



## Beginner's Guide

# YouTube Advertising Checklist








# Guide on How to Use the Checklist

This checklist is structured to ensure you cover every critical component of your YouTube ad campaigns.

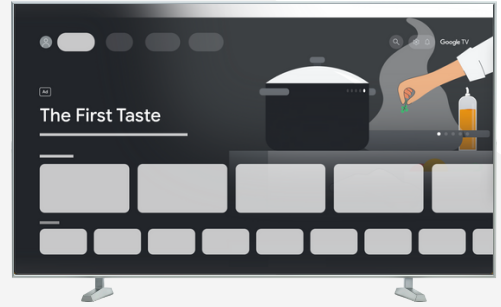
Whether collaborating with your advertising agency or internal teams, this document will keep everyone aligned and streamline the campaign management process.

## Instructions for Use:

-  **Complete Each Section:** Fill out the campaign name, objectives, and all relevant details. Make sure to include specific metrics and requirements to ensure clarity and precision.
-  **Review and Share:** Once completed, review the checklist for any missing information. Share this document with all team members involved, including creative, strategy, and performance analysts, to maintain alignment and consistency.
-  **Track Progress:** Use the checklist to track the implementation and performance of each ad component, from setup to post-campaign analysis.

**Tip:** Be sure to adapt this checklist for each unique campaign to maximize effectiveness.

# Campaign Overview



This section provides a snapshot of your campaign, giving everyone a clear understanding of the main goals and target audience.

- ✓ **Campaign Name:** Write a descriptive campaign title (e.g., "2025 New Product Launch - Spring")
- ✓ **Objective:** Specify your primary and secondary campaign goals (e.g., drive 50,000 website visits, boost YouTube channel subscribers by 10%, or reach \$30 CPA)
- ✓ **Target Audience:**
  - Demographics:** Age, gender, income range (e.g., 25-45, high-income professionals)
  - Interests & Behaviors:** Detailed interests (e.g., travel enthusiasts, eco-conscious consumers)
  - Geography:** Countries, cities, or regions (e.g., North America, urban areas only).
- ✓ **Campaign Goals:**
  - Impressions:** Number (e.g., 1 million impressions)
  - CPM/CPA Targets:** Desired costs per metric
  - Engagement Metrics:** (e.g., 15% video completion rate, 5% CTR)

**Remember:** Establish clear, measurable goals to track performance effectively.



# Campaign Requirements

Define the specific elements needed to execute your campaign effectively

✓ **Ad Type:** Video (e.g., 15-second skippable ads, 6-second bumper ads)

✓ **Ad Creatives:** List each creative asset:

**Number and Type:** Specify formats like "3 x 15-second video ads featuring customer testimonials."

**Creative Style:** Animation, live-action, UGC, or a mix.

**Campaign Duration:** Outline the campaign start and end dates (e.g., January 15 to April 15)

✓ **Budget:** Include a total campaign budget and detailed breakdown per phase (e.g., \$50,000 allocated across pre-roll, in-stream, and Shorts ads)

## Preferred Platforms:

□ **YouTube App:** Reach mobile-first audiences

□ **Connected TV:** Target premium viewers

□ **Google Display Network:** Broaden reach with complementary visuals

*Repeat this section for each unique campaign.*



# Ad Placement and Formats

Be strategic about where and how your ads are presented to maximize reach and impact.

## ✓ Preferred Ad Placements

- ❑ **YouTube Search Results:** Capture intent-driven audiences.
- ❑ **YouTube Videos:** Choose between In-stream, Bumper, or Mid-roll.
- ❑ **YouTube Shorts:** Engage with bite-sized content.
- ❑ **YouTube Partner Sites:** Extend reach across video partner networks.
- ❑ **Other:** Specify additional placements.

## ✓ Ad Formats

- ❑ **Skippable In-stream Ads:** For flexible storytelling.
- ❑ **Non-Skippable In-stream Ads:** Maximize attention in short bursts.
- ❑ **Bumper Ads:** Quick, memorable messages.
- ❑ **Discovery Ads:** Appear in search results and next to related content.
- ❑ **YouTube Shorts Ads:** Engage with short-form video.

*Consider testing multiple formats to identify the best-performing option.*



# Targeting and Bidding Strategy

Detail your approach to reach the right audience efficiently and within budget.

## ✓ Targeting Options

- ❑ **Demographics:** Be specific (e.g., 30-40, married, high-income bracket).
- ❑ **Interests:** Use YouTube's affinity categories or create custom intent audiences.
- ❑ **Geographic Location:** Pinpoint specific cities or countries.
- ❑ **Device Type:** Optimize for platforms like mobile or CTV.
- ❑ **Custom Audiences:** Leverage CRM lists or past website visitors.
- ❑ **Other:** Any niche segmentation criteria.

## ✓ Bidding Strategy

- ❑ **CPV:** Optimize for cost-effective views
- ❑ **CPM:** Use for awareness-driven campaigns
- ❑ **CPA:** Drive conversions with performance-based bidding
- ❑ **Target Bid Amount:** Enter a specific figure (\$0.10 CPV, \$5 CPM).

*Match your bidding strategy to campaign goals for optimal ROI.*



# Performance Metrics and KPIs

Set precise benchmarks to measure your campaign's success.

## ✓ KPIs

- ❑ **View-Through Rate (VTR):** Target % (e.g., 20% VTR).
- ❑ **Cost per View (CPV):** Desired cost (e.g., \$0.03 per view).
- ❑ **Click-Through Rate (CTR):** Benchmark for engagement (e.g., 5% CTR)
- ❑ **Conversion Rate:** Expected % (e.g., 3% site conversions).
- ❑ **Return on Ad Spend (ROAS):** Profitability target (e.g., 5:1).
- ❑ **Cost per Thousand Impressions (CPM):** Efficiency measure.

## ✓ Goals for Each Metric

**Example:** "Achieve a 10% increase in CTR compared to last campaign," or "Maintain CPV under \$0.05."

*Review KPIs regularly and adjust tactics based on real-time performance data.*



# Key Contacts for the Campaign

Ensure smooth communication by listing key team members

- ✓ **Contact Name:** (e.g., Sarah Lee)
- ✓ **Email:**
- ✓ **Responsibility:** Role (e.g., Creative Director, Analytics Lead)
- ✓ **Backup Contacts:** Include secondary contacts for urgent needs.

*Add all relevant team members to ensure everyone is informed and accountable.*

## Sample:

**Name:** Jessica Turner

**Email:** jessica.turner@adagency.com

**Responsibility:**

- Develop and oversee the overall campaign strategy
- Analyze market trends and audience insights
- Ensure the campaign aligns with brand goals and objectives
- Conduct regular performance evaluations and provide strategic recommendations

**Backup Contact:** Mark Harris (mark.harris@adagency.com)





# Additional Notes

Use this section for any extra instructions

- ✔ **Special Creative Considerations:** Guidelines for consistent brand messaging.
- ✔ **Testing and Optimization Plans:** Outline A/B testing strategies.
- ✔ **Compliance Requirements:** Industry regulations to adhere to.
- ✔ **Integration Details:** How this campaign will align with other marketing efforts.

*Document everything needed for a seamless execution.*

## Sample for Media Buyers

### Testing and Optimization Plan

**A/B Testing:** We will run A/B tests on various ad creatives, particularly testing different opening hooks and CTAs. Monitor the performance of each variation and adjust accordingly to maximize engagement and conversion rates.

**Optimization Schedule:** Weekly check-ins with the performance team to analyze metrics, reallocate budget if necessary, and pause underperforming ads. A full performance review will be conducted mid-campaign, with changes implemented as needed.

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