Network Merger Checklist

The purpose of this document is to enumerate some of the things to consider when merging two Google Ad Manager 360 networks.

What this document is not: an exhaustive guide of all potential pitfalls nor required list of changes.

Reference links:
- Users, Contacts, Roles, Teams, Companies
- Inventory Structure
- Technology & Tagging
- Campaigns, Deals, Ad Exchange & Exchange Bidding
- Audiences, Targeting & Forecasting
- Integration with Third Party Systems & API Access
- Reporting & Data
- Admin
- Video specific items
- Bulk import/export of entities in ad manager

Users, Contacts, Roles, Teams, Companies
- Analyze all users and their access requirements.
- Identify roles and role permissions.
- Do roles need to be changed/merged?
- Who are your points of contact and what are their responsibilities?
- Will you need to separate control by teams? Have a team for sales, another for traffickers? Or would you need different teams per properties (team for PropertyA vs team for PropertyB)?
- Identify and merge contacts.
- Identify and merge companies (like advertisers and agencies).

Inventory Structure
- How are you planning to design your new/merged inventory? Keep limits in mind.
  - Both ad unit structures should be merged
    - How many sites do you run?
    - Do you have ad units per site / property / brand?
    - Do you have ad units per app?
  - Both active key-value sets should be merged/simplified
  - Suggested ad unit structure:
    - Level 1 - Sites, properties & apps.
    - Level 2-4 - Site sections.

- - ■ Last Level - Ad positions.
- Consider all labels & merge where appropriate. Review existing labels for competitive exclusion, ad exclusion, frequency capping, creative wrappers.
- Review & consolidate your native styles & formats:
  - Review styles' HTML & CSS - unify where possible.
  - Review all formats, delete formats that have the same variables (redo related styles).
  - Review targeting of native styles.
  - Identify Native Formats - especially those targeting RON
    - ■ Identify formats eligible for AdX backfill - determine what format should serve where
- Do inventories refresh? How so - with what frequency?
  - Unify practice across inventory to simplify setup & comparison of performance.
  - Declare refresh in AdX if backfill is enabled.

Technology & Tagging

- What technologies & libraries are you using to build your websites and apps?
  - Are they different across companies or areas within each company?
  - How does your mobile app setup look like? (amount apps / SDKs)
  - How does your OTT/CTV inventory look like?
- How do technical teams work with AdOps teams (e.g. to change tagging)?
  - Is it affected by the tech team's development lifecycle?
  - Does this vary across companies?
  - Do you have a tag manager (e.g. Google Tag Manager)?
  - How do you distribute / maintain third party tags on your properties?
- You need to retag all properties considering:
  - All tags across all properties should point to the new consolidated network.
  - You will have a new key-value structure.
  - You will have a new ad unit structure.
- Do you use Tagless Requests (fka Simple URL)?
  - Update them across all your properties.
  - Will its limitations and unsupported features be OK in the new network?
- Are GPT Passbacks being used with 3rd party ad servers?
- Do you have partners with ad tags pointing at your network?
  - Identify and follow-up with partners and pages/apps that are not part of your O&O inventory. Tags might need to change to adapt to a new network/structure.
- Review your AMP inventory. Adopt best monetization practices.

Campaigns, Deals, Ad Exchange & Exchange Bidding

- How many campaigns do you need to migrate from one network to another?

- ○ For new campaigns (to traffic) consider splitting into 2 campaigns: one in the old network (until cutoff date) and one in the new consolidated network.
- ○ For campaigns already trafficked, options:
  - ■ Terminate now and create 2 new campaigns (one in each network). Split impressions linearly depending on % of campaign flight (e.g. if 40% of remaining flight time is before cutoff date - traffic in old network 40% of impressions and leave 60% of impressions in new network).
  - ■ Terminate near the cutoff date and create a new campaign in the new network with remaining impressions.
- What deals are you running (PG, PD, PA)?
  - ○ What are the expiration dates?
  - ○ Are you migrating all deals from the legacy network or waiting until they finalize?
  - ○ Identify all deals to recreate.
  - ○ Remove unused Private Auctions
  - ○ Consolidate PAs with same buyers across both networks (renegotiate terms anchoring on the highest price across both networks).
- How many SSP networks do you work with?
  - ○ How many of them offer unique demand?
  - ○ Are there any SSP networks that you'd like to work with in the future?
- Review and consolidate Yield Groups
  - ○ Merge yield groups targeting the same inventory (especially RON YGs)
  - ○ Merge yield groups with the same monetization partners (especially RON YGs)
- Review and consolidate Preferred Deals with third parties:
  - ○ Deals transacting through Exchange Bidding.
  - ○ Deals transacting through Header Bidding (serving through Price Priorities).
- Identify and Merge price priority line items (e.g. used for header bidding campaigns)
- Review and consolidate rules:
  - ○ Opt-in, blocking, open auction pricing, first look pricing, UPR, protections.

Audiences, Targeting & Forecasting

- Targeting
  - ○ How are you targeting campaigns? (content related / RON / ROS / Vertical / Horizontal)
  - ○ Anything you are not targeting today that you would like to target when migrating? (key-words / Geo / Audience / Day Parting / Frequency Cap)
  - ○ Video targeting: consider CMS metadata from new ingestion sources.
  - ○ Review EU user consent policies. Review Restricted data processing (CCPA) settings.
- Audience
  - ○ What audience systems does each network use today?

- - - Identify and merge audience segments where possible (through DMP if possible, by dropping any similar segments across networks or by reimplementing audience pixels to collect audience lists again).
    - Do you use cookies, RDIDs? Do you have a way to identify users across devices (use PPID)? Would you like to be able to do that?
    - Are you identifying audience segments through key-values?
    - How are you reporting on user segments (consider user segment reporting limitations)?
  - Forecasting
    - Migrate any manual forcast adjustments
    - Consider pre-tagging sites to build forecasts

Integration with Third Party Systems & API Access

- What other external tools do you use in conjunction with your ad server? Will you require integration with other third party systems?
  - Consider among others (not exhaustive) CRM, Billing, Sales Management, Forecasting, Reporting, Creative Building, DMPs, etc.
- Are you utilizing a third party data provider (DMPs)
- How many systems have access to either network through the API
  - What are the technical details of each integration?
  - What are the business use cases?
  - Have queries per second (QPS) in mind to avoid quota errors.
- How many teams have access? Consider authorization/authentication (roles / users)
  - Do 3rd party companies access your network through the API?

Reporting & Data

- What kinds of reports do you have today who are their audiences?
  - What reports do you create ad hoc?
  - What scheduled reports do you have?
- Did you experience reporting limitations in the past?
  - Can this be an opportunity to use AM360's API for reporting?
- What type of reports do you send to your advertisers? How do you send reports?
- What internal teams query which reports?
- Approximate sizes of reports? Ran into any issues with the sizes of reports?
  - New consolidated network will probably be larger - as such, if you face problems today chances are you will do so more in new network.
  - Consider narrowing down scope of large reports (by reducing date range, dimensions or metrics).
- Data Transfer:
  - Do the different networks actually use Data Transfer
    - In what way? What are the business use cases?
  - What files are active? Which ones are actually used? (When merger is complete, remember to finalize DT in the old network to avoid extra costs).

- ○ What fields are used in each file?
- ○ What teams, individuals or tools have access to DT files?
- ○ How are you using data? What processes / insights depend on Data Transfer?
  - ■ Any reports / dashboard / data analysis?
  - ■ Joining DT data with other data sources from either company?
  - ■ Consider the use of Data Studio & Big Query to extract insight.

Admin

- What betas are active on each network?
  - ○ Review which ones apply to new consolidated network:
    - ■ Should any be added? Any stopped/removed?
- Review & modify billing.
- Review all Scaled Partners.
- Recreate all activity groups in the new consolidated network.

Video-Specific Items

- What types of ads are you offering?
  - ○ Pre-rolls? Mid-rolls? Post-rolls? Review your video ad rules setup.
  - ○ Overlays?
  - ○ Redirects?
  - ○ VPAID?
  - ○ In-article / in-feed video?
  - ○ Companions?
- Unify video settings across networks:
  - ○ Are you defining the number of ads in each pod?
  - ○ Are you defining the length of each pod? (e.g. 60 secs)
  - ○ Are you using video fallback (recommended)?
- Player Tech
  - ○ What video player are you using in Web, mWeb and mobile?
  - ○ Consider unifying/standardizing to simplify tech stack.
- Hosting and Transcoding
  - ○ Do you need any hosting or encoding services?
  - ○ Where are you hosting your video ad content? Will you keep hosting your video content in the same place or will you migrate to another platform?
- Content Ingestion
  - ○ Where is your video content hosted? (e.g. BrightCove, YouTube, self-hosted)
    - ■ Unify and simplify content sources where possible.
  - ○ Are you defining cue points?
  - ○ How will you use the new content metadata in targeting?

Bulk import/export of entities in ad manager

You may choose to use the Ad Manager API to migrate some of the entities from one ad manager network to another. Below mentioned are some of the services that can be used for this purpose. For any api related questions, please reach out to admanagerapi-support@google.com:

- Ad units = InventoryService
- Key Values = CustomTargetingService
- Orders and Line Items = OrderService and LineItemService
- Proposals and Proposal line items = ProposalService and ProposalLineItemService
- Users = UserService's getUsersByStatement(), createUsers()
- Roles = UserService's getAllRoles(), not possible to create roles via API

Note that a script using the functions mentioned above would have to be written by your team in order to export data into and import from a CSV. Private auctions, pricing rules are not supported in the API yet.

TIPS
TACTICAL IMPLEMENTATION PROCESS & STRATEGY