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The OMS Buyer's Guide

Leveraging technology to create efficiency and revenue

Introduction

Publishers ask their order management systems (OMS) to do a lot. Today's OMS software—just like the Ad Ops teams that use it—must adapt the unique complexities of a fast-paced, changing media industry, while delivering on fulfillment and performance expectations that are now table stakes.

Even amid the rise and fanfare of generative AI, at Boostr we have observed that for most media businesses, the I/O process for an average campaign still requires 15 to 20 emails with a client, another 20 for campaign approval and configuration, and still more for post-launch optimization. That's not to mention the flurry of internal activity that happens behind the scenes.

For a modern media company that hopes to grow, it's simply not sustainable.

"You are receiving more RFPs, sending out more proposals and IOs than ever," said Rob Lewis, Vice President of Sales at Boostr. "Most publishers

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need an OMS solution that's real-time and configured to address the nuances of a media business."

Enter the advanced OMS—one that meets the needs of a complex, omnichannel media business. The right OMS meets expectations for media Sales teams and Ad Ops teams, empowering them to do more, faster. The right OMS also can deliver better, more useful performance data to advertisers, improving renewals and future campaign performance.

But how do you identify the right OMS for your business? At Boostr, we've been helping media companies grow for the past decade, so we've seen what works— and what doesn't. When it comes to selecting an OMS solution, we've identified three core questions to frame your process:

Does the OMS support…
- Smart media planning?
- Managing complexity?
- Staying competitive?

By ensuring your OMS delivers a resounding "Yes!" to the three questions above, you'll set your company on a path toward greater efficiency, profitability, and long-term sustainability.

But before we dive into these three areas, we'll examine how we got here.

Today's Ad Ops Challenges

It can be difficult keeping up with the rapidly changing media industry. The last few years have added additional stressors to the publisher's plate. Shifting macroeconomic conditions, lower ad spending, and privacy restrictions like the demise of third-party cookies have added pressure and created a demand for agility. The inherent dynamism in publishing paired with higher performance standards give publishers a lot to juggle.

In 2024, some of the most pressing issues publishers are facing include media fragmentation, data proliferation, and the need to adapt to new technologies. Publishers can leverage an OMS to navigate each of these challenges.

CHALLENGE #1

Media fragmentation

Audiences are now dispersed across a growing number of media channels. With more places to watch, scroll, and see ads, it is difficult to reach and saturate a target audience. Navigating proliferating platforms isn't the only problem that arises alongside media fragmentation. Sellers must also deal with how it complicates the creation of media plans and the billing process.

Many publishers have failed to optimize their processes to mitigate the impacts of fragmentation. Instead, they have fallen into the trap of continuing legacy practices, resulting in siloed and heavily manual processes. "This doesn't feel like it is setting Ad Ops up for success," writes Jay Kulkarni in AdMonsters. "They are typically working on parallel campaigns across different ad servers and platforms, resulting in heavily fragmented data, making it difficult to track and analyze campaign metrics when done manually." Without unified data, automation, and visibility across campaigns, above-average performance becomes almost impossible.

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Data proliferation

Data creation has skyrocketed. Effectively collecting, analyzing, and delivering insights based on that data can help organizations understand audience behaviors and preferences, which are critical to succeeding in an increasingly saturated media landscape.

Managing, organizing, and effectively using data to make Ad Ops more effective can change the game for publishers—but so many fail to invest in the right software and strategies to reach their potential. "Implementing automation and AI into existing processes and workflows should be seen as an opportunity to grow and expand skills," reports AdMonsters.

While publishers can't escape the enormous amount of data they must manage, they can streamline how it is synthesized and make it more accessible with an OMS that syncs information across systems and presents functional, user-friendly dashboards.

Adapting to new technologies

Technologies are rapidly emerging; AI, AR, and VR didn't play major roles in most people's lives just a few years ago. Now every publisher is racing to integrate them into their operations.

Incorporating new technologies into long-range planning can be difficult. Cost and time to value are factors, as is adoption, onboarding, and shiny object syndrome, or (when a tool has been sufficiently integrated into operations, a shiny new one will emerge.

Despite its application challenges, AI will be a vital part of the publisher's toolbox, powering decision-making for audience targeting, budget allocation, planning, and other tasks. But publishers face difficulty in selecting and implementing the right solutions, making sure they don't overwhelm teams already managing many clients, tools, and objectives.

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OMS Buyer's Guide: Three Core Capabilities

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#1: Smart media planning

The basics of media planning include understanding client objectives, targeting the right audiences, identifying the right products, and allocating the appropriate budget to achieve client goals. But smart media planners know that more precise display and promotion can take performance to the next level, as can using data to optimize throughout a campaign, ensuring on-pace delivery that meets specifications and requirements.

Seamless integration means no learning curve is required.

The right OMS supports Ad Ops efforts in these areas with:

SCALING AND FLEXIBILITY: A good OMS supports all inventory and grows with you. Ad Ops can easily add new products and smoothly accommodate greater volume or multiple billing schedules.

EASY INTEGRATION: An OMS should automatically sync across software, eliminating time-consuming reconciliations and freeing up teams from time-consuming busywork, letting them focus on strategy that adds a competitive edge. Seamless integration means no learning curve is required, and your data is finally unified and useful.

INVENTORY AND PRODUCT MANAGEMENT: Flexible inventory and single-product architecture can eliminate product catalog bloat and inaccuracies that cause poor revenue visibility and confusion. Instead, Ad Ops teams can streamline plans across a complex product mix.

ACTIONABLE INVENTORY DATA: Visibility is about more than just knowing what's booked and what isn't. Ad Ops can act on that information to boost revenue across channels through oversold inventory checks, pacing alerts, and price comparisons.

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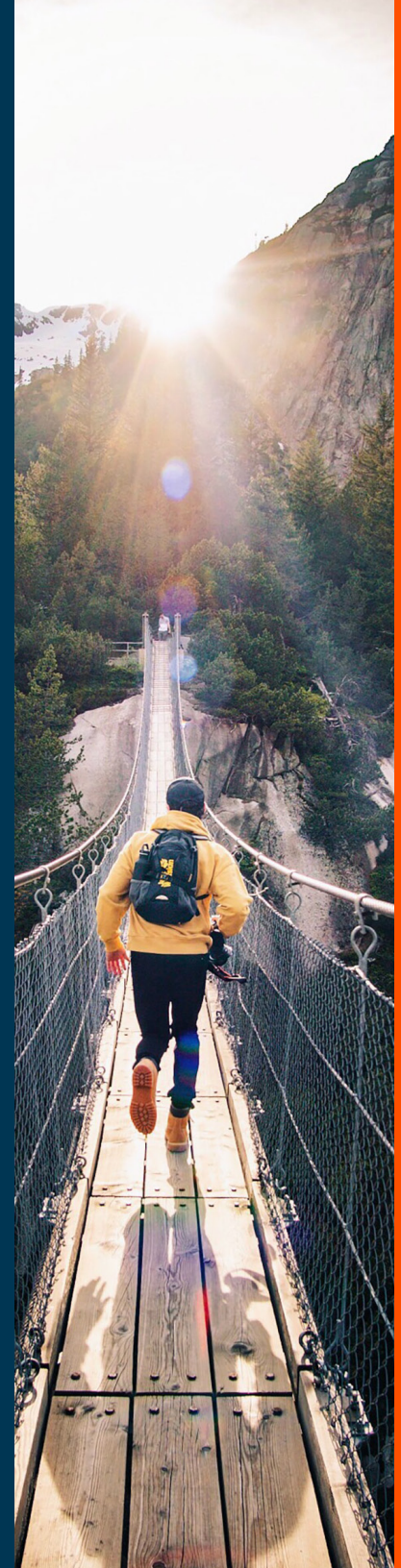
#2: Managing complexity

One of the biggest obstacles any publisher must overcome today is the growing complexity of products, channels, and data. Complexity can negatively impact efficiency and customer satisfaction. The antidote is visibility, automated management, and organizing real-time data flow into dashboards that make it actionable.

The bigger picture of performance only emerges when you can access real-time data.

An efficient OMS can do all of this and more, by delivering:

MANAGED BILLING: Scheduling invoices, pre-billing, and billing against third- and first-party delivery data are standard. But an OMS built for publishers in a rapidly changing industry needs to allow for nonstandard billing terms, too.

DYNAMIC RATE CARDS: Dynamic pricing strategies allow publishers to capture as many customers as possible, sell products at higher prices for smaller quantities, give volume discounts, or adjust based on market demand and competitors' pricing. Instead of foisting these responsibilities onto sellers to manage, publishers can execute with software more effectively and consistently.

REAL-TIME DATA: The bigger picture of performance only emerges when you can access real-time data. With an OMS that manages data effectively, you can access important information such as order status, which is continuously collected from multiple sources and analyzed to make the best decisions at any given moment. Ad Ops can build and optimize campaigns that exceed expectations.

SINGLE I/OS ACROSS SYSTEMS: The terms and content of an ad buy should always be at everyone's fingertips. Syncing I/Os across systems is a useful way to give team members their time back while eliminating errors.

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#3: Staying competitive

Adapting to new technology, introducing AI and automations, and properly leveraging data may seem difficult, but technology is meant to make life easier—not add to mounting challenges. An OMS supports innovation by delivering data via easy-to-use dashboards and replacing manual processes with AI-powered automations, freeing up time for Ad Ops to focus on more important tasks.

An intuitive interface with expert UX provides minimized disruption and accelerated time to value.

Gaining a competitive advantage requires an OMS that is:

EASY TO ONBOARD: If you have to spend months learning the software, hire experts to customize it, and deliver extensive training to staff, the upfront cost of updating an OMS is too great. An intuitive interface with expert UX provides minimized disruption and accelerated time to value.

EQUIPPED WITH THE RIGHT ANALYTICS AND REPORTING: A robust OMS should let you track key metrics such as billing and margins, generate performance reports, and provide insights about sales, customer behavior, ad performance, and revenue. Access to inventory data can boost revenue across channels through dynamic approval rules, oversold inventory checks, campaign pacing alerts, and actual vs. rate card price comparisons.

AUTOMATED: Automations manage repetitive, day-to-day processes so sellers can focus on strategizing instead of implementing, delivering value-add services to clients, and finding optimization opportunities.
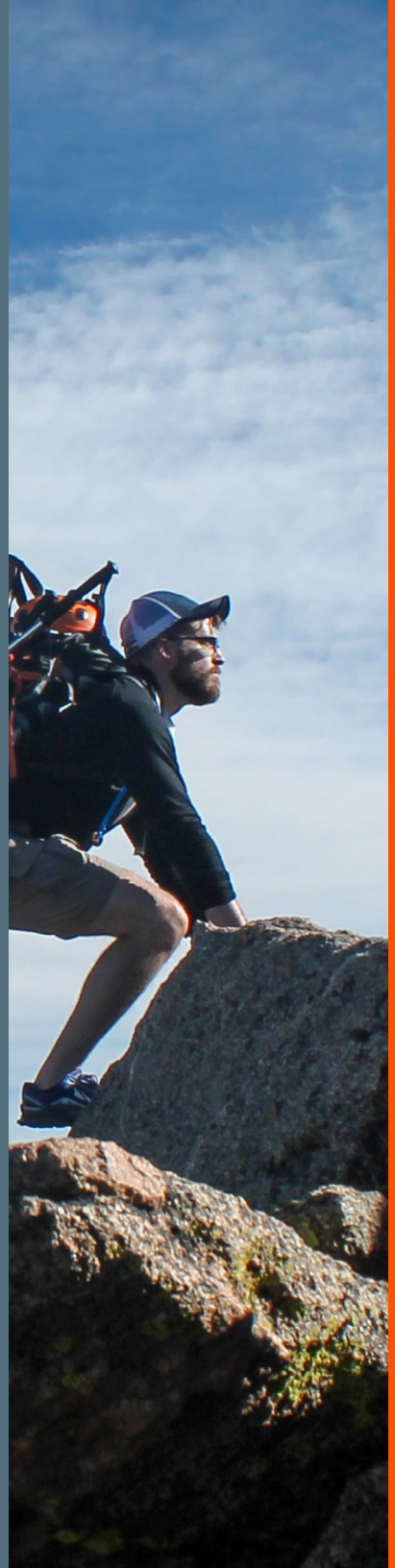
Your OMS checklist

Use this at-a-glance checklist to evaluate the OMS solutions you're considering and organize your thoughts.

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	Yes	No	Notes
Does it have the integrations you need?			i.e.,What integrations do you most need? Salesforce? QuickBooks? Note what it has and doesn't have here.
Can it support all of your inventory?			
Can it handle complex billing needs?			
Does it have dynamic rate cards?			
Is order status easy to find?			
Are there automated workflows for order approvals?			
Does it generate pacing reports?			
Does it sync I/Os, products, and accounts automatically with your CRM?			
Is the interface user-friendly?			
Is it easy to create reports on key metrics like margins?			
Are performance reports easy to generate and understand?			
Are comparisons like actual vs. rate card price easy to generate?			
Is scheduling intuitive?			
Does the product have a high adherence rate?			
Is assistance available?			
Is it customizable?			
Is the software being updated based on customer feedback and changing demands in the marketplace?			

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Problem-Solving in the Real World

BrightLine used Boostr's OMS to drive greater revenue

GOAL: ACHIEVE A 95% DELIVERY RATE FOR BOOKED CAMPAIGNS

BrightLine offers data-powered connected TV (CTV) services that set the bar for personalized, interactive advertising. Yet, the pioneering company wanted to do more with its data and use insights to inform strategy, design, and delivery. Since BrightLine bills based on delivery and not what is booked—like most media companies—Ad Ops wanted to gain better visibility into its pipelines in order to consistently meet or exceed a 95% delivery rate, grow revenue, and better serve its partners.

STRATEGY: IMPROVE VISIBILITY, DELIVER PACING INSIGHTS, AND GENERATE REAL-TIME ANALYTICS

BrightLine decided to leverage Boostr to maximize booked revenue. It integrated the OMS system for live feedback on pacing, empowering teams to adjust orders to increase booked revenue and bill on time. Working with Boostr's support teams, BrightLine created dashboards that turn data on bookings versus delivery into at-a-glance insights. That dashboard, coupled with individual media partner dashboards, allowed teams to visualize trends by publisher and media type, creating maximum visibility, clear expectations, and actionable insight.

RESULTS: EXCEEDED DELIVERY GOALS AND REVENUE FORECASTS

With Boostr's OMS, BrightLine consistently meets its goal of delivering at 95% of booked revenue or greater. Pacing insights are revolutionizing how Ad Ops manages delivery, helping the team exceed client expectations and add more consultative services to each account, creating more expansive relationships and optimization opportunities. "Boostr has truly pushed us ahead exponentially in terms of what we can do with our data," said Victoria Pisarri, VP of Client Operations at BrightLine.

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Conclusion: From planning to action

Advertising funds publishers' ability to fulfill their missions and vision. But publishers should think even bigger, looking to automate wherever they can, according to thought leaders like David DiAngelo, Global Vice President of Marketplace Development at Emodo, an AI-powered ad exchange: "Technology has become a vital tool across all industries to enable efficiency. Let's look at automation in the same light," he writes in AdMonsters.

Selecting the right OMS solution can help remove repetitive tasks and free up Ad Ops teams to be more strategic, focusing on campaign performance, customer experience, retention, and identifying opportunities for upsell.

New OMS technology is increasingly creating more opportunities to experiment and improve. With well-managed dynamic data, easy-to-activate automation, and

intuitive interfaces, the right OMS makes it easier for everyone to work toward the shared goals at the heart of a business.

While transformation can feel complicated, media companies don't have to go it alone. Guidance, education, and leadership through an evolving tech landscape are part of the role of any OMS provider. "Your business will expand and have better access to resources if you work with a system that is always enhancing and customizing its features to meet your needs in a better way," writes Sakshi John in MarTech Series. At Boostr, we take the responsibility to serve our partners and innovate alongside them seriously. We work closely with our clients to make sure our solutions work for them, integrating feedback from individual companies while paying close attention to industry trends to ensure our OMS software delivers consistent, meaningful results for publishers.

Find out how Boostr's OMS can move you closer to your big goals. Get in touch today.

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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.

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