

Practical Generative AI Use Cases & Tools for Agencies

 **Direct Digital**
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Forward

Is generative AI used in your agency? The answer is undoubtedly yes, even if you don't realize it. Throughout the business world, curious employees began experimenting with generative AI tools, quickly realizing their benefits in streamlining workflows and boosting the quality of their work. Telling them to stop using these tools just isn't feasible.

The proliferation won't slow down anytime soon. Instead, all business leaders must understand how generative AI can drive their businesses forward. This guide offers agencies practical insights into the use cases best suited for AI and the available tools.

About the DDH AI Council

The DDH AI Council was founded to address a growing concern: the widening divide between organizations that embrace generative AI and those that are hesitant to adopt it. Generative AI is rapidly reshaping how we work, raising the overall caliber while enabling teams to innovate faster. We understand that for many business leaders, generative AI is still an unknown technology that comes with many risks. We aim to demystify generative AI and provide the education and insights business leaders need to build a roadmap for its adoption, with complete confidence that its use will be safe and transformative.



Generative AI is rapidly reshaping how we work, raising the overall caliber while enabling teams to innovate faster.

Table of Contents

About this Guide	4
Use Cases & Generative AI Tools At-A-Glance	6
Use Case #1: Meeting Preparation & Client Intelligence	10
Use Case #2: Client Interviews and Team Brainstorming	16
Use Case #3: Client Research and Pitch Preparation	18
Use Case #4: Copy and Tagline Iteration	20
Use Case #5: Graphics and Design Iteration	22
Use Case #6: Digital Ad Coding and Deployment	24
Parting Thoughts	26
Glossary of Terms	28

Direct Digital Holdings is a fast growing, efficiency-focused solutions provider in the digital marketing and advertising sector. We are a family of brands serving direct advertisers, agencies, publishers, and marketers.

About this Guide

Agencies often find themselves in a tricky spot. Clients read about how generative AI speeds up work and expect to see a decrease in the hours and FTEs on their monthly invoices.

Your clients have a point. Over the past few years, we've seen hundreds — if not thousands — of tools enter the market that streamline and drive efficiency in many aspects of the agency employees' jobs. These tools tend to specialize in particular tasks, which is the subject of this guide.

Our approach is rooted in collaboration. Generative AI isn't a standalone solution; it's part of a broader consultation service. Your clients look to you for strategic advice about their position in the marketplace, and increasingly, that includes how they adopt generative AI tools internally. Agencies can help clients navigate the ever-expanding AI landscape, determining the right tools and use cases that align with their needs and goals.



Generative AI isn't a standalone solution; it's part of a broader consultation service.

Throughout this Guide, we stress the importance of the agency employees' insight and expertise in delivering projects. AI is an enhancement but not a replacement for humans. Generative AI can speed up the pace of projects by automating mundane and repetitive tasks, giving team members more time to think strategically. In the best-case scenario, the overall caliber is higher, though the billable hours will remain the same.

This guide looks at six practical agency use cases where generative AI can have a big impact:

- Meeting preparation and client intelligence
- Client interviews and team brainstorming
- Client research and pitch preparation
- Copy and tagline iteration
- Graphics and design iteration
- Digital ad coding and deployment

We'll suggest tools you may want to use for each use case. It's not cheating! Even global brands like Coca-Cola use AI to iterate and test ideas faster. Just note that there is a difference between iterating and starting from scratch. Coca-Cola relied on AI to reimagine its "The Holidays Are Coming" ad, which consumers [universally panned](#).

Even global brands like Coca-Cola use AI to iterate and test ideas faster.



Use Cases & Generative AI Tools At-A-Glance



In this chapter, we will examine the following use cases and tools that can enhance the way agency team members work:

Use Case	Description	Example Tools
Meeting Prep	Understand who you're meeting before you walk into the room. Pulling data from LinkedIn and other social media, AI can build profiles of attendees, letting you prepare smarter talking points and spot potential connections.	Max.ai
Client Interviews & Team Brainstorming	Record meetings with real-time transcriptions and summaries, assign action items and let team members ask transcript-specific questions about what was said.	MeetGeek.ai Otter.ai
Client Research & Pitch Prep	Get a jump start on your client research and pitch prep with automated research. These tools can collect and assemble competitive insights, RFP responses, and background analysis, saving time on data gathering.	Waldo.fyi Hyperwrit.ai Scite.ai focaldata.com
Copy & Tagline Iteration	Generate, test, and refine messaging for brand alignment and targeted copy, including tone and style adjustments. Brand-aware AI tools can come very close to matching brand voice and elements.	ChatGPT Claud.ai Copy.ai Anyword
Graphics Iteration	Produce multiple design variations quickly, enhance prototypes, and ensure branding consistency across formats.	Midjourney DALL-E Adobe Firefly
Digital Ad Coding	Prepare ad creatives for deployment with automated resizing, code generation, and error checking.	GitHub Copilot ChatGPT Google Gemini Celtra

Additional Tools on the Market

While we've focused on core tools for specific agency tasks, a whole ecosystem of AI-powered tools can help streamline your workflow. A few worth noting:

Content & Writing

- Jasper AI and Writer.com for “brand-aware” team copywriting
- Grammarly and Hemingway for content editing
- Surfer SEO and Content at Scale for SEO content guidance

Workflow & Productivity

- Notion AI for team collaboration and documentation
- Zapier for automating repetitive tasks
- FullStory for understanding digital experiences

Quality Control

- Originality AI for checking AI-generated content
- Undetectable AI for ensuring natural-sounding content

Keep in mind that these tools raise the bar of what's possible, but they're most effective when paired with human expertise and strategy (see the DDH's [Demystifying Generative AI for a discussion on the limits of AI](#)). Think of them as ways to streamline your work with your agency partners, not replacements for strategic partnerships.

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AI Tools vs. Human Expertise

AI tools are well-designed and easy to use, giving non-expert the impression that they can “take over” a range of tasks from now on. But is that the case? Let’s look at Surfer SEO as an example.

What Surfer Can Do	What Surfer Can't Do
<ul style="list-style-type: none">• Create SEO-friendly content outlines• Suggest optimal keyword density• Analyze competitor content• Recommend word count and structure	<ul style="list-style-type: none">• Navigate continuous algorithm changes• Build a strategic roadmap that aligns with your client’s business goals• Make smart budget decisions across different SEO tactics• Read between the lines of performance data• Understand your client’s unique challenges and opportunities

The Takeaway: Think of AI SEO tools as a smart assistant. They can handle the heavy lifting of research and initial optimization, but you still need an experienced strategist to:

- Guide overall direction
- Monitor ROI
- Adjust tactics when algorithms shift
- Turn data into actionable insights

Pro Tip

Use tools like Surfer SEO to enhance your work with SEO experts, not replace them. You’ll get better content faster, but you still need the experts to ensure your plan performs.

Use Case 1

Meeting Preparation and Client Research

Meeting Prep & AI Productivity Tools

The best way to make a great impression: Come wholly prepared for your client meetings. Knowing the unique concerns, backgrounds, and interests of the people with whom you meet will instill confidence in your work. People want to do business with agencies that care about them.

But deep diving into a client takes time, and your teams are business enough. For this reason, your agency should consider some AI-powered productivity tools that are available today. These tools can help users analyze and organize the information they gather, acting like a research assistant to help prepare for important meetings so that team members can focus on strategy.



AI can help you prepare relevant context and questions for your discussion.

Here's how it could work: Before meeting with a potential client's marketing team, gather key information from their LinkedIn profiles, company announcements, and social media presence. Next, feed this information into your chosen AI tool.

For instance, if you've noticed some attendees posting on LinkedIn about influencer marketing in travel destinations, your AI assistant can help organize these insights into discussion points. Or, if you've found news about their recent expansion into LatAm markets, the AI can help you prepare relevant context and questions for your discussion.

Tools	<ul style="list-style-type: none"> • Max.ai • Notion.ai • Zapier Central
Live Research Support	<ul style="list-style-type: none"> • Analyze LinkedIn profiles and company updates • Extract key talking points from social posts • Identify common themes across sources
Content Analysis	<ul style="list-style-type: none"> • Summarize professional backgrounds • Spot trending topics (like "influencer marketing") • Track business developments (e.g., market expansions)
Smart Preparation Features	<ul style="list-style-type: none"> • Generate discussion points • Create meeting agendas • Compile relevant questions based on research

Pro Tip

The key is using AI to enhance your research process, not replace it. You gather the intelligence; AI helps you make better use of it.

Use Case 1 Spotlight: “Speed Dating with AI”

Here’s a real example:
Our team must prepare for a speed-dating networking event with 30 potential clients. They fed the attendee list into Max-AI, which:

Analyzed each attendee’s background

The screenshot displays the Max-AI interface. At the top, there is a grid of AI models: Claude-3.5-Sonnet, Claude-3-Haiku, Gemini-1.5-Flash, Llama-3.2-90B, GPT-4o-mini, and Claude-3.5-Sonnet. Below the grid is a chat window with the following prompt:

Using the attached list of conference attendees, research and collect the following data and provide the output in a table format per attendee. Provide the following information for each attendee:

1. Name and job title
2. Company and industry
3. Social media presence (LinkedIn, Twitter, etc.)
4. Recent professional activities or accomplishments
5. Any public speaking engagements or published content
6. Interaction patterns at previous events (if available)

Based on the personal and professional data of each conference participant, create a set of personas that represent the entire list of attendees. Include the following areas of analysis:

Use Case

1

Spotlight: “Speed Dating with AI”

Created detailed personas

The screenshot shows an AI interface with a grid of models and a text prompt. The grid contains the following models:

Claude-3.5-Sonnet	Claude-3-Haiku	Gemini-1.5-Flash
Llama-3.2-90B	GPT-4o-mini	Claude-3.5-Sonnet

The text prompt reads:

Based on the personal and professional data of each conference participant, create a set of personas that represent the entire list of attendees. Include the following areas of analysis:

- Personal Communication Style
 - Are they data-driven or relationship-focused?
 - Do they prefer formal or casual communication?
 - What is their typical decision-making process?
- Digital Behavior
 - How active are they on professional platforms?
 - What type of content do they engage with?
 - What is their preferred communication channel?

Use Case

1

Spotlight: “Speed Dating with AI”

Identified common themes across profiles

The screenshot displays an AI interface with a grid of model selection options and a list of identified common themes. The grid contains the following models:

Claude-3.5-Sonnet	Claude-3-Haiku	Gemini-1.5-Flash
Llama-3.2-90B	GPT-4o-mini	Claude-3.5-Sonnet

Below the grid, a list of identified common themes is shown:

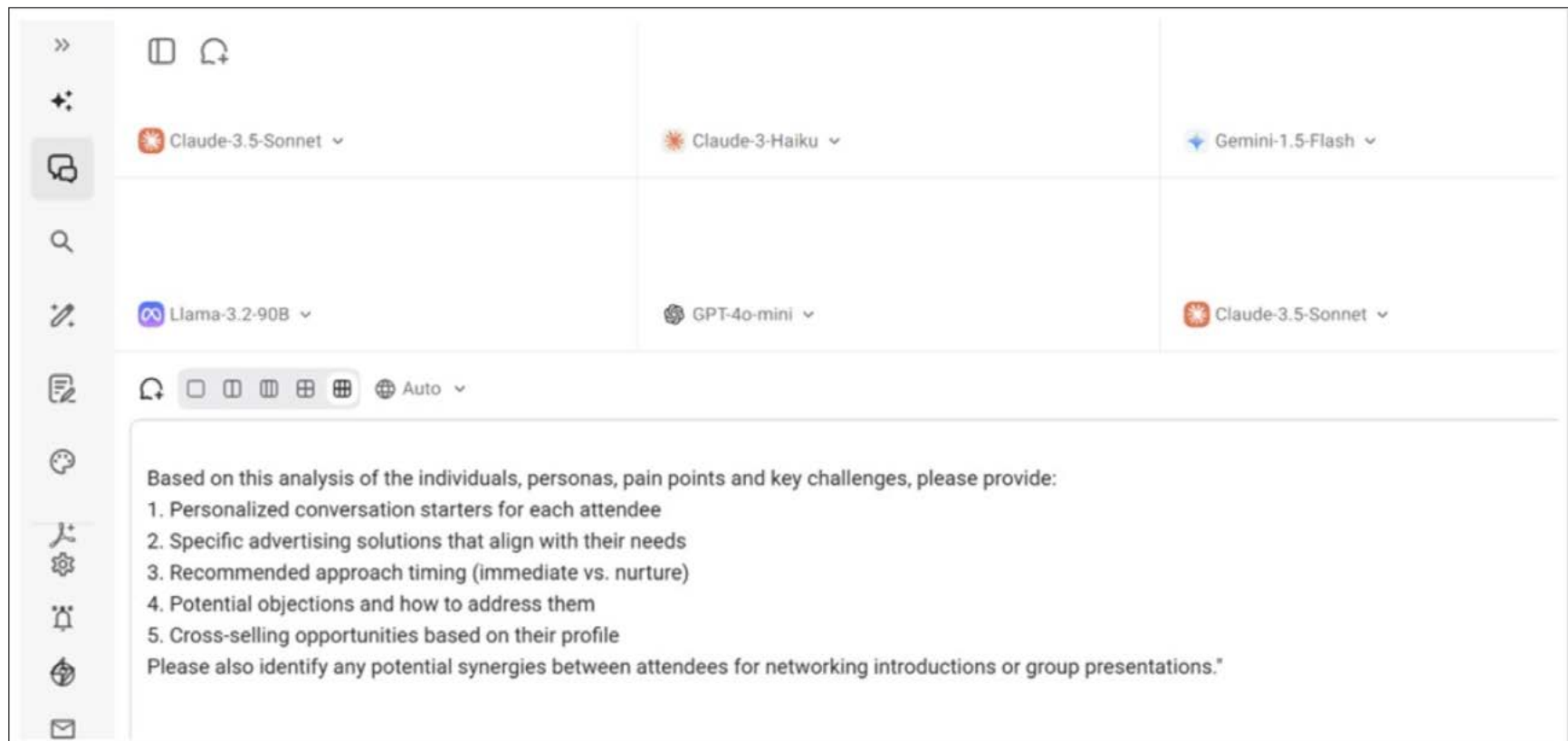
What are the common themes associated with the panel of attendees based on their backgrounds, job descriptions, industry and company.

- Professional Pain Points**
 - What challenges does their industry face?
 - What are their company's current marketing objectives?
 - What resources or solutions might they be seeking?
- Purchasing Authority**
 - What is their level of decision-making power?
 - Who else might be involved in their purchasing decisions?
 - What is their typical budget range for marketing services?

Use Case 1 Spotlight: “Speed Dating with AI”

Generated six targeted conversation topics for each person

The result? Our team walked in, knowing who they’d meet and exactly what would resonate with each person. Instead of generic small talk, they could have meaningful conversations immediately.



The screenshot displays an AI interface with a grid of AI models and a list of generated conversation topics. The grid shows the following models:

Claude-3.5-Sonnet	Claude-3-Haiku	Gemini-1.5-Flash
Llama-3.2-90B	GPT-4o-mini	Claude-3.5-Sonnet

Below the grid, a list of generated conversation topics is shown:

Based on this analysis of the individuals, personas, pain points and key challenges, please provide:

1. Personalized conversation starters for each attendee
2. Specific advertising solutions that align with their needs
3. Recommended approach timing (immediate vs. nurture)
4. Potential objections and how to address them
5. Cross-selling opportunities based on their profile

Please also identify any potential synergies between attendees for networking introductions or group presentations."

Client Interviews and Team Brainstorming

Meeting tools such as voice-to-text AI capture every word in a meeting in real-time, creating searchable transcripts and recordings. Some offer assistants who attend and record meetings you can't attend due to prior commitments.


This means relying on something other than memory or inaccurate notes scribbled in a hurry. One feature teams love is searching the live transcript during meetings to find the exact wording of recent discussions (e.g., "I like how Stacey said that. How'd you repeat it?")




Tools	<ul style="list-style-type: none"> • MeetGeek.ai • Otter.ai
Live Meeting Support	<ul style="list-style-type: none"> • Search the transcript while the meeting is in progress • Find exact wording instantly when needed
Never Miss a Meeting	<ul style="list-style-type: none"> • AI records when you're double-booked • Get a complete recording, transcript, concise summaries summary, and action items generated by the AI tool
Smart Transcript Features	<ul style="list-style-type: none"> • Instant meeting summaries • Automatic action item detection • Ask natural language search (“What’s the deadline?” “What did the client decide on color choices?”)

Action Items



- Susie to update the creative brief based on the team's feedback
- Schedule an interview with Christy to showcase her AI expertise
- Determine additional industry verticals to include in the ebook content
- Explore creating shorter, standalone content pieces (e.g. blog posts) to drive interest in the full ebook
- Add action item

 **Waldo** just now
Which AI tools did Christy want us to highlight?

 **Otter** just now
According to the transcript, Christy did not explicitly state which AI tools she wanted the team to highlight. However, the discussion covered a few tools that were mentioned:

1. Waldo - Christy mentioned using this tool for client research and preparation.
2. Adobe Gen Studio - Lena mentioned this as an Adobe AI assistant for performance marketers to generate and test creative assets.

The transcript does not indicate that Christy

Ask anything about your conversations...  



Pro Tip

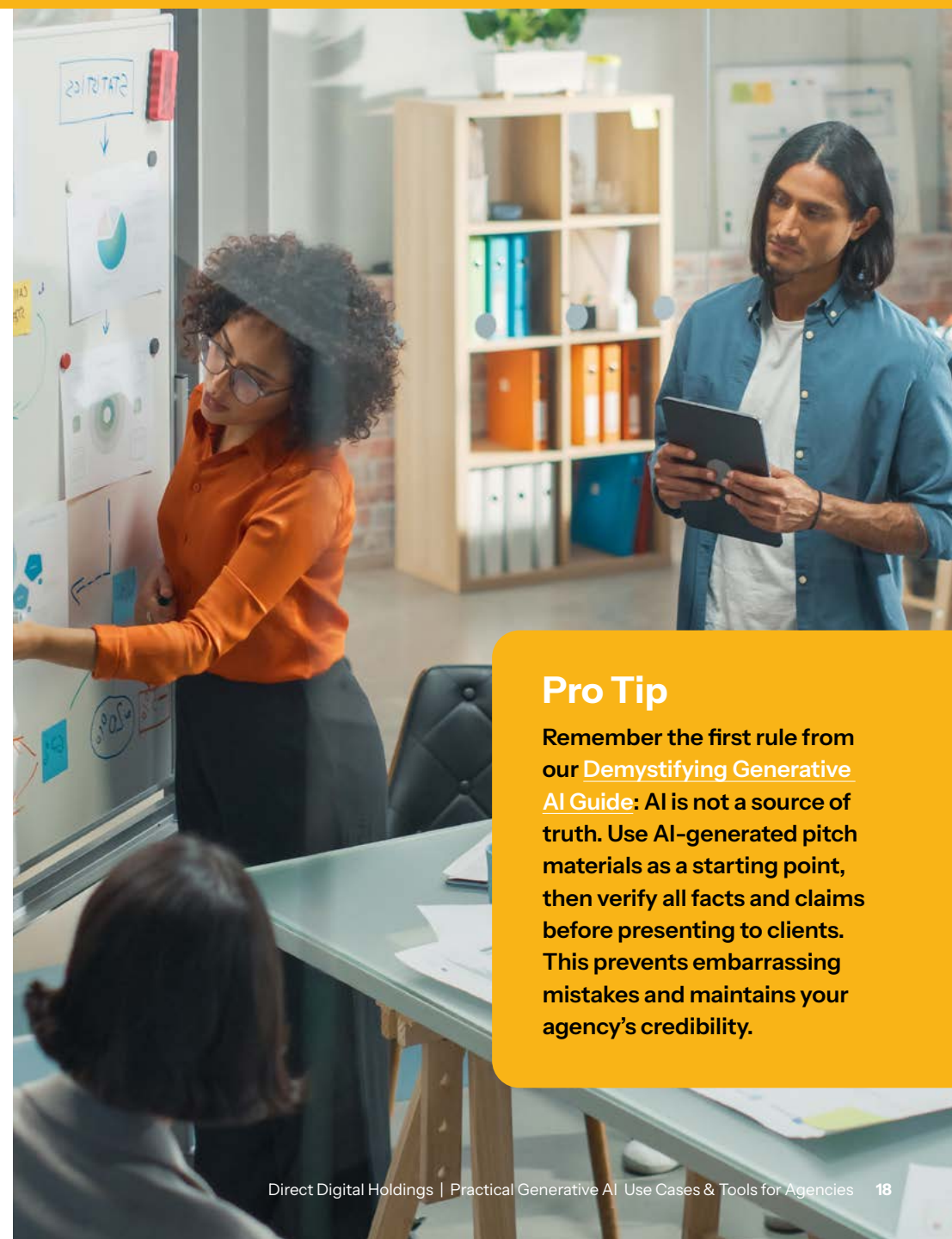
Always ask permission to record the conversation, and when approval is granted by all recipients, say, “We are now recording” after you hit the record button.

Use Case 3

Client Research and Pitch Preparation

One of the great things AI can do is jumpstart client research and pitch prep so that you and your team can focus more on the creative strategy best suited for humans.

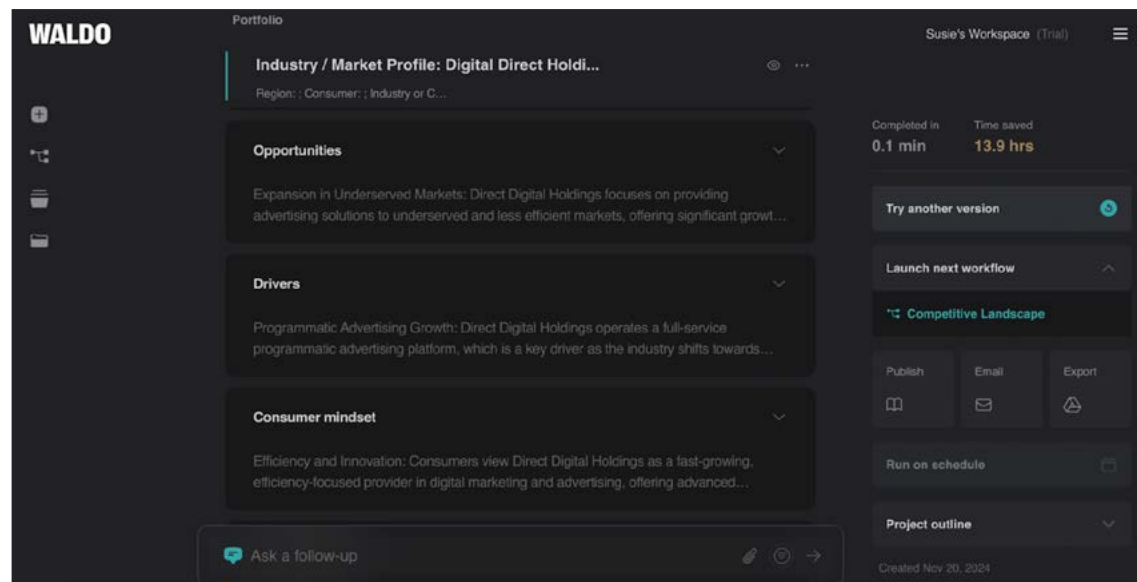
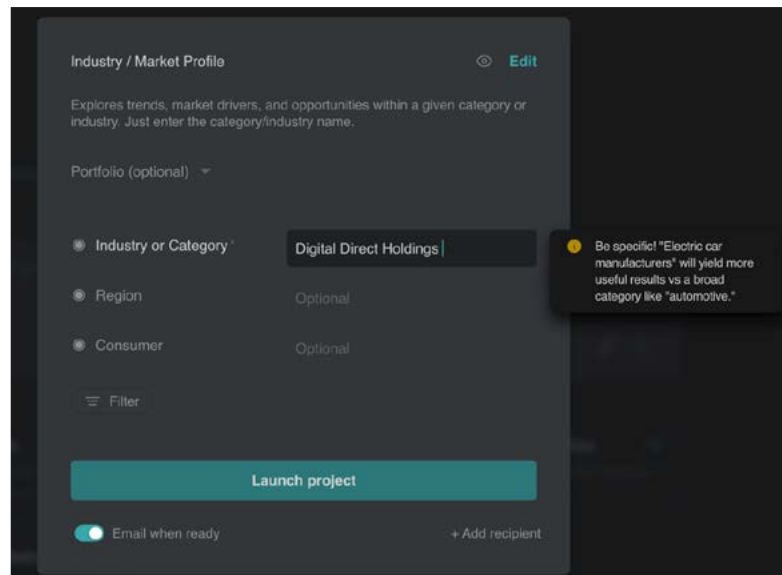
Here's how it works: Tell the AI tool what you need to know about a potential client or industry. The tool then automatically crawls relevant sources — company websites, news, social media, and industry reports — and returns organized insights. If you're preparing for a beauty brand pitch, the AI will discover market trends, compile competitor strategies, and identify untapped opportunities without manual searching.



Pro Tip

Remember the first rule from our [Demystifying Generative AI Guide](#): AI is not a source of truth. Use AI-generated pitch materials as a starting point, then verify all facts and claims before presenting to clients. This prevents embarrassing mistakes and maintains your agency's credibility.

Tools	<ul style="list-style-type: none"> • Waldo.fyi • PitchGrade
Automated Research	<ul style="list-style-type: none"> • Instant market analysis • Competitor intelligence gathering • Industry trend detection
Smart Analysis	<ul style="list-style-type: none"> • Pattern recognition across sources • Gap identification • Opportunity spotting
Strategic Insights	<ul style="list-style-type: none"> • Ready-to-use pitch points • Data-backed recommendations • Competitive positioning suggestions



Copy & Tagline Generation

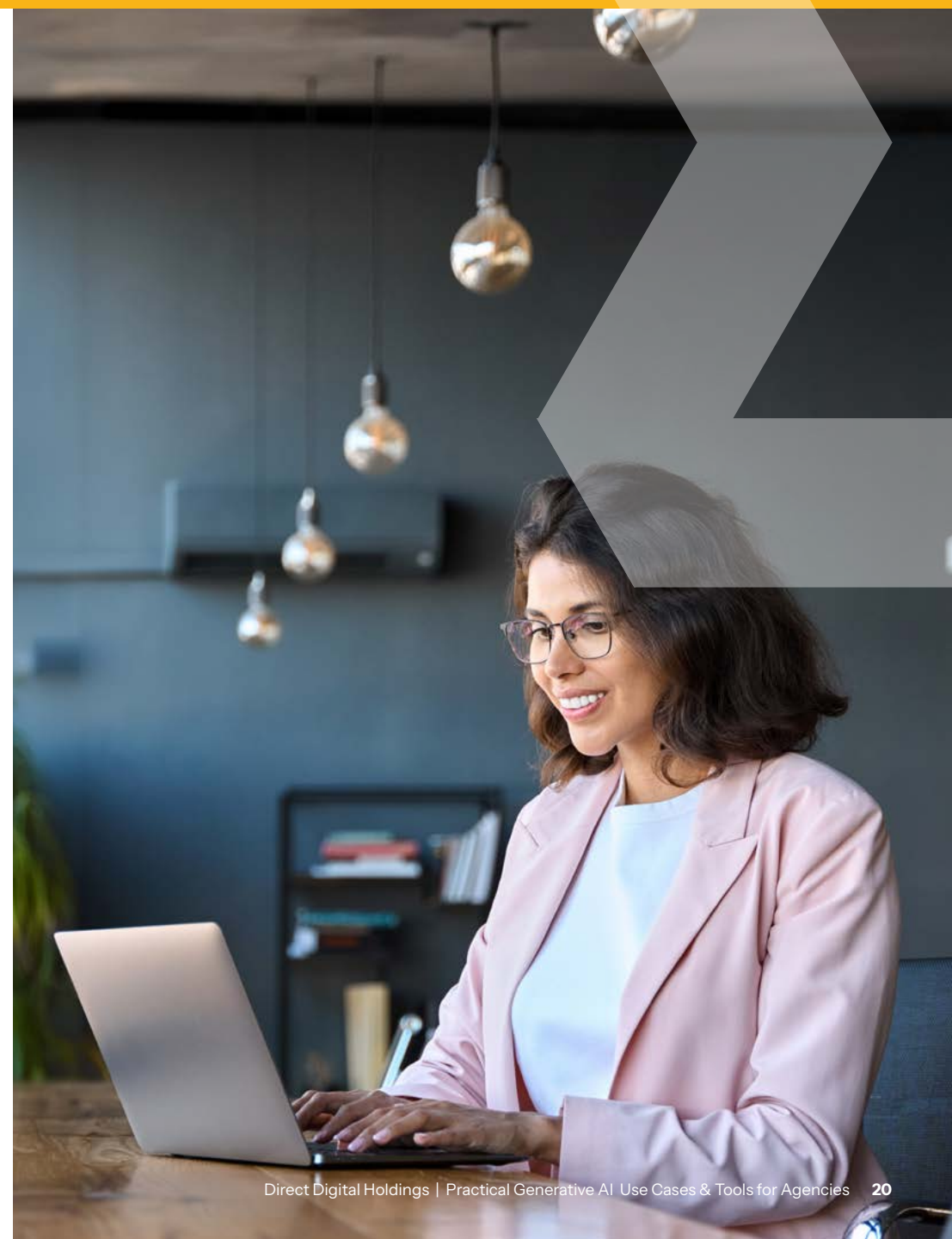
AI tools based on large language models (LLMs) have received a lot of attention these past few years, and for a good reason: They're excellent brainstorming partners for copywriters.

The key to using these tools successfully is to provide them with clear direction – brand essence, target audience, emotional takeaways – so the AI can generate relevant starting points for your creative process.

Here's how it works: Rather than just asking for “taglines,” describe your client's unique brand value. For example, let's say you're creating a tagline for a beverage company. Explain the brand essence in your prompt; you might explain: “Our drinks are scientifically engineered for optimal hydration, but we want to sound approachable to young professionals.”

The AI will use that information to suggest multiple angles for you to explore, such as:

- “Pure refreshment, perfectly crafted” (friendly)
- “Optimal hydration, scientifically formulated” (formal)
- “Fuel your thirst with science!” (energetic)



Some tools are marketed as “brand aware,” but don’t rely on them solely. AI tools are always a starting — not an endpoint.

Tools	<ul style="list-style-type: none"> • Copy.ai • Anyword • Claude.ai • ChatGPT
Quick Ideation	<ul style="list-style-type: none"> • Generate multiple tagline options • Explore different messaging angles • Test various hooks and appeals
Tone Refinement	<ul style="list-style-type: none"> • Match specific brand voices • Adjust for different audiences • Customize for market segments
Message Testing	<ul style="list-style-type: none"> • Compare variations quickly • Test cultural nuances • Validate market-specific messaging

What can I help with?

I need ideas for a tagline for a beverage brand that wants to breakthrough the noise. They target young professionals who are on the go, but value their health.

🌐 🌐 ⬆️

Create image
Get advice
Summarize text
Code
Surprise me
More

Pro Tip

As noted in our [Demystifying Generative AI Guide](#), these tools are brainstorming partners, not final editors. AI-generated text often sounds stiff and produces dense, information-packed sentences that can be hard to read. Your role as a copywriter is to:

- Use AI outputs as inspiration.
- Apply your experience and expertise to make copy more accessible for the intended reader.
- Craft final messages with the brand message, even if you use a brand-aware AI tool

Important Note: Many corporate boilerplates are flagged as “AI-generated” by AI detection tools because they pack dense information into formal language. Warn clients that even human-written professional copy can trigger these flags!

Graphics and Design Iteration

AI image and video generation tools have revolutionized the design process. These tools use various AI models (which we explain in detail in our [Demystifying Generative AI](#) guide) to help teams explore ideas rapidly.

But be warned: While these tools can create finished products, [the public often only accepts](#) AI-generated images and videos. AI helps you explore ideas with clients, making it easy to generate multiple concept versions, whether testing color schemes, inserting different characters, or adapting layouts. This rapid iteration helps teams get to the correct answer faster. But, in this scenario, designers use AI-generated concepts as stepping stones toward polished final work.

Here's how it works: Input your client's brand guidelines and basic concept requirements as a prompt. For a new product launch, you might tell the AI: "Show me a lifestyle photo of people enjoying this product outdoors, with warm lighting and an energetic feel." The AI will generate several options, letting you quickly test different scenes, lighting, and compositions.



Tools	<ul style="list-style-type: none"> • Midjourney • DALL-E • Adobe Firefly
Rapid Visualization	<ul style="list-style-type: none"> • Generate multiple concepts quickly • Test different visual styles • Create quick mockups for review
Brand Consistency	<ul style="list-style-type: none"> • Apply brand guidelines automatically • Generate size variations for platforms • Maintain visual consistency
Design Enhancement	<ul style="list-style-type: none"> • Get AI suggestions for improvements • Speed up feedback cycles • Streamline team review process

Pro Tip

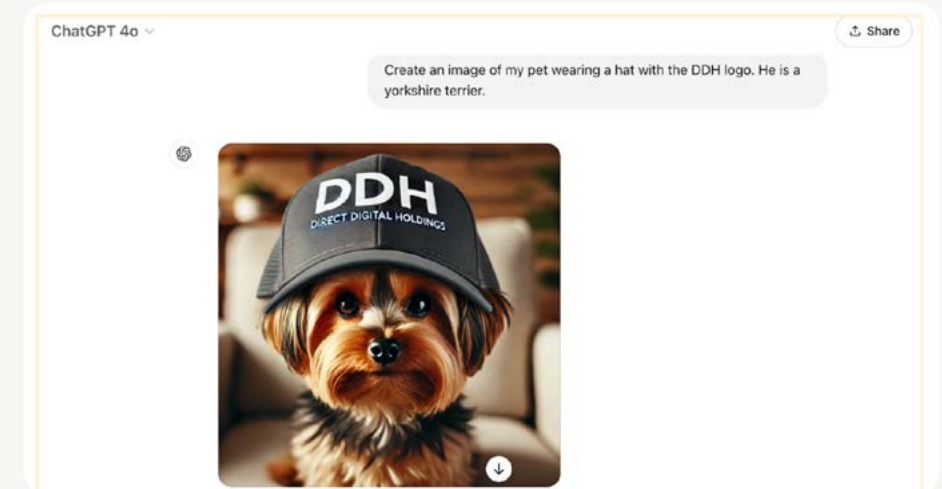
Start with AI for internal mock-ups and rapid iterations. Only show AI-generated work to clients once your team masters the tools. Keep brand-defining content (identity, heritage, emotional storytelling) in human hands - AI is great for variations but not for the core creative that defines your client's voice and values. This lets you build AI expertise while protecting your creative reputation.

Spotlight: “Coca-Cola’s AI Campaign Evolution”

Coca-Cola has been making headlines with its strategic use of AI, with notably mixed results. In March 2023, it started with ‘[Create Real Magic](#),’ where fans can use brand assets to create custom artwork and holiday cards. They then expanded to interactive AI features like personalized snow globes and a digital Santa you can chat with, which were well received.

However, audiences reacted strongly when the brand used AI to recreate their cherished holiday ads. The AI-generated content was called “soulless” and “creepy,” missing the warmth that made the originals memorable.

The Upshot: Audiences welcome AI for personalization and play but expect human creativity for emotional storytelling. In other words, use the right tool for the right job.



Use Case 6

Coding Digital Ads

Digital and social media ads are essential for clients, but let's face it: no one likes creating endless variations and checking them against platform specs. Those coding tasks are perfect for generative AI, which can transform designs into campaign-ready formats quickly, easily, and accurately.

Here's how to use AI to streamline ad production:

1. Upload your creative assets and specs
2. AI generates HTML5 code with animations
3. Creates size variations automatically
4. Adds dynamic content fields
5. Inserts tracking tags

So when you finish a display ad, the system adapts it to all required formats while maintaining proper tagging — all without any manual coding!




```

html
Copy code

<!DOCTYPE html>
<html lang="en">
<head>
<meta charset="UTF-8">
<title>IAB Pushdown Ad Unit</title>
<style>
.pushdown-ad-container {
width: 970px;
overflow: hidden;
cursor: pointer;
}

```

Spotlight: “Asking ChatGPT to create an IAB ad format template”

In this example, we asked ChatGPT to create an IAB ad format template. The tool provided an explanation as well as the appropriate code.

Note: Always test AI-generated code before deploying it in a campaign. Some tools, such as GitHub Copilot, offer multiple ways to prompt for code, including describing what you want in plain English.

Tools	<ul style="list-style-type: none"> • GitHub Copilot • ChatGPT • Gemini • Celtra
Automated Production	<ul style="list-style-type: none"> • Generate HTML5 ad code • Create responsive versions • Automate repetitive coding tasks
Campaign Setup	<ul style="list-style-type: none"> • Embed tracking codes • Set up dynamic content fields • Manage tags and scripts
Quality Assurance	<ul style="list-style-type: none"> • Validate platform compliance • Check file size limits • Verify tracking implementation

Pro Tip

Building a clear process for AI-assisted ad production is crucial. Start with simple banner resizing, then gradually expand to more complex tasks like dynamic content setup. Document what works best, which helps maintain consistency when sending ads to your media agency to traffic.

Parting Thoughts



These six use cases demonstrate how generative AI can enhance your agency's work — from smarter meeting prep to streamlined ad production. The key is starting small, choosing the right tools for specific tasks, and maintaining human oversight of the final product.

Remember: AI tools raise the bar of what's possible, but they're most effective when paired with agency expertise and strategic thinking.

A Word About the AI Journey

The use cases described here represent an organization's initial foray into generative AI adoption — what we at DDH call the “crawl” state of AI adoption. As AI penetrates deeper into the organization or is applied across departments, you will need to establish stronger rules of the road (aka AI governance). For more information, please see the DDH guide, [The Generative AI Roadmap](#).

Want to Learn More?

Check out our additional AI resources:

- ▶ **Practical Generative AI Use Cases & Tools for Agencies**
- ▶ **The Generative AI Playbook: Implementation & Best Practices**
- ▶ **The Generative AI Roadmap**
- ▶ **Responsible AI**

[Click Here](#)

Glossary of Terms

Artificial Intelligence (AI): Models designed to perform tasks that typically require human intelligence, such as analyzing data, generating content, or recognizing patterns.

Generative AI: AI systems that create new content, including text, images, and code, based on patterns learned from large datasets.

Large Language Models (LLMs): Advanced AI systems trained on extensive text data to generate human-like responses. Examples in the guide include ChatGPT and Claude.

Meeting Preparation Tools: AI tools that gather and organize information from sources like LinkedIn, company updates, and social media to prepare smarter talking points and discussion agendas for meetings.

Client Research Tools: AI systems that automate research by compiling competitive insights, analyzing industry trends, and identifying market opportunities.

Graphics Iteration Tools: AI-powered platforms that help teams quickly produce multiple design variations, refine prototypes, and test visual concepts.

Digital Ad Coding Tools: AI tools that automate tasks like resizing ad assets, generating HTML5 code, embedding tracking tags, and ensuring platform compliance for digital campaigns.

Prompt: The input provided to an AI system — such as instructions, questions, or guidelines — that directs its response.

Meeting Transcription Tools: AI-powered platforms that record meetings, generate searchable transcripts, and provide summaries with actionable insights.

Creative Iteration Tools: Tools designed to generate, test, and refine copy or taglines while ensuring alignment with brand guidelines.

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