

Case Study

SmartAdv: Tracking Software Challenges, Decisions, & Migration Processes To Everflow

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In March of 2019, affiliate network **SmartAdv** experienced an avalanche of tracking, domain and systems problems that seriously impacted their business with advertisers and publishers.

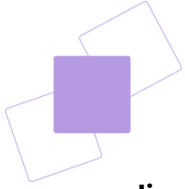
They had been a CAKE subscriber for years, but given mounting issues they began shopping for a more robust network tracking platform in the latter half of 2018.

This Case Study examines the problems SmartAdv had, their features and criteria for a new platform, the process, and considerations surrounding their migration to Everflow.

While network migrations are notorious for being fraught with challenges, service disconnects, and unforeseen consequences, this study captures experiences and lessons learned during this process.

Their process resulted in a smooth transition, uninterrupted business and a positive, unanticipated growth in the relationships with their clients.

NOTE: While there is an obvious business relationship between SmartAdv and Everflow, neither party is receiving, or has received, any financial consideration, compensation, discounts or incentives for participating in this case study.



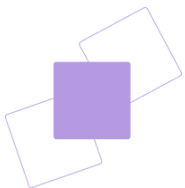
What is your role at SmartAdv and what challenges were you facing?

Jimmy: SmartAdv is a comprehensive affiliate networking and campaign tracking system. We connect advertisers and publisher to create scalable target marketing that increases revenues for all parties. My role at SmartAdv is to maintain advertiser relationships, upkeep SmartAdv standards (Traffic quality, compliance, and traffic flow) and solidify SmartAdv foundation. Networks face challenges daily, the most feared issues come from Tracking Platform issues. Back in March, we were facing multiple issues with our tracking platform (CAKE).

One major issue we had to tackle was our tracking platform stopped displaying conversions due to our postback domain being dropped from CAKE during an update. Our business suffered a massive loss as a result. Our Facebook publishers started losing money because the Facebook Pixels weren't firing due to the postback domain issue. At that moment, I knew it was time to make the switch. I contacted Ross Moore, he replied immediately, and at 10:00PM he set me up with a Trial with Everflow to help salvage our business.

“One major issue we had to tackle was our tracking platform stopped displaying conversions due to our postback domain being dropped from CAKE.”

Andrew: My primary roles are Infrastructure design and management. That includes systems design, integration, and aggregation, oversight and monitoring of network tracking, domains, and IPs. I also handle our websites, maintenance, system wide debugging, including obscure tracking integrations. Overall, like most CTOs I'm the digital janitor. Jimmy nailed some of the major recent challenges that have landed on my desk.

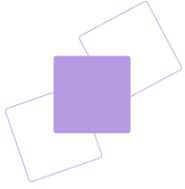


Sam, tell us a bit about Everflow's background and mission. What needs did you see in the marketplace that networks currently have?

Sam: We started Everflow back in mid-2016 with the mission of bringing an innovative partner performance marketing platform to the market.

At the time we were constantly hearing of complaints about the incumbent providers in the market (CAKE, HasOffers & Hitpath, etc) both in terms of new functionality as well as customer support. The background of the team involved starting one of the earliest mobile networks, Moolah Media back in 2009 which was eventually sold to Opera software.

We had to develop our own tracking software at Moolah as the providers at the time couldn't really fulfill our need, especially in mobile. This gave us the unique experience of being actual end users and seeing all the use cases that needed to be addressed in the market firsthand.



Andrew, from your perspective, what challenges and trends have you seen evolving for affiliate networks over the past few years?

Andrew: There have certainly been some advancements, albeit none of them technologically amazing. For example smart-links, ad-rotators, click-walls. Most of the developments have enabled networks to auto-tune for best performance to the affiliates, in terms of EPC, revenue, etc. There's less day to day human intervention required in many cases.

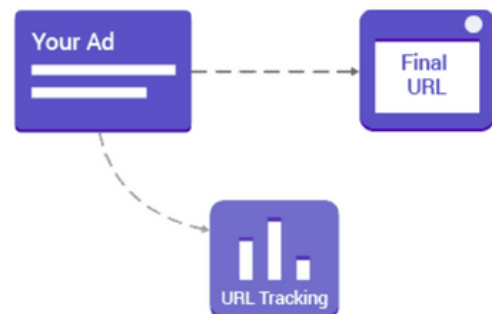
One of the biggest challenges I've seen is the massive move of publishers to social media, and other large platforms for media buying. Many of these, including Facebook and AdWords, do not consistently allow, affiliate tracking links. Google developed what they call Parallel Tracking as a workaround, and Everflow is the first major tracking platform I have seen to make it clear how to implement this. It still has its limitations, requiring an additional conversion tracking setup and limiting the data being passed.

"The biggest challenge was ensuring that SmartAdv hit the ground running with EF with no interruption to the business."

Email always continues to be an issue, even with the most compliant mailers. Service providers, registrars, etc., tend to dislike email no matter what, as it isn't worth the complaints they receive, even when a mailer is operating completely within the law. We have studied this extensively for decades now, with other major players in the email industry. The common problem is that nearly no one actually understands the law, and the laws vary country to country. The U.S. is "advertiser maintains suppression list," and consumers opt-out from getting further correspondence from the Advertiser. In nearly all other countries, a consumer opts-out from the mailer's list. This often leads to massive confusion.

That being said, regardless of the rules, consumers complain either way, and providers just don't want to deal with it which leads to infrastructure challenges. Without going into too much detail, as a network that supports email publishers, the network themselves needs deep knowledge of the potential damage that email can cause to their infrastructure, so that they can design accordingly.

"Facebook and AdWords don't like/allow affiliate tracking links. Everflow is the first major platform I've seen to implement Parallel Tracking."





What brought you to considering working with Everflow as a solution?

Jimmy/Andrew: Honestly, we had been shopping for a while. A brief intro as to why will help explain why we were looking for certain things in a new platform. After being on CAKE for the better part of a decade, it was frustrating that they were not keeping up with the industry.

They have a good platform and there are many things I still like about CAKE, but they became a dinosaur. Basic things like smart-links were never added. As a developer, this was beyond frustrating knowing how simple some of these additions could have been. They were always very happy to take “feature requests”, but they never materialized.

Our Shopping List Looked Like This...

Reliability – ‘Nuff said.

Up-to-Date Tracking – This had to be spot on accurate. Period.

Speed – Very important now with mobile. (Everflow uses 1 redirect domain, not 2. Their response time is also much better, fractions of what we previously were timing).
Features – Smart Links, Parallel Tracking, Invoice system all needed to be bulletproof.

New Features! – We wanted a partner that would work with us to add and develop new features as they became necessary.

Excellent API – This was very important as we have other internal systems that aggregate info from all of our 3rd party platforms. This was absolutely critical for accounting and running the rest of the business efficiently, and accurately.

Price – Less is always more, though cheapest isn’t always best. I love Everflows pricing model. They start at a very down to earth number, so you can get up and running without going broke. They do not nickel and dime, they do not charge me for tracking domains that I buy, SSL, and host. (CAKE did, just to add them to the system, and I know many other major platforms do also). This significantly lowered the monthly cost.

Migration from CAKE – This was absolutely essential. (More on the specifics below).

The final icing on the CAKE (pun intended), was the technological issues with our tracking and postback domains. We encountered a rough month of complaints, and while I was doing damage control on our infrastructure (yes, we hosted outside of CAKE as well), they were unable to keep up with changing the domains in their platform.

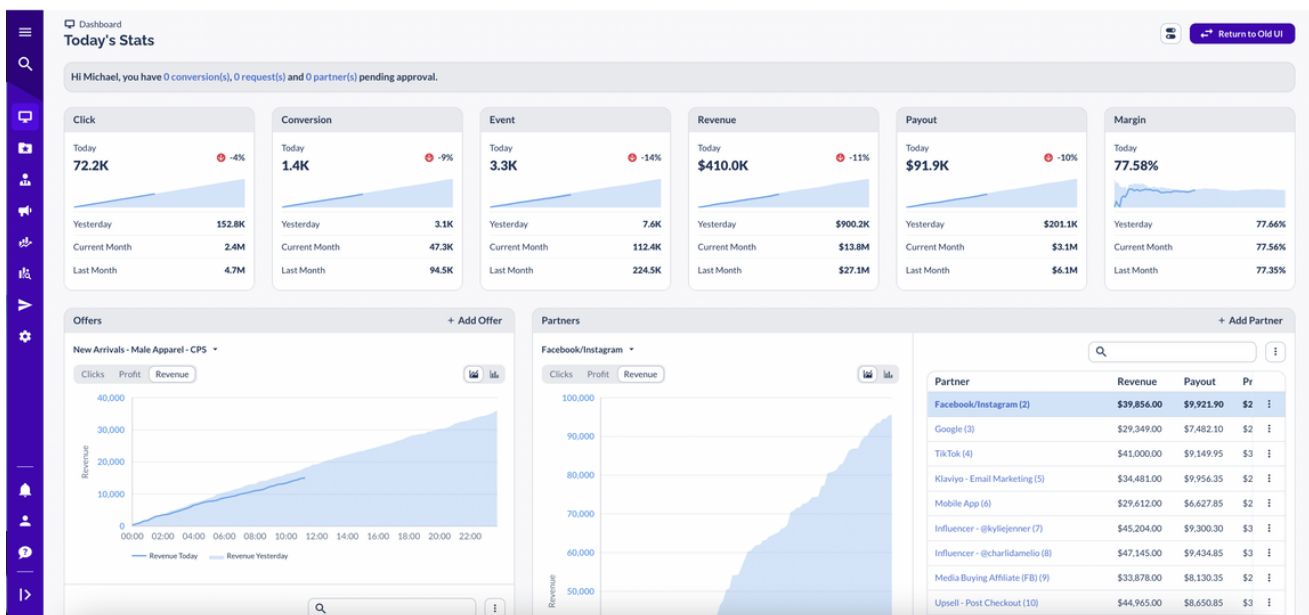
Then our primary post-back domain suddenly stopped working. Being that this was not related in any way to email complaints because they were never used ‘in the wild’, there was no acceptable reason for this. After nearly 48 hours of 0 tracking, yes, 0, they figured it out. Meanwhile, we had to credit thousands of conversions by hand.

That was the final straw and we knew we had to move. The features we were looking for in a new platform, and by far first and foremost, was RELIABILITY. Our shopping initially started due to price, and nearly every platform out there was ½ or less than we were already paying.

What else caught your eye about Everflow's platform versus its competitors?

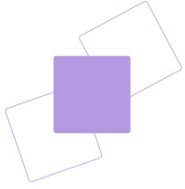
Jimmy/Andrew: Something that really caught our eye, and made us dive deeper into Everflow was a **Google Case Study** about Everflow and their platform, highlighting how well they had implemented the resources made available by the Google Cloud infrastructure. Namely their use of BigQuery, the Kubernetes Engine, and overall ability to ingest and process massive amounts of data in real time.

It absolutely makes Everflow's Flex and Dimensional analytics and reporting unmatched. These capabilities allow marketers to do real time analytics on the platform that other providers just cannot do. Everflow also has a U.I. that has a much more modern and clean look & feel versus the other platforms we looked at. The deeper we dug, the better they looked.



Sam, what are your key features and benefits that you feel give you a competitive advantage over other network tracking systems?

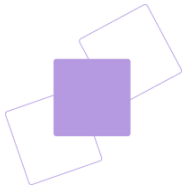
- **SmartSwitch:** This is our auto-optimization functionality that allows network users to automatically optimize on key KPIs.
- **Anti-fraud:** built in anti-fraud features such as proxy detection and time to conversion data that allows users to automatically block fraudulent traffic.
- **Direct linking on Google and FB:** As Google and FB move more toward not allowing 3rd-party tracking links that are not the advertiser link, EF has the capability to enable an effective, leakage-free, tracking solution.



What was your initial assessment in being able to provide what SmartAdv needed?

Sam: We first started talking to SmartAdv at Affiliate Summit East in January 2019 in Las Vegas. At the time, SmartAdv had been on CAKE for a number of years and were not satisfied with the support they'd been receiving, as well as the amount they were paying. Their immediate impression was that our user interface was much cleaner and the pricing more flexible, than CAKE's.

That being said, there were some key features that needed to be implemented for SmartAdv. These included such things as: updating exchange rates monthly to pay out publishers, and global blocking of IPs for certain offers. The SmartAdv team helped Everflow in defining these features, testing them and rolling them out. This was very helpful for Everflow as these features were built into our platform and can now be utilized by other clients as well.



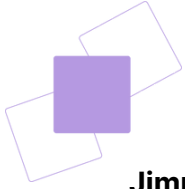
Jimmy and Andrew, tell us about the process in migrating off CAKE to Everflow.

Jimmy/Andrew: We knew that any migration was going to be like doing Open Heart surgery while the patient was still running on a treadmill. We could not just shut the business down and do what we had to do. We had to migrate, manage our existing business and bring on new advertisers and publishers all at the same time.

Obviously, seamless migration off of CAKE to Everflow was paramount. In the best of worlds, this would be a monumental task. We can't emphasize enough about how well Everflow handled this. While no migration is 100% seamless, it was one of the smoothest migrations we have been through.

They were very clear, and very technical, in explaining their process, and worked night and day with us through the various phases. Briefly, it went like this:

- **Migrate all existing Users, Advertisers, Offers, Affiliates, Campaigns, etc. We could no longer add any new entities to CAKE and had to shift all new business to Everflow.**
- **Set up dual post-backs with our advertisers so we could track in both systems simultaneously.**
- **We spent about a month getting our publishers acquainted and working on Everflow, up until a day that we decided to completely shut all business through CAKE.**
- **Once we had no stats running through CAKE, Everflow was able to backfill all of the number from the time between Step 1 and this date. The process went just as planned, and we lost almost no business in the interim.**



Did you run into any issues during the migration?

Jimmy/Andrew: There were some small sticking points, but not so much in the migration, just small differences in how the platforms worked. One I will highlight is email creatives for the publishers. EverFlow was serving them HTML files with images linked to everflow.io. But we wanted it to work like CAKE, where the publishers downloaded a zip file containing all the associated assets.

After a brief call to Everflow and an explanation why, they completely understood the need (not just for us, but all of their clients), and quickly turned around an update. Within a few days our platform was serving up a nice zip file just as we were used to. Problem solved, both for us and for future networks using Everflow.

This is just one of many adjustments/additions they have made to the platform at our request, never with any pushback. We have not had every request met, but that can't be expected from any one. I would say that anything deemed 'critical' to running our (or any other networks) business has been addressed quickly and effectively. Of the requests still on the table, those are more 'in a perfect world' scenarios. I expect the majority of those requests to be rolled in within the next few releases. I can not recall a single time that they said 'no'. It has just been a matter of prioritization.

What we found to be a real positive was that our publishing partners supported the migration to the Everflow platform because there has been a general, positive industry buzz about it.

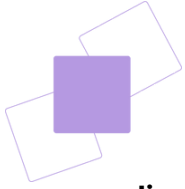


Sam, what were the biggest challenges in fully transitioning and migrating SmartAdv to EF?

Sam: The biggest challenge was ensuring that SmartAdv hit the ground running with EF with no interruption to the business. To ensure that, the customer success team at EF worked with SmartAdv on a migration plan from CAKE that involved automatically ingesting all offers, publishers, advertisers and reporting data.

The process was managed over a 2-month period, while working closely with SmartAdv to ensure that publishers and advertisers were notified and given enough time to transition any tracking links, post backs etc.

While the process of migration may seem daunting, the Everflow Customer Success Team put processes in place to make this as seamless as possible, and there was essentially no down time for SmartAdv.



Do you feel like you got all the support you needed from the Customer Success Team?

Jimmy/Andrew: Absolutely. Everflow's Customer Service Team, their Helpdesk, and Chat Support gave us a timeline, benchmarks, conference call coaching and almost immediate responsiveness to accelerate the learning curve.

Our daily support through this process started with Everflow's CEO himself. Sam was directly involved during high level situations such as customizable features, and other troubleshooting issues. Their team was hands on throughout the whole process and saw that our issues were resolved during migration. Their responsiveness and turnaround time are superb.

They don't have layers of low level support that give us the runaround, or ask us if we have tried rebooting LOL. Any issues that could not be handled by the regular support staff have been immediately passed up to senior management, in most cases the CTO or CEO, who worked with us DIRECTLY to solve the problem.

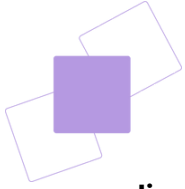
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Can you update us since the migration? How are things going? How long did it take?

Jimmy: From a business perspective, the migration went smooth, with only some minor bumps in the transition. Our offers team and our Account Managers have been very successful in getting both advertisers and publishers on board and the API has worked very well. There are no domain issues to speak of, the system is reliable, and has contributed to helping bring our media buying side to scale. The platform has been stable and allowed us to focus on generating new business, scaling current business, and working on other projects that will grow SmartAdv's footprint in the industry.

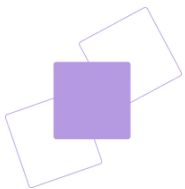
Andrew: From the technical, systems platform perspective, things have been running great! All in all, I think we spent about 3 months start to finish, but it wasn't a 3 month grind. Most of the time was spent overlapping the 2 systems, testing, working with our publishers to get new links, etc. etc. Nearly all of the heavy lifting was done by Everflow, and we mostly just needed to spot check their work (at their request) to make sure everything went as planned. The infrastructure has been solid.



What's next for SmartAdv?

Jimmy: We're definitely positioned to take SmartAdv to the next level! As we evolve with Everflow, you will start seeing custom features only SmartAdv has, such as a CAKE to Everflow API Translator. This allows mailers with Sending Applications specifically built for CAKE to integrate into EF. We'll have other features, unique only to SmartAdv, soon as well. You will see some publishing from us in the near future as we are increasing our digital presence with service content for our advertisers and publishers. We control a tremendous amount of industry intelligence and know what works and what doesn't. This is extremely valuable information that can benefit our clients from a consultative perspective, without crossing any proprietary boundaries. Also, we're looking at increasing business and diversity into other markets while maintaining our U.S. business. The Medicare vertical exploded this year, while Facebook has been the hot commodity, and we're looking to diversify our traffic portfolio and leverage upcoming trends.

Andrew: Now more than ever, we are ready to rock! The biggest thing I see coming down the pipe for Everflow is their accounting system. Not a single tracking platform I have seen has a good invoicing/payment system, if they have one at all. Our business relies on our ability to manage invoicing and payments to thousands of advertisers and publishers on a variety of terms, monthly net7 monthly, net15, weekly net30, etc.. We have inhouse systems that were built specifically for this, but they still have not progressed to where we need them to be. Just the other day I had a long call with Peter at Everflow to discuss their features and plans going forward. I was surprised to see how far along their system has progressed and what features were in the near-term release schedule. He took extensive notes on our needs and is pushing to have this phase of the dev cycle accelerated, noting that these were all additions that would benefit all of their customers.



Sam, what's next for Everflow?

Sam: Our mission is to continue to grow Everflow into the premier tracking platform for performance marketers. Our team has grown to 30 people with over 250 customers worldwide. While we started by targeting the network market, we are also now starting to work with direct advertisers that are looking to implement an affiliate / partner marketing software solution. Our goal is to be at over 1000 customers over the next couple of years.

More Information

To get a demo of the award-winning Everflow partner marketing platform, please visit: <https://www.everflow.io/demo>.

