



**A BUYER'S GUIDE TO
BUSINESS
MANAGEMENT
SOFTWARE
FOR AGENCIES AND
MARKETING SERVICES FIRMS**



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New Demands, New Pressures

Today's consumers are increasingly attention-challenged and demand personalized content and marketing custom-tailored to their needs—delivered when, where and how they want it. These dynamics place agencies and marketing services companies under tremendous pressure to market products and services in ways that grab the consumer's attention in an easily digestible, seamless and non-intrusive manner.

Agencies and marketing services companies also need to adapt to changing consumer perceptions of individuals and media content regarded as credible and trustworthy. For instance, a recent University of Southern California survey revealed that U.S. adults aged 18-59 find the top 10 YouTube celebrities, like

Jenna Marbles and PewDiePie, up to five times more influential and believable than traditional celebrities.¹

Meanwhile client-side brand marketers and procurement teams are asking ever-tougher questions of their agencies such as, "How much ROI am I generating from each dollar of advertising spent on print, TV vs. mobile or online search, display and videos?" and "What have you done for me lately that I cannot do better, more cost-effectively, using an in-house creative or media team?"

According to Ad Age's 2015 Leading National Advertisers (LNA) survey, the top 200 national advertisers (P&G, AT&T, GM, Comcast, Verizon, Ford, American Express, Fiat Chrysler, L'Oreal, Walt Disney, etc.) are doubling down on digital over print and TV, using data to inform media spend and cutting back on non-media agency fees.

Facing stiff competition from brands looking to achieve greater efficiency and control, agencies need to deliver breakthrough creativity—and the performance and cost transparency to back it up.

With the industry rapidly transitioning from traditional manual to automated ad/media buying/management, and from mass marketing to personalization based on big data, these pressures are reshaping the very organizational structures of agencies and marketing services firms. The lines are blurring between technology firms (global systems integrators like Deloitte Digital, Accenture Interactive and advertising tech firms like Google and Yahoo) and digital and full-services agencies like Razorfish and Publicis/Sapient.

To provide brands with efficiency and transparency, agencies must first and foremost achieve internal transparency across the agency lifecycle and workflow.

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Chapter 1

MAKING THE RIGHT DECISIONS

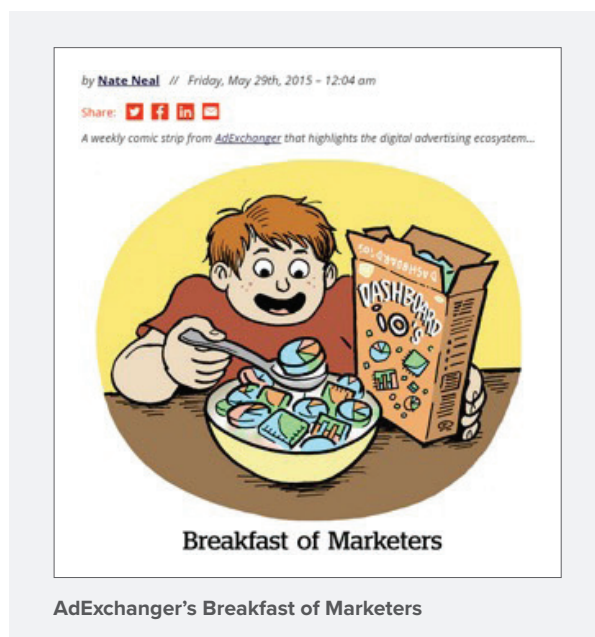
To make smarter decisions faster and increase profits and transparency, agencies must have integrated real-time visibility across the agency or even the holding company level. For example, agencies need deep insights into past projects and profitability with clients to structure proposals for new work that wins the business yet hits agency margin targets.

Disparate and incompatible applications that are typical at agencies and media services firms make it difficult to access accurate, timely data to make informed business decisions. Time and money are lost as personnel manually crunch data in spreadsheets and piece together interdependent processes. Delays, guesswork and lost opportunities are not uncommon despite the industry's growing appetite for data and dashboard metrics, as depicted in AdExchanger's Breakfast of Marketers comic strip of May 29, 2015.

In a fragmented environment, how can agencies and marketing services companies get the data they need to make the decisions that could mean the difference between profit and loss, winning and losing,

survival or extinction? How are they going to become nimble enough to adapt quickly to market realities?

A growing number of firms are rethinking their legacy business systems. Leaders have already transitioned to unified, industry-specific platforms that are driving new levels of efficiency and transparency. Selecting the optimal solution for your business requires an evaluation of your pain points, strategic objectives and the capabilities of a business management system.



Chapter 2

HOW TO EVALUATE BUSINESS MANAGEMENT SYSTEMS

Focus on Outcomes, Not Features

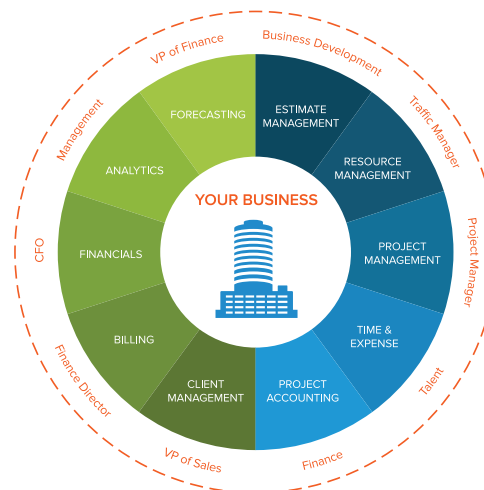
Rather than giving you an exhaustive list of features against which you should compare the systems you're considering, this buyer's guide focuses on outcomes—in other words, what you're trying to achieve.

6 Outcomes for today's Agencies and Marketing Services Companies

- 1 Gain visibility into your business to make smarter, timelier decisions.
- 2 Get up and running quickly, and speed time to value.
- 3 Optimize campaign/project management and resourcing.
- 4 Improve resource and demand/inventory forecasting.
- 5 Scale and evolve with growth.
- 6 Ensure a successful deployment with the right partner.

Outcome #1: Gain Visibility into Your Business to Make Smarter, Timelier Decisions

Look for an integrated, configurable business platform that unifies your business processes from end-to-end, including financials, sales, services and analytics. It should feature role-based dashboards through which you can report in real-time on workflow-specific KPIs, giving you complete visibility into your full business lifecycle.



With a 360-degree view of your company and crucial business metrics, you'll be able to:

- Evaluate business performance and profitability at the project/campaign, account, agency and holding company level.



“We were flying blind, and now with NetSuite we have increased accountability across all departments and can make sure everyone is on the same page. NetSuite has allowed us to grow and evolve and stay on top of our industry. We wouldn’t be where we are today without the comfort and features NetSuite has provided over the last six years”

Adtegrity

- Monitor the full lifecycle of campaign/project performance, from bidding/proposal to invoicing.
- Optimize campaign/project management and resourcing.
- Dynamically make informed business decisions in real-time to adapt to changing client needs and demands.
- Determine how to invest in each account, geography or advertising category to maximize revenue.
- Better manage time and expenses.
- Standardize forecasts.

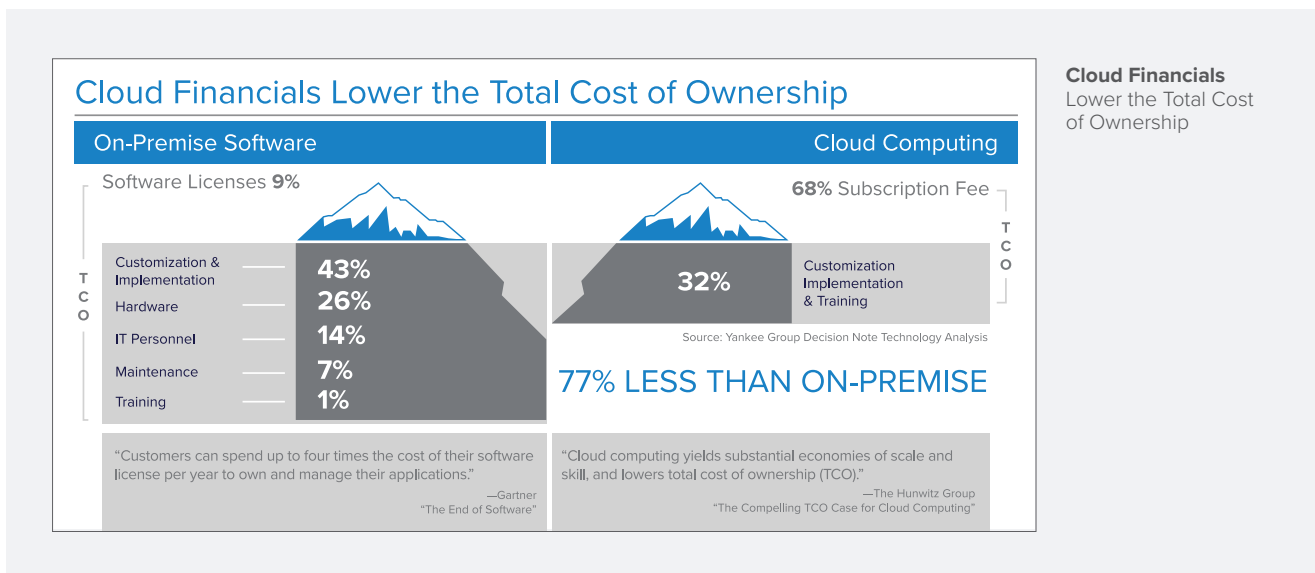
Outcome #2: Get Up and Running Quickly, and Speed Time to Value

Given the accelerated pace of the advertising and marketing services industry, you don't have the luxury of unlimited time and money

to deploy a new business management system. This is why many firms are turning to cloud-based or Software-as-a-Service (SaaS) solutions. Compared to on-premise systems, SaaS is more economical, faster and requires less human capital.

To ensure a rapid deployment, look for a vendor that offers:

- A cloud-based, configurable solution that reduces or eliminates the need for costly custom-coded scripts.
- Training curriculum customized for your organization.
- A global services team able to support international deployments.
- Guaranteed uptime in the cloud backed by a Service-Level Commitment (SLC).





“Adopting NetSuite’s Cloud PSA Solution for managing resources and projects across our global offices can give us real-time visibility into our business. This visibility can give us the insights we need to continue to deliver higher quality project collateral, faster.”

Outcome #3: Optimize Campaign/Project Management and Resourcing

Client-side brand managers and procurement teams can be very demanding, expecting agencies and marketing services companies to execute creative and strategic visions more quickly and efficiently than the brand can accomplish in-house. To reach targets at the account, agency, revenue and profit levels, agency executives and account directors must optimize campaign and project resourcing and trafficking in real-time.

A business management system should:

- Provide real-time dashboards and reports of account/project/campaign revenue and profits, project/campaign delivery vs. agreed-upon targets and milestones.
- Display in real-time the skills, utilization, cost and availability of creative and/or media services staff and freelancers.
- Enable easy drag-and-drop management to allow campaign/project resourcing and trafficking in real-time.
- Integrate with other solutions you use to drive your business, such as DoubleClick, OpenAds and other ad and verification servers.
- Empower individual creative and media services staff and freelancers to capture time and expenses.

Outcome #4: Improve Resource, Demand and Inventory Forecasting

To competitively structure bids and proposals, profitably staff projects, ensure on-time, on-target execution, and remain relevant and competitive long term, agency finance executives must be able to reliably forecast demand and capacity of agency staff/freelancers and advertising inventory.

Look for a solution with sales and forecasting capabilities that allows you to:

- Manage the entire estimate-to-sale workflow.
- Optimize RFP budgeting.
- Create role-based dashboards and UIs (for executives vs. finance vs. project management vs. sales, etc.).
- Gain visibility into historical account/agency/category financials as well as predictive insights.

Outcome #5: Scale and Evolve with Growth

Agencies and marketing services companies need to grow and evolve with macro industry trends, stay ahead of the curve and position themselves for long-term growth on the cutting edge of technology and business model innovation.

A key challenge is to adapt to large-scale shifts in ad spend and viewer behavior. For instance, the research consultancy The Diffusion Group forecasts a sharp decline in



“With continued rapid headcount and top-line growth, we needed a robust system with built-in controls so we could demonstrate to our bankers and auditors that we have a sound financial system in place.”

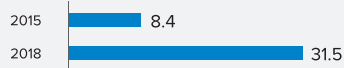
Legacy TV ad revenue forecast

Billions U.S. \$ per year



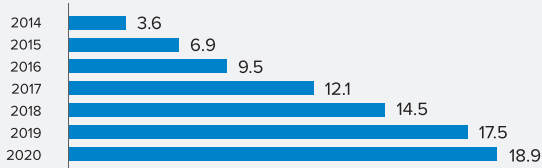
OTT TV ad revenue forecast

Billions U.S. \$ per year



Average Weekly OTT TV viewing

(hours/week among U.S. consumers)



Data: The Diffusion Group

legacy TV ad spend, with exponential growth in Over-The-Top (OTT) ad spend through providers such as YouTube, Hulu, Netflix, Chromecast, Apple TV, Comcast and Time Warner:²

- Legacy TV ad spend is forecast to decrease 21% from \$59.9 billion to \$47.5 billion between 2015 and 2018.
- OTT ad spend is expected to grow 275% from \$8.4 billion to \$31.5 billion over the next three years.
- Average weekly OTT TV viewing is expected to grow 174% among U.S. consumers, from 6.9 hours a week to 18.9 hours in 2020.

Your business management system should be able to scale to handle rapid industry, business and geographical changes and growth, no matter how advertisers buy and manage media (manually or programmatically) or how clients source and manage creative projects and content. Look for a solution that:

- Enables operational efficiencies to handle growth, not hinder it.
- Is trusted by existing agencies and marketing firms, both large global firms and small boutiques.
- Has a track record of supporting agencies and marketing services firms through periods of hyper-growth.
- Has data centers designed to accommodate surges and spikes in usage, and to scale to address increased volume and transactions.
- Streamlines complex billing.
- Manages revenue recognition.

Outcome #6: Ensure a Successful Deployment with the Right Partner

The success or failure of any software deployment, whether it's an onsite system or a SaaS application in the cloud, often rests with the vendor partner you choose.

Look for the following:

- **Vertical focus.** The vendor should have a vertical team focusing on agencies and marketing services.
- **Sustainability.** The company should be built upon a solid business model that ensures that it will be around for the foreseeable future.
- **Business continuity.** The vendor must have systems and infrastructure in place, including disaster recover capabilities, that ensure your business will have access to its data even through multiple types of disruption.
- **Audit control.** The vendor enables you to keep business metrics easily accessible for review and analysis for auditors and potential investors, reducing your investment in internal audit systems and increasing the speed at which your auditors can access that information.



"There's huge value for our digital marketing business in how NetSuite delivers one view of the customer and one lead-to-cash order flow straight through to financials In one integrated system."

Netsertive

EVALUATION WORKSHEET

This worksheet provides an evaluation framework that summarizes the key business outcomes discussed in this paper, as well as the underlying functionality that a business management system must provide to support these outcomes.

Outcome	Functional Criteria	Rating (0-5)
Gain visibility into your business to make better, timelier decisions.	Evaluate business performance and profitability at the project/campaign, account, agency and holding company level.	
	Monitor the full lifecycle of campaign/project performance, from bidding/proposal to invoicing.	
	Optimize campaign/project management and resourcing.	
	Dynamically make informed business decisions in real-time to adapt to changing client needs and demands.	
	Determine how to invest in each account, geography or advertising category to maximize revenue.	
	Manage time and expenses.	
	Standardize forecasts.	
Get up and running quickly, and speed time-to-value.	Cloud-based, configurable solution that reduces or eliminates the need for costly custom-coded scripts.	
	Training curriculum offered for your organization.	
	Global services team able to support international deployments.	
	Offers guaranteed uptime backed by a Service-Level Commitment (SLC).	
Optimize campaign/project management and resourcing.	Provide real-time dashboards and reports of account/project/campaign revenue and profits, project/campaign delivery vs. agreed-upon targets and milestones.	
	Display in real-time the skills, utilization, cost and availability of creative and media services staff and freelancers.	
	Enable easy drag-and-drop management to allow campaign/project resourcing and trafficking in real-time.	
	Integrate with other solutions you use to drive your business, such as DoubleClick, OpenAds and other ad and verification servers.	
	Empower individual creative and media services staff and freelancers to capture time and expenses.	

Outcome	Functional Criteria	Rating (0-5)
Improve resource, demand and inventory forecasting.	Manage the entire estimate-to-sale workflow.	
	Optimize RFP budgeting.	
	Create role-based dashboards and UIs (for executives vs. finance vs. project management vs. sales, etc.).	
	Gain visibility into historical account/agency/category financials as well as forecast/predictive insights.	
	Enable unified and recurring billing.	
	Allow you to expand your online business by selling multiple brands, languages and currencies on a single ecommerce platform.	
Scale and evolve with growth.	Enables operational efficiencies that handle growth, not hinder it.	
	Is trusted by existing agencies and marketing firms, both large global firms and small boutiques.	
	Has a track record of supporting agencies and marketing services firms through periods of hyper-growth.	
	Has data centers designed to accommodate surges and spikes in usage, and to scale to address increased volume and transactions.	
	Streamlines complex billing.	
	Manages revenue recognition.	
The right partner to ensure a successful deployment.	Has a vertical focus, including a team focused on agencies and marketing services.	
	Company is sustainable, i.e., built on a solid business model.	
	Ensures business continuity with systems and infrastructure that allow access to data at all times as well as certified disaster recovery processes that map to your organization.	
	Understands and enables audit control with easily accessible business metrics.	



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