

CASE STUDY



CSI Payscale Takes Social Media Billing Process from Months to Hours

BACKGROUND

When it came to client billing for Google and Facebook ad campaigns, PGR Media was playing a costly waiting game. It took months to get invoices and they never seemed to accurately match up to client campaign spend. In many cases, PGR reported seeing credits applied to accounts for things that didn't run correctly months after the original invoice had already been paid. This created challenges and confusion surrounding billing organization and reconciliation, all of which was an extremely time consuming process for the PGR account staff.

"The process of going through invoicing and reconciling errors went on for months," said Margaret Beatty, VP of Finance, PGR Media. "We may have thought an invoice had been reconciled only to receive a notice three months later that a credit had been applied. Then we had to go back to the client and say 'Sorry, that wasn't the actual cost'."

PGR attempted to switch to a traditional credit card billing system but found that every client along with each of their campaigns appeared on one bill. This meant they had to go through each line item manually to identify clients and campaigns.

"This reconciliation process was still very difficult and it took us hours upon hours each month to go through just one credit card bill."

THE SOLUTION

With CSI Payscale, PGR was able to transfer their Google and Facebook client accounts to a ghost card system.

"Once we switched to ghost cards we were able to set up separate cards for every client. At the end of the month, reports were provided with totals broken down by client, making it much more organized and easier to reconcile."

Transferring accounts from invoicing to card was simple and required only the submission of a request to the Google and Facebook representative. The rep then coordinated the transition on the back end and set up a new ad account with a different card attached to each client.

On the card billing system, credit adjustments for campaigns appeared in real-time as opposed to months later and each client account and their campaigns appeared on separate bills for easy organization and reconciliation. PGR set up ghost cards by client whereby all campaigns were charged to one card under that specific client.

"It literally takes about an hour from start to finish. And that was from day one of implementation."

- Margaret Beatty, VP of Finance, PGR Media

"Sometimes we still need to break the charges out by campaign because there are different budgets for each campaign or bills may need to be sent to specific departments within the client's company; however, this is also a simple process that can be completed through Google and Facebook reports that break the charges out by campaign for you."

THE RESULTS

With CSI Payscale, Beatty took her media billing process from months to hours. Where it used to take a few months for the media teams to get the invoices, review them, organize charges by client and campaign, and finalize reconciliations, they are now able to quickly download reports, review, and pay.

"It literally takes about an hour from start to finish. And that was from day one of implementation." The time saved on the reconciliation process gave PGR the additional time needed to concentrate their efforts on higher-level tasks thus creating what has been comparable to having an extra part-time staff member.

Much more organized and easier to reconcile

Transferring accounts from invoicing to card was simple

Adjustments for campaigns appeared in real-time