

## AD Sales & Salesforce

### A Media CXO's Guide to Operational Excellence in a Post-Pandemic World

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## About V2

Over 15+ years as a Salesforce partner, V2 has led 500+ projects for well-known global brands and high-growth organizations. Our Salesforce consulting offerings include implementations, transformation advisory, and managed services.

V2 offers a refreshing boutique approach by combining fair pricing, flexible business practices, extensive Salesforce capabilities, and deep industry expertise. Our white-gloved approach to customer success is what sets us apart from global SIs.

We understand the nuances of your industry including key trends, process flows, roles & responsibilities, data structures, and technology integrations. We'll speak your industry language on day one, and we drive business and digital transformation by taking a holistic approach to solving client challenges. Our innovative D(3P) framework focuses on four pillars: Data, People, Process, Platforms/Technology.

# About the authors



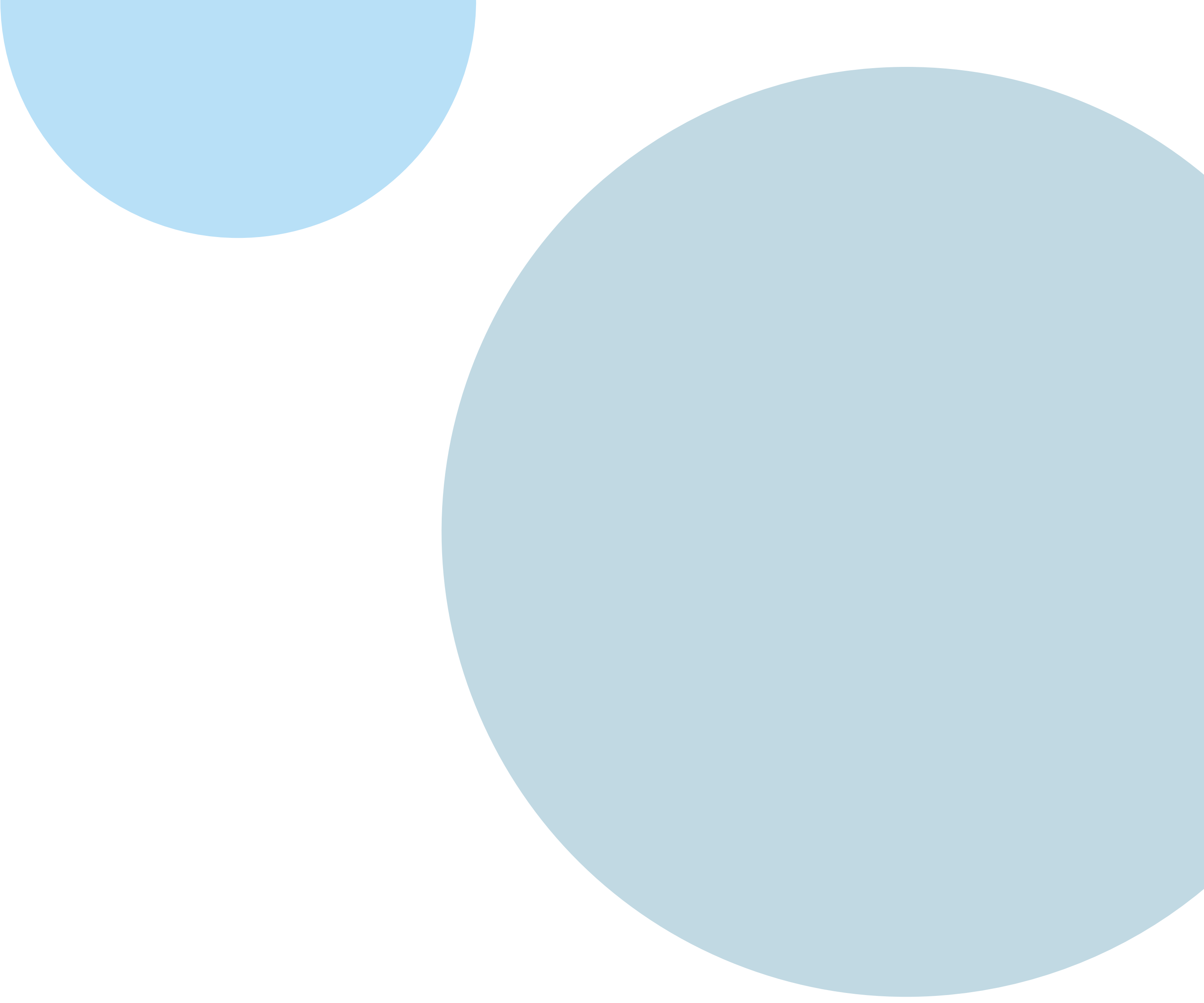
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# Introduction

The media advertising industry is, undoubtedly, fiercely competitive. Many media companies struggle to find a competitive edge let alone realize the traditional business school notion of a ‘sustained competitive advantage.’ And while chief digital officers, publishers, and others are focused on ensuring a media organization’s products and services are compelling in the marketplace, high-level operations executives obsess 24/7 over a different key question: “How can our ad sales process run more efficiently and effectively in order to make a measurable impact on both the top line and the bottom line?” Our perspective is that world-class media operations executives including, but not limited to, COOs and heads of sales operations, must lead the transformation effort and take a holistic approach to achieving operational excellence spanning **four key areas: data, people, process, and platforms (i.e., technology)**. This approach, which can be used to solve both small-scale and large-scale challenges—such as assessing how to streamline the prospect-to-cash flow in order to reduce the time from IO signature to revenue recognition—is a framework V2 has leveraged working with many enterprise media clients, and one that **V2 has appropriately coined as “D(3P).”**

While a single focus area (either data, people, process, or platforms) may be top of mind at any point in time for a media operations executive; only when the interconnected nature of all four focus areas is acknowledged can larger organizational issues truly be addressed and resolved.

**“ In other words, sustainable media business transformation cannot be achieved through a band-aid approach in just a single area. ”**

Executives such as CROs, while critically important in helping drive ad sales revenue and sales strategy, oftentimes play a less critical role in the greater business transformation of the ad sales organization. In their roles, such executives are intensely focused on day-to-day selling activities, overseeing sales management and setting short-term and long-term sales strategies. It is our experience that heads of sales will often provide important input and bless refinements to ad sales systems and processes behind the scenes, while allowing their executive counterparts in operations to invest a significantly greater amount of time and energy benchmarking the current state, analyzing options and implementing change spanning people, process, platforms, and data.

While on the people side of the equation we assert that operations executives are a key factor in the success of any ad sales business transformation, when it comes to platforms/ technology we are equally as convinced that Salesforce can be a transformational enterprise business application platform, ubiquitous across almost all segments of media. Offering multiple “Clouds”, Salesforce provides a strong set of features spanning various functional areas that can help media organizations manage a more effective prospect-to-cash flow.

By combining a proper business transformation framework with an intelligently designed and maintained Salesforce, media operations executives can indeed achieve a streamlined prospect-to-cash flow. Results may include improved seller effectiveness, better pre- and post-sales team collaboration, increased ROI on an IT investment and higher revenues.

This eBook shares our firm’s observations and lessons learned having worked for 15+ years with a large number of small, mid-sized, and global media organizations. In addition, we share insights around where forward-thinking media operations executives should be investing precious time and energy spanning people, process, platforms, and data. If you are eager to learn how to craft a winning strategy for your ad sales organization with Salesforce as a central platform, you’ve come to the right place.

## **Chapter 1**

# Media, a fiercely competitive marketplace



Regardless of whether you're a seasoned media executive who lived through the heyday of print media advertising or you're a relative newcomer whose focus has been primarily on digital media in one form or another, one fact should be clear: Google and Facebook, arguably, have captured an enormous portion of digital ad revenue, leaving a relatively small percentage of the remaining available ad spend for a vast ecosystem of media organizations to fight over. Fierce battles are playing out at both the national and local levels where relationship-based selling still matters and ad sales executives are finding it harder and harder to meet their quotas.

While “Less down is the new up” is a concept we heard many clients using to describe the pre-2020 pandemic market, “surviving the times and waiting to see the long-term, industry-wide structural impacts” is the updated point of view—and from our perspective, that’s simply no fun.

Disruption, for better or for worse, remains high. Television is still bringing in a lot of money but is preoccupied with cord cutting and the rapid transition to OTT. Print remains a cash cow for many, albeit declining at an uncomfortable pace. Display, despite its historically destructive draw of dollars away from print, has been overshadowed by an obsession with mobile. And programmatic...we could certainly debate that topic from an array of angles spanning viability to ethical implications.

On a positive note, in a non-pandemic market, advertisers are still spending a lot of money to build their brands and improve customer journeys. In such markets, publishers can be innovative, expanding into agency-like services and using events to stem the loss of revenue across other media types. Agencies and global consulting behemoths’ business models are rapidly converging through M&A, likely leading to more innovation and healthy competition. And who knows, perhaps the two 800-pound gorillas will, at some point soon, show a chink in their armor and begin to shed market share in the face of new entrants and evolving advertiser buying behaviors.

Facing such exponential rates of change, there is much opportunity for ad sales organizations to innovate, ensuring they are positioned to not only pivot in response to market changes, but also adequately interpret trends to pivot at the right time, so as not to get left in the dust. But pulling back the curtain, we see inhibitors to such innovation. As tenured consultants in the CRM space, some of us with more than 10,000 or even 20,000 hours under our belts, we remain somewhat dismayed by the general lack of rigor around business transformation spanning the people, process, platforms, and data aspects of advertising sales. Of course there is progress, but it is often slow or in response to fire drills. Typically roles are not well defined, processes are left broken for extended periods of time, platforms like CRM are not leveraged effectively, and dirty data proliferates in the ongoing absence of data governance. We often ask ourselves, **“Why, in the face of such tough market conditions, are so many ad sales executives lax in their approach to optimizing Salesforce as part of their ad sales prospect-to-cash flow?”**



**We believe there are a range of debatable answers to this question, most of which we do not necessarily support, including:**



A history of creative dominance where a more disciplined process and systems-based approach may not be valued.



A predominance of ‘old school’ sellers who’ve risen the ranks themselves “without needing a CRM system” to succeed.



A fear that forcing top sellers to leverage a CRM may prompt them to leave the company.



A generally frenetic industry culture where agencies are constantly pushing the limits of rapid RFP turnaround times, leaving little time to be ‘slowed down’ entering data into a system.



General trending toward more transactional business, particularly given the growth of programmatic ad buying platforms, leaving many wondering how and where CRM really fits in.

As consultants and fellow salespeople, we’ve patiently listened for years to these and other well-intentioned explanations. In the end, it’s up to each and every executive and media ad sales organization to make a choice: continue down a path where your ad sellers and management can choose at their discretion whether to provide transparency and accountability in a consistent manner, or make a conscious decision to set a higher, but reasonable, bar in the interest of running a more productive and profitable company. We do believe strongly that the future viability of ad sales organizations across any segment will largely favor organizations who have committed to resolving operational inefficiencies around people, process, platforms, and data over a sustained period of time.

## **Chapter 2**

# Salesforce and Advertising Sales: An Evolutionary Tale



## The Early Digital Days

Who were the first ad sales customers to get on the Salesforce platform? While we cannot say definitively, we are confident in asserting that our firm was at the forefront of working with some of those media companies, designing and deploying some of the most complex and successful ad sales CRM platforms to date, spanning a range of sectors in media. We share this not to lay claims as ‘the best’ or ‘the only’ firm but rather to say that media is indeed extremely complex and nuanced in comparison to other industries looking to leverage a platform like Salesforce for ad sales. Many years into our consulting work for well-known global brands, we are still growing and learning through interactions with new and existing clients. We do believe, however, that at this juncture of our firm’s evolution, we bring a reasonably well-informed and proven perspective on the topic of Salesforce for ad sales.

Over a decade ago, we witnessed a surge in digital media early adopters, especially publisher networks, who wanted to leverage Salesforce to manage both sides of their business: the traditional ad sales side focused on insertion orders (“IOs”) and the publisher network side whose mission was to build revenue-share relationships. Given the generally tech savvy user base in digital media, we were able to invest a majority of our energy on creating a sound architecture and UX, knowing that adoption would, in most cases, not be a huge uphill battle. For that reason, Salesforce for digital networks was a great place for us to start before taking on the more complex nature of traditional print publishers.

# Moving upstream to a maturing print + Digital World

Having completed many projects with a number of networks whose user bases tended to be more technically savvy and bought into the concept of leveraging CRM, our clients began facilitating conversations with executives at more traditional print organizations and sharing their success stories. At the time, print was still the clear cash cow, display was prominent and marketers were still trying to figure out the long-term play for mobile. Those referrals/endorsements led us to win business with a handful of very well known and significant print publishers, including a project to deploy Salesforce across 20+ print titles and digital properties.

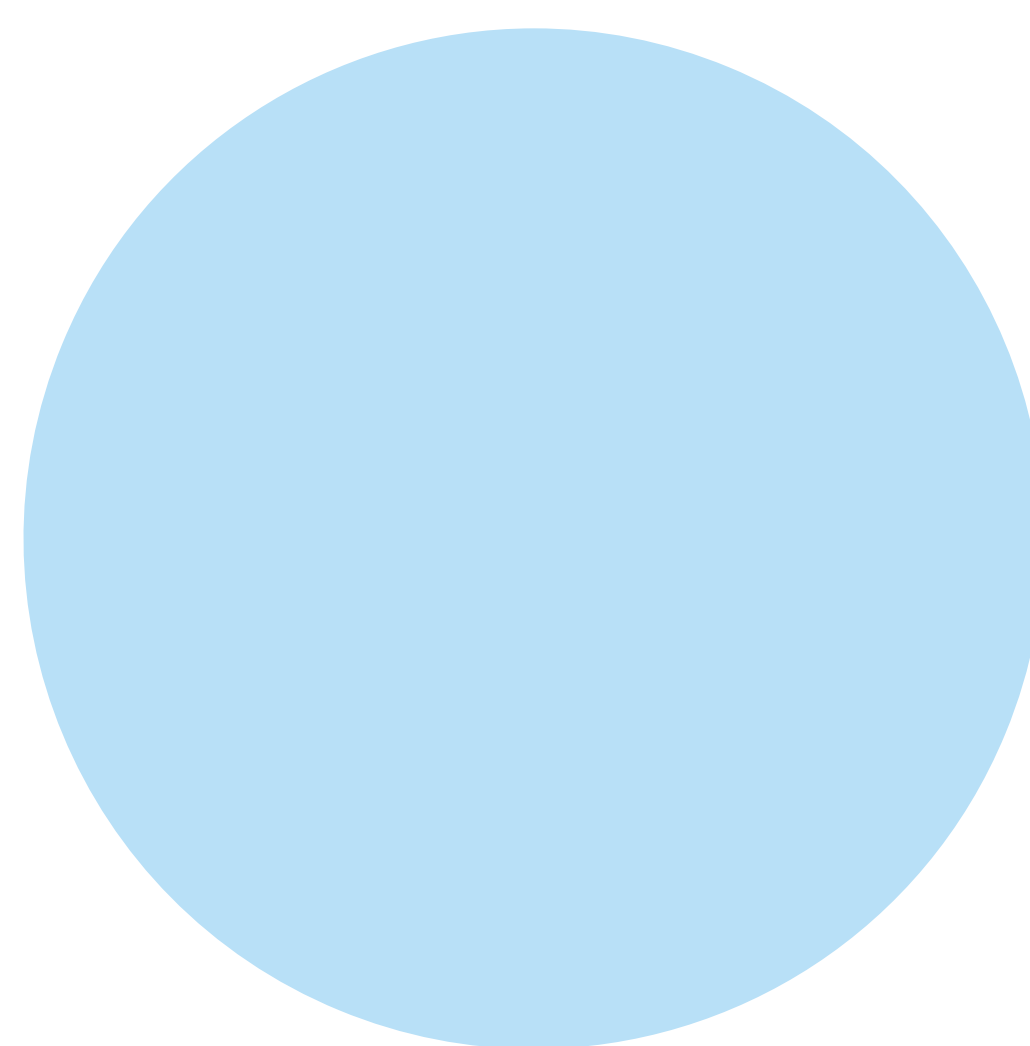
What we quickly learned was that in comparison to pure play digital networks, mixed media publishers posed an exciting challenge: how to architect Salesforce in a manner that simultaneously worked well for both print and digital sales and integrated logically with oftentimes separate media order management systems. In addition, with the larger size of these organizations, more formal management consulting with a focus on process improvement and change management was necessary. Up front workshops and prospect-to-cash consulting were critical, and welcomed, prior to finalizing designs and building prototypes.

In addition to embracing our holistic management consulting approach, these larger media clients operated with a refreshingly firm commitment to corporate governance, providing our team with consistent access to formal and informal executive steering committees. The result was that our teams, in close collaboration with talented client-side counterparts, were able to tackle large-scale deployments involving multiple integrations, large data sets, Apex and Visualforce code bases, hundreds or even thousands of users, prospect-to-cash flow improvements, extensive testing, multi-region end user training, and consistent change management activities—all with little to no business disruption throughout the project and at cutover.

“ In an industry where projects are most often under-scoped, we were able to prove that it is possible to deliver on-time, within budget, and without business disruption. ”



After setting a high watermark for success with some of the larger print organizations, we took on additional segments: agencies, ad tech, sports, television, out-of-home, radio, streaming, content acquisition and rights, professional information providers, among others. Salesforce had now become mainstream for most ad sales organizations regardless of size. Unfortunately, what we've observed in recent years is a wave of poorly launched deployments, in our opinion, largely due to media organizations choosing to invest too few internal resources and/or electing to partner with consulting organizations who lack proven experience in media. In the world of complex media process flows, data and integrated platforms, cutting corners is oftentimes a recipe for failure and frustration. To clarify, in our opinion Salesforce and its platform are not the problem—wait until you are ready to invest the proper time, money, and resources if you want to build a world-class, Salesforce-centric media Cloud architecture.



## Today's Key Trends

**Trend 1:** Streamlining Prospect-to-Cash

**Trend 2:** Normalizing Across Markets

**Trend 3:** Merging & Optimizing Legacy Platforms

**Trend 4:** Focusing on Audience Solutions

**Trend 5:** Growing the Customer, Partner & Employee Experience



## Trend 1:

### Streamlining Prospect-to-Cash

The most recent phase of media business transformation has largely been about optimizing the prospect-to-cash flow and especially OMS/billing integration. Over the last few years, we've worked on a number of large-scale initiatives that began as management consulting projects focused around people, process, platforms, and data and a heavy analysis of Salesforce. Interestingly, rather than being pulled in to simply 'fix Salesforce,' executives first outlined key strategic business challenges and asked us to analyze their organization in a more holistic manner. In one instance, the COO of a publisher whose media types spanned print, digital, events, agency services, and programmatic, asked us to focus mainly on the company's cash flow and issues with days sales outstanding (DSO). We hypothesized the origin of their suboptimal DSO metric could have been the result of upstream CRM and OMS systems design flaws. We worked our way from back to front, presented findings and transitioned into a major CRM + OMS/billing system upgrade initiative. While our efforts went far beyond Salesforce, the platform played a key role in the company's future nirvana state.

## Trend 2:

### Normalizing Across Markets

In addition to prospect-to-cash and CRM-/OMS-focused initiatives we've also seen a lot of focus on multi-region/multi-market process and technology normalization. Companies which may have grown through acquisitions or have organically developed sales teams spanning a lot of markets are recommitting to the alignment of processes and technology platforms. The challenge, of course, is largely rooted in change management—figuring out how to get people who perform the same role across different markets to operate more similarly. What makes this normalization so challenging is the generally accepted belief that it's critical to retain the local nuances which may help a market maintain its competitive advantage. Translation: Companies need to thread the needle of both accelerating standardization of processes and technology across many markets and providing a certain level of tolerance for local variances.

## Trend 3:

### Merging & Optimizing Legacy Platforms

A third trend is the result of increasing M&A activity in the ad sales industry in recent years. Many companies have moved to acquire one or more companies, oftentimes each with its own Salesforce org. Disparate orgs are often left intact for years following a merger, creating islands of data, differing workflows and poor cross-team collaboration. In some circumstances the various business units' operating procedures and business models are so dissimilar that it makes sense to keep the Salesforce orgs separate indefinitely. But in others, it does indeed make sense to merge some or all of the Salesforce orgs, leading to improved collaboration and better data. Media organizations should perform a careful pros/cons analysis before making any org merge decisions as the 'right' answer is oftentimes not clear cut.



## Trend 4:

### Focusing on Audience Solutions

Another trend we've seen media organizations invest an increasing amount of energy on is leveraging best-in class technology platforms to better measure audiences. In the world of Salesforce, Marketing Cloud with its many "Studios" spanning email, mobile, social, advertising, and a few others is becoming more prevalent within media organizations. Datorama, another Salesforce acquisition in 2018, has seen a lot of momentum given its ability to both extract and visualize data from 3rd party systems. And given the momentum of DMPs, Audience Studio is another part of Marketing Cloud which will continue to evolve and be leveraged by media organizations to help build better customer experiences. From a customer service perspective, we also expect to see an uptick in Salesforce Service Cloud implementations in media to support customer interactions, especially around B2B2C models which involve both ad sales and subscriptions. Salesforce, in recent years, has done an excellent job building an omni-channel support solution which spans phone, digital channels, and even field service for those media organizations who may need to service physical assets (e.g., billboards, out-of-home digital advertising screens, etc.). Having the ability to store and share key CRM data spanning both sales and service in one underlying database (e.g., Accounts and Contacts) is a strong value proposition for Salesforce's CRM solution.

## Trend 5:

### Growing the Customer, Partner & Employee Experience

A final trend we are seeing is a shift by organizations to invest more heavily in portal technologies like Salesforce's Experience Cloud to enhance customer, partner, and employee collaboration and experience. While portals and various CMS platforms have been around for quite some time, Salesforce has pushed into this space with the belief that its enterprise-level, integrated tech stack including a robust security model, responsive mobile features, world-class analytics, and a reduced reliance on integrations will ultimately help it win the "long-game" when it comes to portal solutions. And while other best-of-breed solutions may exist for employee engagement portals, partner relationship management and customer support, we believe that Salesforce will continue to win market share as customers recognize that flashy 3rd-party portals needing extensive integration with foundational systems such as CRM, will likely lead to an inflexible solution bound for deprecation. We are excited by the prospect of media organizations' increased utilization of Salesforce's Experience Cloud to better communicate with a distributed media workforce, collaborate with outside rep firms, and improve omni-channel B2B2C support. In regard to the latter, media organizations whose models span ad sales, subscriptions, events, and other revenue models where self-service is deemed important, would be wise to consider Salesforce's industry-leading Service Cloud suite and leverage Experience Cloud to support web-based support activities.

From our perspective as business transformation consultants, these trends are encouraging. Well-informed media clients are treating the Salesforce platform as a catalyst to help solve much larger business challenges. Forward thinking operations executives are hovering above the noise and recognizing that a proper Salesforce-centric Cloud architecture can and will have a positive impact on ad seller effectiveness, provide greater transparency for middle management and executives, send a positive signal to recruits, and ultimately help generate higher revenues. A healthy Salesforce org is not a nice to have, it's a must have. Let's now put our experience to good use and take you through some key plays to run a better ad sales organization on Salesforce!



## Chapter 3

# Key plays to win the game

## Key Plays To Win The Game

At this point you've likely recognized that after having booked tens of thousands of hours advising media clients, we've formed a working hypothesis around how best to streamline a media advertising sales organization through technology. We've talked about our past and our perspectives on the present, but what's in store for your future? We are sharing eight key plays to run a more effective ad sales organization leveraging our D(3P) framework of people, process, platforms, and data, enabling you to navigate any uncertainties ahead.



# Play #1

## Increase Data Governance and Focus on Cross-System Alignment of Advertiser & Agency Accounts

Historically, relationship-based selling has been a critical part of the ad sales industry. Post-pandemic, a vast majority of media companies moved their ad sales organizations to a fully remote model, and despite any positive indicators on the horizon, it is likely that many companies will remain highly remote for the foreseeable future. That said, it is more challenging than ever to nurture existing relationships in the absence of conversations over coffee, dinner, or other forms of entertainment which have traditionally helped build trust-based relationships between buyers and sellers. Similarly, forging new relationships during times of uncertainty is proving even more difficult as sellers struggle to book and run highly effective meetings to build rapport through an entirely virtual setting. In a highly remote environment, tracking and understanding advertiser and agency relationships and your sellers' interactions with each is critical, underscoring the need for a streamlined, clean CRM database tailored for the nuances of media.

Media organizations will rarely achieve a state of agile and accurate reporting unless accounts can be uniquely defined and identified across key CRM, OMS, billing and delivery systems, among others. Defining unique Account definitions and ensuring relevant IDs are properly propagated cross-system requires a strong understanding of data governance and "master data management." Data-savvy media organizations will recognize this need and embark upon more rigorous analysis spanning their prospect-to-cash architectures. Salesforce, with its flexible data model, record type functionality, native account hierarchies feature, and generally account-centric approach, is well-equipped to play a strong role supporting this alignment strategy. This alignment, however, will necessitate extensive process and data flow mapping and cross departmental collaboration. Oftentimes various systems within a media architecture are 'owned' by different technically-rooted teams spanning ad operations and IT; therefore, leadership must be established early to bring together the various constituents for effective collaboration. A 'gold list' of sales advertiser and agency accounts should be defined, methodically propagated across all systems and maintained by delegated data stewards. The old world approach of little to no governance policies around the creation of new accounts, poorly defined opportunity record names, and other lackadaisical data habits should be replaced by more strict data governance policies overseen by a data steward and/or other data-oriented resources.

## Play #2

# Reduce Spreadsheets and Increase Management and Executive-Level Adoption with Salesforce's Einstein Analytics and Tableau

For years, media organizations struggled to build a true analytics engine in Salesforce using only out-of-the-box reports and dashboards. In particular, the complex nature of modeling revenue in media inevitably leads to a web of spreadsheets. Whereas print insertion dollars are more easily attributed to a particular time period, digital revenue is flighted over future months and largely dependent on a company's ability to serve up impressions. Accurate forecasting is usually achieved by merging weighted pipeline data with actuals coming out of the ad server and/or OMS. Managers and executives want to dynamically slice and dice data across titles, properties, sales reps, media types...you understand.

Salesforce's Einstein Analytics solution dramatically changed the game in this respect. Customers, who in the past chose competitive technologies like Power BI or others from the plethora of solutions available in the fragmented analytics marketplace, may see the benefits of leveraging Salesforce's rapidly evolving analytics platform. Now more than ever it is critical for media companies to understand each element of their prospect-to-cash flow in real-time. Managers can run more effective meetings via dynamic dashboards and hold sellers more accountable for keeping Salesforce up to date. And even more exciting, Salesforce's AI and machine learning capabilities are evolving rapidly, prompting customers to begin exploring the concept of predictive capabilities. Running predictive analytics around advertiser and agency relationships, RFP acquisition and wins, B2B spend (think advertisers) and B2C spend (think subscribers), sales pipeline metrics, and forecasting, enables media companies to understand not only where the business has been but where it is going, improving data-driven decision-making. When done right, Salesforce Einstein is an incredibly powerful tool and helps drive critical management and executive-level adoption.

It should be noted as well that Salesforce acquired Tableau in 2019, further cementing its commitment to analytics. And while in the past many have characterized Einstein as the "CRM-focused" analytics platform and Tableau as a great solution to visualize data from non-Sales Cloud data sources, we believe the two solutions will continue down a path of convergence. Datorama, too, may also begin to merge (at least the visualization part of that solution) with Salesforce's two enterprise-class analytics engines. The good news is that Salesforce is 100% "all in" with analytics and will surely prove to be a long-term leader when it comes to visualizing data and providing AI powered insights.



## Play #3

# Recognize that Accurate Forecasting Requires Effective Opportunity Pipeline Management (and Will Involve Data from Multiple Systems)

For a majority of media organizations, a proper forecast combines weighted pipeline data with booked and/or actualized revenue numbers. Whereas print revenue may be entirely booked in a defined period and can be forecasted as such, digital revenue is typically ‘flighted’ meaning that the amount on the insertion order is spread out over a period of weeks or months based on anticipated delivery. While pipeline data for print and digital IOs can live in Salesforce (provided that sellers are effectively utilizing the systems), booked and actualized numbers often reside in systems further back in a media architecture (usually OMS and/or billing system). Many media companies also use logic to ‘split’ revenue in both CRM and OMS systems, which requires careful consideration from a systems design and reporting perspective. Pipeline, booked, and actualized data sets need to come together in a central location for the purposes of thorough reporting and analytics. Einstein Analytics and other analytics solutions are best equipped to join this disparate data that first needs to come together in a data warehouse and/or Salesforce’s Analytics Cloud environment. And even when an evolved level of data aggregation occurs, the ‘last mile’ before hitting a CFO’s, CRO’s, or CEO’s desk often involves human insight.

Putting aside for the moment a discussion around your OMS and billing systems’ data, let’s get to the crux of many media organizations’ issue with forecasting: a highly ineffective Opportunity pipeline management process flow and data capture/upkeep in Salesforce. In our experience, the vast majority of media organizations are NOT doing a good job leveraging Salesforce Opportunity and Opportunity Line Items for effective pipeline management. There are a range of processes, change management (people), data, and technical reasons behind deficient Opportunity pipeline management within organizations which could be an entire eBook in and of itself.

In short, you need to optimize Salesforce in a manner which will adequately capture revenue across media types and not overburden ad sales reps with too much data entry and upkeep—it’s a fine balance we’ve helped many clients achieve. But without near real-time Opportunity pipeline data, your forecasting will likely be based solely or largely on historical orders, calculated by the quants in finance or sales operations and devoid of critically important insights from current selling activities. Once you’ve cracked the code on a proper Salesforce Opportunity pipeline design and process, we strongly suggest that you and your executive team take a harder stance around upkeep of opportunities so you can inch closer towards the reality of near real-time media forecasting.

We’ve advised many media organizations that they will likely struggle to conduct proper media forecasting solely within Salesforce’s Sales Cloud. Don’t blame Salesforce for this but rather leverage Salesforce as it was designed—to be a world-class CRM platform that can capture the critically important Opportunity pipeline data set that feeds into a more robust forecasting solution. Unfortunately, we’ve come across many improperly designed Salesforce orgs that are unable to easily and accurately capture multiple media types spanning print, digital, events, services, and others for pipeline management purposes.

On a final note, as programmatic continues to take hold in media, organizations selling digital inventory in a programmatic fashion will need to more effectively surface programmatic platforms data to sellers, account managers, and/or other roles in the company. Although opportunity-based selling that is IO-centric will remain, as programmatic sales volumes increase, CROs will need to rethink the way service agreements are sold and tracked, which usually involves an up front master agreement and monthly tracking of orders through various platforms. Improved integrations with your OMS and surfacing summary-level data to Salesforce for consumption by pre- and post-sale teams will be necessary. V2 has developed Salesforce Platform-based solutions which support the nuances of programmatic and we will continue to evolve such solutions as programmatic continues to play a large role in the evolution of media ad buying.

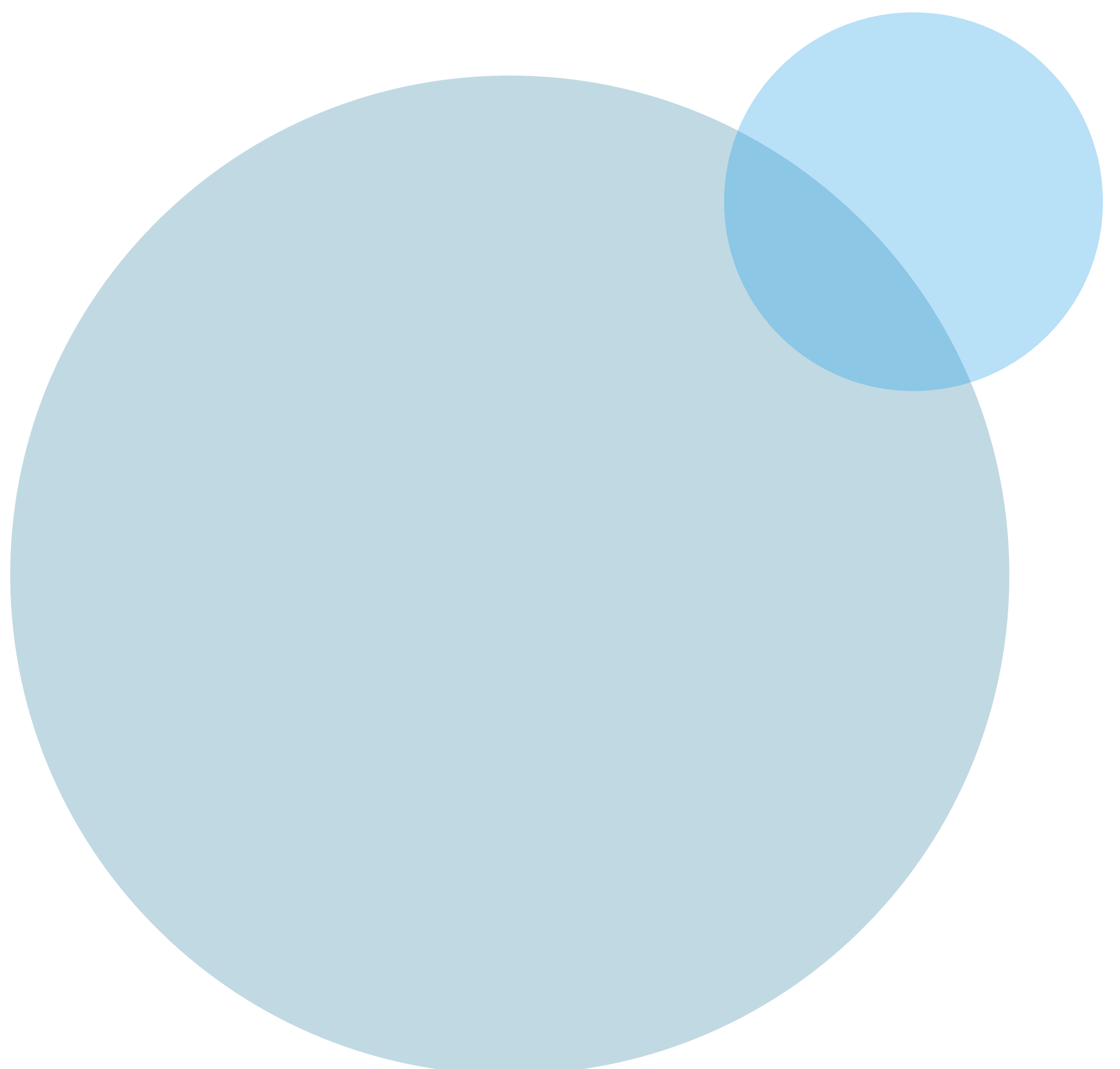


## Play #4

### Require the Tracking of Sellers' Meaningful Activities

For those of us who possess both significant sales and consulting experience, this topic can really inspire us to 'take off the gloves.' We hate to break the news to all those old school ad sales managers/executives out there whose philosophy is 'just hit your numbers and we'll leave you alone'—you are a dying breed. Transparency and accountability is where it's at, so understanding the quantity but more so the quality of your ad sellers weekly activities should not be a favor but rather a requirement to get their paychecks.

You should care whether your sellers are constantly booking meetings with low-level agency folks rather than finding insightful ways to build high-level direct client relationships. Of course the latter is more difficult but isn't that why they make the big bucks? We've designed Salesforce many times to eliminate excuses and easily capture meaningful seller activities (true, meaningful agency and advertiser direct touchpoints, versus every call or email). Stop running traditional activity-based reports, which are flooded with the minutia of emails and blank meeting/event records, and begin setting the bar high. Hold your sales team accountable to meet with the right people, balance out quantity and quality and show transparency by requiring regular submission of meeting notes and next steps.



# Play #5

## Evaluate Your Long-Term OMS/ Billing Strategy

A vast majority of our clients who sell across various media types have historically leveraged separate OMS and billing solutions for print and digital. This split has resulted in different processes, data sets, and personnel and, as a result, has further exacerbated end of month reconciliation and billing procedures. Moreover, with Google's deprecation of DSM and the continued shift away from print into digital, many organizations are evaluating new OMS solutions. To say that each media client's order management and billing requirements are nuanced is an understatement.

We've helped clients traverse this complex and critically important vendor selection process by modeling the very detailed flows that each vendor must demonstrate to the best of its ability. Most vendors are sprinting to fill in gaps in their solutions. Stronger players in print are moving into digital and vice versa. Some vendors have built their own proprietary architecture and integrate with Salesforce's Sales Cloud natively while others are built on the Salesforce platform. Most solutions are capable of capturing digital orders and integrating with DFP, and they also offer print production integration. Revenue splits and related advanced features typically vary between solutions, but most don't actually provide robust invoicing functionality, electing instead to integrate with legacy billing systems.

Our advice? Aim to leverage fewer, and ideally, a single OMS if possible as it will simplify your long-term Cloud architecture. In addition, ensure you take a very careful and methodical approach to your OMS vendor selection process and invest the time up front to understand how an OMS will function in conjunction with your CRM and billing system. Oftentimes, ad sales organizations unjustifiably place too much emphasis on the OMS UI and fail to dig in to understand the underlying architecture and how the piping will work between systems. Lack of rigor in making this critical decision could be very costly down the road.

When it comes to developing a long- and short-list of potential OMS solutions, there are many options. Most of the top-performing OMS vendors who have already proven they can meet the complex needs of ad sales organizations are not built natively on the Salesforce platform. These established players have, however, increasingly invested energy to integrate with Salesforce—but in our opinion have done so with moderate success. Salesforce, on the other hand, purchased Vlocity early in 2020 for its industry-focused order management capabilities and Salesforce Platform roots. And as with most other Salesforce solution acquisitions, the company will surely invest significant resources to bring a media ad sales-specific solution to the marketplace. It may, however, take Salesforce a few years to catch up with the well-established media OMS solutions who have already demonstrated an ability to execute across an impressive volume of deployments. Fast forward, and we believe there will be two camps of thought around OMS: those who believe a Salesforce-based, single platform solution for CRM and OMS is the “holy grail” media Cloud architecture and others, who for various reasons including commercial considerations and a best-of-breed mentality, will choose to run CRM and OMS separately. In our opinion, both camps will be justified in their chosen path and it's likely that consolidation among the non-Salesforce solutions will occur, leaving a few top players who have the financial clout to effectively compete with Salesforce along the R&D and sales and marketing fronts.



## Play #6

# Consider Reworking Key Integrations with Middleware

Media Cloud architectures are notoriously nuanced and often strung together with complex, poorly documented integrations. In normal times, integration is key to driving synergies across systems and departments, all while improving agility and reducing the costs typically incurred when facing a sea of disparate, redundant systems and hardwired integrations. Moreover, in the post-pandemic market, organizations should seek to double-down on collaboration, innovation, automation, and reusability—a solid middleware strategy enables Media companies to operate in such a manner and be better positioned for survival.

Importantly, the knowledge and capabilities required to maintain, troubleshoot, and augment these integrations typically rests on one or two team members—a very risky state of business if those limited resources operate with little checks and balances or exit your organization unexpectedly. Years ago, V2 worked with a major publisher who, in the throes of a massive Salesforce optimization project, had to call a resource in India out of retirement to advise on a legacy AS400 integration that nobody else in the company could support adequately or reverse-engineer—true story.

To centralize ETL processes and streamline data flows, media CIOs and CTOs should consider replacing legacy and/or code-based integrations with a middleware/ESB solution. Whether Salesforce to OMS, OMS to billing, or other source/target connections, these middlewares can provide a flexible and powerful solution. We acknowledge there is an additional cost associated with licensing middleware, however, more forward-thinking and data-driven media organizations will compare that additional cost against the continued risk that one-off integrations with legacy systems pose. Middleware can provide a reduced-risk, flexible long-term path towards a tightly integrated media Cloud architecture. When evaluating choices of middleware, you should definitely consider Salesforce's MuleSoft solution, an enterprise-class ESB solution it acquired in mid-2018. While smaller, more cost conscious media companies may see MuleSoft as too robust and costly for their needs, larger organizations would be wise to consider this powerful Salesforce solution.

## Play #7

# Continually Optimize Process Flows and Reduce Ambiguity in Role Definitions

We've found workshops spanning roles, titles, departments, and regions to be an extremely effective tactic to rapidly assess both process flow effectiveness and clarity around current role definitions and responsibilities. When we discuss the various activities spanning the prospect-to-cash flow, or even a portion of it, we almost inevitably surface ambiguity around "who should be doing what." For example, should sellers be responsible for entering and updating critical Opportunity data or should assistants, planners, account managers, or other supporting roles be responsible? Another common debate: should sellers book orders or hand off to another team? Responsibilities left in limbo with no clear owner can be detrimental to organizations, especially when teams erroneously believe the other 'has it covered.' During normal times, but especially in periods of economic uncertainty, defining roles and responsibilities is important to understanding gaps, bottlenecks, and inefficiencies, as well as to drive effective cross-team collaboration.

It's fascinating to us that these and other people-related role and responsibility questions are often left unresolved for months if not years, even though companies have gone through large-scale, business transformation initiatives. In some cases, unintentionally vague role and responsibility definitions have cost media organizations large amounts of money. What is the cost of finding out too late that an important RFP fell through the cracks? What's the impact of a campaign that was already sold somehow but was never entered into your delivery system, forcing you to forgo that budget and/or deal with the wrath of an angry advertiser or agency when the campaign never launches?

It's natural for teams to be misaligned, especially in ad sales where so many tangential roles are involved throughout the prospect-to-cash flow, but it's your job to not let those misalignments linger. Forward-thinking media COOs and other operationally-oriented executives should address change management challenges head on and understand well that process flow refinement and role clarification will require ongoing attention so long as your organization is adapting to change.

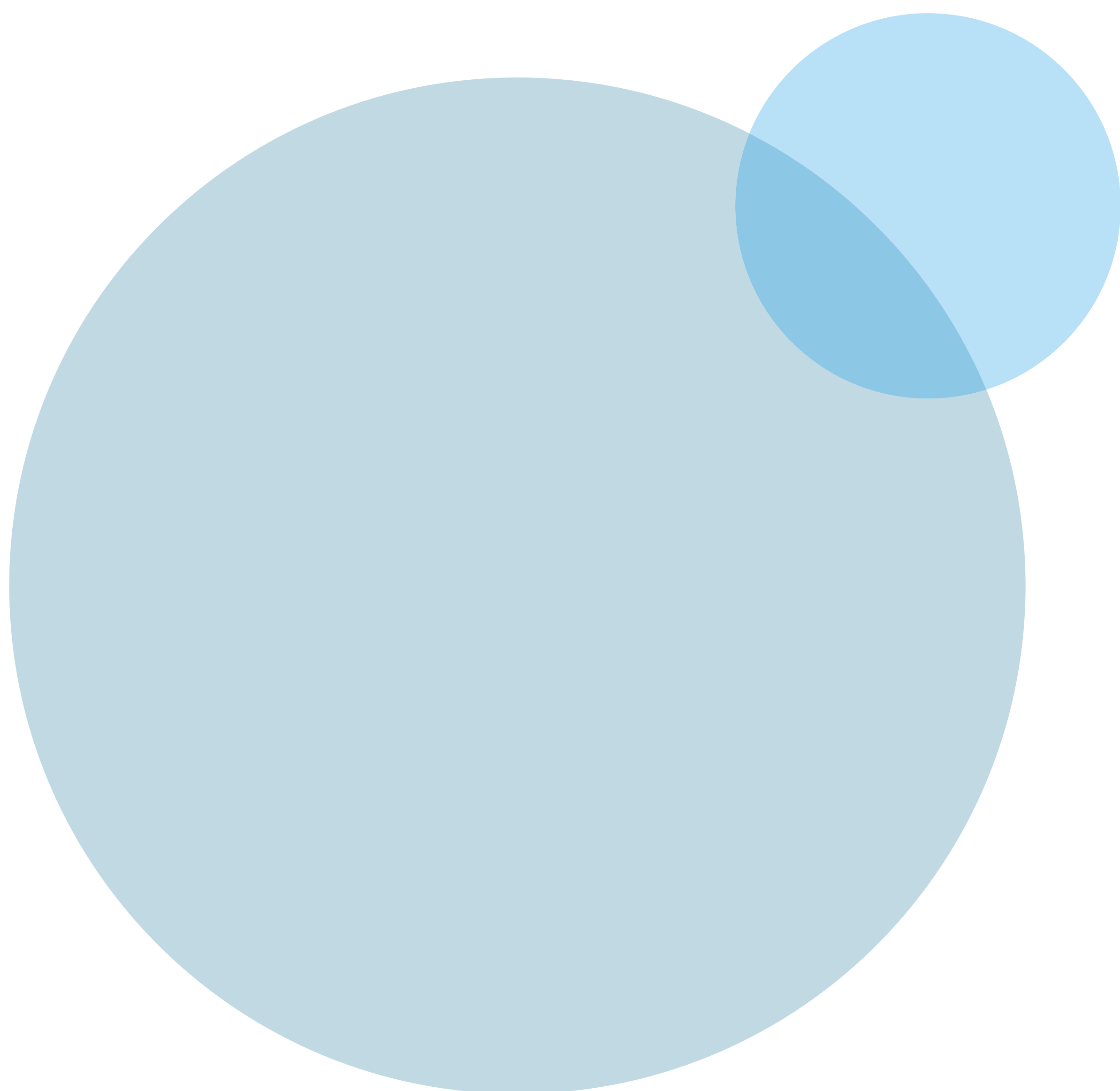


## Play #8

### Focus Intensely on End User Sentiment, Effective Onboarding, and Training & Adoption

You likely have a talented Salesforce team. They likely have put in long hours and show tremendous dedication to improving your Salesforce. But they are human and nobody likes to hear firsthand the negative feedback about a system they have toiled over for years. We can't tell you how many times we've heard a more 'rosy' picture from an operations team about end user sentiment, only to 'get an earful' during the early minutes of our workshops. It's critical you gain an objective and unfiltered opinion from your user base about the state of Salesforce within your organization. The first step in healing your low end user sentiment is discussing the issue, without ego, and focusing on the common good of the organization.

While poor end user reviews of your Salesforce are likely rooted in a range of configuration, data, UX, and other issues, they could also be the result of ineffective onboarding and a lack of ongoing training. Salesforce support teams are often understaffed and lack the bandwidth and/or capabilities to provide effective and ongoing multi-channel training. Most of us in the old days didn't learn the Microsoft Office suite in a 2-hour training, so why do we think that end users should magically become Salesforce gurus without proper training and adoption activities? Yes, Salesforce Lightning has an appealing UI, however, CRM is about forming habits—it's your team's job to help the organization thrive.





## The Path Ahead

Running a highly successful advertising sales organization has its challenges. Chief revenue officers, by nature, typically are not inclined to invest in activities that are perceived to slow down or hinder their sellers' performance. CROs and other tenured sales executives will say, and we would not disagree, that revenue is the lifeblood of a company. Oftentimes a CRO's success, however, has not historically been attributed to his/her adoption of systems and/or established processes. Instead, they have relied upon leveraging longstanding relationships with advertisers and agencies, working in a crafty manner to get IOs in the door and ensuring their top sellers are happy and remain within the organization—until it doesn't work.

It is our opinion that media operations executives will play a critical role in the long-term health of ad sales organizations. Combining a business transformation framework spanning people, process, platforms, and data with a commitment to leveraging a best-in-class CRM system such as Salesforce is a recipe for success. Careful analysis of the prospect-to-cash flow, breaking it down into sub-flows, will be necessary to realize change. Multiple systems spanning marketing automation, CRM, OMS, ad serving, print production, BI, and others will need to be tied together with a coherent Cloud architecture strategy. Data cleansing will be imminent as will new data governance policies. Refinement of roles and responsibilities, especially as it pertains to data entry and upkeep, will likely be necessary.

It's a tall task, but there is light at the end of the tunnel. We've seen clients embark on this journey and realize excellent results within a reasonable time frame. But transformation does not happen overnight; it undoubtedly takes time, a commitment of resources and perhaps, most importantly, a willingness to be resolute and confident when your organization is resistant to change. Others have done it, so can you.





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