

Transforming a4's ad sales budgeting process



A4, a division of Altice News & Advertising, provides audience-based, multiscreen advertising solutions to local, regional, and national businesses and advertising clients.



a4's coverage offers over 80 million authenticated U.S. household IP addresses and 15 million households with viewership data collected across 210 Designated Market Areas (DMAs), including the Optimum markets that span nationwide. The company delivers services that cover linear, OTT, programmatic, mobile, and social media video and display ad solutions.

a4 also provides unique programming and inventory opportunities through owned news networks and properties: News 12 and News 12+, Cheddar News, i24NEWS, Rate My Professors, and AdMessenger.

Inefficiency caused by a manual budgeting process

The a4 sales group encompasses sellers, media planners, and ad operations. The team used a complicated budgeting process for ad sales forecasting, goal setting, and assigning a budget to sales reps and accounts.

The budgeting had many dimensions and was broken down by account, month, and category. There was added complexity since some account executives split accounts. The large amount of information made it overwhelming for a team member to find the relevant details needed for their role. If sellers couldn't get accurate pacing information, they couldn't predict their ability to hit targets for the month, quarter, or year and risked selling less than expected.

There were several issues with a4's budgeting workflow:

- o **Highly manual:** The team was managing sales with emails and spreadsheets.
- o **Time-consuming:** It's challenging enough getting annual budgeting done by the first of each year, but the manual processes added an extra hurdle.
- o **Lacking visibility:** Without a single source of truth, the process was preventing collaboration and accessibility for users across the organization.

"Historically, it would be a two- to four-week clean-up period for somebody to go through each piece of data to get to something that was manageable," said Chris Quinn, Senior Director of Ad Sales Systems at a4. "Once that clean data was provided, they would then share that with the AEs and management and spreadsheets would be flying everywhere. And spreadsheet management is a very challenging thing to do, especially when you're working across 150 AEs."

Building a more collaborative and automated system

To enhance their Salesforce platform in the past, a4 had worked with Shift CRM, which Silverline acquired in 2021. Over the past three years, a4 went from having almost no AE adoption of Salesforce to having all AEs use the platform for account creation, activity management, and notes.

a4's Salesforce team supports the entire enterprise and has several initiatives each year. Knowing Silverline's expertise and experience in the media and entertainment industry, a4 partnered with Silverline to evaluate the business need to improve the budgeting process and alleviate skepticism about building the solution on Salesforce.

Silverline went through a discovery process to identify the budgeting pain points and presented its findings and a roadmap to a4's stakeholders. The plan completely turned around the organization's perception of what was possible with Salesforce.

"No one outside of my organization and the Silverline team thought that what we were asking for could be done in the time we did it," said Quinn. "In partnership with design instructions from my team and Silverline's team, we were able to deliver everything we needed to, and managed expectations around what those tools were to make sure we got it out in time."

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It was an extremely impressive cross-functional display that had a lot of moving parts along a lot of different places in the organization. It worked out wonderfully because of the patience and determination of Silverline’s team.

Chris Quinn

Senior Director of Ad Sales Systems, a4

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Silverline built a custom Salesforce Lightning Web Component solution that allows the a4 team to see, do, show, and approve the ad sales and budgeting work within one system. Once the budgeting process is complete, Salesforce then automatically creates the records. The new system rolls up all the budgeting information into a summarized, user-friendly format to give visibility and accessibility across the ad sales team.

“Having all the information in one central location reduces a lot of the chatter, reduces a lot of the possibility for errors in the process,” said Quinn. “It allows us to spend less time cleaning data and managing the process and more time working with our sales team, making sure that we have the correct budgets across all the accounts so that the expectations are set accordingly to make sure that we earn as much revenue as possible, but don’t push things to the point where we create a ton of risk.”

Accelerating the budget process for improved ad sales

By streamlining the Salesforce user interface, Silverline has given a4 the ability to gain real-time insight into its ad sales performance and how it’s pacing to its goal. The new Salesforce system allows the entire a4 team, from the top down and bottom up, to perform their budget planning better.

“With the budget planning tool in Salesforce, our local sales team was able to essentially do all of their 2023 sales budget planning directly in the platform, freeing up a ton of time by replacing management of spreadsheets,” said Quinn. “One of the senior executives on the sales team shifted budgets around, and then called up his support person to ask, ‘Did I do that right? That just seemed too easy.’”

The sales team can now expose budgeting information against pipeline information in Salesforce, which enables users to know where they’re directionally going. They are also leveraging Salesforce to have better control over their account and order data, so as they aggregate data in their reporting platform, they’re able to show invoice revenue directly against budget.

AEs now have a better understanding of how they’re working, but more importantly, it gives sales leadership the ability to better manage their teams, which leads to increased performance and increased revenue. The amount of time that sales leadership and AEs spent on managing the budgeting process was reduced by up to 60 percent.

“Because the sales team is able to see benefits from their perspective — at the AE level, manager, director, and above — there’s more openness to using the platform,” said Quinn. “It’s really an across-the-board solution where the platform ends up not just serving sales, but also serving marketing, product development, and operations, all with the goal of increasing efficiency and revenue.”



About Silverline

Silverline leverages insight acquired through thousands of engagements along with real-world expertise gained across the Media and Entertainment industry, including: broadcast, publishing, and agencies. From strategy and implementation to managed services, we guide clients through every phase of their journey — enabling continuous value with the Salesforce platform. To learn more visit: <https://silverlinecrm.com/media-entertainment/>

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