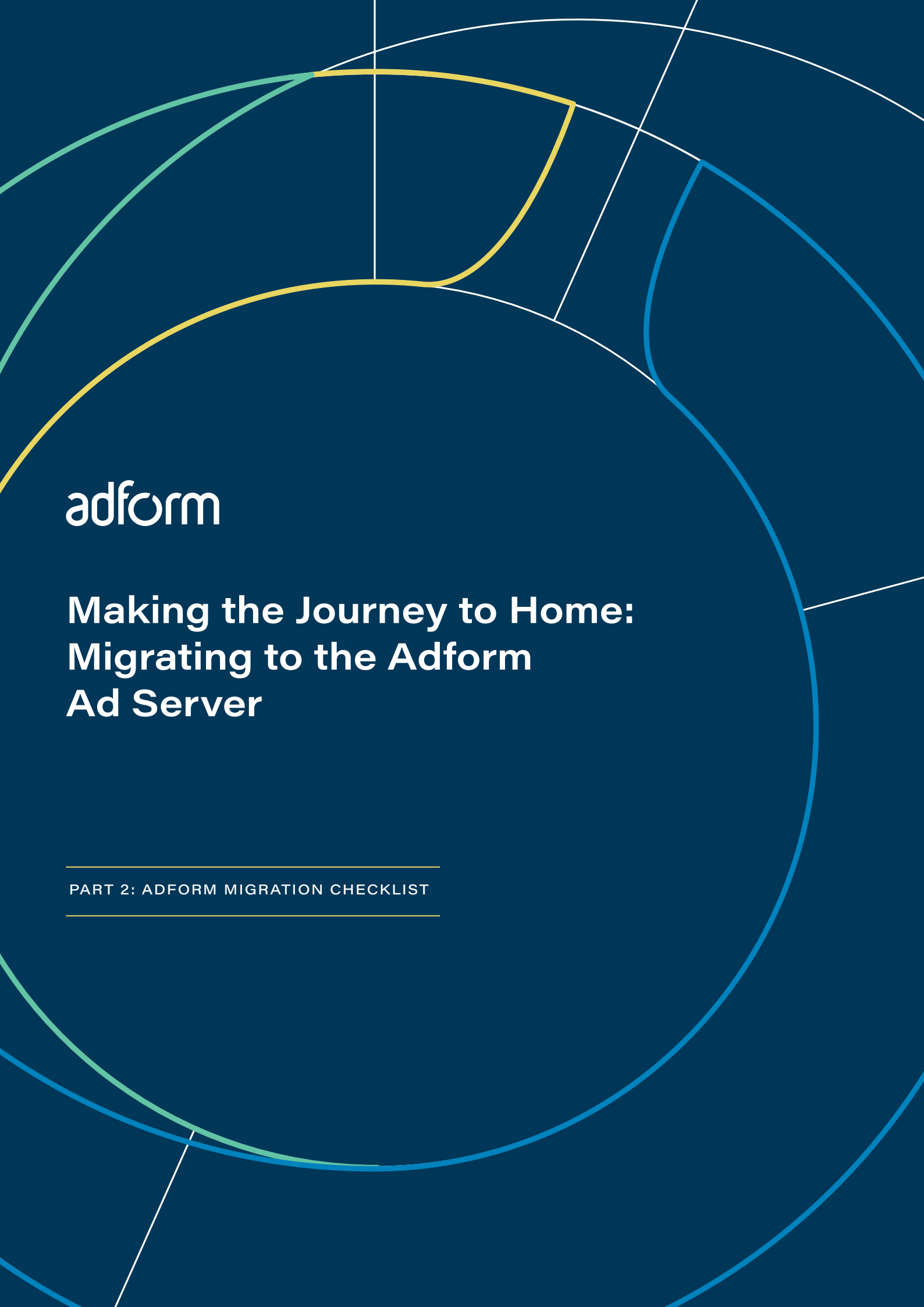




adform

Making the Journey to Home: Migrating to the Adform Ad Server

PART 2: ADFORM MIGRATION CHECKLIST



The modern ad server has evolved significantly since the early days of digital advertising, and yet, has remained more essential today than ever before. In a world full of disruption and continuous change, whether it's initiated by a major ad inventory owner, or by companies we refer to as 'walled gardens,' nearly every brand advertiser and agency will need to be prepared to make big decisions to keep abreast of changes.

At Adform, we believe that for transparency, data ownership, and control, Advertisers need to be harnessing the power of an independent and highly integrated ad tech platform. The following white paper series examines what makes our platform unique, debunks myths around migrating to new tech, and shows the clear, automated path of switching to the suite of our advertising tools. In this white paper, we highlight the processes involved in transitioning to the Adform Ad Server; including, client and account configuration, campaign and tag set up, and a glossary of Adform terms to help you familiarize yourself with the new terminology.



PART 1

What Makes the Adform Ad Server Different?



PART 2

The Adform Migration Checklist



PART 3

Debunking Common Myths Around Ad Server Migration

Migration Checklist

Below we identify steps you can take in order to smoothly migrate client activity onto Adform's platform. They have been divided into Adform and client specific activities:

Key



Adform activity



Client activity

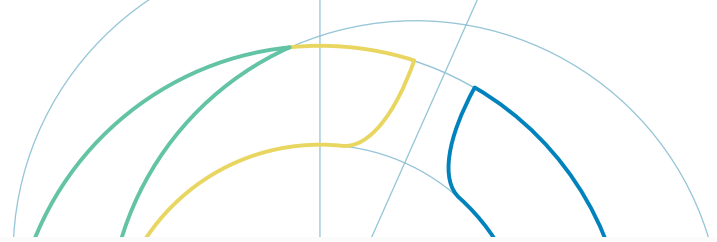


**Adform and/or
Client activity**

Account Configuration

The first crucial step in the migration process is defining the essential settings that clients have in place. The following ten steps outline commonly used processes for configuring these settings.

1. Account hierarchy identification.
2. Account hierarchy solution & setup.
3. Identification of client specific settings (e.g. viewability thresholds).
4. Configuration of client specific settings.
5. Identification of third party integrations (e.g. Brand Safety partners).
6. Configuration of third party integrations.
7. Naming Convention recommendation and set up (if needed).
8. User rights and roles definition.
9. Account access allocation based on user rights and roles definition.
10. Identification and asset gathering of campaigns to be migrated to Adform.



Site or Publisher Certification and Configuration

Adform has a large number of publishers certified across the globe, therefore, in the vast majority of cases there are no limitations to rapid campaign execution. However, in cases where there are any outstanding publishers or particular Rich Media formats that you would like to run, our publisher certification ensures that this does not impact user experience.

Adform's site publisher process can also ensure that all campaign data is passed through and attributed correctly from the outset.



Certifications Process

1. Identification of relevant publishers, formats, and contact details.
2. Mapping of existing certifications based on step one.
3. Outstanding publisher certification of identified formats.



Media Planning Tools

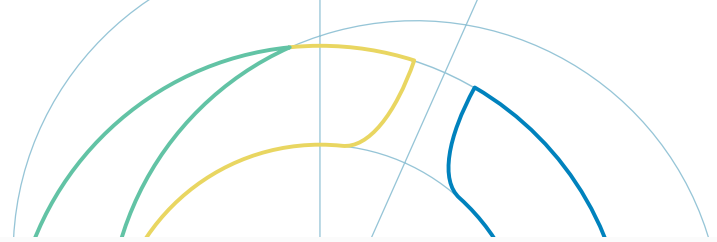
In cases where media planning tools are used for placement creation, we suggest the following steps are taken:

1. Account/advertiser mapping in client media planning tool.
2. Account/advertiser mapping in Adform.
3. Media mapping in client media planning tool.
4. Test campaign push from client media planning tool to Adform.
5. QA by Client and Adform.

Creative Conversion

In order to ensure smooth data collection and efficient creative performance, Adform will assist in overseeing the application of Adform creative specifications and overall creative migration.

- Standard Image Ad migration.
- Standard HTML creative adjustment based on Adform specifications.
- Standard HTML creative migration to the Adform platform.
- Standard HTML Ad QA.
- Rich media creative re-built based on Adform specifications.
- Rich media creative QA.
- Rich media creative set up in Adform.



Tag Management Setup

Adform's Tag Management (website tracking) solution is used to track visits to a specific page or event on a website. The tracking code utilizes JavaScript functions, which gather visit count, basic visitor information, and sends this information along with campaign data to Adform servers.

Configuring this information according to your needs and goals is essential as it will directly affect performance data and decisions.

1. Existing tag management / analytics systems requirement identification.
2. Advertiser sites and landing page identification.
3. Analysis and recommendation for tag management solution.
4. Generation of tracking scripts based on agreed solution.
5. Tracking script implementation on sites based on agreed solution.
6. Tag management solution QA.
7. Set up of conversion tag rules.

Campaign Setup

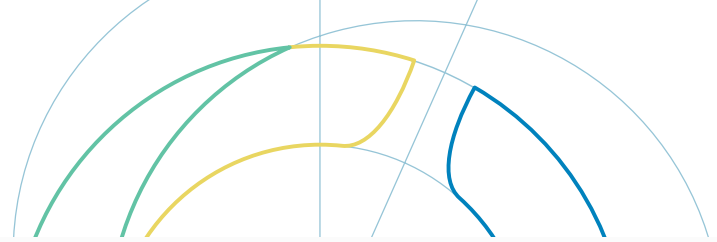
Campaign set up in Adform's Platform is a straightforward workflow divided into sections per area, so you will not miss a step while creating one. We have outlined some key steps that we recommend you take.

1. Campaign creation.
2. Media plan import.
3. Creative assets upload.
4. Landing page specification.
5. Tag creation.
6. 3rd party tracking implementation (if applicable).
7. QA of Campaign set up & AdServing scripts.
8. AdServing script delivery to Publishers.

Data Reporting Configuration

Adform's reporting tools enable you to receive and analyze data in a customizable way. This could range from a quick overview of key KPIs through to comprehensive log level data.

1. Most used metrics and reports identification.
2. Conversion reporting filter pre-set up.
3. Custom report setup.
4. Customer journey & attribution modelling setup.
5. Scheduled reports setup (applicable for Standard & Custom Report).
6. Master data service setup (if applicable).
7. External dashboards connection (if applicable).



Migration Schedule

A number of activities enlisted in the Migration checklist can be performed in parallel. This enables clients to progress with migration in a fast and efficient manner as all activities are supported by dedicated specialists in each area.

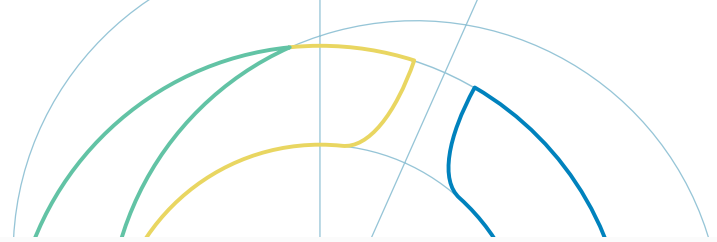
Activities	Implementation					Hot Desking		Operations
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	
Contract & Billing Details	Client							
Introduction and Planning	Client							
Account Configuration		Client						
Media Configuration		Client	Client	Client				
Creative Tools Trainings**		Creative agency						
Creatives Configuration *		Creative agency	Creative agency	Creative agency		Creative agency		
Website Tracking Trainings**		Client						
Website Tracking Configuration *			Client	Client		Client		
Campaign Management Trainings**		Client						
Campaign Setup *			Client	Client		Client		
Data Reporting Tools Trainings**					Client			
Data Reporting Configuration					Client	Client	Client	
Dedicated Consultant/Specialist Success Sessions								Client

* Time frame needed for these activities depend on volume & complexity

** An example training agenda can be found in the Appendix

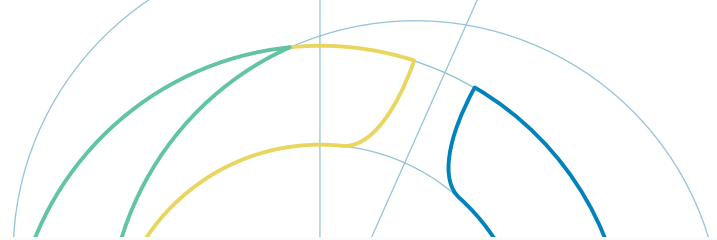
Client

Creative agency

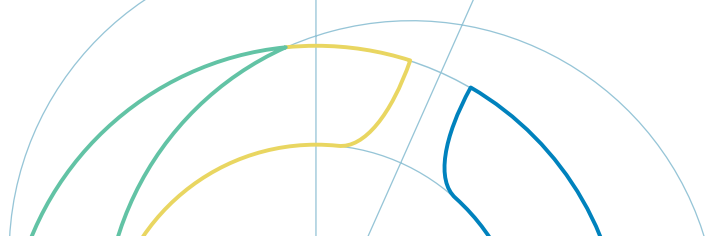


Glossary

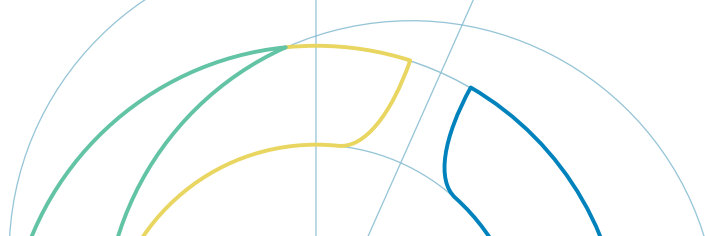
Adform	Description	Competitor / Industry Naming Convention
Account	Adform platform user entity created to represent a media agency, a client (advertiser), a publisher, or a creative agency.	Account
Adform Apps	Third party vendors integrated with Adform that help improve areas such as viewability, attribution, fraud detection and brand safety. The feature allows you to automatically insert a 3rd party tracker into Adform's tags and collect independent stats.	Integrations
Adform HTML5 Studio	An online tool that allows you to create and adjust HTML and Rich Media banners according to Adform specifications.	Ad Builder
Advertiser/Client	A brand entity in the Adform Account	Brand
Analytics	A reporting tool that generates interactive reports that are easy to read and share.	MDX Analytics
Assets	In the context of Rich Media, an asset is an audio, image, video, font, flash, or HTML element that when combined form various advertising formats, such as Expandable, Floating, Video Streaming banners, etc.	Assets
Banner	Creative material to be used in campaign. Banner types vary from image, and Rich Media to HTML5, Keyword, etc.	Banner
Banner Attributes	A five-level banner grouping system in Adform used to distinguish one banner group from another.	Classification
BN	Unique Adform Tag ID.	Ad ID
Campaign	The primary element in the Adform system that contains media, placements, banners, and tags.	Campaign
Container Tags	A pixel, implemented on an Adform tracking point on a website, that passes a request/statistic to a 3rd party system once it fires.	3rd party tags
Conversion	The user action that represents the ultimate goal or purpose of the campaign, e.g. purchase or registration.	Conversion



Custom Reports	Reporting tool that allows clients to build reports from scratch to suit their needs. They can select dimensions and metrics that are most useful when analyzing their campaigns and evaluating particular KPIs. A generated report can be exported to Excel, *.csv file or sent directly to client's mailbox. If needed on a regular basis, reports can be sent automatically to multiple recipients on a daily, weekly, monthly or yearly basis.	Report builder
Customer Journey	Report solution allows the viewing and analyzing of client's entire path of interactions leading to a conversion (e.g. purchase, registration, other). The tool provides insights into the best performing channels, media, placements and campaigns and help to optimize marketing strategy.	P2C
Dynamic Content Optimization	The DCO tool customizes the content of an ad in real time to make them more relevant to the user. Ads are updated dynamically, based on any combination of user behavior, product preference, history, demographics, and geography.	Smart versioning
Label	Labels enable you to tag, include, sort & group campaigns in the custom reporting tool.	Classification
Landing page	Specific web page that a visitor reaches by clicking on a link or a banner.	Destination URL
Line item	A layer in the campaign hierarchy unique for each media placement, allowing you to specify the agreed volumes, prices, formats and sizes. Once created, banners are attached to line items and Ad Serving scripts (Tags) are generated.	Placement
Master data service	Master Data is a service offered by Adform for clients who are interested in analyzing their transaction level data (also known as "raw data") gathered by Adform's business intelligence tools. The service is perfect for those willing to do their own calculations using internal business rules and logic.	Cookie-Level data
Media plan	Campaign guide containing the plan for media, budget, and creatives in the form of line items.	Media plan
Order	Orders represent an additional level between campaign and line items, allowing you to efficiently organize buying strategies.	Package
Period	Period of time during which the campaign is supposed to be served based on campaigns' start and end dates.	Serving period
Publisher Certification	The process of certifying the placements on publisher websites and/or apps, thus ensuring that a particular placement can support any type of rich media banner without impacting user experience.	Publisher Certification



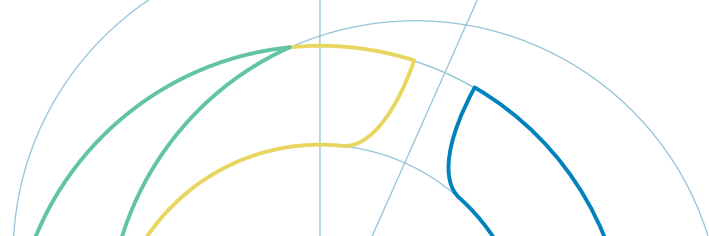
Publisher/Media	Provider of an advertising space, such as an online newspaper, a community, or other site, where banners are displayed.	Publisher
Quick stats	A reporting tool that allows the fastest way of viewing basic campaign data. Quick Stats are used to monitor media or banner performance, visits on a tracking point, or the amount of leads generated.	MDX Analytics
Rotator	Feature allowing the serving of banner ads in different rotation ways (random, sequential, optimized, and A/B). Rotators can be grouped into Nested or Storytelling methods as additional layers of rotation.	Delivery Group
Schedule	Feature that allow for the serving of banners one after another at a specific time.	Time – Based Optimization
Site tracking	A way of measuring website activities related to an Adform campaign. Adform tracks both campaign (i.e. users saw or clicked on Adform banner) and non-campaign traffic.	VersaTag
Tag	Automatically generated ad serving script and/or impression and click tracker, to be implemented in Publisher/Media site.	Placement/Ad Tag
Tracking point	Script implemented on a website of a client (advertiser) in order to track user visits and actions.	Retargeting tag
Variables	Macro used to customize data, i.e. can be added on a Rich Media banner or a tracking point.	External parameters
Visits	The number of visits or visitors who come to advertisers' web site.	Traffic



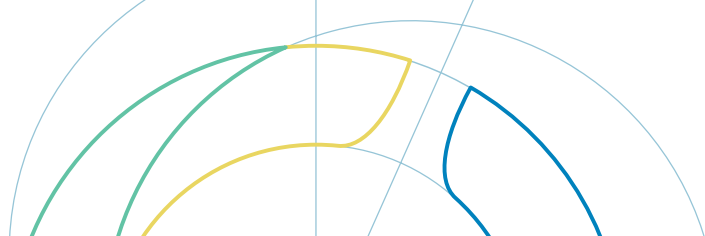
Appendix

Media Agency focused training example

TOPIC	AGENDA	RECOMMENDED ATTENDEES
Full Stack Capabilities Overview	An Introduction on how to best utilize the Adform platform	Agency Stakeholders
Planner Overview Session	- Account Structure - Campaign Overview - Rich Media Capabilities - Banner Overview - Site Tracking Overview	Agency Planners
Ad Server & Reporting	Account & System Settings - User Management - Account Structure - Media - Clients and Settings - Search Integration - Alerts - Adform Apps	Agency Traffickers
	Campaign Management - Campaign Overview Page - New Campaign Setup and Settings - Orders - Line Items - Labels - Alerts	
	Banners - Display - Video - Mobile - Audio - Assets - Templates - Video Converter - Landing Pages - Attributes	
	Rotators - Optimisation - Schedulers - DCO (Basic)	



	Tags • Settings • Banner Replacement • Edit & Send • External Data Targeting	
	DCO (not mandatory) • Banner Production • Feeds • Business Rules • Dynamic Ads	
	Reporting • Quick stats • Analytics • Custom reports manager • Data Exports • Customer Journey • Discrepancy troubleshooting	Agency Traffickers & Planners
	Advanced Reporting • Master Data Service • Data Exports • Reporting API	Analysts
	Overview of the Setup • Unique vs. Dynamic Tracking Points • Mobile App Tracking • Variables • Conversion Tags • Audiences • Filters	Agency Traffickers & Analysts
Site Tracking		



Creative Agency focused training example

AREA	TOPIC
 Intro to the Adform Studio	 What is it? Why use it? Product USPs. Run through of the templates.
 The three modes: expert, quick templates and builder	 What do they do / what are they? Who they are designed for? Importing work from elsewhere and running compliance.
 How the Studio links to the wider Adform platform	 How to export a banner or send it to Adform. How to test the banner: Event logger and click tags. Brief Intro to certifications - what they do.
 Banner Building Workshop	 Configuring the settings. Hands on: Adding in assets, positioning and amends. Organising your assets. The basic components: text, shape, image, video. Animations and events. Tips and tricks.



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Contact us today for your custom
migration plan!

sales@adform.com

Still to come



PART 3

Debunking
Common Myths and
Steps to Migration



Adform provides an integrated Software as a Service platform for the buying, managing and serving of digital advertising. The company's software consists of a Data Management Platform, a Demand Side Platform and an Ad Serving Platform with advanced analytics, reporting and creative tools that drive high impact digital advertising campaigns globally. Founded in Denmark in 2002, Adform services a client portfolio that includes the world's leading agencies, advertisers, consultancies, and publishers.

To learn more visit us at www.adform.com

