OMS REQUIREMENTS SCORECARD

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intro

Choosing an OMS is no small undertaking. It's a big job, with implications for nearly every branch of your business. While each business is different, this scorecard was developed to help you consider important areas of your business. From there you can create a checklist which reflects the unique requirements of each stakeholder group. The requirements you define can then be turned into an RFP for the vendors in your initial consideration set.

If you think this scorecard will be 15 things you can just check off your list and you will have your requirements defined … sorry, no, it's not quite that easy. An OMS is an enterprise system that has far-reaching impacts in your business. Nailing your requirements is going to take some roll-up-your-sleeves work within your team.

If you are running from a system that isn't working for your organization, don't look for an OMS that just handles the trouble tasks better than your current system. Instead, take a step back and consider all your needs for the future. Select an OMS that can grow with your organization over the upcoming years. An OMS is not a small investment. It's worth spending the time upfront to select the right one.

> **"If I had asked people what they wanted, they would have said faster horses."**

So it turns out Henry Ford didn't actually say this, but I think the message still works. Don't define the details of the system in terms of functionality. Define your business requirements, then allow the vendors to share their own unique ways to meet your requirements. Keep an open mind as the answers could look quite different than you expected.

scorecard

Get your Ducks in Order

You are going to convince your organization you need an OMS, either as a new piece of tech or as a replacement to what you have today. To do that, you and your organization need to agree on what the objectives are so that you can measure vendors against these same objectives.

☐ **Improve Efficiency**	● Afford you the efficiency of one or more FTEs? ● Allow you to complete proposals, orders, modifications, reporting, reconciliation, billing faster?
☐ **Provide Scale**	● Support growth ● Support product expansion
☐ **Improve Accuracy**	● Minimize steps ● Error checking ● Support of product/business rules ● Does it automate current manual QA processes?
☐ **Improve Revenue/ROI Capacity**	● Add products you don't offer today ● Optimize campaign performance
☐ **Product Support**	● The lines of business that need support: digital, broadcast, print, audio, CTV, podcasts, events, etc

nuts and bolts

Next, consider the more detailed functionality of the system. We've provided some key considerations, divided into the various OMS aspects. You can use the different sections to build out the specific requirements for your business.

Assess 4 key areas as you undertake this process

1. How your business is taking advantage of the current OMS (if you have one);
2. How your business would like to take advantage of an OMS;
3. Where your organization is going in the future; and
4. Potential expense savings and revenue generation.

While you are building requirements, start to think about priorities. What are organizational must-haves and what are just nice-to-haves. That will help during the decision making process when you hear back from the vendors in your consideration set.

Developing requirements is a bit of a balancing act. You'll want enough detail to ensure the system(s) you're evaluating can meet your business requirements. But don't make your requirement so detailed that you can't take advantage of the unique features of each system being assessed. Keep that in mind to keep your requirements from being unwieldy.

your stats

You and any vendor you assess will want to know the "size' of your business in terms of an OMS. Pulling these stats together upfront will put them at your fingertips when you need them.

	■ Active users for an OMS
	■ Read-only users for an OMS
	■ Monthly proposals
	■ Monthly IOs
	■ Monthly line items
	■ Average creative per line item
	■ Revenue breakdown: direct, PG, PMP, OA

proposal, order entry, validation, approval

General/Direct

- [ ] Efficiency driven by UI design (e.g. product catalog, targeting, etc.)
- [ ] Ability to help with product selection decision making
- [ ] Bulk upload and export
- [ ] Naming flexibility and reconciliation: buyer naming, sales friendly naming, fulfillment naming
- [ ] Choice of billable numbers: IO, line level
- [ ] Application of data parameters, including blocking/approved lists
- [ ] Validation and error checking
- [ ] Approval workflow process
- [ ] Cancellation handling: new, running, ended line items

Programmatic

- [ ] Programmatic proposal support
- [ ] SSP integration

Proposals

- [ ] Proposal template support
- [ ] Proposal submission external workflow

IO

- [ ] IO signature workflow support

order modifications, validation, approval

Don't forget about modifications. While similar to order entry, there are likely some different requirements.

- [ ] Bulk upload modification
- [ ] Modification validation and error checking
- [ ] Modification approval process
- [ ] Modification version history

inventory checking, forecasts, reservations, booking

User Facing

- ☐ ▪ View of contending inventory
- ☐ ▪ Overlapping inventory handling
- ☐ ▪ Reservation functionality
- ☐ ▪ Reservation visibility (vs. sold)
- ☐ ▪ Sponsorship calendar
- ☐ ▪ Viewabilty forecast support
- ☐ ▪ Frequency capping forecast support
- ☐ ▪ Export avails & template support
- ☐ ▪ Override and approval process

Admin

- ☐ ▪ Forecast integration supported
- ☐ ▪ Forecast adjustments: overall, per order, per line
- ☐ ▪ Forecast upload and export support
- ☐ ▪ Forecast accuracy measurement

self-serve

As our industry gets more complicated we need to simplify our current processes. Self-serve processes give end users the ability to do things without a middle-person, thus saving time and allowing your team to focus on higher value activities.

- ☐ ▪ Order placing for advertisers
- ☐ ▪ Order placing for sellers, working with a buyer
- ☐ ▪ Order/invoice payment
- ☐ ▪ Creative submission
- ☐ ▪ Campaign status
- ☐ ▪ Screenshot access
- ☐ ▪ Campaign reporting

products, taxonomy

If you have anything more than a very basic product offering, spend some extra time in documenting your products and how you sell them. Product catalog functionality can work quite differently, this is an area you will likely spend more than a little time talking about vendor functionality.

- ☐ ■ Depth of taxonomy
- ☐ ■ Cost model support
- ☐ ■ Packaging abilities
- ☐ ■ Catalog filtering capabilities
- ☐ ■ Data support: 1st, 2nd, 3rd party
- ☐ ■ Product rules definition and controls
- ☐ ■ Product exception handling
- ☐ ■ Product updates impact to existing line items
- ☐ ■ Product Specific Field/Attribute filtering

billing, reconciliation

What you need from an OMS can vary considerably based on what system(s) you have in place to support the billing process.

- ☐ ■ Billing schedules supported
- ☐ ■ Billing terms supported
- ☐ ■ Billing methods supported
- ☐ ■ Package and line item billing support
- ☐ ■ Support for various delivery impacts, e.g. viewability
- ☐ ■ Integration of 3rd party reporting systems
- ☐ ■ Reconciliation of 3rd party reporting systems
- ☐ ■ Comparison of delivery across primary and 3rd party systems
- ☐ ■ Adjustment flexibility
- ☐ ■ Track recognized and deferred revenue

reporting

How does your organization do reporting today? Is the plan different for tomorrow? Your requirements will vary considerably if you plan to use your OMS as your primary reporting tool vs. exporting some or all of your data to a data visualization tool to be managed outside the OMS. Make sure you bring the right people into this conversation to determine if future requirements are different from what you have in place today.

- Out-of-the-box capabilities
- Customization available
- Data fields supported
- Pacing including 3rd-party system reporting
- Export capabilities
- Schedule reporting capability

Network Wide

- Proposals
- IOs/Campaigns
- Forecast inventory
- Booked inventory
- Performance
- Billing, reconciliation
- Products
- Sales
- Revenue

Campaign/IO Level

- Delivery/Pacing
- Campaign reports

admin, configuration

Some of these requirements will be captured as you work through other aspects of the system requirements. It matters less about where they are captured and more that they are captured.

- Efficiency driven by UI design

- Workflow structure

- Alerts

- Approvals

- Currencies supported

- Time zones supported

- Error handling and monitoring

- Role permission customization

- Product creation and management

- Targeting creation and maintenance

- Rate card support

- Overrides: product, rates

- Multi-site support and customization

- Custom field support: creation, mapping, reporting

integrations

Integrations to the other systems you use can add a lot of value. Determine which systems would benefit from integration and how robust the integration capabilities need to be for your business.

Potential Integrations

- Ad server(s)
- CRM
- Financial system
- Reporting/data visualization
- Forecasting system
- Self-serve
- Programmatic: SSP, PG support
- DMP/CDP
- Electronic signature
- Visitor relationship management/ad blocking/consent
- Non-digital fulfillment system(s)

Data Points Integrated for Each Integration

- Direction and cadence of data updates
- Line item to flight mapping support, where applicable
- System of record for what data
- Existing ETL
- Failed mapping support/alerts

data/mobile access

If you want to be able to build integrations or access data, this section will be very important to you.

API(s) Support

- Data points not available via the API
- Cost for API access

Mobile Access

- App or mobile web

dedicated test instance for proof of concept during evaluation

Nothing is going to answer your questions about how the system will work like using the system before you purchase. This means an investment of time for both you and the vendor you are considering. You will need to develop your organization's use cases and pull together sample data. The requirements work you will do will serve you well in this process to assess functionality.

The vendor will need to understand your business to help you configure the system to best solve your use cases. This is not a small effort for either group, but when you do select your vendor of choice, you will have a detailed understanding about both how to configure your live environment and what to expect from the relationship

- Test instance available

- Technical depth of proof of concept phase

- Collaboration and support through the proof of concept phase

company/relationship

general

Your organization may have standards they follow for this type of assessment, if so, great. Either way, you should do some level of assessment of the organization. You want to ensure they are able to support your organization long term; an OMS is a big purchase that should be used by your organization for multiple years.

- Company location

- Years in business

- How long this product has been in market

- Current clients

- Average client and employee retention

- References

- Relationship within the industry

- Regulatory Compliance: SOX, GDPR, etc.

- Current or past litigation against publishers

support

You. Need. Good. Support. OMS are complicated systems that span multiple teams. Support can make or break your success with the system. You need support that aligns to your organization's business needs and expectations.

As to migration, the level of support you need and who provides that support can vary. The OMS vendor, outside consulting firms, internal resources, or a combination of resources can make up your project team. It is important to be realistic about your available internal resources and build a project plan and resource plan that are realistic and account for challenges you will no doubt come across along the way.

Ongoing Support

- Named account manager
- Standing meetings with account management
- Relationship of account management and support
- Support submission process
- Support tiers and SLA of each
- Handling of feature requests
- Self education options

Uptime

- Cadence, schedule, timing, and duration of planned downtime
- Average system uptime for last 12 months
- Disaster recovery infrastructure and protocol

Compliance

- Annual SOC 1 audit
- Annual SOC 2 audit

Migration Support

- Configuration to meet your use cases
- Data transformation and migration

enhancements

You aren't buying an OMS just for what you need today, but also for what you need in the future. The industry will change, client expectations will change, and internal needs will change. It is important that you partner with someone who will grow with you and provide system updates that align with your business.

Releases

- [ ] ◾ Cadence
- [ ] ◾ Notice
- [ ] ◾ Process
- [ ] ◾ Test environment availability
- [ ] ◾ Proactive communication regarding features that could benefit my business
- [ ] ◾ Beta process

Customization

- [ ] ◾ Offered
- [ ] ◾ Percent of customers leveraging customization
- [ ] ◾ Customizations for one, rolled into production for all
- [ ] ◾ Cost strategy and model

Roadmap

- [ ] ◾ Current roadmap
- [ ] ◾ Weight of clients in roadmap development
- [ ] ◾ Ongoing insight into roadmap plans
- [ ] ◾ Vision for the future, direction of the business

final thoughts

As you go through the requirements phase, do not get so hung up in the nuts and bolts that you lose sight of the big picture. Efficiencies bring down product and people costs, while integrations and capabilities can drive up opportunities, revenue, and margin. Make sure you are maximizing each to the overall benefit of your organization.

To that end, I strongly recommend your organization stay open to process changes or enhancements as you implement a new OMS. A different process or shifting of responsibilities could seem like a roadblock at first blush, but if it provides for new opportunities or efficiencies, it's worth true consideration.

Lastly, no relationship is perfect. No OMS will likely be a perfect fit. Focus on the highest priorities and consider compromises for the less critical areas. To allow you to prioritize, you have to know what is the most important. To do that, you have to do the work. I hope this scorecard helps you in your process.

If you are just getting started, consider checking out the **OMS Evaluation Guide.** Dan Calamai and I wrote it to give some guidance around the whole OMS evaluation process. Then come back to this OMS Requirements Scorecard to dig in