



SIMPLIFY YOUR SWITCH FROM AD-X MOBILE ATTRIBUTION AND MEASUREMENT

*A simple, six-step process to make it easier
to identify a replacement for your Ad-X instance.*

INTRODUCTION

Some companies had found an easier decision-making path than others. We've discussed switching experiences with a variety of our new clients, and have codified a six-step process to make the transition as easy as possible.

As you are likely aware, Criteo has decided to shut down the Ad-X mobile app attribution platform. In September, support for the Ad-X stops entirely, and you will be left without data and insights unless you identify a replacement solution. Every Ad-X client will need to find a new app attribution partner in the coming weeks.

As a company at the forefront of measurement, data management and attribution, Apsalar has worked with lots of companies as they endeavored to find the right replacement partner. Whether they were companies that had grown frustrated with their initial app measurement toolset, or simply had to switch because their current partner had stopped supporting their business effectively, each of these prospects needed to find the right partner for their needs, and pursued a variety of processes to make their decisions.

To help companies just beginning the evaluation process, we interviewed a cross-section of switchers, with the goal of identifying the most effective process for identifying the best new partner. What became clear from these interviews was that some companies had found an easier decision-making path than others.

We've discussed switching experiences with a variety of our clients and prospects and have codified a simple, six-step process to make the selection as easy as possible. These steps are:



- 1 Start by making a thorough inventory of your specific needs
- 2 Develop an evaluation spreadsheet of all of your key needs/questions
- 3 Create your “shortlist” of possible partners for consideration
- 4 Schedule calls and/or field your RFI/RFP
- 5 Orchestrate an informative and comprehensive demo
- 6 Make your evaluation decision

The balance of this document provides specifics about each of these steps, why it is important, and tips on how to be more effective at each stage. At the end of the document, you'll find a sample list of questions to use in your evaluation process to ensure that you get maximum value from interactions with possible partners, with the minimum investment of time and effort.

1

START BY MAKING A THOROUGH INVENTORY OF YOUR SPECIFIC NEEDS

Before you choose a new attribution solution, you first need to define the key strategic questions you want to answer with it. Rather than starting with a laundry list of features, take a little time FIRST to identify your real information needs. Then translate that into the essential feature sets you'll want.

Many companies told us that members of evaluation teams sometimes got sidetracked when they hear about “shiny” new features, with the result that real needs didn't get the attention that they warranted.

Taking a strategic approach at the outset is valuable because it helps your whole process stay focused on your real needs. Many companies told us that members of their evaluation teams sometimes got sidetracked when they heard about “shiny” new features, with the result that real brand needs didn't get the attention that they warranted.

For this first step, it's valuable to think about two types of use cases – download/acquisition and user engagement/remarketing. The points below will provide some examples of how you can up level team thinking in this initial stage of your process:



High Level Questions You Need to Answer

Download/User Acquisition

- **Relative performance of marketing efforts by source (site, vendor, etc.):** This information helps you rank your marketing vendors, campaigns, messages and creatives and optimize to the most effective partners and tactics.
- **Ability to create, track and analyze user cohorts you define:** When you can track the paths and activities of user groups within your audience, you can gain important insights about their motivations and what makes them convert and engage. This is essential analysis for the savvy app marketer, and what's critical here is to ensure that the platform you choose offers maximum flexibility.
- **Understanding the purchase and engagement processes through buying funnel and trending analysis:** It's critical for a marketer to understand the path that users take to conversion and download. By understanding all of the critical steps in that path, you can improve prospect flow and drive a greater conversion rate. Trending analysis enables you to assess your ongoing optimization efforts with ease.
- **Precision revenue tracking and receipt verification:** Measuring your revenue is obviously of utmost importance, and receipt verification helps to protect yourself against mistakes and fraud.

User Engagement/Reengagement

- **Accurately calculating lifetime value (LTV) and other key financial metrics for customers so you can make more effective budget allocation, campaign and creative decisions:** Understanding the total value of a customer is extremely important both as a basis for your acquisition marketing calculations and as a metric to track and increase over time. You need to ensure that the platform you choose enables you to accurately track sales to re-engagement partners AND the original partner that drove an install.
- **Benchmarking and increasing engagement activity:** Understanding what users do in your app helps you formulate strategies to drive richer, more frequent and more profitable user engagement.
- **Benchmarking and increasing downstream sales:** For many companies, understanding their post install revenue is essential business knowledge.

After formulating these strategic level considerations, it's time to start thinking about specific information needs you may have. What different actions do you need to have tracked? Do you need data for specific regions? How do you plan to action your data? You get the idea.

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In addition, it is usually beneficial to involve all regular users as you develop your wish list. This will help to ensure that the platform you choose meets everyone's needs. It will also help drive better compliance when the new platform is implemented, because it makes people feel included and involved in the process.





2

DEVELOP AN EVALUATION SPREADSHEET OF ALL OF YOUR KEY NEEDS/QUESTIONS

Step two is to efficiently document all of the thinking and learning in stage one. We think it's helpful to organize your needs in the context of seven key areas or "buckets":

- **Overview of Scale/Integrations:** This helps to ensure that you can get started and expand your marketing and measurement programs easily, with the partners you want and in the geographies you need. Pre-established connections are valuable because they enable you to move faster and with fewer hiccups.
- **Platform Software Performance:** These criteria are designed to ensure that the platform you choose won't give you and your team operational headaches. There's nothing more annoying than paying for a tool that makes you sit and wait to use it.



- **Metrics and Measures:** Here's where you identify the “nuts and bolts” of your needs. Spell out the specific data needs you have to ensure that you can determine if the potential partner would be right for you.
- **Implementation and Support** We think it's important to understand what the company's implementation process is on a step-by-step basis, as it gives you a great indicator of how much they will care about you “after the sale.” The availability of great documentation is also a strong indicator of a comprehensive and well-thought-through offering. Finally, understand who/what will be available to support you after the sale.
- **Analytics and Segmentation:** Most industry leaders believe that the ability to define high profitability segments for future marketing efforts will be essential in the future. If you are in the commerce, retail, travel and personal finance verticals, or if your company operates in another vertical with complex monetization, then these features already matter a lot.
- **Costs and Contracts:** Pricing models vary markedly in this business from vendor to vendor. You need to understand what events and actions each alternative solution charges

for, whether or not there are monthly minimums, contract durations, terms and more.

- **Company Information:** As we mentioned earlier, you have to make the switch from Ad-X because Criteo is sun- setting the offering. We bet you will agree that you won't want to go through this process twice, so make sure that the partner you select has the resources and staying power to be there for the long haul. In addition, it's important to ensure that the partner you choose has a commitment to future product improvements and innovation; understanding their roadmap will be important.

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To ease the process of developing your specific criteria list, we have included a baseline question set at the end of this paper. You can supplement this list with your specific needs as identified in step one.

3

Create your “shortlist” of possible partners to consider

No one has time to evaluate every single potential vendor out there. But how do you best focus your options to the right shortlist? An informal survey of switching prospects led to the conclusion that most companies use three core criteria to winnow down the list:

- **Ability to Meet the Specific Needs of Your Vertical**

Depending upon your business category, understanding whether a potential partner has made a concerted effort to serve the needs of your vertical may be critical. For gaming companies, this can be less important because most games have relatively straightforward information and tracking needs that many companies can serve. But if your company has more complex monetization strategies, finding vendors attuned to your specific needs really matters.



It's critical to understand whether your solution provider pays specific attention to your vertical. Verticals like ecommerce and travel, for example, have very specific needs that not every provider can meet.

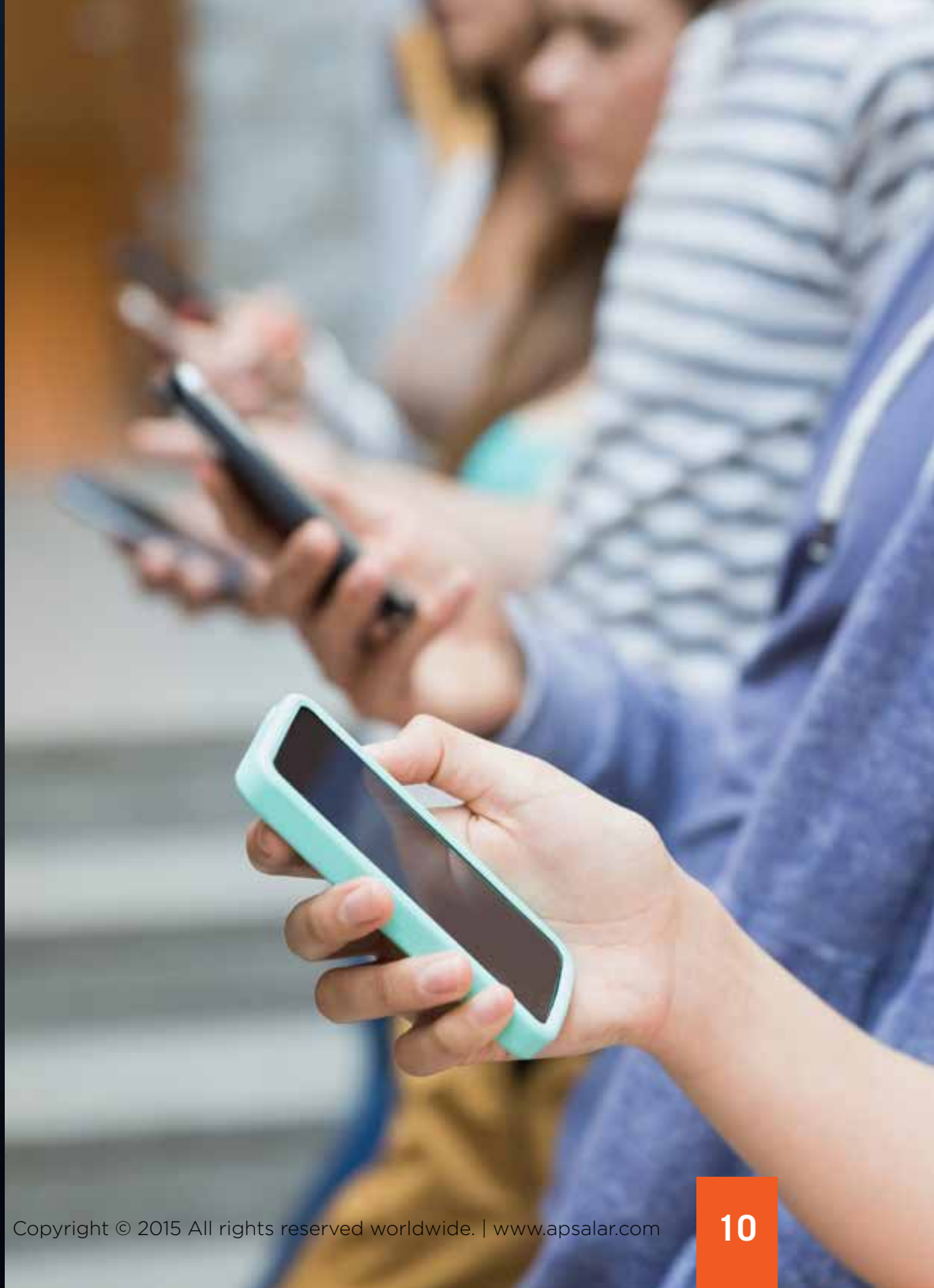
At minimum a potential solution should be able to provide you with examples of companies with similar measurement and attribution needs. Again, we come back to the idea that as you explore options to fill the gap left by the Ad-X shutdown, don't LIMIT yourself to finding an offering with the same or similar feature set. Set your sights higher.

- **Size and Longevity of the Potential Vendor**

We'll admit a little bias here, because Apsalar is a big player in the space, with more than five years in the business. But we sincerely believe that size and longevity are great indicators of the strength of both a platform and the service that they provide. We concede that small fry in the industry might question this criterion – you'll need to determine whether you think it is a valuable consideration.

- **Public Client List**

Solutions providers that serve larger organizations have had to demonstrate financial stability, outstanding data security, and strong client service. That doesn't mean a vendor without such clients doesn't have those qualities. You'll simply have to decide whether what they offer seems good enough to make you willing to take that risk.



4

Schedule calls and demos/field your RFI

Once you have your evaluation criteria summarized in a spreadsheet, you can effectively conduct your search. All of the “switcher” companies we spoke with took introductory calls or meetings to understand the core credentials of offerings. Some companies chose to follow those initial discussions with a formal RFI/RFP process, while others conduct a more informal process via a supplementary meeting where they walk down their question list.

Whichever way you go, your spreadsheet helps to ensure that you conduct apples-to-apples evaluations. By focusing the discussion on your strategic needs rather than vendor “spiels” and “shiny objects”, you make much more effective use of your time. Even if salespeople might not like it so much.



Talk about your business challenges first rather than beginning immediately with very narrow features reviews.

Again, start these discussions strategically. Your need is to replace Ad-X, but your objective should be to find something even better than Ad-X.

Talk about your business challenges initially, rather than driving immediately into very narrow features checks. By forcing a discussion on first, your business issues, the ensuing discussion will go a long way toward figuring out which potential vendors can really be a business partner.

If you take the formal RFI route, watch for signals of how well or how poorly the prospective partner seeks to understand your business and strategic needs. Translation: did they actually read the RFP and respond to your questions, or just thump over a template response. That's a great surrogate indicator of the quality of service and support you can expect ongoing.



5

Orchestrate an informative and comprehensive demo

The demo shouldn't be just an opportunity for vendors to dazzle you with sexy UI. Rather, it's a critical step to understand how easy or how difficult your key activities may be to complete.

As a first step, identify your top ten most frequent or most important actions in the platform, and ask the vendor to show you how each of those are done. By all means take in "the whole show" but make sure you see the things that you and your team will do most.

Simple is Usually Best

I am a huge believer in simple and intuitive UI and navigation. Something that appears slightly annoying in a demo will feel supremely annoying four months later when you've experienced it 1,346 times.

Insist on a live demo. Never rely purely on screenshots to make your evaluation. A demo is about the doing, not (just) the seeing. In addition, make sure they show you a "live" web demo, not a localized instance of the platform. That way you can experience the platform in a real world use case, and see for yourself the actual running speed of the tool.

In addition, we think it's valuable to include your power user(s) in the demo so they can see what it will be like and can subsequently provide you with their feedback.



6

MAKE YOUR EVALUATION AND DECISION

If you take the sort of methodical approach outlined in this paper, this step will be relatively simple for you. By understanding your needs, making the right shortlist, and evaluating alternatives “apples to apples” you’ll probably have a clear sense of which vendor is best for you.

In addition, it’s valuable to speak with the account manager that you would be working with before you make your final decision. Since most of your team’s interactions with this person will be by phone and email, a phone introduction can be a great way of evaluating your chemistry.





CONCLUSION

The process outlined above represents a simple and thorough way to ensure that you make the right choice on an Ad-X replacement. But if you take away nothing else from this document, please make sure you don't skip or breeze through the first steps. A couple of hours devoted to these critical initial process stages will make a huge difference in ensuring you choose right - and choose quickly.

We hope that this paper has been useful and informative. We'd love to hear any comments or questions you may have about this document, or indeed about our company.

PLATFORM NEEDS INVENTORY

We prepared this starter list of questions to help you get started developing an evaluation tool for prospective Ad-X replacements. Feel free to copy and edit/add to this list for your process or RFP.

Overview

- How many overall media networks/vendors is your platform currently integrated with?
- Can your platform track/do you support Facebook?
- Can your platform track/do you support Twitter?
- Can your platform track/do you support Google?
- Specifically, is your platform integrated with <<INSERT THE LIST OF YOUR PARTNERS>>?
- If I work with a partner that isn't on your current partner list, what is the process to get them added?
- Do you support both iOS and Android?
- <<If relevant>>How strong is your media partner footprint internationally?

Platform Performance

- Do you offer a web-based interface for the platform?
- What is your server uptime level?
- What is the trend for server uptime over the past year?

Metrics and Measures

- What types of consumer events can your platform measure?
- Can it measure and report on total revenue events as well as individual revenue event types?
- Can a user define custom events for tracking?
- <<If relevant>> Can your platform pass custom user IDs with the device ID?
- Can you measure app retention at the aggregate, vendor, campaign and creative levels?
- Can you deliver data for specific regions? What regions are available?
- Does your platform provide insights related to ARPU and LTV at the aggregate, vendor, campaign and creative levels?
- Do you offer special tools to help us test and evaluate new media vendors against existing partners?
- Can data from the tool be exported via Excel/CSV?
- Can data be exported via an API?
- Do you have pre-existing integrations with enterprise tools like Adobe Analytics or Google Analytics? If so, please list all of your existing and planned enterprise platform integrations.

Implementation and Support

- Please outline the implementation process when a new client engages with you.
- Do you offer dedicated individual(s) for a client's implementation?
- What sorts of ongoing client support do you offer?
- Do you offer a dedicated, named account person for each client?
- What are the hours for "emergency" client support?
- Please outline the documentation available to customers and provide hyperlinks to the key documents.
- What is your churn rate for clients in the most recent 12-month period?
- What were the last three clients you lost, and why?

Analytics and Segmentation

- What are the audience analytics capabilities of the platform?
- Does the platform include audience segmentation tools that enable you to conduct cohort analysis?
- What criteria can be used for creating cohorts/segments?
- Can you export audiences to analytics tools/are there currently integrations?
- Can you export audiences to media partners?

Costs and Contracts

- Please outline your cost structure. Specifically, do you charge for:
 - Ad Clicks
 - Paid Installs
 - Organic Installs
 - Paid Events
 - Organic Events
 - Remarketing Events
- What is the typical contract length?
- What are the cancellation and payment terms?

About the Vendor

- How long have you been in business?
- Provide profiles of the key executives in your firm.
- What is the financial state of the company?
- Are any media company(ies) owners or part owners of your company? Do you have any special agreements with media companies that could be construed to represent conflicts of interest to providing unbiased vendor-level data to clients?
- Is mobile app measurement a significant portion of the total business?
- Please outline your product roadmap for the future. How will your offering be changing in the future?

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