Choosing a New Order Management System Checklist

Is your company on the hunt for a new order management system? Finding a new solution for your business can be tricky, whether you're looking to replace the soon-to-be-discontinued Google DSM or trying to implement an OMS for the first time. Here's a handy checklist of the top 8 things you should consider when looking for a new OMS.

| ### ACCOMMODATES ALL YOUR REVENUE SOURCES ### Be sure your OMS has the flexibility to handle various types of incoming revenue streams. Direct sales Demand side platforms Automated programmatic platforms Ad networks 3rd party representatives Demand side platforms Ad networks 3rd party representatives Demand side platforms Ad networks 3rd party representatives Display do Server: PPP, Smart Addit Ad Server: Adswizz, Triton Video Ad Server: RetWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Yield Management: Yieldex, Rubicon Media Analytics: ad-juster Adulence measurement: Nielsen, comScore ARE THEY LEGIT? Talk to media companies with similar challenges that have found success using an OMS. You may even find use cases you never realised were possible with a new OMS! Customizable dashboards Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. Print Digital Digital Digital Duto-fhome TV Event sponsorships Radio Print Digital audio Digital Out-of-home TV Event sponsorships April New Event sponsorships Phone support After hours support April Import from CRM Migration CAPABILITIES Ability to handle the international elements of your business and manage all of their business requirements. Ability to handle the international elements of your business Dedicated in-region support Dedicated in-region support Import from CRM Impo | | |
|--|---|---|
| Direct sales CRM: Salesforce, Zoho, Dynamics 365 CRM: Salesforce, Zoho, Dynamics 365 Display Ad Server: DFP, Smart Audio Ad Server: Adswizz, Triton Ad networks Display Ad Server: DFP, Smart Audio Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Prew Media AppNexus Accounting and Finance: NetSuite, Sage, O | ACCOMMODATES ALL YOUR REVENUE SOURCES | ABILITY TO INTEGRATE WITH EXISTING SYSTEMS |
| □ Demand side platforms □ CRM: Salesforce, Zoho, Dynamics 365 □ Automated programmatic platforms □ Display Ad Server: Adswizz, Triton □ Ad networks □ Audio Ad Server: Adswizz, Triton □ Audio Ad Server: FreeWheel, AppNexus □ Accounting and Finance: NetSuite, Sage, Oracle POWERFUL POST-SALES FEATURES □ Accounting and Finance: NetSuite, Sage, Oracle □ Prival Management: Yieldex, Rubicon □ Media Analytics: ad-juster □ Business Intelligence: STAQ □ Audience measurement: Nielsen, comScore □ Reconciliation and invoice generation □ Reconciliation and invoice generation □ Reconcile 1st and 3rd party revenue □ Allience measurement: Nielsen, comScore □ Billing on actual delivery monthly / contracted monthly □ Yield analysis □ Customizable dashboards □ Case studies □ Talk to media companies with similar challenges that have found success using an OMS: Nou may even find use cases you never realised were possible with a new OMS: □ Cross-MEDIA CAMPAIGN CAPABILITIES □ Case studies □ Thought leadership If you have advertising campaigns running on multiple media invoice the entire campaign. □ Digital audio □ Customer testimonials □ Print □ Digital audio □ Out-of-home □ Customer support teams can solve issues quickly and get you b | of incoming revenue streams. | technologies serve different purposes, but it's crucial that they can |
| □ Automated programmatic platforms □ Ad networks □ Ard party representatives □ Video Ad Server: Adswizz, Triton □ Video Ad Server: FreeWheel, AppNexus □ Accounting and Finance: NetSuite, Sage, Oracle □ Vield Management: Yieldex, Rubicon □ Media Analytics: ad-juster □ Business Intelligence: STAQ □ Audione and invoice generation □ Reconcile 1st and 3rd party revenue □ Billing on actual delivery monthly / Contracted monthly □ Vield analysis □ Customizable dashboards □ Customizable dashboards □ Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. □ Print □ Digital audio □ Training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! □ Phone support □ Training available □ After hours support □ Training available □ After hours support □ Training available □ Migration Capabilities — From Old To New Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless witch from old to new? □ Master data via API □ Import fro | | ☐ CRM: Salesforce, Zoho, Dynamics 365 |
| Audio Ad Server: Adswizz, Triton Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: FreeWheel, AppNexus Accounting and Finance: NetSuite, Sage, Oracle Video Ad Server: Adswirt AppNexus Accounting and Selection ARE THEY LEGIT? ARE THEY LEGIT? Talk to media companies with similar chollenges that have found success using an OMS, You may even find use cases you never realised were possible with an even OMS! Case studies Case s | · | |
| Video Ad Server: FreeWheel, AppNexus | | |
| Accounting and Finance: NetSuite, Sage, Oracle Yield Management: Yieldex, Rubicon Media Analytics: ad-juster Business Intelligence: STAQ Audience measurement: Nielsen, comScore ARE THEY LEGIT? Talk to media companies with similar challenges that have found success using an OMS. You may even find use cases you never realised were possible with a new OMS! Customizable dashboards Out-of-home Ty Digital Out-of-home Ty Event sponsorships Phine support Online help documents Phone support Online help documents Email support Online help documents After hours support Images yestems? Is there a process in place for data migrating from legacy systems? Is there a process in place for data migrating managing a seamless switch from diato and It never the nultiple currencies Master data via API Import from financials Import from financials Import from financials Import from financials Import catalogs Import from financials Import from f | | |
| Yield Management: Yieldex, Rubicon Media Analytics: ad-juster Business Intelligence: STAQ Audience measurement: Nielsen, comScore Business Intelligence: STAQ Audience measurement: Nielsen, comScore Business Intelligence: STAQ Audience measurement: Nielsen, comScore ARE THEY LEGIT? Talk to media companies with similar challenges that have found success using an OMS. You may even find use cases you never realised were possible with a new OMS! Case studies Thought leadership Case studies Case studies Thought leadership Case studies Thought leadership Case studies Thought leadership Case studies Case studies Thought leadership Case studies Case studies Thought leadership Case studies Thought leadership Case studies Case studies Thought leadership Case studies Thought leadership Case studies Case studies Thought leadership Case studies Thought lead | ☐ 3rd party representatives | |
| Media Analytics: ad-juster | | |
| A great OMS should be able to manage the entire ad sales cycle. Look for features that can automate post-sale tasks to make your life easier. Reconciliation and invoice generation Reconcile 1st and 3rd party revenue Billing on actual delivery monthly / contracted monthly Reconcile 1st and 3rd party revenue 1st to the we office 1st to | POWERFUL POST-SALES FEATURES | |
| Look for features that can automate post-sale tasks to make your life easier. Reconciliation and invoice generation Reconcile 1st and 3rd party revenue Billing on actual delivery monthly / contracted monthly Yield analysis Customizable dashboards Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. Print Digital Out-of-home Ty Digital Out-of-home Ty Radio INTERNATIONAL SCOPE Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Audience measurement: Nielsen, comScore ARE THEY LEGIT? Talk to media companies with similar challenges that have found success using an OMS. You may even find use cases you never realised were possible with a new OMS! Case studies Thought leadership Caustomer testimonials A+ CUSTOMER SUPPORT Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! Phone support Phone support After hours support Are hours support Are HOSTOMER SUPPORT Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! After hours support After | A great OMS should be able to manage the entire ad sales cycle. | |
| Reconcile 1st and 3rd party revenue Billing on actual delivery monthly / contracted monthly Yield analysis Customizable dashboards Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales Case studies Thought leadership Financial stability Customer testimonials Customer testimonials Case studies Thought leadership Financial stability Customer testimonials Customer testimonials Customer testimonials Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! Phone support Online help documents Email support Online help documents After hours support After hours support Training available After hours support MIGRATION CAPABILITIES FROM OLD TO NEW their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Master data via API Import from financials Transactional data via API Product catalogs Product | Look for features that can automate post-sale tasks to make | |
| □ Billing on actual delivery monthly / contracted monthly □ Yield analysis □ Customizable dashboards □ Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. □ Print □ Digital □ Out-of-home Event sponsorships □ Phone support □ Online help documents After hours support □ Training available □ After hours support □ Training available □ After hours support □ Training available □ After hours support □ New their business requirements. □ Ability to handle the international elements of your business Multi-language in the UI and within documents □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | ☐ Reconciliation and invoice generation | |
| □ Billing on actual delivery monthly / contracted monthly □ Yield analysis □ Customizable dashboards □ Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. □ Print □ Digital □ Out-of-home □ TV □ □ Event sponsorships □ Phone support □ Online help documents □ Radio □ After hours support □ Online help documents □ After hours support □ Training available □ After hours support □ International elements of your business requirements. □ Ability to handle the international elements of your business □ Multi-language in the UI and within documents □ Multi-language in the UI and within documents □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | ☐ Reconcile 1st and 3rd party revenue | ARE THEY LEGIT? |
| Yield analysis Customizable dashboards Customizable dashboards Customizable dashboards Case studies Thought leadership Logos Financial stability Customer testimonials Case studies Thought leadership Logos Financial stability Customer testimonials Customer testimo | ☐ Billing on actual delivery monthly / contracted monthly | |
| □ Normalization of advertiser accounts for consolidated revenue reporting across direct and programmatic sales □ CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. □ Print □ Digital audio □ Out-of-home □ Event sponsorships □ Phone support □ Online help documents □ Sales □ Radio □ NITERNATIONAL SCOPE Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. □ Ability to handle the international elements of your business □ Multi-language in the UI and within documents □ Handle multiple currencies □ Master data via API □ Inport from financials □ Transactional data via API □ Product catalogs | ☐ Yield analysis | |
| Logos | ☐ Customizable dashboards | you never realised were possible with a new OMS! |
| CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. Print Digital audio Digital Out-of-home TV Event sponsorships Radio INTERNATIONAL SCOPE Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Handle multiple currencies Customer testimonials A+ CUSTOMER SUPPORT Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! Phone support Online help documents Email support Training available After hours support MIGRATION CAPABILITIES—FROM OLD TO NEW Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? Master data via API Import from financials Transactional data via API Product catalogs | | ☐ Case studies ☐ Thought leadership |
| CROSS-MEDIA CAMPAIGN CAPABILITIES If you have advertising campaigns running on multiple media formats, your OMS should allow you to propose, execute and invoice the entire campaign. Print Digital audio Digital Out-of-home TV Event sponsorships Radio INTERNATIONAL SCOPE Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Handle multiple currencies A+ CUSTOMER SUPPORT Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! Phone support Online help documents Email support Training available After hours support MIGRATION CAPABILITIES—FROM OLD TO NEW Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? Master data via API Import from financials Transactional data via API Product catalogs | revenue reporting across direct and programmatic sales | ☐ Logos ☐ Financial stability |
| A + CUSTOMER SUPPORT | | ☐ Customer testimonials |
| A+ CUSTOMER SUPPORT Ask what tools, training and support your OMS provider offers and the associated costs. Road bumps happen in any business, so you want to be sure their customer support teams can solve issues quickly and get you back on track! TV | CROSS-MEDIA CAMPAIGN CAPABILITIES | |
| □ Print □ Digital audio □ Out-of-home □ Digital □ Out-of-home □ Digital □ Out-of-home □ Event sponsorships □ Phone support □ Online help documents □ Sadio □ Phone support □ Online help documents □ Email support □ Training available □ After hours support □ Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | formats, your OMS should allow you to propose, execute and | |
| □ Digital □ Out-of-home issues quickly and get you back on track! □ TV □ Event sponsorships □ Phone support □ Online help documents □ Email support □ Training available □ After hours support □ Migration capacity is there a process in place for data migration making a seamless switch from old to new? □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | | |
| □ TV □ Event sponsorships □ Radio □ Radio □ Email support □ Online help documents □ Email support □ Training available □ After hours support □ MIGRATION CAPABILITIES → FROM OLD TO NEW their business requirements. □ Ability to handle the international elements of your business □ Multi-language in the UI and within documents □ Handle multiple currencies □ Training available □ After hours support □ Online help documents □ After hours support □ Training available □ After hours support □ Training available □ After hours support □ MIGRATION CAPABILITIES → FROM OLD TO NEW Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | G | |
| □ Radio □ Email support □ Training available □ After hours support □ After hours support □ Training available □ After hours support □ Description of the support □ Description of the support □ Training available □ After hours support □ Training available □ After hours support □ Description of the support □ Description of th | 0 | |
| INTERNATIONAL SCOPE Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Master data via API Product catalogs | · · · · · · · · · · · · · · · · · · · | |
| Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Handle multiple currencies MIGRATION CAPABILITIES— FROM OLD TO NEW Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? Master data via API Import from financials Transactional data via API Product catalogs | Li Radio | |
| Media companies with business across borders need to know that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business Multi-language in the UI and within documents Master data via API Import from financials Transactional data via API Product catalogs | | ☐ After hours support |
| that they can monetize their audiences and manage all of their business requirements. Ability to handle the international elements of your business MIGRATION CAPABILITIES — FROM OLD TO NEW Do they have experience in migrating from legacy systems? Is there a process in place for data migration making a seamless switch from old to new? Multi-language in the UI and within documents Master data via API Import from financials Transactional data via API Product catalogs | | |
| □ Ability to handle the international elements of your business □ Multi-language in the UI and within documents □ Handle multiple currencies □ Transactional data via API □ Product catalogs | that they can monetize their audiences and manage all of | |
| of your business Switch from old to new? □ Multi-language in the UI and within documents □ Master data via API □ Import from financials □ Transactional data via API □ Product catalogs | · | |
| ☐ Handle multiple currencies ☐ Transactional data via API ☐ Product catalogs | of your business | switch from old to new? |
| | | |
| □ Dedicated in-region support □ Import from CRM | · | |
| | □ Dedicated in-region support | ☐ Import from CRM |