on the bottom of the plan screen (image, video, flash, etc.).

13. Display totals for multiple currencies

Display different totals by currency on one flowchart. Workflow step, percent of total and flight status can also be illustrated.

Workflows

1. Flight Workflow

Planners can track flights across budgeted, planned, booked and actual workflow steps.

2. Vendor Workflow

Planners can track the status of vendor planning and spending information across planned, booked and actual workflow steps.

3. Plan Approvals and Buy Authorizations

The Approval and Authorization features allows for tracked and fluid communication between planner and client, offering email notifications and status updates for each workflow step.

4. Electronically push goals to Mediaocean buy systems (pending eligibility)

When working in the flowchart, planners can send planning goals directly to Mediaocean buy systems. This simplifies the planning workflow and ensures data alignment between platforms.

Admin – Data Management

1. Reference Data Lookups

Site administrators can streamline the planning process by populating databases in Reference Data. These databases include Agency Discount Percentage, Rate, Fees, Terms and Conditions and Conversion Factor.

2. Master Data Management

Site administrator can manage the data for key fields, such as vendors, formats, campaigns, etc. via the Data Manager.

3. Currency Series Manager

Administrators can input company exchange rates on a monthly, quarterly or annual basis.

4. Event Manager

The Event Manager allows you to capture global, country and media plan-specific events, letting you plan and display these events within the context of a media plan.

File Management

1. File Manager

You can upload and store files, enabling you to keep track of any additional files you may need to attach to media plans or share with your team.

Creative Management

1. Searchable Creative Archive

Creative assets can be uploaded into plans and/or the Creative Archive. Creative executions allow users to enter various attributes such as geography, media type, business hierarchy, dates, and more.

2. Online Previews

View a preview of an uploaded creative asset for easy reference.

3. View Creative Asset Assignments

While in your media plan, you can assign creatives to flights and view any creatives used for flights within the media plan.

Reporting

1. Standard Report Templates

Users can create reports using a 3-step Report Designer. Reports can be saved as Global or Personal.

2. Ad-hoc Reporting

Create reports and save them for future reference, enabling you to gather data whenever you need.

3. Comparison Reports

You can generate reports that compare data from plan versions and flight workflow to understand how the media plans evolved over time.

4. Exporting Formats

You can export reports to a number of different formats, enabling you to view them as needed. These formats include a raw excel format, XSLX, PDF, CSV, and more.