

# ***DSM Migration and Contingency Survey***

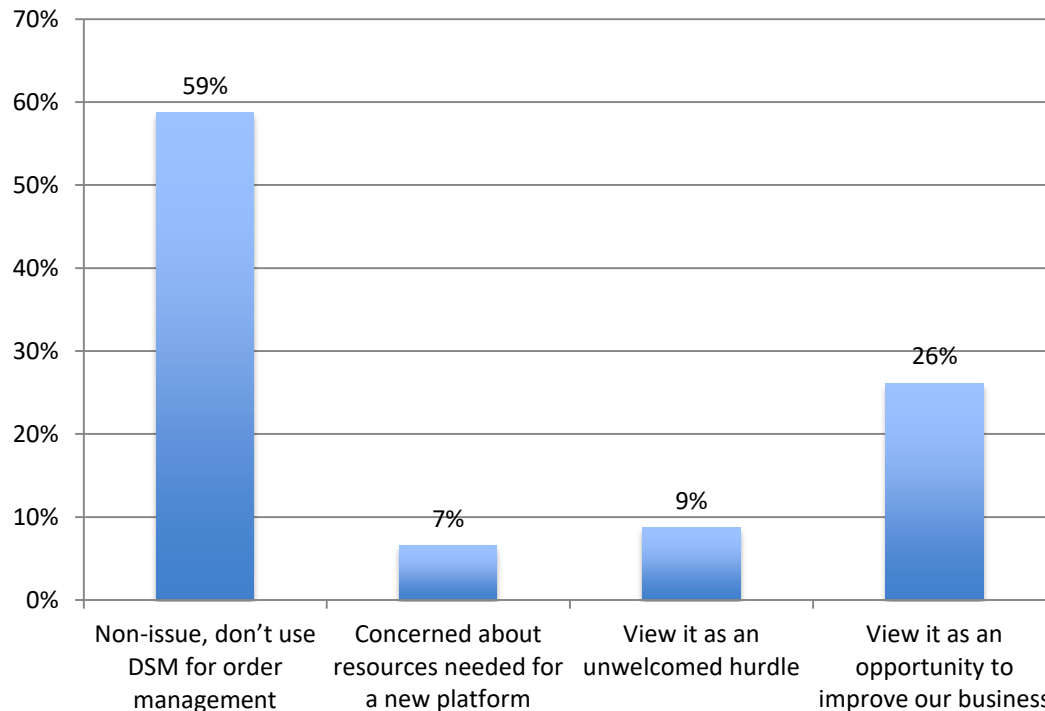
# Survey Overview

- Canam Research partnered with Placements.io to conduct '*DSM Migration and Contingency Survey.*'
- The survey invitations were sent via email to and conducted online.
- Over 7,000 executives at leading publishers were invited to participate.
- Research focused on:
  - Planning and timeline of organizations for DSM replacement
  - Implementation of new future platform
  - Impact of DSM replacement on sales and revenue recognition
  - Obstacles in transitioning off of DSM
  - Integration of OMS with other platforms

# Key Observations

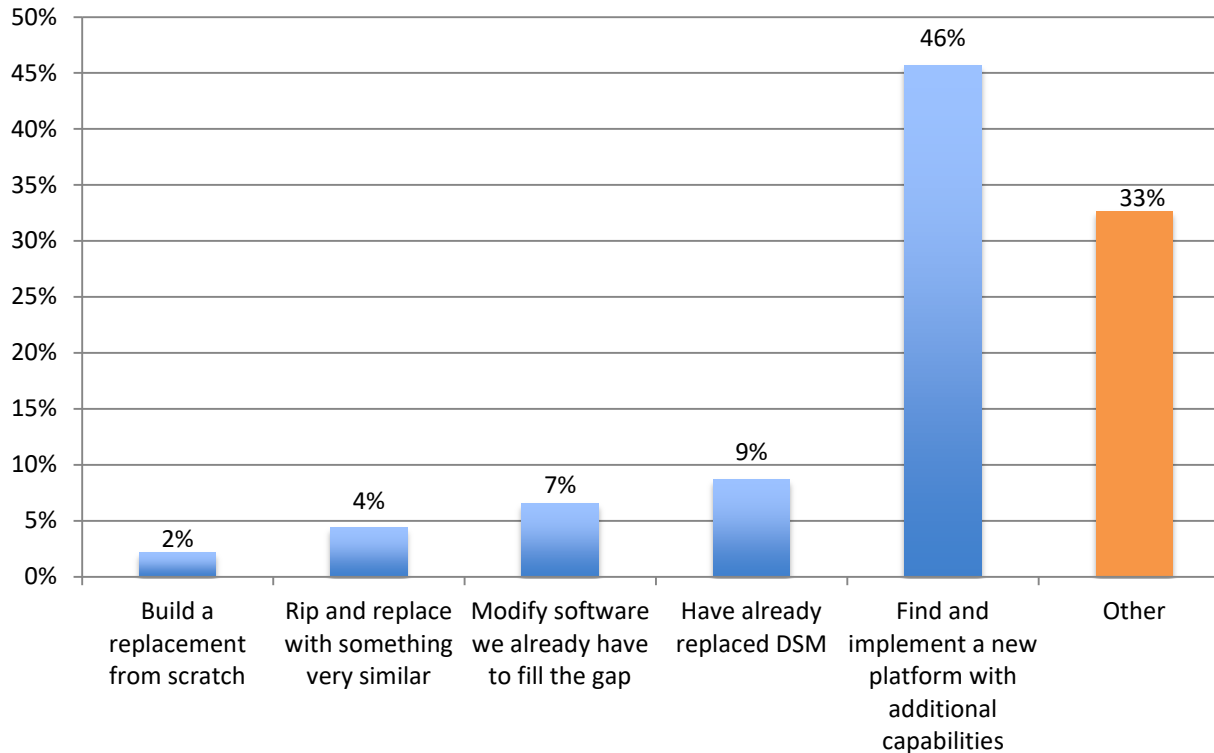
- 59% of respondents need to find and implement a new solution to replace DSM, and 41% of respondents haven't even started the selection process. Planning, budget, and requirements analysis should be started ASAP!
- 74% of respondents state their executive team is not aware or only moderately supportive of the transition and don't understand the impact of an Order Management System (OMS) on the business.
  - The right OMS should increase revenue and decrease costs. 26% of respondents have a neutral view of the sales impact of the DSM replacement.
  - 46% of respondents do not see any effect on their revenue recognition, which is a missed opportunity.
- 59% of respondents anticipate that the implementation phase will be their biggest hurdle in transitioning off of DSM – a seamless transition is critical.
- 76% of respondents want their future OMS to integrate with their CRM, ad server, programmatic, and social — a connected ecosystem is crucial.

## How does your organization view Google's retirement of their DoubleClick Sales Manager (DSM) product for Ad Order Management?



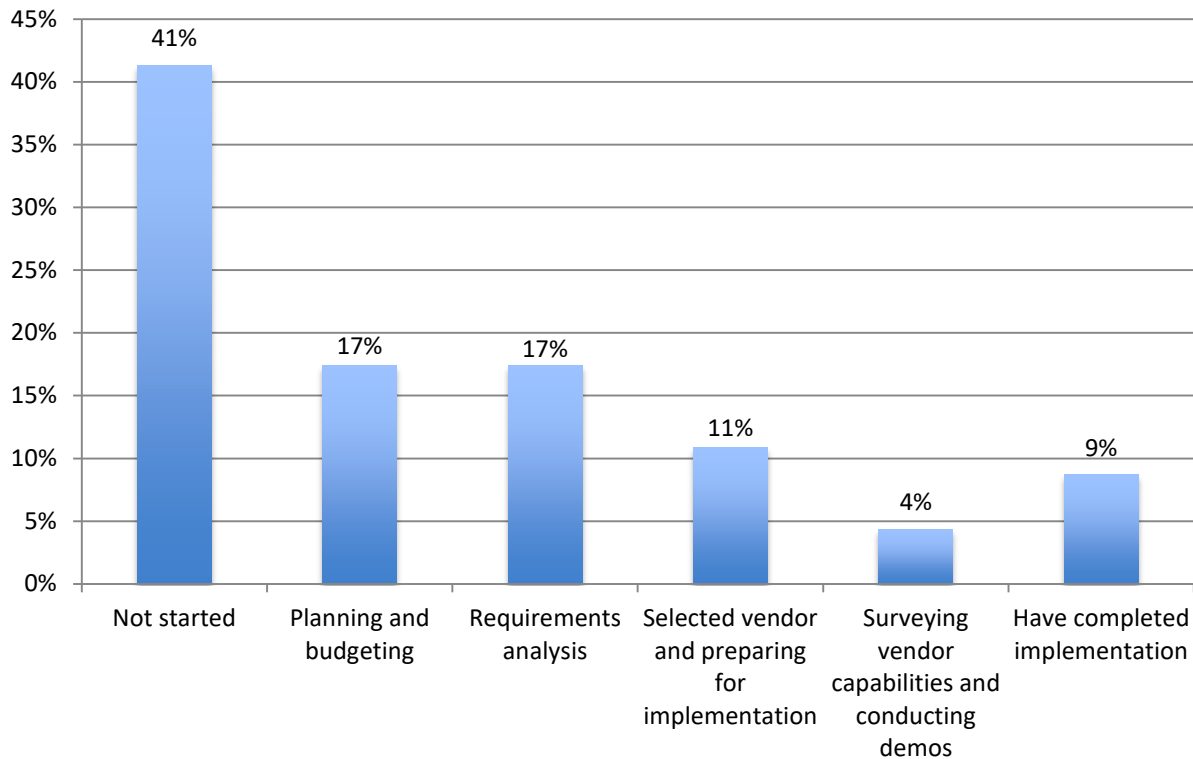
- 26% of respondents view Google's retirement of DSM, and introduction of Ad Order Management as a new opportunity to improve their business.
- 9% of respondents view it as an unwelcomed hurdle, followed by 7% of respondents that are concerned about needing resources for a new platform.

## Which of the following best describes your plan for replacing DSM?



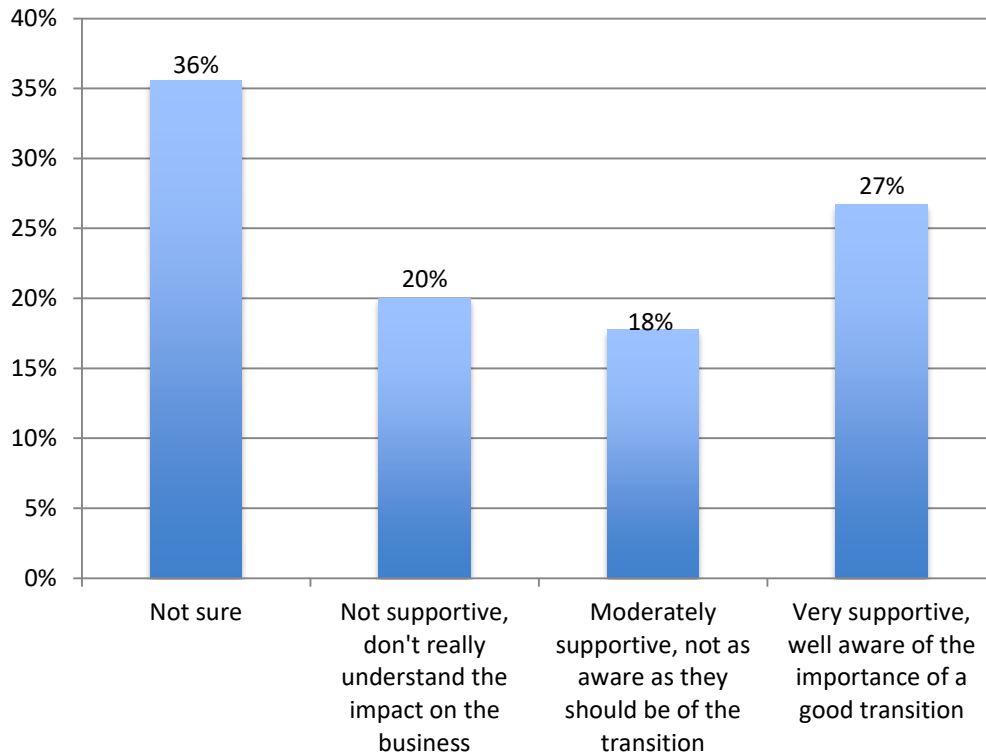
- 46% of respondents would find and implement a new platform with additional capabilities to replace their DSMs vs. 9% of respondents that already have a new platform in place.
- 7% of respondents would modify existing software to fill the gap vs. 4% of respondents that would replace their existing software with something similar.

## Which of the following best describes what stage you are at with replacing DSM?



- 9% of respondents have already replaced their DSMs vs. 41% that do not have plans to replace their DSMs any time soon.
- 17% of respondents are currently planning, budgeting, and analyzing requirements to replace their DSMs.

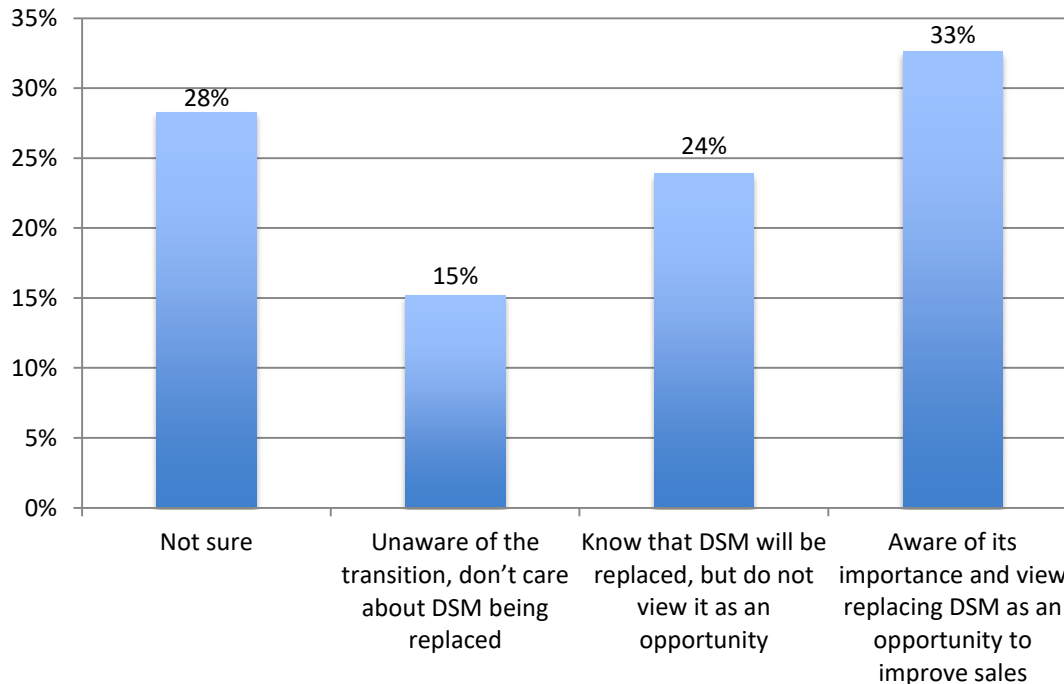
## Which of the following best describes how your executive team is responding to the need to replace DSM?



Multiple options chosen by respondents

- 27% of respondents state that their executive team is very supportive and well aware of the importance of a good transition vs. 20% of respondents that state their executive team is not supportive and don't really understand the impact on the business.
- 18% of respondents state that their executive team is moderately supportive and not as aware as they should be.

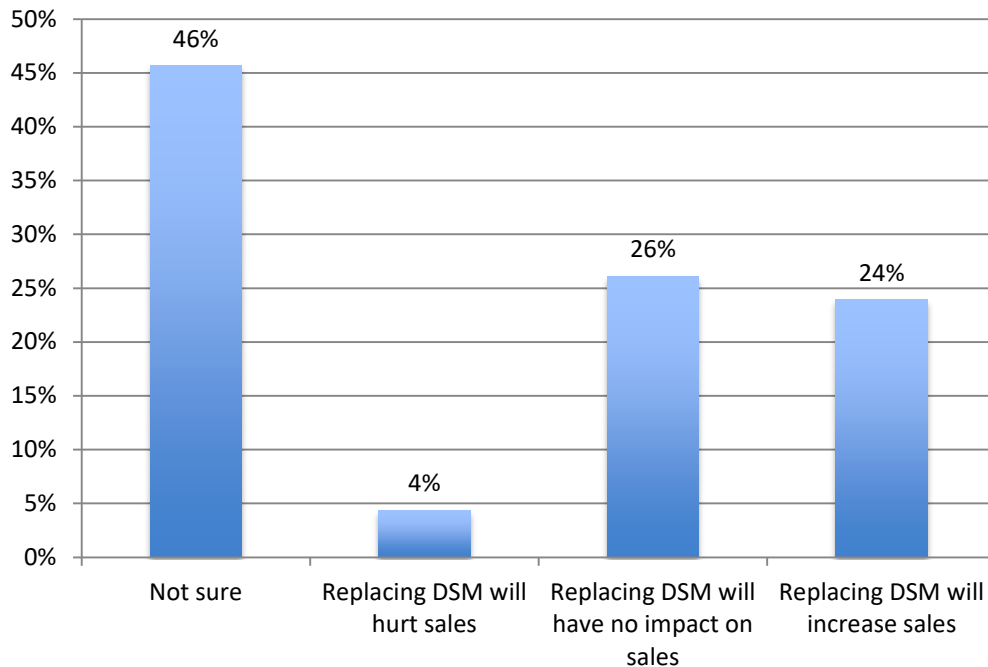
## Describe how your sales and media planning organization views the need to replace DSM?



- 33% of respondents state that their sales and media planning organization is aware of the importance to replace DSM and view it as an opportunity to improve sales vs. 15% of respondents that state their sales and media planning organization is unaware of the transition, and don't care about DSM replacement.
- 24% of respondents state that their sales and media planning organization know that DSM will be replaced, but do not view it as an opportunity.

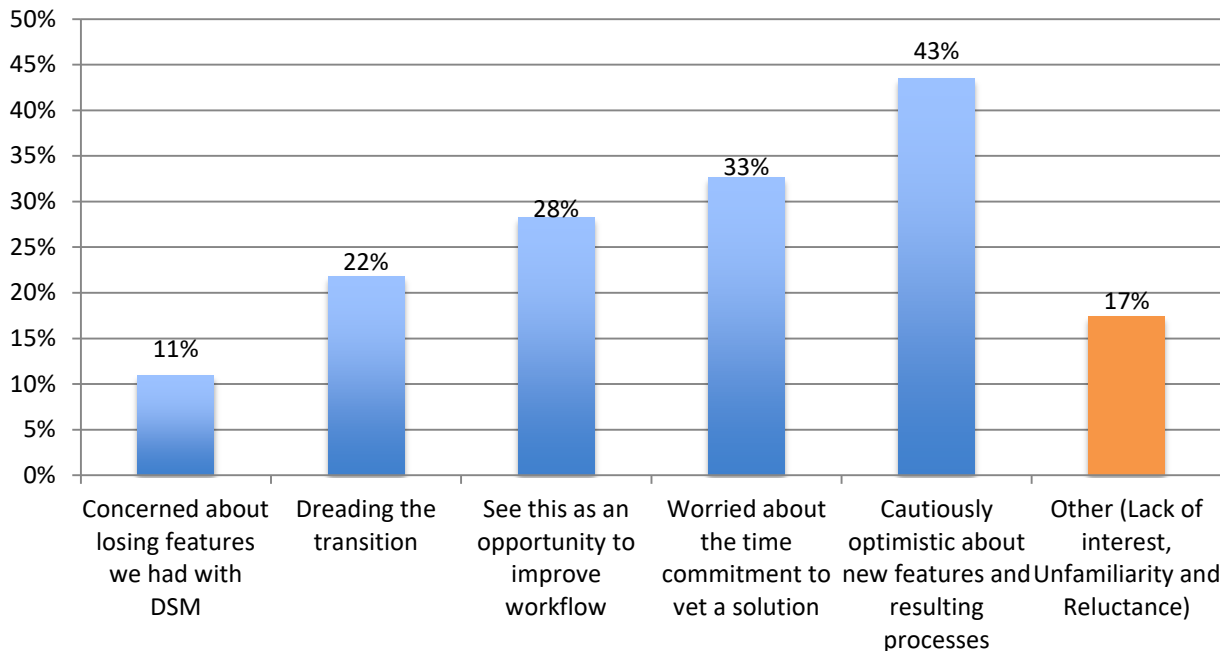


# What impact on sales results do you expect to come from replacing DSM?



- 24% of respondents are positive that replacing DSM will increase sales vs. 4% of respondents that anticipate a decrease in sales.
- 26% of respondents have neutral view that replacing DSM will have no impact on sales.

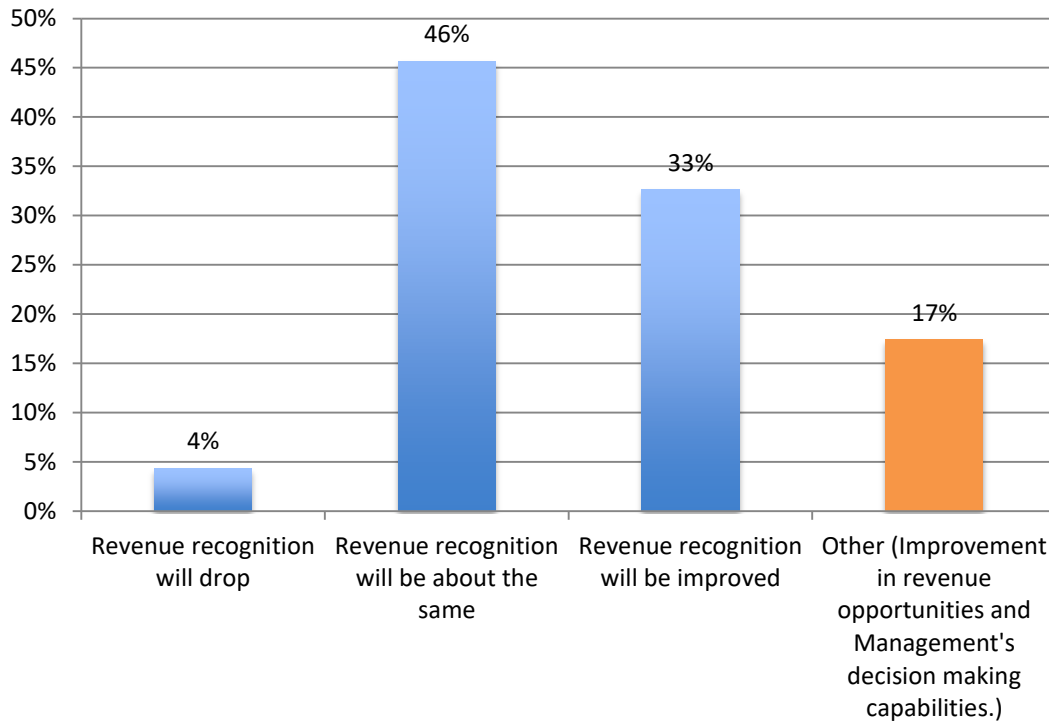
# Which best describe how your ad operations team views the impact of replacing DSM? (Check all that apply)



Multiple options chosen by respondents

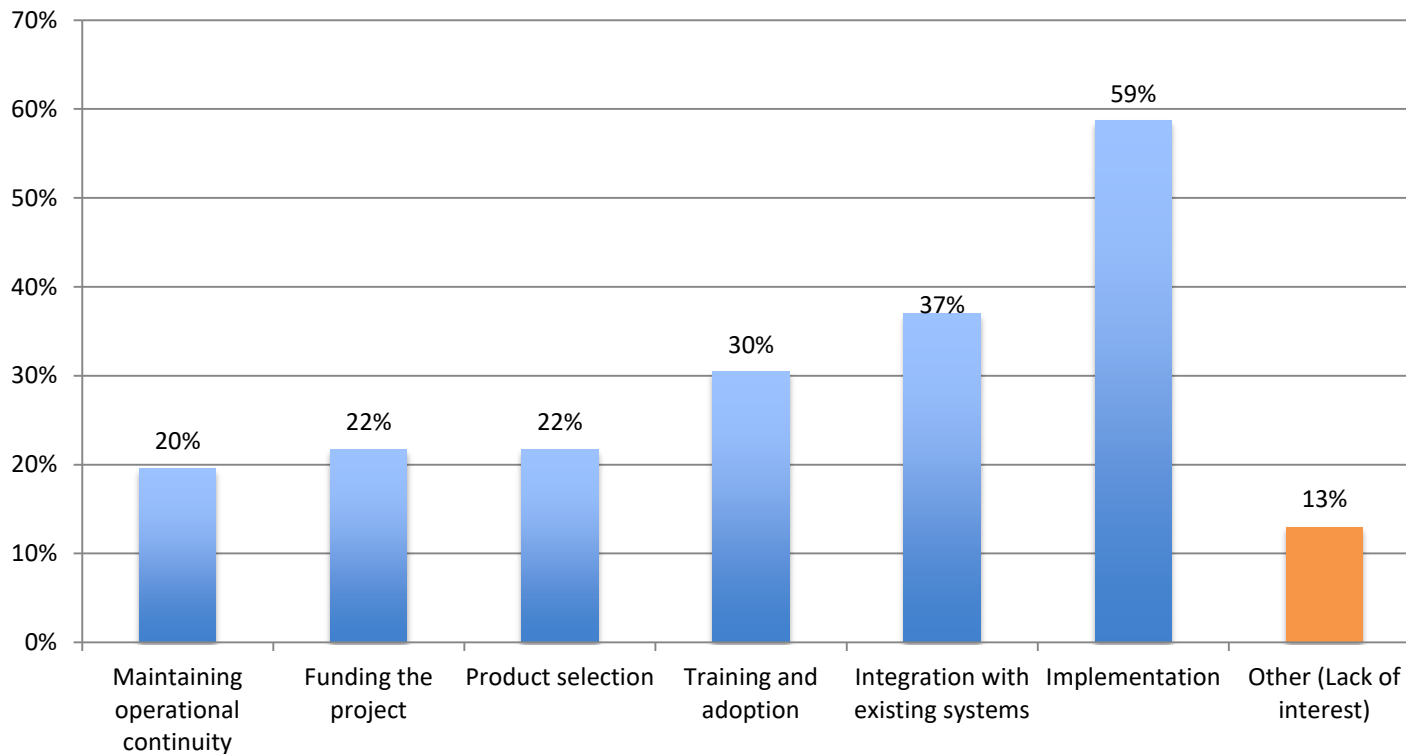
- 43% of respondents state that their Ad operations team is cautiously optimistic about the new features and processes vs. 11% of respondents that state their Ad operations team is concerned about losing DSM supported features.
- 28% of respondents state that their Ad Operations team see this as an opportunity to improve workflow vs. 22% of respondents that state their AD operations team see this as detrimental.

# What impact do you think your future platform will have on revenue recognition?



- 33% of respondents state that their future platform will improve revenue recognition vs. 4% of respondents that anticipate revenue recognition will drop.
- 46% of respondents do not see any impact on their revenue recognition vs. 17% of respondents that anticipate improvement in revenue opportunities and management's decision making capabilities.

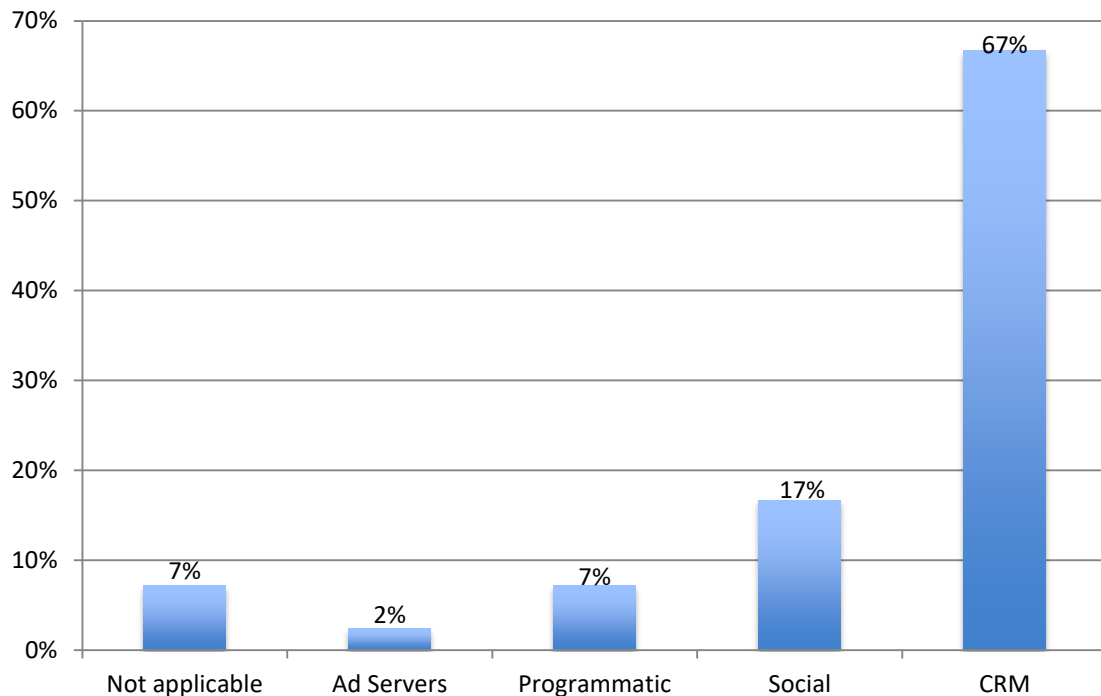
## What do you anticipate will be biggest hurdles in transitioning off of DSM? (Check all that apply)



Multiple options chosen by respondents

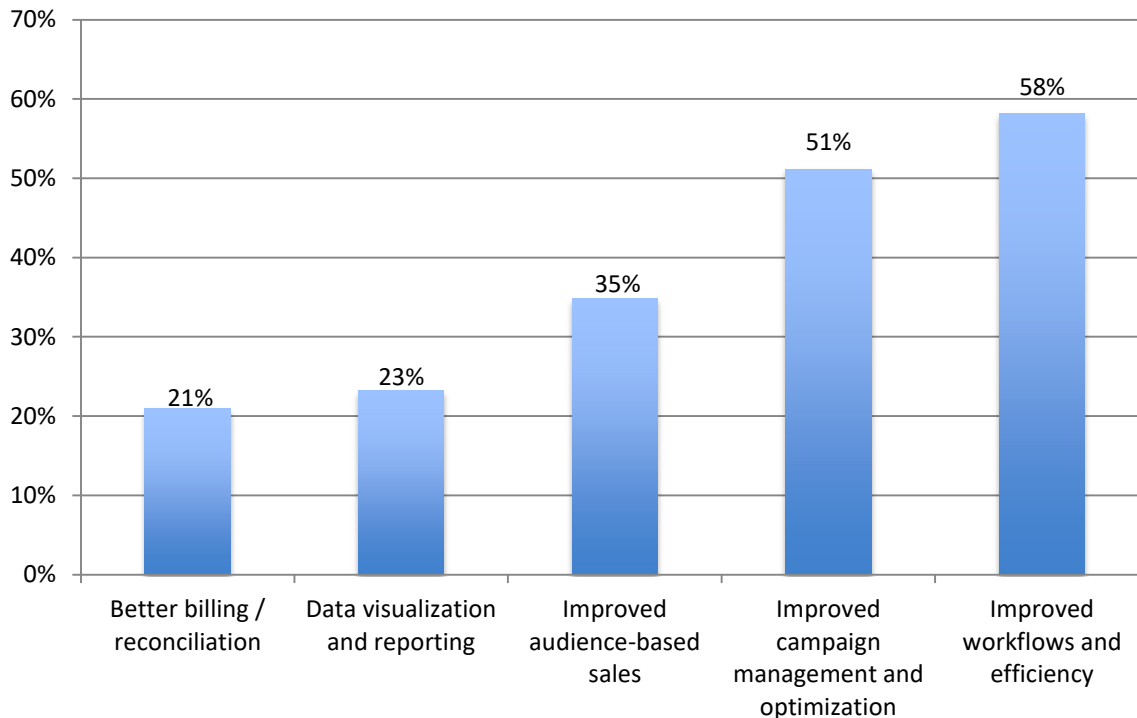
- 59% of respondents anticipate that the implementation phase will be their biggest hurdle in transitioning off of DSM.
- 37% of respondents anticipate integration with existing systems, followed by 30% of respondents that anticipate training and adoption will be their biggest hurdles.

## What platforms do you hope your future OMS will integrate with? (For example - CRM, Ad Servers, Programmatic, Social, etc.)



- 67% of respondents hope that their future OMS will integrate with their CRMs vs. 26% of respondents that hope their OMS will integrate with other platforms such as Ad Servers, Programmatic and Social.

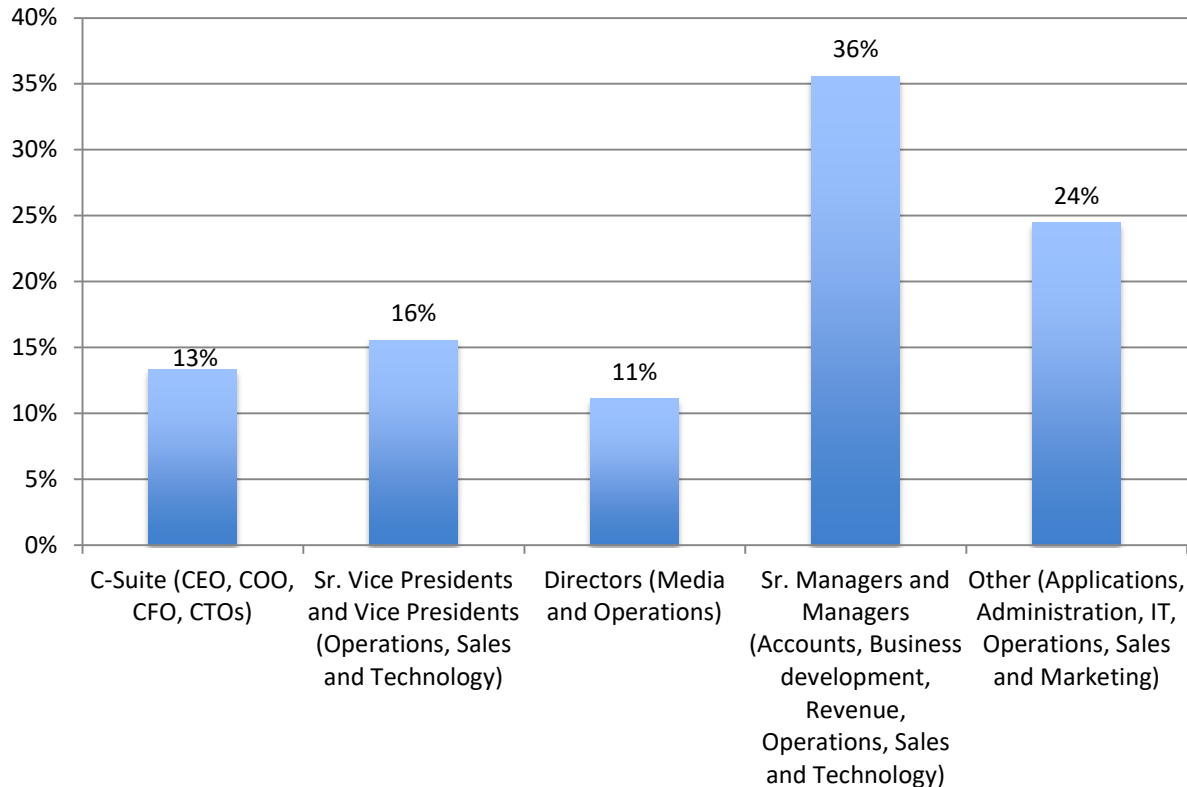
## What are the benefits you anticipate from transitioning from DSM? (Check all that apply)



Multiple options chosen by respondents

- 58% of respondents anticipate key benefits such as improved workflows and efficiency.
- 51% of respondents anticipate improved campaign management and optimization.
- 35% of respondents anticipate improved audience-based sales.

## What kinds of respondents took the survey and shared their details?



- 13% of respondents are C-Suite executives (CEO, COO, CFO and CTOs).
- 16% of respondents are Sr. Vice Presidents and Vice Presidents (Operations, Sales and Technology).
- 11% of respondents are Directors (Media and Operations).

*Thank you!*



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