CHOOSING AN SEM PLATFORM:

Analyze, Ask and Act

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THE **RUNDOWN**

Marketers are constantly being asked to do more with less. The good news is that technology is working with them to make that easier. Search engine marketing (SEM) software platforms are an effective tool for improving team efficiency and campaign effectiveness. Marketing organizations should thoroughly evaluate SEM platforms—a big commitment for any company—before selecting one to make the most of the investment.

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Running a high-performance search campaign across different search engines, geographies, formats, devices and channels can be quite challenging. And today's ever-changing digital landscape adds to both the complexity and opportunity. To help ease these headaches and work [faster, smarter and better,](#) many companies are using an SEM software platform.

These platforms can automate the time-consuming, manual tasks associated with search engine marketing, such as keyword, ad group and campaign management, as well as optimization, while improving productivity and campaign performance. Many SEM platforms have emerged over the past few years, each offering a different set of features. In this guide, we'll explore the benefits of SEM tools and identify the key factors to consider and questions to ask in order to choose the right one.

Why an SEM tool matters

Automating SEM through an enterprise platform can improve efficiency and productivity in several ways:

Better workflow. Day-to-day management of ad groups, ad copy, keyword lists and bidding is streamlined, with less time is spent on manual reporting and optimization.

Smarter decisions. Businesses can stay current and keep pace with rapid changes in ad formats, search engine requirements and tracking methods. It also facilitates streamlined reporting, enhanced analytics and greater insights into customer behavior through multichannel reporting and attribution.

Increased performance. A single platform collects all campaign data in one place, which can then be used to glean important insights, such as how different marketing channels can work together to improve campaign performance.

Asking the tough questions

Deciding on an SEM platform requires comprehensive evaluation, including an assessment of business needs, staff capabilities, management support and financial resources. Here are some questions to ask *before* evaluating tools:

What are the goals? Is too much time spent crunching numbers? Should marketers refocus on more strategic tasks such as creative testing? It's important to understand the business objectives and what pain points the technology will solve.

Are integrated digital marketing capabilities needed? Some platforms feature APIs to export data, while others manage multiple channels through a single interface. If an SEM campaign currently includes search and display, there may be an opportunity to integrate these channels.

Are the reporting needs complex? Some SEM platforms offer a range of report options, from the metrics included to the frequency of measurement. Think about how much report customization will be required.

How will success be defined and benchmarked? Make sure the platform measures the key performance indicators (KPIs) being used to optimize campaign performance.

Investigating platform features

When evaluating a platform's feature set, service levels and price are clearly important. Also consider things like consistent workflow, custom reporting, easy optimization and cross-channel integration.

WORKFLOW. An SEM platform can dramatically simplify day-to-day campaign management and reporting in a variety of ways:

- *Usability.* The system should be intuitive, easy to learn and able to accommodate large sets of data. Managing multiple channels, such as display and social, from a single UI is also key.

- *Bulk operations.* Can big changes be made painlessly and at scale in the UI, in bulk upload sheets or directly on the engine?

- *Customized views and reporting.* Does the platform support custom views of campaigns with features like labels or filters?

- *Automation and alerts.* Setting up rules to automate changes is helpful when things need to happen at a specific time or when unique conditions are met.

- *Engine support.* It should support all of the engines the business works with as well as the features, reporting, tracking and API data imports offered by those engines.

- *Feeds and business data integrations.* How seamless and easy is it to connect and integrate business data into end-to-end campaign management? Can offline/event-based conversions be added?

REPORTING. Measurement is central to any search engine marketing initiative, but it can be quite time consuming. Here are the key areas to consider:

- *Conversion tracking and tagging.* Can existing conversion tracking tags be used, or will new tags be needed to start tracking conversions?

- *Data speed and freshness.* How quickly are conversions reported on and how quickly does data flow from the engines? Both can affect the quality and freshness of insights, auto-optimization and campaign performance.

- *Flexibility.* Assess the level of customization available to deliver the insights that matter most. Can summary reports be run across all accounts and engines? What metrics are available for reporting and how easily can data be imported/exported?

- *Insights.* Does the system proactively surface insights? Can additional insights be extracted such as search queries, reporting on-site links and budget pacing?

- *Site analytics integration.* Assess whether the platform offers its own analytics package and if it's integrated. Can a third-party solution be imported easily?

- *Attribution.* Does the platform enable search-based attribution as well as attribution across channels? Find out what models are supported.

- *Data access.* Evaluate how easy it is to get the data in the format desired. Is an API available for reporting, updating and uploading other digital or offline conversions? Is web query functionality available?

- *View impact of changes.* Can changes made by users and the bidding system be viewed? Can date ranges be compared to detect trends and view the impact of changes on performance?

OPTIMIZATION. This can be the difference between a good and a great search campaign. Here are some important factors to consider:

- *Testing.* What type (A/B or multivariate) of testing is available?

- *Goal setting.* Find out how easy and intuitive it is to tell the system what the goals are, whether they relate to revenue, cost per action (CPA), ad position or a combination?

- *Optimization.* Once goals are set, how rich are the metrics available to optimize from, including different types of conversions, micro conversions or site analytics data such as "time on site."

- *Bid optimization intelligence.* Ask how the optimization system handles low-volume keywords, if a portfolio bidding approach is used and how often algorithms are updated.

- *Transparency and control.* Inquire about the rationale for bids, the ability to preview or override intended bids, how to gain insight into primary constraints and, if so desired, how to exclude keywords from bid optimization altogether.

CROSS-CHANNEL INTEGRATION. Many marketers manage search as part of their broader digital efforts and will want a platform that offers support across channels:

- *Consolidated reporting.* Does the platform support the correct media and identify cross-channel opportunities? Is this done through APIs or native integration? Is it real-time integration?

- *Seamless integration.* The platform shouldn't require extra steps like data transfers and reconciliation of multiple reports to get cross-channel reporting that's real-time, accurate and deduplicated.

Selecting a suitable partner

The tough questions have been asked and a list of features identified (the absolutes and the nice to haves). With this information in hand, it's time to pick a partner.

Identify and contact vendors. Identify vendors that meet the criteria. Provide this list to the vendors to expedite comparison when evaluating proposals.

 Schedule demos. Set up demos for all potential internal users. This offers the team a chance to ask questions and get a better understanding of what it might be like to work with the product.

Check references. If possible, consult several customer references. These should be the primary users of the platform, not just the procurement manager who signed the contract.

Negotiate a contract. It should detail the technology and support covered. Try to uncover any additional fees such as charges for custom integrations, engineering services, mid-year training and an "out" clause.

SEM platforms can help businesses become more productive and efficient by streamlining workflow, reporting and optimization while managing campaigns across channels. Before investing in one, however, it's important to assess business needs and prep questions for the evaluation process. We've included a checklist below to help you pick an SEM partner

SEM Platform Checklist

	Vendor A	Vendor B	Vendor C
Workflow			
Usability			
Bulk operations			
Customized reporting			
Automation and alerts			
Engine support			
Feeds and business data integration			
Reporting			
Conversion tracking			
Data speed and freshness			
Flexibility			
Insights			
Site analytics integration			
Attribution			
Data access formats			
API availability			
Optimization			
Testing			
Goal setting			
Optimization			
Bid optimization intelligence			
Transparency and control			
Cross-channel Integration			
Consolidated reporting			
Seamless integration			