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Digital Asset Management

FOR DUMMIES®

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Learn to:

- **Recognize the fundamentals of a DAM system**
- **Understand how a DAM system can benefit your organization**
- **Implement a DAM system in your organization**

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⬭ bynder

Stephanie Diamond
Emily Kolvitz

Bynder is award-winning digital asset management software that allows brands to easily create, find and use content, such as documents, graphics and videos. More than 150,000 brand managers, marketers and creatives use Bynder's brand portals every day to collaborate globally, produce, review and approve new marketing collateral, and circulate company content at the click of a button.

For more information please visit **bynder.com/Dummies**

Digital Asset Management

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Bynder Special Edition

by Stephanie Diamond
Emily Kolvitz

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Publisher's Acknowledgments

Introduction

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*Y*our business customers have changed. They don't rely on you for product information. They thoroughly research information about your products and services before they ever talk to your salesperson. For this reason you need to create content that delights and encourages customers to learn more about you. You need to tell them stories about customer successes and show them how you can help them accomplish their goals. However, creating this content is no small feat. You have thousands of brand assets, videos, product photos, and a host of other files that you need to develop into compelling content.

About This Book

Welcome to *Digital Asset Management For Dummies,* Bynder Special Edition. The purpose of this book is to provide marketers, brand managers, digital content managers, and those who are new to digital asset management (DAM) with the knowledge they need to implement a DAM or improve their current ability to manage their digital assets.

In this book, we cover the following:

- ✔ Fundamentals that make up a DAM system and how you benefit from implementing a DAM in your organization

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- ✔ Concepts you need to know to develop an effective DAM structure to manage your assets, including things like taxonomy and metadata

- ✔ Issues surrounding the establishment of roles and permissions so that the system is secure and the right people can properly access it

- ✔ Best ways to implement and promote your DAM to get high user adoption

- ✔ Integration of your DAM into your digital ecosystem so that everything works together to avoid bottlenecks and improve productivity

- ✔ Importance of analytics to help you determine which content is effective and best demonstrates the return on investment (ROI) of your system

- ✔ Best practices to use when launching your DAM

Foolish Assumptions

When writing this book, we made the following assumptions about you:

- ✔ You already know a little bit about digital content management, and you're either new to DAM or are looking to discover a little bit more about how to get started with DAM.

- ✔ You're looking for a quick starter guide that covers a lot of topics.

- ✔ You may be looking for some information that can help you convince your CMO or VP to allocate funds toward establishing a DAM system.

✔ You may be a CMP, VP, or C-Level executive looking to gain market share by optimizing efficiencies across your digital content creation and publishing process.

Icons Used in This Book

You may notice these two icons, drawing your eye to certain pieces of information. Here's what they mean:

This icon highlights information that helps you do things better and faster.

This icon points out things that you'll want to remember when you are implementing your DAM.

Where to Go from Here

Like all *For Dummies* books, you can read sequentially from cover to cover, or you can jump in and out, depending on your preference. Some parts of the book reference other parts where you can find more detail on a particular area. Check out www.bynder.com for more information about implementing your DAM.

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Chapter 1

Knowing Where to Start with DAM Solutions

. . . .

In This Chapter

▶ Looking at DAM fundamentals

▶ Understanding why you need a DAM

▶ Reviewing how to assess your needs

▶ Evaluating cloud-based services

. . . .

Digital content has drastically grown in importance, which creates a problem for marketers and digital creators who must keep up with the demand for quality content. They need to quickly respond to their competitors' promotions and get attention in a marketplace that is constantly changing. Not only do marketers need to find a solution, but they also need to demonstrate that it's worth the investment and provides real value to the organization.

We're sure you recognize this problem. You may be asking yourself how you can effectively manage your digital assets and demonstrate a high return on investment (ROI) for now and for the future. An effective

DAM allows you to increase operational efficiencies, generate real revenue from your assets, and grab new organizational opportunities when they present themselves.

In this chapter, we look at DAM fundamentals and demonstrate how to get attention for your most important corporate assets — your digital content.

Comprehending the Fundamentals of DAM

The proliferation of valuable media assets has created the need for a system to manage and retrieve them so that they can be used to attract and delight customers. You have your marketing materials, video, graphics, photos, brand assets, and much more called *rich media*. Each asset has its own requirements and variations that must also be tagged, uploaded, and stored in your DAM system.

You also have a staff across the globe who needs to quickly utilize this media. What's more, employees are continually creating new digital content that needs to be entered in the DAM system and deployed across all web platforms, so utilizing your assets is one part of the DAM equation.

The second part is the role your content plays in effectively telling your organization's story to the world to engage people. A DAM helps you tell your brand story by providing the structure and system you need to produce compelling media. It also drives your customer experience. The media assets you create will either encourage your customers to seek more information about you or drive them toward your competitor.

The following sections take a closer look at what you need to know about DAM, including the trends that led to the creation of DAM and the unique characteristics of a DAM system.

Changing trends that created a need for DAM solutions

If you're wondering what caused the urgent need for the development of DAM systems, you have to look back before the wave of new technology impacted the selling cycle. Marketers could take their time creating static product brochures and data sheets that typically had a stale corporate photo and a logo. They would print these sheets and mail them to customers and then call them for an appointment. Those days are clearly over. No executive today would consider waiting for a packet of materials to come in the mail or answer a cold call from an unknown salesperson.

Specific marketplace trends created the need for software that could streamline the creation and distribution rich media to sell products. Here are five main trends that have had the greatest impact:

- ✔ **A change in buying behavior:** Smartphones and the web have changed the way people buy. They may walk into a store to look at a product and then buy it online at a better price. They may check their phones to find discounts or coupons causing them to buy from the retailer that gets to them first. This behavior requires marketers to change almost everything about the way they present and promote their products.

Key product information needs to be available from mobile devices. In addition, you as a marketer need to use rich media that has been personalized to develop real relationships.

✔ **The need to prove ROI:** Continual fluctuations in the economy have caused marketers to become smarter about their company's investments. They need to demonstrate that the systems and processes they adopt will add to the bottom line. Management needs to see tangible results; the pressure is on executives to demonstrate that value.

✔ **The introduction of Software as a Service (SaaS):** The advent of cloud technology has created a category of services that allows marketers to access sophisticated software on a subscription basis. This is more cost effective and doesn't require long ramp-up times. In the earlier days of digital asset management systems, most were hosted on site on the company's locally owned servers. Refer to the section, "Understanding the Value of SaaS" later in this chapter for more information.

✔ **The development of content marketing:** Mobile devices have made digital content ubiquitous. Companies need to create a never-ending supply of rich media to engage their customers 24/7. Doing so requires staff to produce professional-looking and entertaining content for advertising, websites, social media platforms, and so on. Customers' expectations have risen, so companies need to improve their methods to meet them.

✔ **The need for omnichannel marketing:** *Omnichannel marketing* refers to a seamless customer experience across all your channels. Customers should be able to look at products at home on a company's website, find a coupon for it on their mobile device, and then redeem it at their local store or on their tablet. Shoppers expect to be able to connect with your company without any regard to the device they're using or their location. Your rich media assets need to be viable on all platforms.

According to the CMO Club (2015), 64 percent of marketers say that their top barriers to achieving omnichannel marketing are the lack of resources and investments. Make sure that your staffers have the right resources to do their job by allocating budget toward technologies to manage digital content and to pay dedicated content administrators who will oversee the administration of these systems.

✔ **The reduction of product life cycles:** Technology has made access to all content faster and easier. It has also impacted the product life cycle. Customers expect new product releases to occur frequently. Hence, the content to develop and promote them must be supported by a streamlined production process.

As you can see, these trends impact every part of your operation. Without a way to manage assets, you're damaging your company's chance to develop customer relationships and stay relevant in an increasingly fast paced digital world.

Eyeing the characteristics of a DAM

At its core, a DAM system makes digital content available to people and easy to share across the organization. It's a central repository where all the most current media is stored and found.

The software that supports a DAM system is complex, but its usage shouldn't be. Although several companies claim to offer DAM systems, they don't all truly meet the necessary requirements. Make sure that you know what these requirements are so you can make the right choice.

According to `http://dammaturitymodel.org/10-core-vendors/` industry members agree on ten functional requirements that must be present to designate a system a DAM. The DAM system must be able to do the following:

- ✔ **Ingest:** The ability to receive and upload assets and manipulate them.

- ✔ **Secure:** The ability to keep documents secure, which also includes the ability to restrict user access to specific assets.

- ✔ **Store:** The ability to store a variety of file types and their attendant metadata.

- ✔ **Render/transform:** Assets uploaded to the system must be able to be transformed into other formats and to become part of the original file.

- ✔ **Enrich:** Assets must be able to be enhanced by the addition or revision of metadata and metrics.

- ✔ **Relate:** The ability to track versions and maintain original assets.

- ✔ **Process:** The system must have a regulated process by which assets are kept in a centralized system and can be sent to users in various locations using effective workflow tools.
- ✔ **Find:** The ability to use a search capability to find and retrieve assets.
- ✔ **Preview:** The ability to view the asset without having to download it, thus saving time and making users more productive.
- ✔ **Produce/publish:** The ability to allow users to either share or link content outside the system.

Review this list when you're selecting your DAM so that you know it meets all the requisites.

Recognizing Why Your Company Needs a DAM

Unless you have already made an effort to streamline your marketing operations and find the right DAM solution, more than likely you have uncoordinated, unstructured, and/or manual processes that require too much attention from your staff.

Your staff members can't possibly be productive when they're required to manually find, view, and manage rich media assets scattered around the organization. Therefore, bringing a DAM system into the organization to improve productivity and encourage the use of materials across the business is important.

The following sections point out the benefits your organization will gain from DAM and discuss how customer interactions will be enhanced.

Benefitting from DAM

One major benefit of a DAM is that it provides you with what is commonly referred to in DAM as "the single source of truth." In other words, DAM gives you one central location where all your latest media is stored and made accessible across the organization. You're assured that in this location, you can find the most up-to-date materials that can be edited and shared with colleagues and vendors. Further, through the use of rights, permissions, and metadata you can confirm how and when the content can be used.

So what are some of the other benefits of bringing a DAM system into your organization? A DAM system can do the following:

- ✔ **Improve operational efficiency:** Assets are readily accessible across the organization and facilitate group (and even remote) collaboration among team members. It also minimizes the risk that outdated materials are used. They're archived and retrieved when needed.

- ✔ **Increase marketing productivity:** You don't waste time looking for assets. Writers and designers can spend the time working on the right versions of assets.

- ✔ **Reduce costs:** Marketing assets are available at all times from any location, which means that staff can work on them as needed, saving time and effort without voice private network (VPN), from any device, from any location.

- ✔ **Shorten marketing cycle time:** The need to rework and repurpose assets is expedited because the right assets are available to those who need to revise them. This reduces the time to publish, which helps companies beat their competitors to market.

- ✔ **Increase security and compliance:** Using a DAM system ensures that your documents have been vetted and only made accessible to the appropriate people. With built-in risk mitigation, you don't have to worry as much about noncompliance. Rights are captured and visible through metadata, to prevent usage rights from being violated.

- ✔ **Promote better content optimization:** Analytics can be used to improve your content and determine which media assets resonate with your customers. This also helps you determine what to create in the future, or even if an existing asset may have value in being repurposed for further ROI.

- ✔ **Provide more effective brand experiences:** Only the correct brand assets are deployed, which ensures consistency and enhances the customer experience.

> According to the *Forrester Wave* report, *Digital Asset Management for Customer Experience Q3, 2016,* "workflow, marketing support, analytics and cloud are the key differentiators that make a DAM successful." Make sure to have these features when you choose your DAM solution.

Enhancing customer interactions

Another significant reason for adding a DAM system is to help you and your company tell your story to prospects and customers. Your website and social media platforms would be dull, uninteresting sites without rich media to support them. Here are a few rich media types your company shouldn't be without:

- ✔ **Client testimonials:** Testimonials come alive when you show video of satisfied customers who have successfully used your service.

- ✔ **Tutorials:** Video tutorials that showcase how to use your products to their best advantage help customers see how they can benefit from buying them.

- ✔ **Product promotion videos:** Promotional videos that are available 24/7 make your products available to interested prospects at any time. Your message is consistent and you can portray your brand the way you want it to be seen.

- ✔ **User-generated content:** Users who want to create their own content related to your product should be able to upload it to your sites and become part of your digital library.

- ✔ **Webinars:** Webinars have become an important part of a marketer's arsenal. You need to keep them updated and accessible.

Making the Right DAM Choice: What You Need to Know

Broadly speaking you need to examine three main areas to choose the right DAM solution, which are your

goals and expectations; your must-have features; and the selection of the right DAM provider. This section takes a closer look at each.

Examining your goals and expectations

As you begin, determine why you want a DAM solution and how you plan to use it. You want to

- ✔ **Look at your present needs and your future plans.** If you grow, will you be able to scale up?

- ✔ **Scrutinize the state of your assets.** What kind of system (if any) are you currently using?

- ✔ **Identify the assets you need to accommodate.** Where are they located and how will you determine which ones have enough value to put in a DAM system?

- ✔ **See whether your present systems can be integrated into your new DAM solution.** Are you aware of all the systems that make up your digital ecosystem?

- ✔ **Calculate how fast your new solution can be up and working.** Do you know what needs to be done before you can launch your DAM? What is the minimum viable product (MVP) to get up and running quickly?

Determining your must-have features

Each DAM system has different features and benefits. To determine your must-have features, first you want to

- ✔ **Understand your organization's current state of business processes with regard to digital content creation and publishing.**

- ✔ **Understand what systems you need the DAM to connect to.**

> ✔ **Have an idea of what a successful DAM system implementation looks like for an organization similar to yours.**

One way you can start to address these issues is by crafting a request for proposal (RFP) with a statement of work (SOW). This helps you document the business requirements for your DAM system and ultimately determines which technology features are must-haves and which ones are just nice-to-haves. Too often, when selecting a system, you make mistakes when you start with the features that are needed instead of the problems that need to be solved. Some vendors offer RFP templates to help people to start documenting this information.

Selecting the right provider

This issue is key. DAM vendors offer significantly different solutions, varying wildly on quality of product, pricing, and support. To be sure that you're choosing the right one, you need to do the following:

> ✔ **See how well each vendor deals with cutting-edge technology:** Look at their current features and the pace at which they bring out new ones. Do they provide a product roadmap? Are they the leaders in the field?

> ✔ **Read case studies from satisfied customers:** To determine if they're trustworthy and deliver what they promise, make sure you read case studies from other customers.

> ✔ **Get a demo or free trial of the product:** Doing so won't only help you examine the system in more depth, but it also will give you the chance to work with the vendor to see if you think they are a good fit.

Understanding the Value of SaaS

One of the trends that made DAM systems even more effective was the advent of SaaS and cloud technology. DAM providers who offer SaaS can provide distinct benefits to their customers. This section discusses those benefits.

Reviewing the advantages of SaaS for DAM systems

Many executives dread the idea of bringing a costly new system in-house. They fear the expense and the possibility that the system won't scale as the company grows. However, companies that choose a SaaS DAM vendor don't have this concern. Some of the reasons for this are as follows:

- ✔ **Shorter implementation time:** SaaS DAMs offer a turnkey solution. There is no need to ramp up and phase in the system.

- ✔ **Scalability:** If you experience the need for quick expansion, you have the ability to quickly scale up.

- ✔ **No capital expenditure:** SaaS doesn't require the purchase of equipment, so no physical outlay for hardware is required.

- ✔ **Easier collaboration:** Employees don't have to be based in a particular location to access the system. They can use their web browser whenever they're ready to work.

✔ **Reduction in IT spending:** You should rely on a SaaS vendor to provide whatever you need with regard to storage and maintenance, so you don't need to burden your IT department.

✔ **Better support:** A vendor's staff knows how systems should function and can quickly deal with unexpected problems.

Using mobile devices to access digital assets

Although it's unlikely that your users will conduct all their DAM work using a mobile device, you should ensure that users are able to access the DAM via mobile if that is their preference.

According to Statista (2016), more than one quarter of the world's population can access the Internet from a smartphone. Therefore, providing your employees with the ability to access your DAM system from the field will facilitate collaboration and improve productivity.

> Imagine that every time you leave your office, you can't look at or work on your digital assets. You can't edit them or approve them. You hold up the publishing process, thus giving your competitors the edge. For this reason, excluding access to your DAM from mobile devices would be unwise. Consider making it a must-have feature.

Chapter 2

Utilizing DAM Terminology

● ●

In This Chapter

▶ Making it easy to recognize DAM terms

▶ Understanding taxonomy and metadata

▶ Finding assets using a taxonomy

▶ Examining artificial intelligence

● ●

*H*ave you ever searched for an image or file on your computer, in email, Dropbox, or Google Drive and failed to find it? We're sure you have. The problem isn't uncommon. You know it's there, some-where. You just don't remember what you called it or in what folder you put it. The file could possibly be in someone else's custody, and he or she could be on vacation or out of office. So to find it, you need to continue being unproductive as you search for it or you have to waste time recreating it.

Your ability to find digital content is only as good as the system you develop to access it. If you multiply the issue of locating assets across an enterprise, you can understand why systems must be established to search and find media stored on your organization's computers.

In this chapter, we examine digital asset management (DAM) systems that are created to help you find what you're looking for and the technical terms associated with developing them.

Simplifying DAM Language

More than likely, you're probably unfamiliar with some terms used when discussing managing digital content and DAM. Just like with any new topic there are always a few new words you need to know.

The good news is that these terms have easy-to-recognize underlying concepts that make it simple to adopt the jargon. Here we explain what we mean when we designate something a digital asset.

Reviewing DAM terms

Digital assets are files that have some intrinsic value to a company or individuals. They can be images, videos, graphics, brand logos, presentation decks, and so on. To make them accessible to people using the DAM, they need to be organized, tagged with metadata, and easily findable. An organization wouldn't be able to succeed in this always-on environment if it wasn't able to retrieve specific digital assets quickly and efficiently.

DAM, at its core, enables you to create, find, and use content when you need it.

Focusing on DAM structure

To fully understand DAM lingo, you need to know the following two terms that are critical to structuring your digital assets:

- ✔ **Taxonomy:** A *taxonomy* is a classification scheme that helps you *organize* your rich media assets

into categories. Essentially, taxonomy makes things easier to find by establishing a structure. A useful taxonomy uses controlled language that is consistent and provides a clear understanding of the relationships between attributes.

Your taxonomy is the backbone of your entire DAM system. You need to give it a great deal of attention when you're setting up your system. Think of it as the foundation for DAM.

✔ **Metadata:** Metadata is another confusing technical term. It refers to data about your data. But, it too is a really a simple concept. Metadata helps you *describe* an asset.

So when developing your DAM system, you need both a structure to organize your system (taxonomy) and data to describe your assets (metadata) to make them easily findable.

Creating a Taxonomy

To produce an effective taxonomy, you and your stakeholders need to ask the following questions so that you're prepared to start a conversation about your DAM's structure. Ideally this taxonomy conversation has already begun during a discovery phase where you're evaluating current business practices and pain points that you can address with a DAM solution.

✔ **What is the scope for your DAM system?**
Consider what your currents needs are and what you'll need in the future. Does your company have plans to expand or acquire more assets? Ask yourself if you know the full scope of digital assets that are available in your organization. Who owns them? What are they used for and when?

- ✔ **What types of digital assets does your organization utilize?** Obtaining a sampling of the types of assets that you will want to store in your DAM system and practicing an exercise where you describe them can help you to think about descriptive keywords and categories that may make sense in your taxonomy.

- ✔ **How do departments in your organization currently find your media assets?** This question is crucial because to create a successful system, you need to know what's working now and what needs to be improved. Do you always find yourself asking other people where the latest design file is?

- ✔ **How would you like to find these assets?** This question makes you think about what your ideal system would look like and helps you determine what you need to accomplish.

- ✔ **Have you already set up a file-naming convention?** Naming conventions can be helpful to provide additional context to your digital assets about who created them, or even what categories or products they refer to. If you have a file-naming convention, does it include information that you could use in your metadata? For example, a filename 2018-spring-bynder-001.jpg can already tell you a few metadata fields that might be useful such as the year, season, company, shot number, and the file type. Figure 2-1 shows a digital asset with metadata on the right.

Many DAM vendors recommend using a *hierarchical* taxonomy, which means that you start at the top and work downward through your nested folders. This type of search can cause fatigue, especially when trying to remember

which folder something might be located in. Figure 2-2 shows what a nested folder structure can look like. In this example, an asset can only be found by one search path.
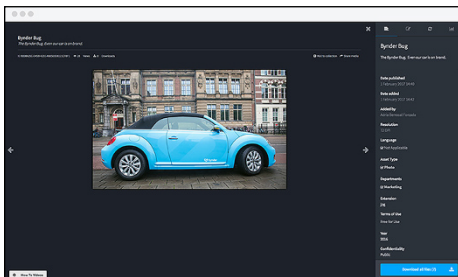
Figure 2-1: Detailed view of an asset with metadata.

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In a library, a book may only have one location on a shelf, whereas in a DAM system, an asset may be found in various "locations" because it may have multiple tags.

Using a *flat nonhierarchical system* allows you to conduct a multifaceted search that permits any combination of terms to be searched. That way you never have to remember what folder you put something in. You may only remember two pieces of information about the file, such as that it was made in the year 2017 and it was a logo. With multifaceted search, you can find that file again quite easily.

Multifaceted search (refer to Figure 2-3) is also utilized in popular ecommerce sites like Amazon.com, which allows you to narrow down your search by selecting brands, sizes colors, and other descriptive metadata.
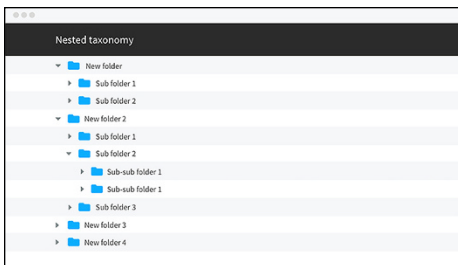
Figure 2-2: A nested taxonomy with subfolders.

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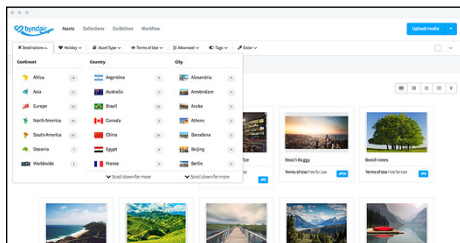
Figure 2-3: Multifaceted search in a DAM system.

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Applying Metadata

Metadata describes your assets with important information that can be utilized to find them again. Metadata isn't only searchable; it's also there to provide context for an asset. For example, if someone were to ask you to describe a particular piece of video, you may say that

you created it on a specific date (date created), it's three minutes long (duration), and it is about your latest product launch (description). That's metadata.

These sections examine different examples of metadata and how you can effectively apply metadata in your DAM.

Looking at examples of metadata fields

If you put all those pieces of data into a DAM system, you would easily be able to search and find the asset in which you're looking. Some other examples of metadata fields might include the following:

- ✔ **Filename:** Descriptive name given to the asset which follows your naming conventions

- ✔ **File type:** Video, photo, image, and so on

- ✔ **Department:** Which department will use it

- ✔ **Source:** Where it originated from (creators, designers, and/or department)

- ✔ **Copyrights or other legal restrictions:** Notations about permissions and rights to use the asset

- ✔ **Purpose of the document:** Why you created it

- ✔ **Recommended use:** How the asset should be used to avoid misuse

Applying metadata best practices

The key to creating an effective DAM system requires the successful application of metadata. A successful DAM system is only as good as the quality of the metadata it has. There is a common saying, "Garbage in, Garbage out" when discussing quality of metadata because it powers the search, so if metadata is missing, incomplete, or inaccurate, it can negatively affect search outcomes and user experiences. Here are

several best practices for you to consider when setting up your metadata:

- ✔ **Apply your metadata as close to the time of asset creation as possible.** As soon as you create or right after you create it, apply data to the file. Deciding to "do it later" usually turns into deciding to "do it never."

- ✔ **Make some metadata fields required.** If you're having people upload to the DAM system, don't let them submit their assets until they at least fill out a few required form fields about what they're sending.

- ✔ **Upload one main source file and create derivatives to cut down on the amount of files in the asset bank.** Create once and reuse many. Upload a master, high-resolution file and let the DAM system auto-create smaller, lower-resolution cuts of the file for you.

- ✔ **Automate what you can.** Does your DAM system have options to automatically extract embedded metadata upon ingestion? If so, take advantage of this. It can mean that you spend less time entering data that has already been applied to the file.

- ✔ **Create standardized file-naming conventions to aid with findability.** A standardized file-naming convention provides additional context for a file. If the file leaves your DAM system, it still takes with it a little bit of context. In addition, embedding metadata inside of your assets can provide provenance information as well (information about where the asset came from originally).

- ✔ **Leverage data that already exists** in other systems. Do you already have PIM or CRM systems

that capture and store relevant information pertaining to your digital assets? If so, think about displaying that information in your DAM or making sure it gets applied to these assets.

Finding Assets with Taxonomy

Without a taxonomy, you would have to manually root through your media assets to locate the content you need. Obviously, doing so wastes time and money. To understand how you use a taxonomy to find assets, check out this example of a portion of a portal that houses digital assets about fruit for a fruit retailer that can be used to illustrate how to locate assets using a taxonomy.

Here are some examples of categories utilized:

- ✔ **Asset type:** Values for asset type include images, videos, documents, presentations
- ✔ **Asset subtype:** Logos, promos, brand guidelines, brochures
- ✔ **Fruit Group:** Apples, bananas, berries, grapes, melons
- ✔ **Fruit Name:** Fuji, Gala, Granny Smith, Macintosh, Red Delicious
- ✔ **Produce preparation:** Fresh, frozen, prepared

As you can see in Figure 2-4, documenting your taxonomy in a taxonomy tool or a spreadsheet is helpful.

Then when the user seeks to find a particular asset, she would begin searching using some possible categories and its accompanying metadata (description). If she wanted to find a promo video that includes a fresh Granny Smith apple, she could apply two keywords or filters (video and granny smith) and quickly find the asset.

Asset Type	Asset Sub-type	Dependency	Fruit Group	Fruit Name	Dependency	Brand Name	Source	Produce Preparation	Produce Quality	Season
Images	Stock Photography	Images	Apples	Fuji	Apples	Applicory	North America	Fresh Produce	Fair Trade	Summer
Videos	Product Photography	Images	Bananas	Gala	Apples	Bradberry Growers	South America	Frozen Produce	Non-GMO	Spring
Documents	Corporate Photography	Images	Berries	Granny Smith	Apples	Bundler Fruit	Europe	Prepared Produce	Organic	Winter
Presentations	Logos	Videos	Citrus	Macintosh	Apples	Clementini Citrus	Asia			Fall
	Commercials	Videos	Grapes	Red Delicious	Apples	Freshly International	Africa			
	Promos	Videos	Melons	Niri Banana	Bananas	Kelviz Fruits	Australia			
	Brand Guidelines	Documents	Stone Fruits	Plantain	Bananas	Old MacDonald Brands				
	Brochures	Documents		Blackberry	Berries	Palmer Fruits & Foods				
	Menus	Documents		Blueberry	Berries	TO Produce				
				Cranberry	Berries					
				Raspberry	Berries					
				Strawberry	Berries					
				Clementine	Citrus					
				Lemon	Citrus					
				Lime	Citrus					
				Orange	Citrus					
				Pineapple	Citrus					
				Tangerine	Citrus					
				Green Seedless	Grapes					
				Red Seedless	Grapes					
				Watermelon	Melons					
				Apricot	Stone Fruits					
				Cherry	Stone Fruits					
				Nectarine	Stone Fruits					
				Peach	Stone Fruits					
				Plum	Stone Fruits					

Figure 2-4: Using Excel is helpful to document taxonomy.

Carey MacDonald

Asset type: Video

Asset subtype: Promo

Fruit group: Apple

Fruit name: Granny Smith

Along with this would be some additional metadata:

Length of asset: 3 minutes

Department: Marketing

The DAM system would then locate the asset and display a preview of the video.

Considering Artificial Intelligence (AI)

If you've used Amazon's voice recognition app Alexa or Siri Apple's smartphone app a question, then, you've used artificial intelligence (AI). It's here now!

> The use of AI in the enterprise is predicted to increase from $202.5 million in 2015 to $11.1 billion by 2024 according to market research firm Tractica. The term *artificial intelligence* is applied when a machine mimics cognitive functions that humans associate with other human minds, such as learning and problem solving. For DAM, it means that uploaded images get auto-tagged, helping with the categorization, identification, and search-ability of assets that would otherwise be buried in the depths of your brand portal.

Digital asset managers and administrators spend an enormous amount of time and resources on metadata application. It's tedious, thankless work, but absolutely necessary so that colleagues can find the assets they need. Figure 2-5 shows an example of what artificial intelligence can do in terms of automated tagging.
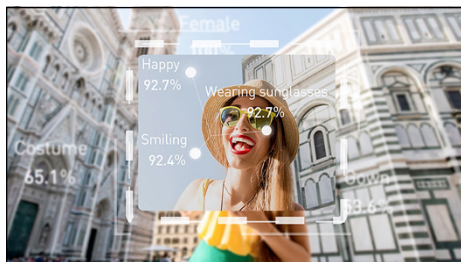
Figure 2-5: Automated metadata application using AI.

Bynder

Applying AI capabilities to DAM can accomplish things like the following:

- ✔ **Automatically suggesting keywords for images that you upload:** By comparing a new image against a large database of already tagged images, the DAM system is able to predict with confidence what the image you just uploaded might be about.

- ✔ **Using voice recognition to retrieve assets:** Similar to the way you may ask Siri to find a restaurant near you, AI capabilities embedded in DAM can allow you to ask a personal DAM assistant to find you the latest company logo in CMYK color space for a print piece.

- ✔ **Intelligently tagging to suggest names for people shown in photos:** You may already be familiar with this type of AI; it's frequently seen in applications like Facebook.

- ✔ **Supplying personal DAM assistants:** Imagine a DAM system with a chatbot that is able to direct you to specific areas of the portal or even suggest new assets to you based on your questions!

- ✔ **Providing taxonomy assistance:** Designing and implementing a taxonomy is a lot of work! AI of the future could potentially assist in the shaping of your customized taxonomy for your DAM.

AI allows everyone to find what he or she needs in no time. Content that isn't tagged can be difficult or impossible to find quickly. With automated tags generated with 80 percent accuracy upon upload, not only marketers but also entire businesses will find what they need faster.

Chapter 3

Delving into Permissions, Assets, and Access

· ··

In This Chapter

▶ Determining the value of your assets

▶ Collaborating with team members

▶ Categorizing roles of users

▶ Preventing access and protecting digital assets

· ··

*O*ne significant value a DAM provides is that it allows you to determine who can view an asset and what that person can do with it. Imagine the chaos that would ensue if everyone using the DAM could access and change media assets at will. You wouldn't know which version was current, and important files could be lost, mislabeled, deleted, or even stolen. You could also end up with more than 20 versions of the same asset. Permissions provide structure to your DAM and allow you to assign different roles and level of access to your valuable assets.

This chapter discusses the role that permissions play in developing a functional DAM and how you can protect and store your digital records.

Appraising Your Assets

To figure out the types of roles and permissions you need for your DAM, start by looking at your current assets. You should consider the full world of digital assets in your organization, but ultimately you should define what a valuable digital asset is and whether it should go in the DAM system.

An organization's digital assets belong to that organization. When starting this type of appraisal, it can be tricky to discover where your assets are and who is responsible for their management. After you do, you may be tasked with convincing them that the DAM is the safest place for this important company intellectual property.

Here are some things you can do to make a preliminary evaluation of the assets you currently have:

✔ **Bring in the subject matter experts (SMEs).** Find the people in your organization who know where assets are, who has custodianship over them, and how they're used.

✔ **Prioritize your media.** Determine the most critical assets and plan to work with them first. Discover which assets are the most widely used and who would benefit the most from having them in a centralized repository.

✔ **Determine the scope.** Look at the number and type of assets that exist. Furthermore, examine the at shared network drives, cloud storage providers, and other systems in your organization.

✔ **Identify asset sizes.** Determine the average file sizes and determine which departments have the largest files. This can help when estimating the amount of storage space you'll need in a DAM system to get it up and running. Ideally, you also choose a vendor that is able to scale up immediately should your storage needs change quickly.

The following sections help you discover rules around accessing your digital assets by presenting some important questions you can ask and explains how you can use the *Digital Asset Management Maturity Model* in your research.

Asking questions

The quality of your permissions determines how well users can access the assets they need. Asking yourself a series of questions can help you formulate your permissions strategy. Here are some to consider:

✔ **Are there assets that certain users shouldn't be able to see?** These can include such things as archived logos and legal documents that shouldn't be shared.

✔ **Are there some assets whose activity needs to be monitored to ensure proper use?** These assets can include things like photographs that are only licensed for use for a specific period of time, or assets that aren't allowed to be used before a certain date (for example, photographs and press release information for a new product coming out next month).

✔ **Are some assets being used incorrectly?** You need a way to communicate the appropriate use

of assets. It's a good idea to include this information in metadata.

✔ **Is someone responsible for monitoring uploads and downloads?** It's an afterthought in many DAM implementations, but having a dedicated administrator who is actively monitoring the health and use of the system is important. This dedicated administrator can also monitor uploads and downloads.

Measuring DAM maturity

As you assess your assets, you may want to look at the *Digital Asset Management Maturity Model* developed by the DAM Foundation, the Real Story Group and Optimity Advisors (http://dammaturitymodel.org/). This model was designed to help companies determine their organizations' ability to manage their assets. The model runs across 15 dimensions organized into four categories: people, information, systems, and processes. The process has two phases:

✔ Create a list of all key personnel across the organization who would advocate for a DAM.

✔ Administer a detailed questionnaire to each of them asking them to respond to current needs and future plans.

After the exercise is completed, the organization will be able to rate itself as having one of five levels of maturity — ad hoc, incipient, formative, operational, and optimal.

According to the developers of this model, the level of maturity at which you stand is less important than the identification of your organization's weaknesses and the creation of a plan to address them.

To understand how the rating works, here is an explanation for each level as it relates to the use of assets:

- ✔ **Ad hoc:** Unorganized with no policy or organization strategy
- ✔ **Incipient:** Common repositories and policies
- ✔ **Formative:** Centralized organization and policy
- ✔ **Operational:** All new repositories and asset types registered with defined standard and practices for authoritative asset management
- ✔ **Optimal:** Assets prepared and authorized for use and reuse across multiple channels, with organizational understanding of authoring for different intentions

As you can see, this model is detailed and complex. It can help you determine where your organization sits on the maturity continuum.

Reviewing Permissions

Your DAM system not only allows you to set levels of permission, but it also allows you to set user roles. When a user logs into the system with verified credentials, he is only shown the assets available to him based on his assigned role.

Permissions can help you protect your organization from misusing digital assets, but it can also help curate the experience for people logging in if they only see the assets they need and that might be of use to them. One application of permissions includes using a watermark. Figure 3-1 illustrates a watermarked digital asset. A watermark can be used to show the user that this

specific asset has additional restrictions and requires a download approval.

These sections delve deeper into what you need to know when reviewing and setting permissions, including thinking about what restrictions individual assets, users, or groups should have.

Figure 3-1: An example of a watermarked digital asset.
Bynder

Assigning roles

Perhaps you have been in a group project where roles were clearly defined at the beginning of the project, which made the overall project go very smoothly. Having roles in a DAM system is similar to that. These different roles can all work in the same DAM, and it's clearly defined what each role can and can't do. Contrast that with being in a group project with too many people trying to control the project.

No clear expectations are set, and it's difficult to know what each person can or should do. This type of project structure has no governance or set of rules and

policies to guide expectations and provide structure to deliverables.

> **REMEMBER** A good DAM system is one with governance and one with a dedicated administrator. An administrator would be tasked with assigning roles to different types of users, based on their needs. There are typical roles that an administrator would set. Here are some examples of different types of roles and their definitions:

- ✔ **A light user:** This person has the fewest rights in the portal and often may only have view and download access. He or she doesn't usually have access to upload assets.

- ✔ **A regular user:** This person has all the permissions of a light user and could potentially also be allowed to upload assets.

- ✔ **An administrator/heavy user:** This is a person who can use any part of the system and can do such things as manage other people's permissions, revise taxonomy, and access analytics.

Controlling access to the DAM

An administrator also needs to control DAM access by verifying that the user is a legitimate employee or person who has been given access. Some of the ways to allow DAM access are as follows:

- ✔ **A secure login:** The login is secure and has a password. Some DAM systems allow you to connect to your active directory for your organization, which is a system that contains the most up-to-date database of all the people in your organization who might need access to systems. In the

case that multiple organizations need to access the DAM, there should be a way for those users to have access as well and get approval by the DAM administrator.

✔ **A defined user profile:** This allows the administrator to create a custom profile that doesn't exactly fit with predefined roles like we mentioned in the previous section (for instance, a light user).

✔ **The ability to set user roles:** This allows the administrator to assign permissions roles to users and to oversee user administration.

✔ **Access control:** This allows the administrator to control access to various parts of your organization's taxonomy and assets. Advanced systems also allow access control to other modules in the DAM system, such as a landing page, creative project management, or even to specific collections of assets or file shares.

> If the administrator wants to monitor a particular asset, your system may allow her to set something like a "Request to download" notice that requires a user to ask for permission to download a particular asset.

> If you have documents that should only be available to certain groups (such as the legal department) and shouldn't be visible to other users, you can create a metadata field called "hidden docs," and tag those assets with that value. Then you can control access based on that metadata field. The permissions category eliminates the concern that these documents will be used incorrectly because they won't even be visible to specific user groups.

Facilitating Collaboration

Permissions can play a variety of different roles. Administrators can facilitate collaboration by setting up user groups in your DAM. Users who are designated part of a particular group can log in, work on the right assets from conception to completion, and get approvals — all from within the group.

At a time when teams are scattered across the world, allowing teams to keep their assets and collaborate in workflows together is more productive. Creating user groups can save time if you need to involve the same bundle of people in a workflow again and again, such as a marketing and design team. There are also other ways groups can help facilitate collaboration in DAMs:

- ✔ Sharing assets quickly by tagging a group instead of tagging people individually

- ✔ Showing a group only the specific assets they need to see

- ✔ Curating a landing page with content based on user groups or teams

Securing Your Digital Files

In recent years, much has been written about data leaks and digital security. Your digital files are among your company's most valuable intellectual property (IP), so you don't want to leave their preservation and security to chance. Imagine the cost involved to recreate thousands of videos, photos, and other materials. It would be astronomical and probably undoable. Not only that, but what would happen if your digital

assets fell into the wrong hands before an official product release?

> Make sure that you plan ahead and protect your assets before disaster strikes. Work with a DAM vendor that has a disaster recovery plan in place and that places security and risk mitigation at the top of its priorities.

The International Council on Archives says that your assets should be accessible, intelligible, and useable without regard to technology or environment. They also need to remain reliable, accurate, and authentic. To accomplish this, you need to do some detailed planning and work with a DAM vendor that is serious about data integrity and security.

> Vendors offering cloud-based DAMs have the ability to keep documents safe in a highly secure and centralized portal. They're better protected from leaks and security breaches than on-site solutions, which is especially important to companies that are in highly regulated industries like pharmaceuticals and healthcare. You should also look for vendors that have their ISO 270001 certification and are also HIPAA compliant.

Each cloud provider has its own strategies for protecting and shielding customers' data from attack. Large data centers such as Amazon Web Services (AWS) protect stored data with high-performance technologies. The AWS security team is constantly working on developing technologies and new innovations to protect its users from data theft. Private IT infrastructure by a company whose core competency isn't IT simply isn't able to offer comparable levels of security protection.

With regard to data security, rely on the expertise of companies that have long-standing experience in the construction and maintenance of data protection systems.

Protection of your digital assets not only entails protecting them from unauthorized use both internally and externally, but also from the dangers of data corruption, data loss, or loss of access to data.

Planning Ahead

In addition to working with the right DAM vendor, make sure you plan out a technology roadmap for your organization that details how your assets will be handled with regard to contracts, departmental policies, and everyday activities. Nothing takes the place of a sound strategy that protects your records and preserves them for future use. These types of activities are a shared responsibility across IT, InfoSec, Legal, DAM administrators, and end users of the DAM system.

Here are some things you can proactively do to help keep your assets secure:

✔ **Create a budget for dedicated DAM staff.** Set aside a budget for a person, not a lawsuit.

✔ **Know your metadata.** Regularly audit your metadata to ensure accuracy and completeness.

✔ **Keep your record retention policies updated.** This task is often overlooked and needs to be current to keep assets secure. When should you archive an asset and when should you deaccession an asset?

- ✔ **Ensure that assets are accessible and intelligible.** Make sure you know how you can retrieve stored assets when necessary. Your vendor or your administrator can do regular checks for data integrity to ensure that files are protected from data loss.

- ✔ **Be aware of compliance issues.** Protect your company from legal, ethical, and business issues that may arise if you aren't keeping abreast of changes.

Chapter 4

Launching Your DAM and DAM Creative Project Management

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In This Chapter

▶ Launching your DAM project

▶ Dealing with team roles and responsibilities

▶ Managing creative project management

· ·

*A*fter you have selected a DAM that meets your company's needs, you need to plan your implementation. This involves convincing everyone in your organization on the value the DAM will provide, and the time it will save them by using effective workflows.

This chapter takes a closer look at the planning that is needed to prepare a DAM launch in your organization and the training that's required to encourage adoption.

Strategic Planning for Your DAM Project

Creating a time frame for your launch is the first step in implementing a DAM. Your plan would typically include estimated dates for four phases:

- ✔ **Planning:** In the planning phase, you decide which objectives to tackle and when.

- ✔ **Implementation:** Implementation means getting the DAM system up and running.

- ✔ **Training:** This includes teaching people how to log in and use the system.

- ✔ **Launch:** This is where you officially announce that the system is live and ready for use.

These planned phases give the internal team involved the chance to see how the initial DAM project will roll out. The team members can also weigh in on any timing issues, which can help to facilitate buy-in. Next, you want to consider the following activities and how they fit into your overarching plan:

- ✔ Setting priorities

- ✔ Identifying DAM champions and stakeholders

- ✔ Understanding your internal customer

- ✔ Branding your DAM

- ✔ Locking down your metadata

- ✔ Educating and training the team

- ✔ Building momentum

- ✔ Assessing success and failure

The following sections examine each in a bit more depth.

> **REMEMBER** Be prepared to be flexible, especially if you're taking an agile approach to project management.

Setting priorities

To create an effective system, you have to know what your guiding principles are. This stage is where you establish your mission and purpose for your DAM system. You need to match your objectives with the goals of the business so that your DAM produces ongoing value to the organization.

Identifying stakeholders and champions

You next need to determine who the key stakeholders will be. They should participate from the strategy phase of the program so that you get their best thinking and encourage their buy-in. You also need to identify *internal champions* who will support your efforts and broaden your understanding and use of the system. These internal champions can be from a variety of different departments.

Understanding your internal customer

To ensure use of the system, you need to be clear about who your internal customer is. Your champions will provide you with relevant information, but what about your average user? Do you understand their needs? You can't skip this step if you want to ensure that everyone, both internal staff and external agencies, wants to and does use the system.

Branding your DAM

When you first launch your DAM, some users will be reluctant to jump in and start working. If you create a customized on-brand portal, you'll make the DAM feel familiar to users. They'll recognize the branding elements, fonts, and colors, and they'll be less afraid to try it.

Your DAM system should be recognizably yours with the same ease that people recognize the Coca-Cola logo or the Nike logo. People want the wow factor when interfacing with apps and websites, so keep this in mind when applying your custom look and feel. The design is an important part of the user experience. Allow your users to "eat with their eyes" before consuming or uploading assets. Figure 4-1 shows a sleek design of a DAM portal for a fashion brand.
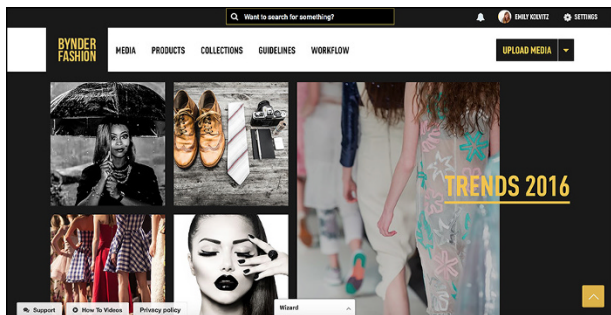
Figure 4-1: A branded DAM system with custom design.

Bynder

The portal can look exactly like your website, which can help increase adoption. Many companies even go a step further and brand their portal with a completely customized name for the site.

Locking down your metadata

The key to a great DAM is the development of useful metadata. Make sure you pay particular attention to it and be consistent with tagging. Refer to Chapter 2 for more information about metadata.

Educating and training

You need to provide effective training and education to help staffers adopt the system. Planning how you'll educate your users before you launch the DAM is important. Refer to the section, "Educating Your Team for DAM" later in this chapter for more on training.

Building momentum

If you demonstrate some initial success with your DAM, you can build momentum and get users to engage with the system. Discover some feature that is working well and showcase it to staffers. Success builds on itself.

Assessing success and failure

After the system is launched, your work is really just beginning. You need to determine what works and what needs improvement. If your DAM has built-in analytics, you can see how people are using the system. You could even create key performance indicators (KPIs) that might help you directly assess engagement and usage. Chapter 6 discusses KPIs in greater detail.

Don't rely just on the analytics. Survey teams and interview people to get feedback.

Educating Your Team for DAM

Furthermore, you want to help everyone adopt and use the DAM system. There are three parts to the education equation that you need to attend to when you're preparing to launch your DAM. They are as follows:

- ✔ **Job responsibilities:** Your team needs to select and advise those individuals who will play an active part in the administration of the DAM. Apprise them of their assigned job duties and ensure that they're willing to perform them.

- ✔ **Assigned roles:** Inform users about their permissions and how they can access the system. Additionally, inform them whom they can contact should they need more access.

- ✔ **Ongoing training:** Provide users with a variety of training modules to use the system. Some vendors offer on-site or remote training sessions, knowledge bases, 24/7 support, or quick training advice via email, chat, or on a call. In addition, they may do webinars and other customer-focused training sessions that are beneficial.

One key to promoting the proper use of your DAM is the role your vendor plays in working with your team to set up the system and provide the guidance you need to maintain an effective and efficient system.

All three areas are equally important if you want to ensure adoption of the system across the organization. These sections examine these areas in greater depth.

Job responsibilities for administrators

When you launch your DAM, make sure your administrators are in place. Administrators oversee the system by doing everything from setting up new users, helping conduct user trainings, and making sure that users are getting exactly what they need to maximize usage of the system and improve efficiencies in their work.

Administrator roles can also differ depending on the size of the company. For example, small or medium-sized companies might focus more on tagging assets and training users, while large corporations dedicate more time to permissions and creating user groups.

To understand the scope of an administrator's role, consider the following example of her responsibilities. She would

- ✔ **Manage users:** The administrator would oversee controlled access to the DAM, set up user groups, and assign permission profiles. The administrator could also be in charge of restricting access of assets to specific users.

- ✔ **Tag assets:** The administrator would describe the assets with metadata and would confirm metadata applied by others is accurate.

- ✔ **Train users:** The administrator would run additional user trainings for groups needing additional assistance, especially in the case of large organizations.

- ✔ **Help position the DAM as the foundation of the digital ecosystem:** The administrator would identify opportunities to make DAM the invisible glue between digital systems throughout the organization.

- ✔ **Find new user groups and assets to add to the DAM:** The administrator would roll out the DAM to users who were maybe not included in the initial DAM rollout, or to users and assets not included in the original scope of the project (as the DAM grows in maturity).

- ✔ **Troubleshoot issues:** In the case that something wasn't working the way it was supposed to, the administrator could help the end users troubleshoot the problem and guide them in how to use the DAM.

As you can see, DAM administrators wear many hats. They must be ready to take on all of these tasks and more. You need someone who really understands the nature of this type of role to succeed in DAM. If you try to install a DAM without a person or team behind it who is driving continuous, iterative improvements, you run the risk that only a few people will use the DAM.

The administrator of a DAM can be committed to that role in a full-time capacity, although this is not always the case. Some companies choose to have administrators who allocate a percentage of their time to administration of the DAM.

Assigned roles for users

To safeguard the utilization of the system, users are assigned specific roles that determine what they can access. Chapter 3 looks at the roles that are assigned to users depending on their needs and priorities.

Training for users

In addition to promoting the launch of the system to excite users, you need to plan for staff training. Doing

so is crucial to the success of the system. As you know, people learn in a variety of ways. They may prefer reading documents, watching videos, or listening to recordings. Make sure you provide a wide selection of training materials.

> **TIP** Pay special attention to training your administrators before implementation to configure systems and do certain tasks to inspire confidence in the use of the system.

Here are some ways you can deliver effective DAM training:

- ✔ **Formal training initiatives:** These materials can be on-site or conducted at an off-site location. The key here is to ensure that your DAM vendor provides ample training so that you aren't forced to create training from scratch.

- ✔ **Self-paced access to resources:** Make sure to give users access to resources they can absorb at their own pace. There should be such things as training scripts, video tutorials, and how-to guides available when needed.

- ✔ **Knowledge base:** Ensure that your vendor has a knowledge base that can supply your users with definitive information on the use of the system.

> **REMEMBER** Ask your DAM vendor if it has a 24/7 support team that can deal with issues and emergencies. Some vendors provide support from within their application, so it's just one click away. Also ask about access to support via email, chat, and phone.

Getting Started with Creative Project Management

Creative project management (CPM) helps you create, approve and publish your assets more efficiently. It can mean the difference between the success and failure of your DAM projects. For this reason, you and your team need to document the way projects should be done so that you can be more productive.

Using creative project management in a DAM environment can help you:

✔ Centralize collaboration through each approval round

✔ Spend less time managing work through email

✔ Ensure that the appropriate approvals are given before publication

The following sections explain the benefits your organization gets from creative project management and how your organization can create preset functionalities that they can use again and again to automate their processes.

Benefitting from presets

Depending on the DAM you choose, you should be able to create preset workflows. If this is an option, there are several benefits. You can

✔ **Communicate more effectively with other staffers and agencies:** You know what the collaboration and approval process should be and who owns each stage.

- ✔ **Ensure brand consistency:** Only assets that are current and approved will be circulated for use.

- ✔ **Automate some part of the media creation process:** When workflows are established, automation is possible so that projects can push forward immediately upon approval.

Identifying project types

You can automate with CPM through many different processes. Quick wins enable you to capitalize on the benefits of CPM including things like:

- ✔ **Creating new versions of assets:** In a project, say that you need to create a translation of a white paper for a new market. You can use CPM to kick off a workflow to make this happen.

- ✔ **Reviewing assets:** Are you sure that your design is on brand and representative of your company's brand and values? Does your asset have the right content or has it been cleared by legal to use it? You can use CPM to review and approve assets and even tag the appropriate people in the project to help collaborate.

- ✔ **Online proofing:** You can use CPM to proof an asset and make sure that it is ready for publication whether it is a print ad or even a web banner.

Creating projects

Just like a car on an assembly line, you want to develop a process for asset creation by which you automate the things that can be automated and allow users to make specific decisions when necessary. Here are some

things you can do to start the workflow-creation conversation:

- ✔ **Goals:** Set your goals so you know what you want to accomplish when developing new workflows.
- ✔ **Priorities:** Determine priorities to find out what needs to be done first.
- ✔ **Roles:** Assign roles to team members responsible for completing the workflow process.
- ✔ **Processes:** Understand the current processes that are used for completing projects.
- ✔ **Streamline:** Identify ways to simplify the process and improve productivity.
- ✔ **Document:** Use templates (preferably supplied by your vendor) to document the process that suits the particular needs of your users.

Chapter 5

Positioning DAM as the Foundation for Your Digital Ecosystem

. . . .

In This Chapter

▶ Understanding the value of integration

▶ Considering types of integration

▶ Demonstrating the benefits of integration

. . . .

*O*ne of the things you may wonder when you buy a new software program is how well it will work with all the other software programs you already use. More than likely, you know how frustrating it is when you have to convert or adjust a digital photograph to certain specifications so that it displays optimally on the web.

Now imagine how complicated this process becomes when you have thousands of images, videos, and brand assets that need to be manipulated by people across your enterprise in all the existing systems.

That's just one reason why integration is so important. Think of DAM as the invisible glue between all of your systems. In this chapter, we look at what an organization's digital ecosystem is and how you get value from positioning your DAM as the digital ecosystem's foundation. Today, assets are everywhere and DAM is the foundation to power the marketer anyplace and anywhere.

Understanding the Value of Integration

Year after year, the number of digital tools available on the market increases, as well as the number of digital systems a single organization utilizes to do its work. In each of these digital systems lies an entire world of people, processes, and data. Figure 5-1 illustrates DAM as the foundational layer of an advanced digital ecosystem.

In a digital ecosystem, you have:

- ✔ **People:** The internal and external people who access, manipulate, and publish the stored content or view it. This includes their roles, responsibilities, and relationships.

- ✔ **Processes:** The way in which people work together to produce the variety of content that is needed for campaigns, promos, websites, videos, and so on.

- ✔ **Data:** The digital information collected to understand and analyze the success of the business.

Connecting these people, processes and data across systems can be difficult, but these connections, or integrations, exponentially increase the return on investment of the DAM.
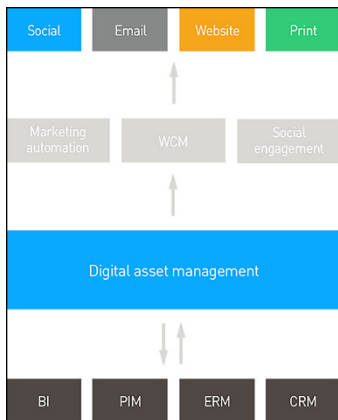
Figure 5-1: DAM as the foundation for a digital ecosystem.
Bynder

Integrations:

- ✔ **Save a lot of time moving assets around:** You may be unaware of how many times you download a file and then re-upload it to a different system. Integrations cut down on having to download then upload to various systems.

- ✔ **Reduce the possibility of error:** By selecting an asset directly from your DAM, you are ensuring that it is the most recent asset, whereas if you select from your desktop or from an older asset that may have been uploaded to a system, you are increasing the chance of using the wrong asset.

✔ **Makes the DAM the one version of the truth:** All visual content is managed there from creation to publishing and it helps you keep control of versions, rights usage, your brand image, and more.

The following sections explain how people, processes, and data support the whole of the digital ecosystem.

Recognizing the people who work on or view assets

You may not realize it, but almost everyone in the organization comes in contact with your marketing content, including the salesperson who needs to craft a proposal to the attorney in the legal department who needs to deal with a photo's copyright issue.

> **REMEMBER**
>
> To comprehend the scope of the people involved, here are some of the groups that will deal with digital assets:

✔ **Content creators:** Agencies, graphic designers, photographers, writers, and editors

✔ **Content managers:** Different departments in your organization, such as marketing, sales, and legal

✔ **Content users:** Internal staff, external agencies, and vendors

✔ **Content consumers:** Customers, prospects, press, and website visitors

This list constitutes a diverse group of people whose needs must be accommodated. You may even see that some users are both content creators and content consumers in your organization. Your ecosystem must work seamlessly across all its systems to support these key players. You can imagine the complexity that all these different job requirements introduce.

Supporting the processes to create content

You must complete a number of business processes in order to develop assets that the ecosystem supports. This list of processes includes the following:

- ✔ **Planning and budgeting:** Marketing and other departments plan a variety of campaigns, promotions, advertising, and other activities that support the organization's business goals.

- ✔ **Content creation:** Assets are brought into the system that will be used to create new assets to support planned (and sometimes unplanned) activities.

- ✔ **Combining asset variations:** Individual assets are combined together to create new content, such as videos and promotions. The system must support several variations of the content and store them all together to be used again.

- ✔ **Content approval:** Before the content is published, it may go through several levels of approval from editors, brand managers, and others for whom the content is being created. This workflow process is unique to each organization. The DAM must be flexible enough to support it.

- ✔ **Format and size conversions:** After the assets are created, they need to be converted into the specific platforms on which you'll publish.

- ✔ **Publishing:** Assets are published to websites, social media, newsrooms, online apps, promos, advertising, and so on.

- ✔ **Analyzing the response:** Analytics are captured to assess how well the audience responded to

content in the DAM, which enables your organization to evaluate successful content and create more of it, or refrain from using assets that don't have a big impact.

✔ **Storing and repurposing:** All digital assets need to be centrally stored and easily accessed across the enterprise for people with the right level of permissions.

> 🎯 Your company's ecosystem must be capable of supporting all these processes across the enterprise. As you think through your current processes, consider how these processes might be streamlined.

Managing the data

The final part of the puzzle that makes up your ecosystem is your data. Your company has a variety of systems it deploys to collect and manipulate one of your company's greatest treasures — its data. Your organization more than likely uses some of the following systems:

✔ **A content management system (CMS):** This system allows you to control and manage content for publication.

✔ **Your website:** The central online platform for your company that includes a variety of assets and written content.

✔ **Your webstore:** You may also have an online webstore where you host a variety of product-related assets.

✔ **Marketing automation systems:** These systems allow you to publish assets on a variety of channels and monitor their reach.

- ✔ **Social platforms:** Assets are created to support the formats for your presence on Facebook, Twitter, Instagram, and so on.
- ✔ **A customer relationship management system (CRM):** This database contains the names, addresses, and data about your customers and their buying habits.
- ✔ **An analytics intelligence program:** This system provides your company with the business intelligence it needs to make strategic business decisions.
- ✔ **A creative suite:** This suite is a group of programs that help in the design and preparation of content to be published.
- ✔ **A file-sharing program:** This type of system allows for large files to be shared but not stored in the DAM.
- ✔ **Email program:** Your email program should work in conjunction with your other systems to complete the ecosystem.

> **REMEMBER**
>
> In addition to these systems, you'll have a variety of other financial and ecommerce systems that support the business.

Looking At Types of Integration

Your organization may require a wide range of integrations between all of these different systems. You may think that once you have a successful DAM up and running, it is time to start thinking about how to take it to the next level, but you should really be thinking of integrations before you even get a DAM system!

How can you make your DAM the invisible glue sending assets to all of your systems? The following are only a few ideas of ways you can potentially begin to stick your various tools and systems together:

- ✔ **Automatically update asset metadata in your DAM from SAP:** When data gets updated in your PIM (Product Information Management) system, you can make sure that it's synced with your DAM system so that the most up-to-date product data is applied to product images in the DAM.

- ✔ **Choosing images to include in a design while working in a creative suite:** You can access images and logos from your DAM while working in a creative suite and have access to the most recent versions as they're updated in the DAM.

- ✔ **Placing images or logos from your DAM directly into your Google Doc or Microsoft Word file:** You can access files to place inside a document from your DAM while working inside of G-Suite applications or Microsoft Office applications.

- ✔ **Hosting product images to your webstore:** You can push final, approved product imagery to your ecommerce website automatically.

- ✔ **Using images from your DAM in your WordPress blog:** You can use an image picker to insert images directly into your blog straight from your DAM.

- ✔ **Pulling in files from your DAM while working in Salesforce:** You can access assets and metadata from your DAM while working inside your CRM.

Some vendors have plug-and-play integrations already ready to go that allow you to connect with your DAM in seconds. It's possible to build your integrations yourself if the DAM vendor has a well-documented API.

Benefitting from the Integration of Systems

Positioning your DAM as the foundation for your digital ecosystem provides significant benefits to the organization. They include the ability to

- ✔ Streamline the way employees work by connecting people with data and systems
- ✔ Provide cost savings due to operational efficiency
- ✔ Access specific assets and data anywhere, anytime across all the systems
- ✔ Produce analytics for content spread across all parts of the company
- ✔ Maintain branding consistency and integrity

By using DAM as the invisible glue between your digital systems, you can develop new solutions and consider new business opportunities.

Considering examples of common types of integrations

A few different types of integrations are

- ✔ **Plug and play:** Also referred to as out-of-the-box plugins, they work right away with no customization on the part of the vendor.

- ✔ **Custom built:** These are either custom built by a vendor or by the customer. Finally, if your vendor has a robust API and you have a talented in-house developer, you

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can also consider making a completely unique integration with his or her help.

Some of the most common types of integrations are listed here:

- ✔ **Ecommerce webstore and Hybris:** You can sync your DAM solution with your webstore so that the product images on your website are the most up-to-date versions that you store in your DAM.

- ✔ **Adobe InDesign, Photoshop, and Bridge integration:** You can apply metadata in Adobe Bridge using custom XMP (eXtensible metadata platform) panels and then auto-ingest that data after you upload it to your DAM. You can also place images directly from your DAM while working inside of Adobe applications such as InDesign and Photoshop.

- ✔ **WordPress:** Using an image picker while you're creating and editing inside the WordPress interface allows you to quickly insert a photograph, logo, or other file into your page directly from the DAM without having to go to the DAM, download the file, and then re-upload the file to WordPress.

- ✔ **Sitecore:** You can save time by uploading images directly from your DAM to Sitecore, and even have the description in your DAM populate the alt-text in Sitecore, helping to improve search engine optimization (SEO).

Using Analytics and Reporting to Show ROI

. . . .

In This Chapter

▶ Defining key performance indicators

▶ Developing data reports

▶ Embracing analytics

. . . .

*Y*our DAM needs to quickly demonstrate its worth. Managers must show that any system they bring into the organization can produce a return on investment (ROI). To do this, you need to establish key performance indicators (KPIs) that collect the right data to present reports that show a return. (*KPI*s are measures that determine how well your company is succeeding in reaching its goals.)

In this chapter, we examine how using data from KPIs can help your organization determine its ROI and prove that your DAM has ongoing value.

Demonstrating DAM Value

Many DAM system vendors promise to deliver an ROI upon implementation. Typically, this is explained by

using a simple ROI calculator to look at the time saved multiplied by users across the organization, multiplied by their salaries. This is a gross measure that does show savings, but not all systems are created equal. Some DAM systems demonstrate an even greater value over a longer period of time. Your use and adoption of the system can also have a huge impact on the bottom line for ROI.

This section discusses an approach that can help you capitalize on all that DAM has to offer by frequently measuring the right bits of data that your management is interested in.

Establishing KPIs

To assess the ongoing value of your DAM, you need to select what types of measures you'll use to determine ROI. There are some different ways to demonstrate ROI:

- ✔ **Revenue generation:** This is the increased sale of products and services as a result of the use of rich media assets that the DAM helped you create to generate sales. You can look at such measures as lead generation, brand awareness, lead nurturing, web engagement, and so on. This is really only possible for advanced digital asset management, where the DAM is the invisible glue between all of your digital systems.

- ✔ **Productivity savings:** This is the time and money that you save by using your DAM to be more productive. KPIs that measure productivity savings include system adoption, efficient use of assets, and effective repurposing of assets.

- ✔ **Increased brand consistency and brand value:** This may be difficult to measure, but it's important nonetheless. A simple way to quantify this is to compare the number of branding inconsistencies from past projects to current projects.

Some good examples of KPIs for your DAM system might be the following:

- ✔ **The percentage of people who are using the system throughout the organization versus the non-users:** Usage should increase as time passes.
- ✔ **The number of assets that can be approved weekly before and after the implementation of the DAM:** The number of approvals or turnaround time should increase as time passes.
- ✔ **The number of photos that can be reused because they're easier to find:** Previously, people may not even have known about having these resources available to them. An example is internally produced stock photography that the company owns. It can be used again and again and possibly even licensed out for external use.

Collecting data using analytics

You will want to know if your DAM has an analytics tool that you can use to measure and optimize the life cycle of your content. To this end, ask your vendor if its DAM offering includes the following:

- ✔ **Ability to quickly visualize metrics inside the DAM system:** Accessing analytics without having to export it or wait a long time to view all the uploads or downloads for a specific period of time allows you to quickly see trends over time.

Using a return on investment calculator

If you need help quantifying hard costs for senior leadership to jump on board or are just curious to see how much a DAM solution might save your company, a return on investment calculator is a good place to start.

The calculator takes into consideration many things, including hourly rate for your employees, number of employees, number of tasks or jobs per week, the number of publications, and orders of advertising materials per week. You can use these metrics to compare time spent per week with and without a DAM solution.

Some DAM vendors have ROI calculators available that you can simply plug in your metrics and they'll do the calculations for you. One thing to note is that although ROI calculators are handy for getting rough estimates or ballparks of where you can see efficiency gains across activities, they are only a crude measure of returns. Using your own KPIs that apply to your unique business can help you quantify return on investment to senior leadership even further.

- ✔ **Availability of a wide variety of metrics:** The analytics tool should have the ability to show analytics for things like number of logins, downloads, approvals, new workflows generated, and asset usage in integrated systems.

- ✔ **Ability to export data:** For advanced reporting, you may want to export data to either combine with other data sources or to integrate with other analytics tools for new insights into your data.

- ✔ **Ability to track assets, users, and metadata:**
  Every action inside a DAM system should be
  tracked. Ensure that your analytics includes all
  three of these types of data.

- ✔ **Integration with an outside Analytics programs
  (such as Google Analytics):** You don't need to
  reinvent the wheel. Organizations prefer to use
  certain analytics programs. Integrating with the
  analytics tools that you prefer to work with that
  tracks page views and allows you to set goals for
  actions inside your system can save a lot of time
  and effort, and also allow you to capture data that
  traditional DAM analytics programs may or may
 not capture.

Creating reports

In today's visual world, being able to present reports to
your management that show the ongoing value of your
DAM is crucial. Creating reports that illustrate your
KPIs will help people in your organization understand
the value of the system. Your DAM provider should
offer up your analytics data, but you should be the
storyteller of your data.

Telling the story requires you to take the world of data
and condense it down to the most important KPIs that
your executive leadership cares about. You not only
need to illustrate ROI, but you need to make a compel-
ling story that's bite-sized and illustrative.

Consider what the most valuable metrics you want to
highlight are. In the same way that you condense your
message when preparing a slideshow for a presenta-
tion, condense your data to only the relevant points.
These points are what you'll show on your reports.

Remember that it's likely that many people will skim through the report and aren't interested in every single metric measured from the DAM system.

You may have an analytics tool in your DAM that will produce graphics for you based on the data inside your DAM. Figure 6-1 shows an example of this type of graphic.
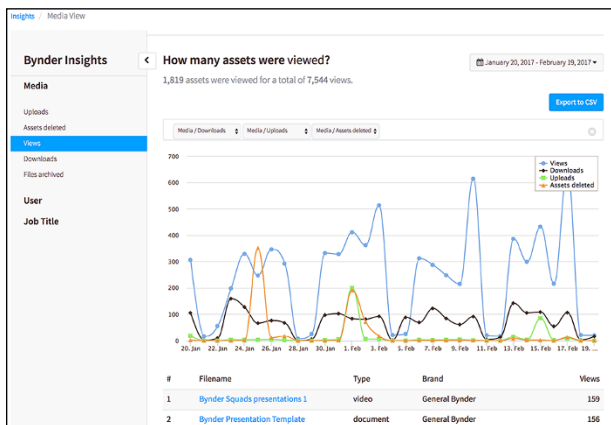

Figure 6-1: Illustrative graphic for report.

Bynder

This can be an excellent place to source graphics for your reports, or possibly you even have a DAM tool that helps you make a report and send it directly from the DAM. You can also use external systems to put together customized reports, especially if you are considering making reports with data that comes from other systems. Figure 6-2 shows an example of a DAM

usage report using data from Google Analytics. Don't forget to include both productivity savings data and revenue generated data in your reports.
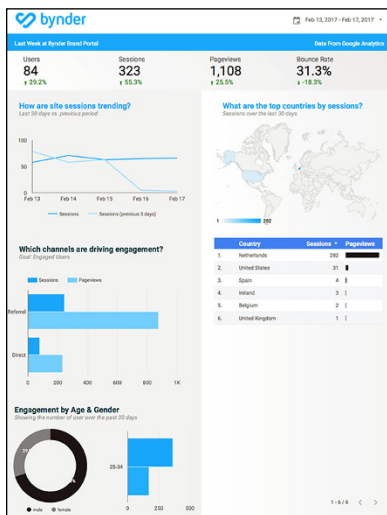
Figure 6-2: Illustrative report of DAM use.

Bynder

Leveraging Analytics for ROI

One of the best ways to identify ROI is to look at the implementation of your DAM in three phases: before, during, and after. During each phase, you should make assessments and ask yourself important questions. The following sections delve deeper into these three phases.

Estimating before implementation

This preliminary activity involves some guesswork on the part of your team, and it's a vital part of your analysis. This activity helps you uncover what you and your team believe will be the primary reasons to bring a DAM system into the organization. You'll make some assumptions that may or may not turn out to be true.

> **REMEMBER**
>
> At this stage, your goal should be to look at what you're currently doing and see where reimagining can help you to optimize your current asset life cycle. The following questions can help you lay the foundation for a beneficial DAM:

- ✔ **How do you expect to generate an ROI from the use of your DAM system?** Look at the measures on which you plan to base your ROI, which can include such factors as man-hours, processes, and technology budgets.

- ✔ **What are your long-term growth and marketing targets?** Project what you intend to do in the future to ensure that your system can scale to meet new challenges.

- ✔ **What cost cutting do you think will result from the use of the DAM?** Naturally, you expect your DAM to organize your assets and save staffers time. Make an estimate to which you'll compare your actual results. An example could be the de-accessioning of other systems in your organization as you gain efficiencies through the use of a DAM.

Managing during implementation

Depending on your organizational culture, this phase of your DAM implementation will likely see some upheaval among staff and external users of the system. Not everyone loves change and some may not want to adopt new ways of working. To manage this phase, you need to be clear about what you're doing and how it will impact the business.

Some questions you can ask include the following:

- ✔ **Do you know what your implementation risks are and how you can mitigate them?** Look at risks to the corporation as a whole and not the effects on individual staffers. Do you have the confidence of your managers?

- ✔ **Are you aware of the challenges that will affect adoption of the system?** Here is where you look at individual users. Without sufficient notification and promotion of the system, you risk pushback by users who don't feel that they were sufficiently prepared.

- ✔ **Can you meet the timelines you set at the beginning of the project?** Were you too ambitious with your estimates? Or perhaps not ambitious enough? Make revisions during this phase so that you don't unknowingly impact a smooth rollout.

Evaluating after implementation

Your DAM system has been implemented. The good news is that during the implementation phase you collected data you can now analyze using your vendor's built-in analytics or other measures. Using the data should enable you to demonstrate a substantial ROI.

Don't be tempted to focus solely on revenue increases. Of course, they're crucial because management will often approve them, and they help reinforce the value of the system. But don't forget that less flashy measures like determining:

- ✔ Which content resonated the most with customers?

- ✔ Who created the best content?

- ✔ How long did it take for them to create this content using the new system?

- ✔ What is the most popular or widely downloaded/used assets in your DAM?

This type of data evaluates engagement that leads to a solid ROI.

Here are some specific questions you need to ask:

- ✔ **Is there broad adoption of the system?** Make an assessment throughout the organization instead of just focusing on heavy users. What percentage of people uses the system on a daily basis? What departments are they in?

- ✔ **Are the marketing objectives you identified being met?** You need to ensure that the KPIs you're measuring are the right ones and that they indicate positive results. If not, you need to make changes.

- ✔ **Can you point to a reduction in unapproved versions of assets that demonstrate a rise in productivity?** Look for real measures of productivity and don't just rely on personal feedback.

Chapter 7

Top Ten Best Practices When Launching Your DAM

● ●

In This Chapter

▶ Establishing a marketing plan

▶ Recognizing risks

● ●

*Y*ou want to focus on best practices so that you get value from other employees' in-depth experience when launching your DAM. Here are ten best practices to ensure a successful launch and continuous usage and adoption of your DAM:

✔ **Create a marketing plan.** You need to market your DAM product just like you probably have a marketing plan for your product. Your *end users* are internal staff members who need to get excited about using this new system. Make the same type of materials you would for customers, including videos and newsletter announcements.

   Don't rely solely on training materials to generate enthusiasm. Just like how a brand resonates with a customer, how will your brand portal resonate with your internal customers? You're ideally

appealing to their pain points. How can the brand portal help them and make their lives easier? What about it speaks to them in a way that drives an organic urge to check out the new system? You can even create some buzz around launching your system by being a bit cheeky in your marketing collateral messaging.

✔ **Craft and communicate a launch plan.** After you craft your launch plan, you need to tell your employees about it. Give them plenty of time to provide feedback and identify potential problems. Encourage them to feel like they're part of the launch's continuing success.

✔ **Get executive sponsorship.** Adoption of your DAM requires executive leadership. The introduction of new programs always has some reluctance. Change can be scary, even to organizations that thrive on continuous change and improvement! To ensure that your DAM is accepted, have one or more executives sponsor the adoption of your program. Doing so helps signal to staffers that your organization's higher-ups approve the program.

✔ **Do a soft and a hard launch.** Launch your program in two steps. The first step is a soft launch, also referred to as a *pilot*. Select a group of heavy users one to two months before implementation. The primary goal of this test phase is to collect feedback, determine if there are immediate scope changes, and solidify your plan for the hard launch. The second step is to implement the hard launch, also referred to as a *full launch,* to the entire user base.

- ✔ **Identify and empower system champions to support and drive adoption.** Identify the tech-savvy users of your DAM who want to champion its use across the organization. You usually know who these people are well before launch. They're the influencers who can demonstrate the value of the system and act as an additional resource as you roll out the program.

- ✔ **Establish a resource center.** Everyone learns at his or her own pace. Make sure you create a training hub where users can find reference materials to serve their needs at each stage in the learning process.

- ✔ **Train users and enable them to easily provide feedback.** Feedback from users helps make programs go from good to great. Train users and provide them with a voice so that you can satisfy your user base and make your DAM system better. Hold focus groups and make providing feedback easy and intuitive.

- ✔ **Identify any risks.** To feel confident that you have things under control, look at potential problems before you launch.

- ✔ **Measure adoption.** After launching your DAM program, determine how your organization is using it. Are there some unforeseen barriers to acceptance? Make sure to set goals and create key performance indicators (KPIs); see Chapter 6. These metrics can help you to determine your return on investment.

- ✔ **Use storytelling and case studies.** Technology comes alive when you can use a compelling case study to explain a product's benefits. You help users envision how they'll use it and provide a pleasing way to deliver complex information. When you highlight internal staff members who are using the product to its best advantage, you also encourage greater adoption rates among reluctant staffers.

DAM is a great resource that must be first approved internally before it can be a success externally.

Create, find, and use your content effectively with DAM

In today's digital world, customers know what they want before they even talk to you because they've researched your products and services online. Your organization needs to be able to share the right content at the right time on the right channel. Your organization needs digital asset management. *Digital Asset Management For Dummies*, Bynder Special Edition, walks you through the basics of digital asset management (DAM), including what a DAM consists of, how your organization can benefit by implementing DAM, how you can develop a DAM structure to manage your digital assets, and so much more.

Stephanie Diamond is a thought leader and management-marketing professional with 20+ years of experience building profits in more than 75 different industries. **Emily Kolvitz** is a DAM consultant and digital librarian.

Open the book and find:

- **How to assess your present needs**
- **Best practices for taxonomy and metadata**
- **Tips for setting permissions in your DAM system**
- **How to launch your DAM project**
- **Guidance on integration of your people, processes, and data**

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