

The CRM Buyer's Guide

**Maximize ROI with technology that
meets today's challenges**

Introduction

Media businesses had a rough year in 2023. As we noted in our annual [Boostr Media Ad Sales Trend report](#), advertiser churn was alarmingly high, at 50% or greater for many publishers in the first half of the year. The secret to keeping customers – new and existing alike – happy? Flawless customer experience, from the first intro call to the post-campaign report.

But keeping track of sales opportunities and customer interactions across complex hierarchical relationships (think: product, brand, media agency, holding company) is impossible with spreadsheets alone, or with CRM solutions that weren't built to support the nuances of a modern media organization.

"It becomes overwhelming," explains Rob Lewis, Vice President of Sales at Boost. "You are receiving more RFPs, sending out more proposals and IOs. Publishers have to start thinking about how they can connect their proposals with inventory and the ad server, and how to do it all seamlessly."

The right CRM can solve these problems. Having the right CRM solution can boost conversions by 300% and increase team productivity by 50%. It can also help Sales meet quotas and empower Rev Ops with greater access to customer data and insights, which can inform packaging and future pricing strategies.

Selecting the right CRM for your business can be daunting. Here at Boostr, we've identified three core concepts to consider when evaluating CRM solutions that can deliver efficiency and help you meet future challenges, including:

- Ease of integration
- Advanced analytics
- Sales support



The Challenges Facing Today's Media Sales Teams

Media sales organizations have a big job. They must coordinate across Sales, Rev Ops, Ad Ops, Finance, and more, breaking down communication and data silos to sell more efficiently. In 2024, the publishing landscape will face growing obstacles from media fragmentation, data proliferation, and the need to adapt to new and quickly evolving technologies. Each issue has the potential to exacerbate a media sales organization's challenges, including lack of cohesive data, accelerating sales cycles, and trouble analyzing performance.

CHALLENGE #1

Lack of cohesive data

Most sales organizations have different pools of data living in different systems. Pipeline data is captured not only in CRMs, but also in emails, spreadsheets, and sellers' brains. Inventory avails live in the OMS, and performance data may sit with the agency or the client. Connecting the dots across these systems and stakeholders is key to understanding the full client lifecycle, and improving the customer experience for advertising partners.

Unified data can give visibility into how a business is performing, allowing media sales teams to course correct before issues become problems.

CHALLENGE #2

Shorter sales cycles

Sales cycles are accelerating, giving media sales teams less time to pitch, close, and activate campaigns. With shorter windows to close business, teams are often forced to respond to only a portion of RFPs, leaving money on the table. Moreover, it's challenging to know which RFPs are most important to respond to—either because they represent highest value for a business or are most likely to be won. Automation in the form of proposal recommendation solutions like [Proposal-IQ](#) will be needed in order to achieve a 100% RFP response rate.

Once business is won, the issue of quick turnaround times continues. With 50% shorter lead times, as noted in our [Boostr Media Ad Sales Trend report](#), Ad Ops teams are under greater pressure to secure approvals, check creative, configure campaigns, and get campaigns live.

As Rev Ops teams work to scrutinize the revenue process from end to end to identify gaps, inconsistencies, and opportunities, a shorter window makes forecasting difficult, if not impossible.

CHALLENGE #3

Trouble analyzing performance

Without unified data, Rev Ops teams in particular are hard-pressed to provide meaningful revenue analytics back to the field. Going beyond vanity metrics to track conversion rate, customer churn, pipeline velocity, and client lifetime value can meaningfully boost both strategy and performance. Yet, many Rev Ops teams struggle to access the visibility and consolidated data they need to report on these metrics and create actionable insights.

CRM Buyer's Guide: Three Core Concepts

#1: Ease of integration

Bringing new software into an already complex working environment can introduce unnecessary complexity and create resistance from teams. The role of the CRM is to ensure that Rev Ops and Sales teams' jobs are easier—not more complicated. CRMs purpose-built for publishers can smooth out the implementation process and streamline processes by integrating with other software in the tech stack.

Seek solutions that can easily integrate with key elements of your tech stack

The right CRM will support media sales organizations with:

EASY CONFIGURATION: If you have to hire a consultant to spend months configuring your CRM, chances are it will give you technical headaches in the future. Instead, look for solutions that emphasize ease of use and an intuitive user experience. Out-of-box configuration is another plus.

NEXT-LEVEL SUPPORT: Bringing new software into your business often requires collaborating with the vendor to ensure you're using it to its full capabilities and investing in software that can evolve alongside your business.

DEMONSTRABLE ADOPTION: Ask potential partners for information about their adoption rates. What can the vendor share about how sales teams are using their CRM solution at rollout, at three months, and at six months or a few years down the line.

ROBUST SOFTWARE INTEGRATIONS: Without the right capabilities and integrations, a CRM can become time-consuming and cumbersome for Sales teams. To assure functionality and, ultimately, satisfaction, it's important to seek solutions that can easily integrate with key elements of your tech stack, including your OMS and financial software.



#2: Advanced analytics

One of the key functions of a CRM for media businesses is to provide intelligence that would otherwise remain inaccessible. Getting automated insights and accurate predictions helps Rev Ops and Sales teams identify opportunities and make recommendations that can increase the effectiveness of outreach strategies, helping sellers better understand their customers' needs and habits to deliver a more consistent client experience. Simultaneously, powerful reporting is key to helping Rev Ops optimize sales strategies for the future.

CRMs can offer
at-a-glance insights
into the health of your
media business

While shopping for a CRM, consider your analytics needs and whether the solution can deliver:

CUSTOMIZABLE DASHBOARDS: CRMs can offer at-a-glance insights into the health of your media business on any given day. The ability to customize these dashboards based on specific priorities can optimize Sales' and Rev Ops' efforts by highlighting what's most important to them.

OMNICHANNEL FORECASTS: Real-time access to pipeline and delivery data across all media formats can ensure a seamless delivery experience for clients across their entire mix.

MEDIA-SPECIFIC DATA MODELS: CRMs designed specifically for publishers track and manage data that other CRMs don't. High-fidelity, real-time data relevant to media sales organizations' needs can accelerate time to value.

AUTOMATED REVENUE RECOGNITION: Automated revenue allocation built around customizable start and end dates across various channels takes a huge weight off sellers and keeps every deal recorded, saving teams hours every week.



#3: Sales process support

CRMs simplify every aspect of media sales, ultimately facilitating a faster cycle to deliver more reliable cash flow. In addition to analytic power and integrations that keep data unified, carefully tracked, and constantly updated, a CRM can deliver sales tools that maintain team alignment, drive strategy, and help every seller close more deals, faster—and at higher rates.

Sellers can get clear prospect data, forecasts, and more

Look for a CRM that offers sales support such as:

COMMISSIONS TOOLS: Simplified incentives, calculated in real time by trusted software, can motivate sellers to meet specific goals while eliminating frustrations and lack of confidence on payday.

CUSTOM WORKFLOWS AND FIELDS: The ability to implement your own deal rules, workflows, and product lines without cumbersome coding changes the way sellers work with the CRM. Sellers can get clear prospect data, forecasts, and more—so they can focus on selling, not on data management.

PRECISE PIPELINE PREDICTIONS: The ability to access forecasts with as much specialization as necessary allows sellers to better understand their highest-margin opportunities and move fast without getting bogged down in product complexity.

ONE-CLICK ANALYTICS: At-a-glance numbers are powerful—but so is the ability to go deeper. More robust analytics and data, available with a single click, allow teams to dive deeper, get more strategic, and create the most meaningful selling strategies.



Your CRM checklist

Use this at-a-glance checklist to evaluate the CRM solutions you're considering.

boostr

	Yes	No	Notes
Was it designed for media businesses?			i.e., What integrations do you most need? Salesforce? QuickBooks? Note what it has and doesn't have here.
Is it easy to configure?			
Does set-up require custom coding or a consultant?			
Does maintenance require custom coding or a consultant?			
Can approval rules be set easily for deal creation?			
Can you create custom layouts and fields?			
Can you configure your own workflows and alerts?			
Does it work with your existing tech stack?			
Can it integrate with the OMS?			
Can it connect to your financial software?			
Can deal creation be done natively via email?			
Does it support complex customer hierarchies (e.g., brand, agency, and holding company mapping)?			
Can you talk to a human if problems arise?			
Does it deliver reliable forecasting?			
Can you track net revenue retention?			
Does it track seasonality?			
Can forecasting be done across multiple revenue streams and business models?			
Does forecasting include what's already been delivered?			
Does it have media-specific dashboards built in?			
Does it have a commissions tool built in?			

CASE STUDY

The Transformative Power of the CRM

Bustle Digital Group accelerated billing while boosting revenue

GOAL: MEET OR EXCEED REVENUE GOALS

Bustle Digital Group (BDG) has an expansive portfolio of digital and experiential brands with a monthly readership exceeding 200 million and more than 1,300 client accounts. The brand aimed to generate more revenue by increasing forecast accuracy to uncover insights and make smarter deals. The publisher also wanted to accelerate workflows, free up team members' time, and create more meaningful client experiences. To achieve these goals, they invested in a CRM solution from Boostr.

STRATEGY: UNIFY DATA, GET REAL-TIME INFORMATION, AND ACT ON INSIGHTS

With Boostr's user-friendly platform, BDG's teams were able to access the information needed to build smarter plans. BDG optimized pacing, delivery, and revenue while delivering better results for its partners. Sellers also felt empowered by the data accuracy and were able to devote more time to strategy.

RESULTS: BETTER SELLING, FASTER BILLING, AND MORE RELIABLE DATA

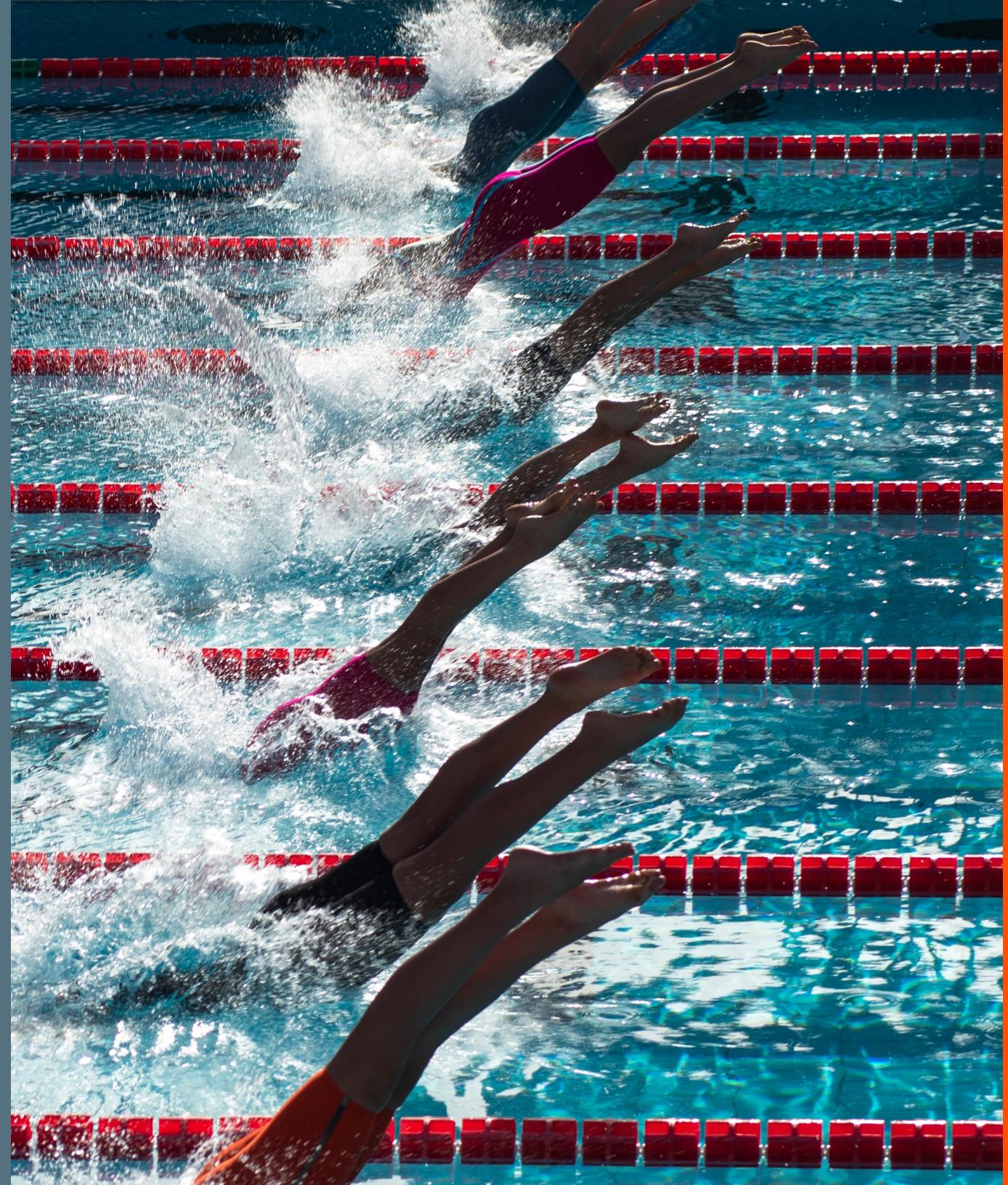
After integrating Boostr's CRM, BDG provided more consultative selling that improved client relationships, while smarter media plans increased revenue. With easily accessible data and automated processes, billing and commissions payouts occur seven to 10 days later, creating better cash flow. Meanwhile, teams are saving an average of four hours a week. "It's made us a stronger, smarter Sales organization," said BDG President and Chief Revenue Officer Jason Wagenheim.

Conclusion: Think Big

Today's CRMs can be a competitive advantage for media sales organizations, offering new ways of organizing your approach to Rev Ops and uncovering new opportunities for upsell and higher margins.

Choosing a CRM that was built to support the complexities of a modern media business, deliver unified data and insights, and help sellers prioritize their efforts can be the difference between muddling along and thriving this year and beyond.

Find out how Boostr's CRM can help you drive resiliency and revenue.
[Start a conversation today.](#)



A scenic landscape featuring two hot air balloons floating in a blue sky with scattered white clouds. The balloons are positioned in the upper half of the frame. Below them, a vast mountain valley stretches out, with rugged, brownish-grey slopes and patches of snow. In the far distance, a range of snow-capped mountains is visible under the bright sky.

About BoostR

BoostR is the most comprehensive and accurate digital transformation technology for managing advertising sales and delivery in the media industry. BoostR offers CRM, OMS, and automated RFP response technologies designed by media professionals to sell more plans at higher margins, delivering peak performance. BoostR clients include Macy's, Lowes, Westwood One, Dish, BuzzFeed, and more. [Contact us for a demo today.](#)

Want to find out how BoostR can help accelerate your digital transformation? Drop us a line [here](#).

VISIT US AT [BOOSTR.COM](https://www.boostr.com)