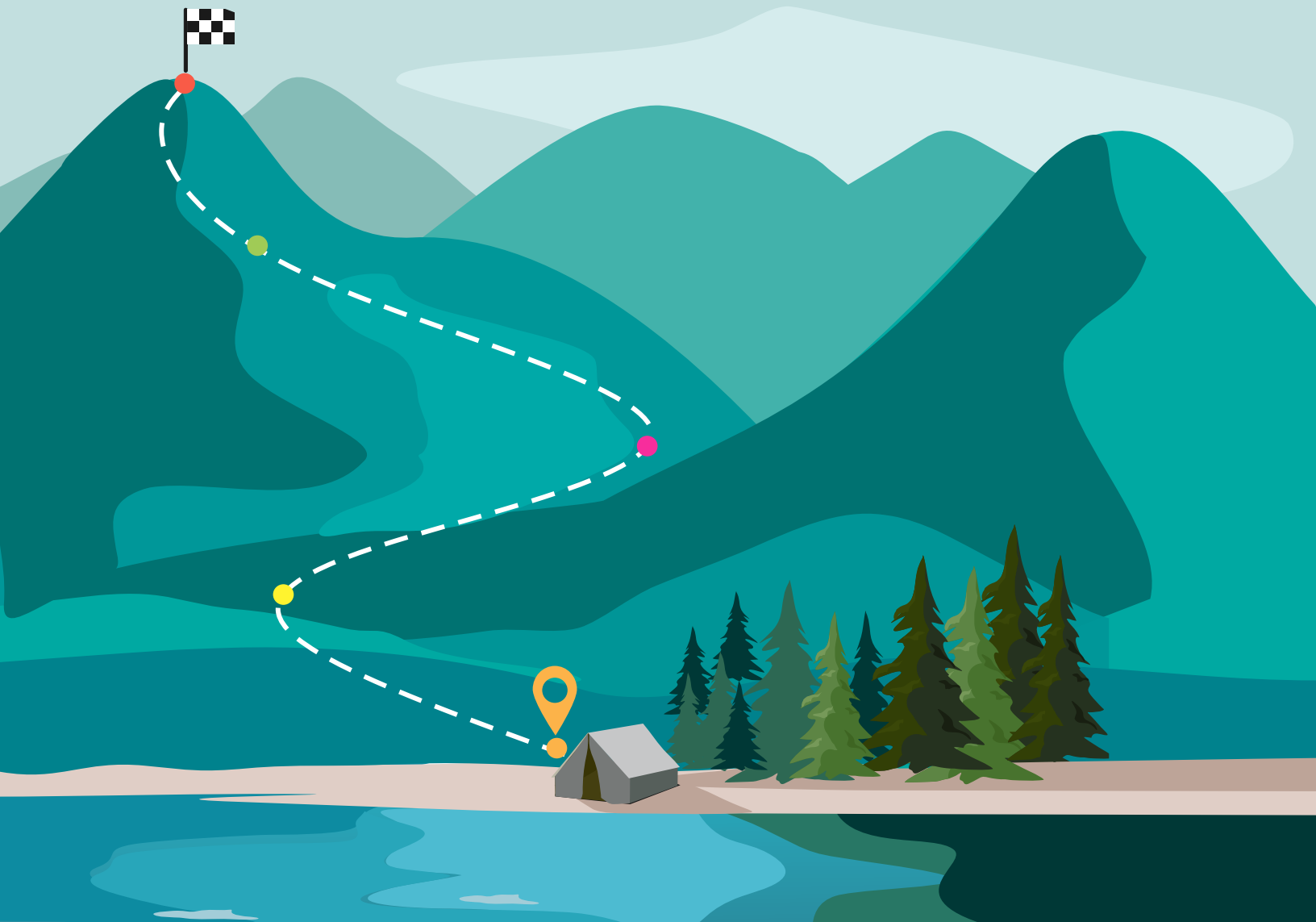# THE
DIGITAL
ASSET MANAGEMENT
JOURNEY GUIDE

Intro

Previously, you needed compelling content as well as printing presses, paper, ink, and delivery trucks to be a successful publisher. These days any company with a website is effectively a publisher, and just like the old days, compelling content is still a necessity. Today, every brand has the same access to distribution as media organizations, elevating the value of content to your brand.

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The Content Cliff

Managing that content is now the challenge. There's so much content being created at any given moment that it's becoming a real challenge for businesses to govern the proliferation of content inflow and outflow. Many companies are struggling with massive quantities of digital images, graphics, advertisements, videos, logos, PDF's, audio, and other files that are literally exploding at the seams.

The process is becoming increasingly unmanageable. What used to be easily maintained in a few folders on your hard drive has quickly become chaotic- either the content you need is on someone else's hard drive, or it is on yours and you can no longer find it, or you know it exists someplace but you need it tomorrow and now you have to pay to have it recreated in time because you just forgot where.

And it's not just about finding the right asset- your ability to control its use is gone. How can you be expected to standardize logos and branding if you don't have a "single source of truth," one central repository where only approved assets are available for use?

Figuratively speaking, it makes you feel like you want to jump off a cliff. Hence the Content Cliff. And, no one likes the Content Cliff.

The first step is, as usual, recognizing you have a problem, understanding that the way you manage the digital assets under your control will drastically impact your future in the marketplace. You must first organize your assets in a way that allows for easy access, at the same time allowing you to limit access to different objects based on departments or groups, or third-party membership. The way you manage your digital assets will reflect directly on your brand as well as your operations.

The DAM Journey is your guide to quantifying your digital asset management needs, helping you decide if you need a DAM, things to look for in a DAM, what to put in your RFP, decision criteria, and the all-important implementation tips. So let's get started on your journey!

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#1

Do You Need a DAM?

Before you start evaluating various DAM vendors, you need to determine if a digital asset management system is a good fit for your business. In order to come to this decision, you must ask yourself a few preliminary questions:

(A) Where do your digital assets live right now?

This is mostly a "are they in one place (one storage device or does one person have everything)? Or, are they spread out among multiple owners?" question. If all your digital assets are in one place, are they in a legacy system you're looking to replace? And, if so, what is that system? Or, are they in a single storage device? If, for example, they're in DropBox, what limitations are you running into? With a DropBox-type solution, are you experiencing constraints around things like rights management or search flexibility? Are you experiencing confusion about which folder to find the right asset, etc.? Can you add metadata to make a key object easier to find going forward? Or, is DropBox totally adequate to your needs at this time?

For most organizations, their digital assets are spread out among multiple individuals, and up until now "managing" them has been knowing who to call and requesting them to email or somehow transfer you the asset you're looking for. So, this step entails making a list of the "owners" who currently maintain or have access to your digital assets.

(B) Let's quantify the problem: what are you dealing with?

Now that you have located where your files are, it's time to do an inventory of your assets. All in, what kinds of files does your organization have (videos, still photos, PDFs, Word, Illustrator, and so on)? What is the rough average size of these file types? What file types do you expect to grow the fastest in the next year or so?

See our inventory spreadsheet for an easy way to get this information in one place. This step lets us focus on the kinds of digital assets you manage, which are prevalent, how much storage space is needed, and how the DAM will need to scale as your business, operations and assets grow.

DOWNLOAD INVENTORY SPREADSHEET

Notice the spreadsheet has a column marked "Metadata Y/N?" Now, you might as well find out if there's textual data already attached to/embedded in your objects. Basically, you can figure this out by thinking about how you currently find the right digital asset you are looking for. Are they in folders sorted by date and/or event? Are they in a database system and you can search by name or some other criteria? Is the only information the filename? Is there a text file associated with each digital object that holds its metadata? Or, do you believe there's no metadata at all for your digital assets?

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(C) What's your user requirement?

For DAM users there are basically two categories:

- **power users** that frequently look for and work with your digital assets
- **occasional users** who access the system once every couple of weeks or so.

In some organizations, requests come to a small number of power users who do all the search and retrieval for the end user. In others, searching has been "democratized" - meaning there's widespread access to the digital assets and people search for what they need themselves.

If you currently have a few power users who do all the searching, is that the way you want to work going forward? Or, would you like to spread the workload so that the end users can search for themselves?

(D) What is your user population like?

In many organizations, users fall into certain roles that often include:

- Administrators
- Marketing Managers
- Brand Managers
- Web Designers
- Photo Editors
- Graphic Designers
- Writers
- Photographers/Videographers
- Archivists

It can be important to define groups like these and for each group define what **privileges** they have or should have, and what objects they can access. For example, you may want photo editors to have the ability to edit metadata and delete or output photos, but you may not want marketing interns to have any of those privileges.

You can similarly limit **access** to your digital assets based on user group. It may be that you don't want web designers to see works in progress, so those should be invisible to the web designer group. Figuring out what your privilege and access requirements might be like, as well as roughly what groups your users fall into might be useful at this stage. **Here's a spreadsheet to help you get a handle on your user group's needs, privileges and access.**

DOWNLOAD USER GROUP SPREADSHEET

*See **Appendix 1 Bonus** section for more detail on various user groups.

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Finally, in many organizations there's an ongoing move to "democratize" access to digital objects. This allows more people in the organization (likely spread across multiple locations), to be able to search for and use digital objects themselves, without the need to submit requests to someone else. This removes the potential for bottlenecks to occur and speeds time-to-market of projects. As such, this may be a user-related goal in your situation.

E Rights Management

Most organizations have digital assets from a variety of sources, and some of those sources place restrictions on how a given asset can be used. Consider how many in-house creatives you have, and if you use outside agencies and what volume of content you get from each.

For example, you may have purchased images or video from an agency, and there may be payments due depending on how, and how many times, you use that image or video. If that has been an issue in the past, then you might want to keep in mind you're looking for a DAM that has some way of indicating those objects, so users know there may be unplanned fees associated with using them.

F Workflow

What are the current steps to your workflow? How long does the creative process take from the point of idea conception to the actual performance tracking phase of a digital campaign? What are the consistent hurdles in your current workflow process? And, what could a DAM system do to help automate it?

If you typically output one object to multiple distribution channels with multiple resolutions and/or file formats– for example, the digital file might get output to print and several web channels with different resolutions and sizes. Also, most DAMs incorporate some level of automation that can greatly reduce hands-on time per object. Lastly, if you have an archivist or someone who reviews or adds metadata so your objects can be easily searched or and retrieved, the database schema and batch editing tools a DAM might provide will greatly increase their effectiveness.

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(G) Speed

Is your current setup responsive enough for your users, or do they complain about the time it takes to get them the digital asset they requested? How is the time it takes to retrieve a specific object measured? Seconds? Minutes? Hours? Days? Will that change as a flood of new objects flow in over the next year? What do you need the response time to be (remember speed expectations these days are set by what people are used to getting rom Google, meaning sub-second response times)?

(H) What is your current way of doing things costing you?

Try using this ROI calculator to get a handle on the sources of, and true costs of your current operation. It helps you quantify the time spent and cost of looking for a typical object, what you have had to do to recreate lost objects, and other factors that help you understand the financial commitment for a DAM. This will help you present a business case to appropriate stakeholders that would be involved in green-lighting the project. Additionally, this number will also give you a better idea of what you need to look for in a DAM.

(I) Funding

Can you get funding for the project, and is it as a capital outlay, or as a renewable monthly expense? What can your company afford and what stakeholders need to be involved to ensure the funding gets approved?

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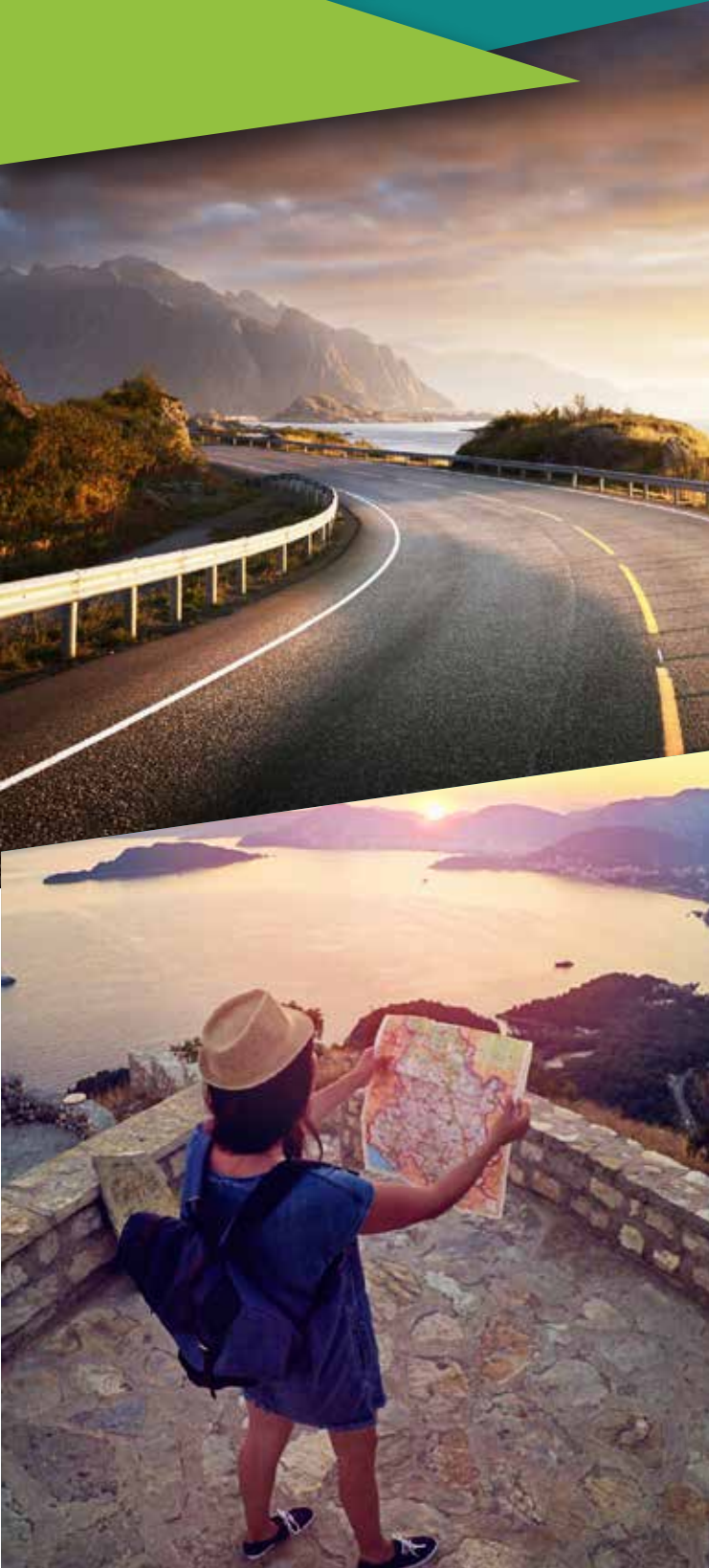
General guidance:

Only you can determine when it's worth your time and effort to switch to a DAM. The **ROI calculator** should give you a fair indication of what your current operation is costing in dollars and cents. From our experience, depending on your operation and the frequency your organization uses its digital assets, a desktop-kind of application, or a well-organized and labeled folder structure will let you manage a few thousand objects in a single location reasonably well, especially if you don't foresee much growth in your collection.

A DAM comes into its own when you either have over 5-10,000 objects, if you need to "democratize" access to the objects over a wider population, if you have user groups with special needs (some people can't see some objects, for example), or if rights management, control or speed have become serious issues. If your objects require higher than normal security or are HIPAA related, or you expect a ramping rate of growth of your collection, a DAM comes into play sooner.

In pretty much all circumstances, if you have > 10,000 digital objects to manage, a DAM will save you time and money, and give you much better control of your collection which will only become truer as time goes on.

If your conclusion is that you need a DAM (or a better DAM), do you have funding for it? Do you want to include other departments and share costs? Now is the time where you need to start putting together a strong business case to win over other stakeholders. Figure out who needs to be involved in the approval process and try your best to put together a high-level budget for the project along with your ROI calculation. You need to get everyone together to present your business case and get a better sense from them of what the approval process will be and approximately how long it will take to get your DAM project budget signed off.

If funding seems achievable, proceed on to the next section.

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#2

Looking for a DAM

If you feel a DAM would really benefit your organization, the next step is to get a good handle on what your requirements for a successful project would be.

✓ Checklists

Gather up your asset inventory spreadsheet from **step b**, your user needs from **step d**, and your ROI calculation from **step h** above. You'll eventually need to add more information to these documents, but they will help you define the problem you're looking to solve even at this point.

⚙ Workflow (again)

Time to do a flow chart of your workflow! Whether your end goal is a marketing campaign, web or print publication project, archiving, or something else, it's a big help to sit down and diagram what your workflow actually looks like. Think about where you begin with content creation and go from there:

1) What is the process of formulating the idea for content? Which group is most involved when it comes to formulating ideas for content creation?

2) Next, who are the creatives? What users or groups create the content? Who takes the video, draws the graphic, purchase or shoots the photo, etc.?

3) Who edits and selects the objects you will use in production, and what tools do they work in (more on this later when we talk about Interfaces)? Is there an approval process, and who needs to see objects for that?

4) Finally, what are the output targets: One or more CMS systems?a print system? A video streaming service? Do you need to know which object was used in what end product? Do you need each digital object to carry a record of all the times it has been used?

5) Incorporate various sharing & permissions into your workflow diagram. If you need to manage digital rights, such as stock photo usage rights, or share digital assets between teams or departments, robust sharing and permissions features are a must in a DAM system. These tools will enable you to share only approved assets suitable for the use case with certain team members, reducing errors and minimizing risk.

For each step, which groups will need to interface with the DAM, and what will they need to do or see? Going through this exercise will reinforce your understanding of your core constituencies and thus expand your identification of the various user groups.

Also, does your system have to have enhanced security and regulatory status (meaning is you subject to HIPAA/HITECH for healthcare related organizations, or GDPR requirements)?

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🔗 Interfaces

Based on your workflow chart, you can identify any external systems your DAM needs to gracefully interface with (like Adobe Creative Suite applications, WordPress, Drupal, Sitecore or another CMS, Salesforce, print publication systems, video editing suites and the like). Making a list of these will help you evaluate which vendors fit your needs the best.

💬 Speaking of Interfaces….

Check in with your Adobe Creative Suite, CMS and other users of systems your DAM will need to integrate to. There are two ways DAMs interface with these kinds of systems. One way is your team launches the DAM, searches for what they will need, and then push that content to their other system (a bit more DAM-centric).

The second way is by having the choice to let your users stay in the application they spend most of their day working in (an Adobe application or your CMS or Salesforce or other publication-type system) and access your DAM through an import mechanism in that application. They never have to leave the application their workload centers around.

After all, the success of your DAM journey will be decided by how well your team feels the selected DAM supports them and makes them more powerful, rather than adds to their workload. By checking in with your team, you can decide which way of working is best for them, and that will define the types of integrations you need your DAM to do.

📱 Mobile

Is access to your DAM from a mobile device important to you now, or is it likely in the future? What's your requirement around a mobile interface? Do you need it to be fully featured, or is it better to have limited functionality, though still be very friendly and useful?
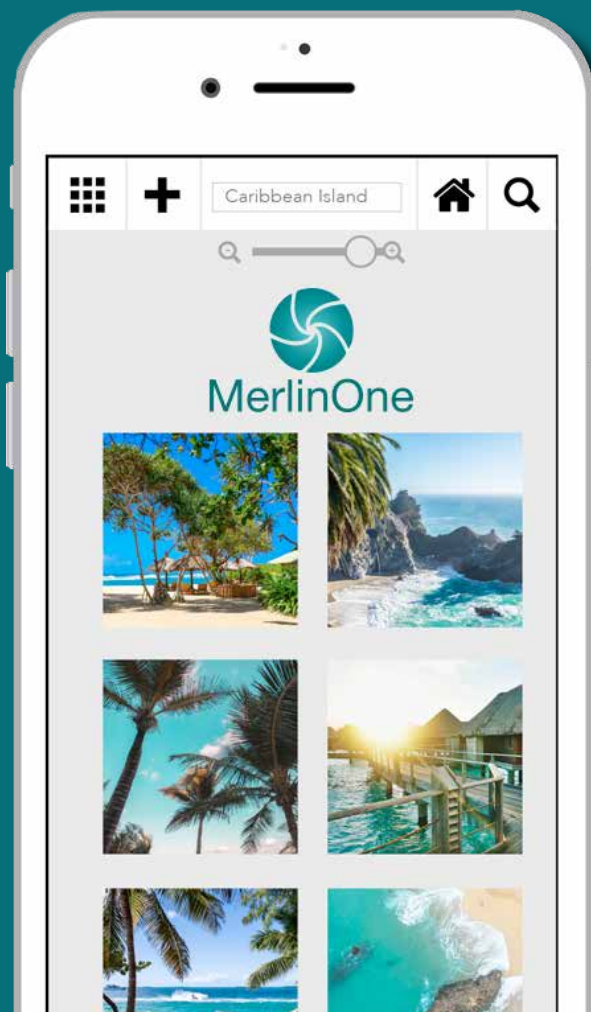
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Implementation

Start off by having an idea of your uptime requirements. Is your organization global and needs the system to be up 24x7? Or, is 99% (87 hours 36 minutes downtime per year), 99.9% (8 hours 46 minutes) or 99.99% (52.5 minutes downtime) enough (bearing in mind that more reliability usually implies more cost)? For some organizations, high availability is really important, and that means you should be looking at a fault-tolerant system (if one server dies another seamlessly takes over). For others, downtime over a weekend is not a problem.

Related to that is how impacted might you be by data loss? Fault tolerance might matter, or you might want periodic off-site backups if you are concerned.

Where will your DAM live?

DAMs can either be on-premise in your data center, hosted by your DAM vendor, or in the cloud (AWS, Azure, Alibaba, etc). Generally, this is decided in conjunction with your IT team, and tends to also be a very economic decision as most DAM seekers ask for quotes for multiple configurations.

On-premise

Reasons for an on-premise install usually are because you:

• Have a datacenter with capacity

• Have security needs where your data cannot be in an outside facility

• You need and already have a HIPAA-compliant server facility.

On-premise can either imply a capital outlay, or the DAM license can possibly be structured as a term license requiring monthly payments. For on-premise, usually your IT team is responsible for allocating systems, system updates, storage expansion over time, and hardware as it relates to performance (your DAM vendor is granted external access for system build, updating, and troubleshooting).

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👤 Vendor hosted

Usually, a DAM is hosted by your vendor typically because of accounting requirements (attractive monthly rates), or your in-house IT group is over-tasked and doesn't want to have to learn a new application. There are important things to factor when considering a hosted DAM. Is your data going to be in a multi-tenant system (meaning it's commingled with other customers)? This type of hosting can bring risk in that sharing a system could impose a heavy workload and possibly effect speed and performance. Or, will your data be in a single tenant system where the latter wouldn't be a concern, though pricing may be slightly higher. Also, what are your fault-tolerance needs? Do you need a system constantly up and running (not to mention reliable) during your working hours (or global companies that could be 7x24? Or, is some level of downtime acceptable? And if so, what reliability are you looking for? Do you require offsite backups of your data so if the vendor site goes down you don't lose everything? Finally, some vendors may have HIPAA-compliant facilities, so if you're in healthcare that may relieve you of having to build one, or if you require pretty high security and auditing capability that may be an attractive option.

In a hosted scenario your vendor is 100% responsible or the system performance, updates, and so forth. A vendor's SLA (Service Level Agreement) becomes important: what exactly are they committing to deliver, and how sincerely do they back that up (are you guaranteed credits or outages, proper notifications required, etc.?

☁ Cloud hosted

An in-the-cloud system usually means your company provides the server instances and storage with your cloud provider and gives the DAM vendor access to build, configure, and periodically update or troubleshoot your system. Your team is responsible for allocating sufficient cloud resources for the system, while the vendor is responsible for recommendations about resources and for system support. In this case, the DAM vendor will need experience and remote access to the cloud facility.

Your team and the importance of having a Champion

Defining who will be included in your team, and who will be the primary decision makers is the next task. These are the people that will be prime beneficiaries of the DAM, and you will need them to assist in the RFP process, and to attend vendor demos.

It's critically important that you appoint a champion for the project. Ideally, this person will:

• Have the passion and foresight to see the value the of the DAM system.

• Reach out to multiple departments in your company and encourage others to participate and also realize the value of the DAM.

• Convey their excitement to upper management so the project will be approved and funded.

It's quite often that a DAM project is desperately needed, though vendor selection and implementation become significantly dragged out or stumbled because there is a lack of champion to push the project forward in an energetic and strategic way.

Cover your future needs as well as your current ones

What will your company's needs be in 2 years, and in 5 years? For example, while the future is unknown, you might know that right now most of your content consists of still images, but your Marketing department has defined a goal of increasing their video content to 50% within 2 years, so a DAM's features around video will eventually be more important. Do you expect the growth rate of the numbers of digital assets to remain the same going forward or to accelerate? If the latter, remember to ask your DAM vendor prospects to put you in touch with reference customers with similarly sized systems: what works fine for a system with 10,000 objects can be incredibly slow when you approach 100,000 or 1 million objects (and that can happen faster than you think)!

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The rollout
process and timetable

What's your realistic timeline for going live?
Do you have a well-defined deadline? Or, is a more gradual transition from your current state to the DAM just fine?

Currently, how much data do you have and in how many different places does your data reside? Do these consist of databases that will need a data export process and subsequent import into the DAM process? Are you budgeting realistic time intervals to get your system up once you have decided on a vendor? Can your prospective vendors supply your recommendations from other comparable clients who can tell you how the roll-out process went, and any lessons learned?

Training and best practices

Success is ultimately measured by how much your users utilize the system and how much they all benefit from using it.
Training can't be forgotten when it comes to implementing your DAM. Ensure your super users know the system in and out so they can help train other users on how the system works and best practices. Your vendor is also a great resource when it comes to training your team and building out workflows. They have experience working with other companies and will have great suggestions on how you could apply learnings most effectively. That's why vendor longevity and experience matters a great deal here.

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#3

What to Put in your RFP

Think about ALL of your users.

They probably can be divided into two camps:

- **Group 1 (Power Users)-** Those users that will spend a significant amount of time navigating the DAM.

- **Group 2 (Casual Users)-** Those users that only require intermittent access to the DAM and won't be utilizing it too often.

How will these two different types of groups interact with your DAM? Are there user interfaces that will satisfy both groups? For many users, the way the DAM looks visually, and operates is very important: is it simple and intuitive, yet powerful enough to accomplish your goals? Or, does the system take 10 steps to do one simple thing? How easy the system is to use will encourage higher adoptability, smoother training, and will make you a hero for bringing in a successful system.

Ask about the experience, longevity and knowledge of the vendor?

As a vendor, to what extent do they offer best practices, resources, advice, system assistance, etc. that have been learned from their deep experience in DAM and earned by the many engagements with other demanding customers? If possible, ask for references that are comparable to your company.

Support and onboarding

Are there several support levels? What capacity are support personnel available to you? What's their knowledge and response time? What's the Onboarding methodology and who needs to be involved from both a vendor side and customer side? Once you say "Go" to a vendor, what happens and how long does it typically take? What's the process of importing your pre-existing data?

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Storage

How much storage will you need to start based on your legacy data? How much growth do you anticipate annually? What file types should you be concerned with, and does the vendor system handle them? Are there any file size or type restrictions?

Video/audio

How does the vendor handle video/audio? Can you transcode content on download? Can you playback video/audio inside your client? Can you clip or frame grab content? How do you search inside of Video?

Security

Do you have special security and/or access requirements (HIPAA, SAML, Active Directory)? What about DR: what is your disaster recovery requirement?

Sharing and permissions

How would you share content with others, both users with access and also people outside the organization that don't? Can the system allow you to set up groups of users with specific access and capabilities limitations?

Working in the DAM versus in creative applications

Are there creatives who would benefit from direct DAM access from the inside of your creative tools like Photoshop, or a CMS? Which CMS or marketing automation systems do you use and will the DAM successfully interface with them?

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The DAM's place in your workflow

How would you integrate with other systems (CMS systems, Salesforce, marketing tools)? What would the nature of the

integration be: specific ways these systems working together will help your users? How does the vendor handle complex automations? How will they help remove repetitive work from your users (like resizing images to our standard sizes)? Does the vendor have an approval process? Can the vendor do customizations that would be useful for your team? How are those handled in terms of specification, cost, and support?

Where does the DAM live?

Do you need your DAM to be on-premise (in your datacenter, with your IT services managing it)? In the vendor's hosted facility (where the vendor is responsible for support)? Or, in your AWS/Azure/Alibaba or other cloud (typically support is a shared responsibility in this case).

Performance and uptime

Are there guaranteed performance levels? Perhaps in an SLA (Service Level Agreement)? Remedies if the performance is not achieved?

Describe how your product scales. Will it hit a ceiling in 3 years?

Decide what your uptime requirements are. Is 24x7 uptime imperative? Or, will uptime during business hours suffice? What is your disaster recovery requirement and what does the vendor charge for that? Do you need off-site data backups, or a fully redundant geographically diverse solution (bearing in mind the costs of each option)?

Example use cases

Your RFP should not just outline various features your DAM system would need, though should rather describe specific scenarios of how certain users would use the system. Describe five of your most important real-world use case scenarios and require the vendor to demo exactly how their system could satisfy your real-world needs.

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Customer references and testimonials

Claims and RFP responses are one thing, actual experiences from existing customers are the true measure of a vendor's capabilities. Always ask vendors for referrals or to guide you to testimonials and case studies.

Take a sandbox if you can

When you have developed a short list as part of your RFP process, ask the vendor to set up a sandbox where you can be hands-on with the system for a week or two. There's no substitute for actual live time on a system to get a feel for how it will work for your team, in your environment.

Be clear with your vendor about what features you need

Be sure both you and your prospective vendor are clear about what desired features are already in their product, what need to be scheduled, and what come under the heading of "customizations." Be aware that typically there is additional charges that could be associated with customizations. Insist these things are called out with precision in any contract: Go with the understanding that if something you feel is a commitment is not written down, it does not exist. Clarity on both sides is everything if you want a successful project!

Ensure your vendor is constantly innovating their product

Finally, make sure your vendor is keeping up with the latest technologies and is implementing them in a truly useful way to bring product advances to your users. In the case of AI/Deep Learning in particular, make sure the advances are real and provide value, rather than token efforts to just create buzz.
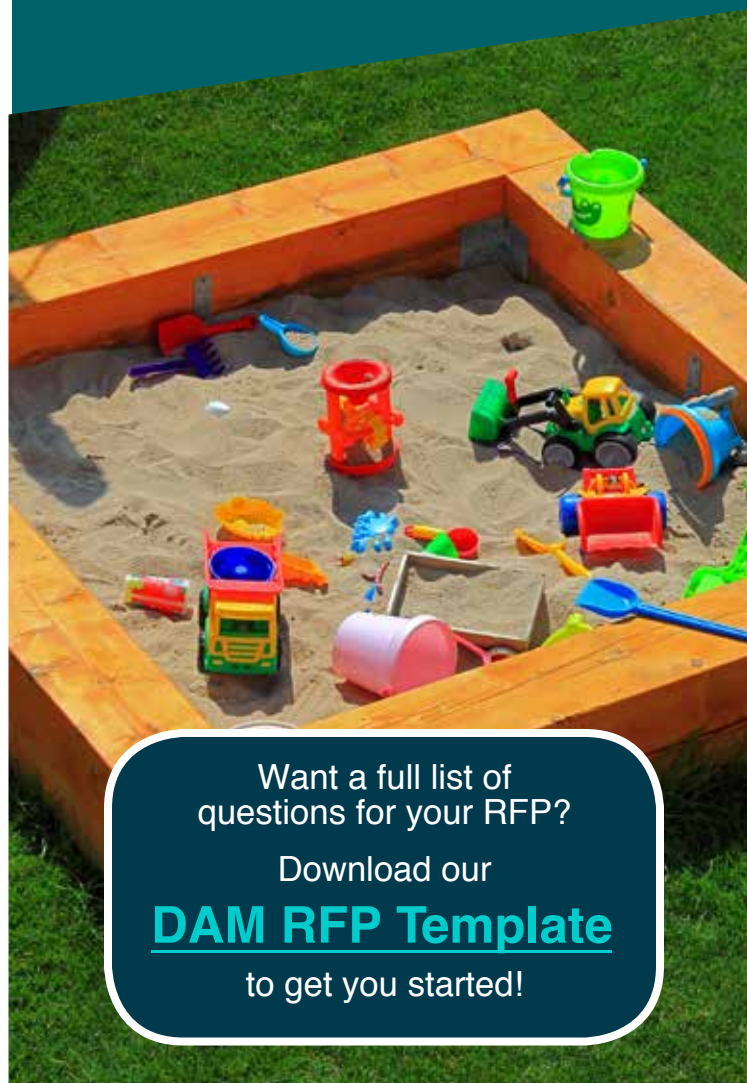
Want a full list of questions for your RFP?

Download our

DAM RFP Template

to get you started!

#4

Tasks you should complete before your DAM implementation

Implementing a DAM can be a painful and drawn-out process or not, often depending on your level of preparation. Make the commitment upfront to have consistent vendor communication and ensure questions from both sides get a fast turn-around.

Report issues as soon as you detect them as waiting until they become a pain point results in unnecessary suffering (no one can fix an issue they are unaware of)! Think of your vendor as your business partner, and establish easy and open communications early in the process… It will go a long way towards reaching success early on!

The number one objective is to get everyone across departments as excited as you are about a new system adoption before implementation begins. Once you get everyone bought in, you need to do some pre-implementation planning to ensure your DAM is a success.

Adoption of a new system involves change, and no matter how dysfunctional the old system might have been, change is a disruption. Always remind your users of top three huge benefits the DAM will bring to them, so they know whatever short-term disruption that might occur is worthwhile.

Form a Project Team

Ensure that each user group is represented from the beginning. A common problem in a DAM rollout is when you think the rollout is done and successful, to then hear from a constituency, "This does not work for us, and no one ever asked us how it should work." The more inclusive you can be, the smoother implementation will run.

At the same time, a Project Leader will need to make rapid decisions if there's a diversity of opinion, and to see that sample files and outstanding questions are answered promptly. It's not uncommon for a DAM project to stall for weeks over waiting for a yes-no answer to how one specific field will be used. Issues like this are easily avoided by inclusion, open early dialog, and project leadership.

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Identify Your Primary DAM Goals & How You Will Measure Them

You are getting a DAM presumably to solve problems you have had previously: your pain points. Be sure ALL of those are identified up front, so the vendor knows what specific major problems they need to solve, and so you can evaluate how well the vendor solves them. Have a list of all the things that used to cause you to pull your hair out, and make sure they're addressed before implementation planning- no vendor has a crystal ball, and the more you can communicate with them, the better they can serve you. This is another area where inclusion of all stakeholders, and good communication and leadership play a huge role. The more it's clear what "success" looks like, the more likely your team and your vendor can assure it's achieved!

Have your inventory of legacy assets ready, and as each batch is imported to your new DAM, confirm all the metadata appears in the right fields, as expected. Work with your vendor on field mappings, so the metadata really works for you and your organization. Similarly, have your user groups, their access and capabilities, and the people you want assigned to them, all ready for your vendor to implement with you. The more complete these lists are before implementation, the smoother it will go.

A new DAM may be your first opportunity to take advantage of beneficial new capabilities. One example could be that you'll require any new asset a user wants to upload into the system has at least a minimum set of metadata fields filled in, or the system will refuse to upload it. This can save you countless hours chasing down information after-the-fact.

Systems integration and automation

Have a checklist of the third-party interfaces you expect your DAM to participate in, and be prepared to check that each one, as it is brought online, functions as desired for both single objects as well as groups of objects. If the DAM is capable of setting up workflows (sequences of operations that you would otherwise have to do manually and repetitively), determine what sequences you want ahead of time and document them so your vendor can configure and test them for you.

Don't overwhelm yourself by biting off more than you need to right now

It's important to not to overcomplicate the process if it doesn't need to be overly complicated. Overcomplication may make users uncomfortable and therefore, you may have challenges with adoption and thus a system which no one will use. Remember, once your system is launched, you can always go back, make tweaks and improve your system. As your business evolves, so will your content and as a result your DAM will too. It's okay to make changes once you have a better idea of what is working and what isn't.

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#5

Final Tips to Help You Prepare for Your DAM Journey

Communicate any issues with your vendor as soon as you detect them. Give your vendor whatever cooperation is needed to describe the nature of the issue and how it impacts you. You'll then a get better response to the issue.

Be clear with your internal users about what you expect from them, particularly in terms of what metadata they must attribute to new objects and ensure everyone is aware of any metadata editing practices you intend to insist upon (like using only certain authorized words as keywords). The clearer you are and the more you enforce your requirements, the more consistent your metadata will be. And, that means you'll always be able to find what you need quickly and reliably.

#6

To Wrap Up

While implementing a DAM may seem daunting, the long-term benefits massively outweigh any challenges.

Given the rapid rise in rate of content creation, the longer you wait the bigger an effort it will take to roll out an effective DAM system. If you set goals, plan appropriately and create a rock star team to help ensure the success of the system, the DAM implementation process will certainly be smoother and faster.

Once up and running, you'll see better communications within your company and higher levels of trust between departments. You'll have greater control over your brand, over the objects used to effectively communicate your value proposition, and your users will be more productive and happier!

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Appendix

Chapter 1 Bonus Section

DAM User Types:

Administrators

These users are your most savvy and knowledgeable DAM users. They are the gate keepers and hold the key to everything. They have authority to change properties and permissions in the backend of the system and can have access to everything that is going on in the DAM. They live in the DAM constantly and also help others with training and maintaining data integrity. They are often those that have to prove system usage and reporting to other stakeholders within their organization. Lastly, these are the users that tend to get up front and personal with their vendor's customer success team. They help to communicate if there are any technical issues and typically work directly with their vendor or system consultant to develop strategy and customization plans on an ongoing basis.

Casual Users & Content Contributors

Casual DAM users are usually people that only need occasional access to the DAM. Often times, they are the content contributors that could see "the DAM system as one of many application services they may access ad-hoc as required; they want to be able to quickly find what they want and then leave." (Digitalassetmanagementnews.com) Casual users could be vendors, partners, contractors, freelance photographers and videographers, etc.

Typical DAM Users

Marketing & Brand Managers

Marketing and brand managers most likely would be a power user group. These job functions often have to oversee and manage all digital assets, especially those that will be going to market. Everything from logos, fonts, video, audio/music files, brand guidelines, ads, other campaign graphics, and so on. A DAM is where everything they could possibly need on a daily basis can be stored

Marketing and brand managers are always needing access to their content and are regularly communicating and sending content through various feeds both internally and externally to the masses. These guys have to juggle many things at the same time, so organization and efficiency are key for them when it comes to the inner workings of the DAM itself.

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A built-in brand portal may also be important to some of these users so that they have express access to the most up-to-date branding information and templates. In addition, system integration is something that these users will always look for since they are needing to juggle various systems simultaneously within the MarTech stack for both content creation and distribution.

Look for options that integrate into CMS like WordPress or Sitecore as well as external distribution platforms like Facebook, Twitter, and so on. Lastly, these users are used to multitasking and have been exposed to many various marketing, design, and product technologies/apps so they are keen on sleek design, automation and flexible capabilities.

Graphic Designers & Creative Directors

Graphic designers typically work hand-in-hand with marketing and brand departments because they create visual concepts, overall layout as well as production design of all marketing content. It is part of the designer's job to ensure that every piece of content they create adheres to the unique value of the brand as well as demonstrates brand continuity throughout.

Having a clear understanding of the brand system and brand standards are paramount for these teams to be most efficient. Graphic designers are in high demand to pump out visual content creatively and with an accelerated level of productivity.
Also, due to the nature of their work, designers are relentlessly tasked with handling a mass of different files at all times. In order to do this, they often must be meticulously organized so they or others can swiftly retrieve the assets they need. Most designers learn this need for top-notch organization on the job, though it is not always helpful for them to have their own system of management. Especially, if files need to be frequently accessed by other members across teams and various channels.

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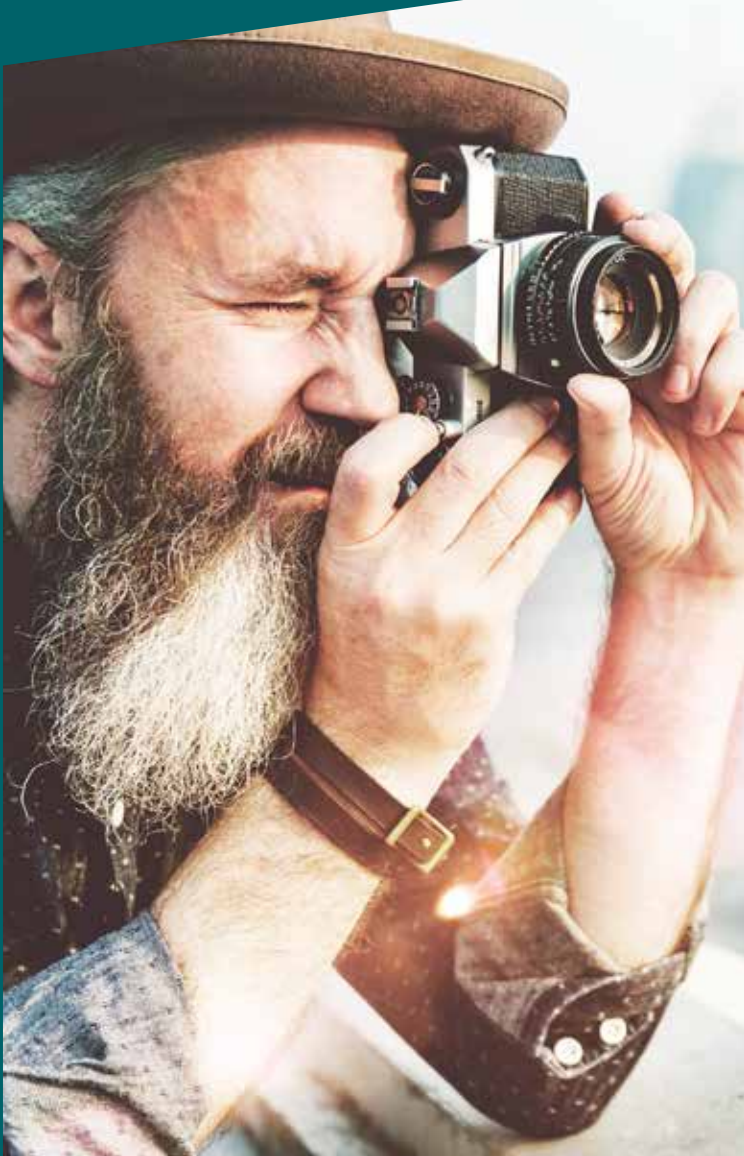
Photographers & Videographers

Photographers and videographers are often your DAM contributor, rather than system admins. These are the types of users who need constant access to your system for uploading and retrieving content, but not necessarily those that need to be overseeing workflows, metadata or taxonomies, or the backend all the time. If many of your contributing users are photographers or videographers, you may want to think about a few capabilities that would make the uploading, downloading, and finding of assets easier like any sort of auto-tagging feature. For instance, in Merlin we use deep learning algorithms for facial recognition, helping the user to determine what images are good quality versus poor quality (based on things like image resolution, focus, balance, and so forth), and recommending similar assets to the one that they are currently working with in the DAM.

In addition, some DAMs (Merlin is one of them) also make it possible for auto transcription from audio or video files. Photographers may have the need to upload hundreds of images or large video files to the DAM at a time, therefore file storage and upload/download timing should definitely be considered. Other things you may also want to think about for this particular type of user is flexibility to upload and store various types of file formats as well as having some kind of backup restoration capability in cases of system or human error.

Librarians & Archivists

Librarians and archivists could easily take on the role of your DAM admin. The reason for this is that librarians and archivists have a highly developed technical skill to bring order and consistency to the organizational process and to the DAM system itself. These users are brilliant when it comes to creating a detailed and strategic framework to your taxonomy and metadata structure. KM World labels this breed of user as ones that are able to "parse data and arm the DAM system with the intelligence it needs to meet users' queries efficiently, reliably."

Another distinct skill that librarians and archivists is their neutral way of understanding other user behavior: who they are, what they look for and how. Workflows, modifiable permission settings, approval oversight capability, auto tagging metadata, customizable search and data field properties are probably a few things that would go on the top of the list for librarian-type DAM users.

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Event Managers

Event producers manage and facilitate content for both internal communications and external distribution (3rd-party vendors, sponsors and event attendees). From printed signage to booth designs and other event marketing collateral, your event managers are definitely concerned with brand integrity and need access to your most up-to-date versions of your content.

These users expect file uploading, downloading and searching to be easy and fast since there are constantly sending assets to various stakeholders before, during and post event and are often on the go. Therefore, system speed, mobile capability, and ease of use are quite important to these users. If your organization puts on events, you may want to think about integration into a project management tool since there are so many logistics and content assets that need to be simultaneously communicated, organized and managed.

Sales, Customer Success & Project Teams

In recent years, there have been an increased demand for sales, customer success and project managers to modify existing or in some cases even create their own content. Content like presentations, branded proposals and contracts, product guides and more are constantly being utilized by sales and customer success teams. Their access to content allows them to distribute content directly to customers rather than requiring a middleman and thus needlessly extending the sales funnel.

However, your sales managers and CSM's will never become your power user, as they are more focused on doing what they are hired to do, which is sell and supervise their customer relationships. It all comes down to speed, UI design and ease of use for these guys. They want express access to approved content so they can quickly make the modifications they need in order to send their content out to the market ASAP.

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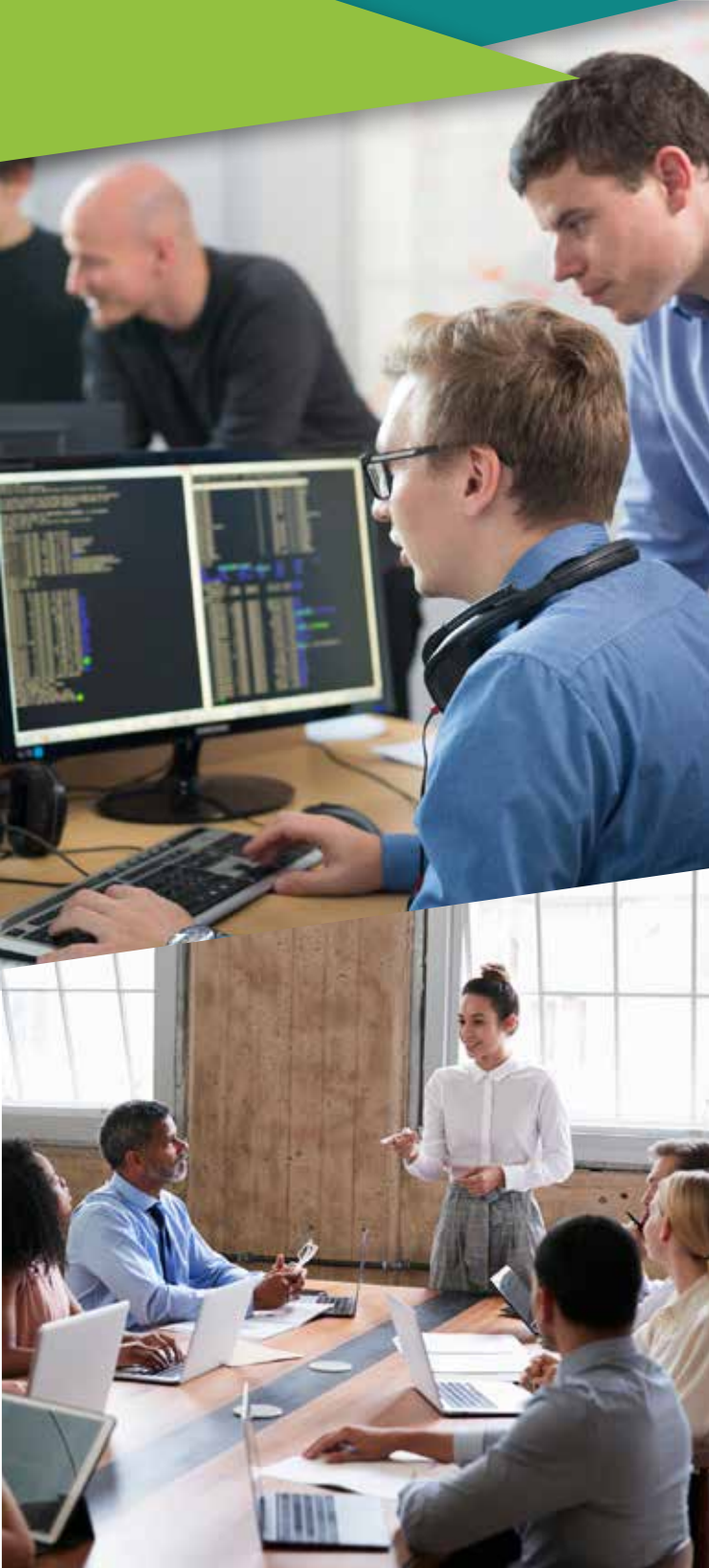
Human Resources

You may not think it, but your HR or Corporate Culture teams could definitely benefit from a DAM. In recent years, many organizations have been dedicating marketing spend and resources to support employee recruitment. In fact, 92 percent of companies actively use social media for their recruiting process. HR teams are not content producers by trade, but they now are tasked with creating a mass amount of content to tell stories that illustrate the organization's positive culture. These teams will fall more under the casual user category and will typically utilize the DAM to access, approve, and download HR or recruiting-related content. Within the DAM, unique permissions and approval, commenting or content mark-up ability could be important to these types of users.

Information Managers

Your information managers or IT department may not even access your DAM for daily use. Really, their main concern is security, data compliance, and technical configuration and implementation. Once you get further along in the DAM purchasing process, you definitely will want to bring your IT or tech ops team in to determine if your technological infrastructure could present any limitations or significant challenges. Not having a clear understanding of what these potential cogs are as well as improper planning could definitely prolong your DAM implementation and onboarding process.

Compliance, Legal & Regulatory Teams

In highly regulated industries, giving DAM access to your compliance and regulatory advisors could really help streamline your approval process. Think of compliance as it relates to rights management and data privacy. Are your marketing teams adhering to the laws and regulations when it comes to data protection (for instance, GDPR and HIPAA)? For example, is your healthcare marketing team about ready to use a photograph of a patient and a doctor from a fundraising event? Not so fast. If that picture indicates that that event is for a particular disease or disorder, it could suggest the patient in the photograph is suffering from that condition. Obviously, before marketing is able to use this photo for their promotional efforts, your compliance team will definitely need to go through the steps of legal approval and you may want to look into a highly-secure DAM (Merlin is certified in both HIPAA and GDPR compliance).
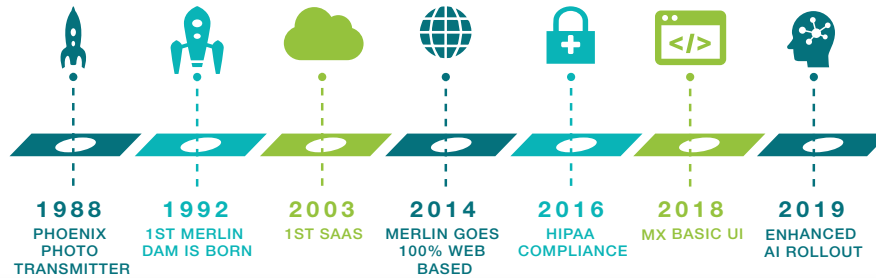
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A DAM can certainly help make communication between marketing/brand and compliance teams. Features that you need to look for to benefit these types of users would be how approvals work in the DAM. Is it set up in a way that allows users to mark-up content? Is there some kind of commenting or live chat incorporated into the DAM? Also, compliance managers will definitely require very specific permissions for certain content hosted in the DAM. Therefore, you should look to make sure the system can have flexible permission settings.

> Again, figuring out what your privilege and access requirements might be like, as well as roughly what groups your users fall into might be useful at this stage. We created a User Group Spreadsheet to help you out-line what your users should be, group needs, privileges and access requirements.
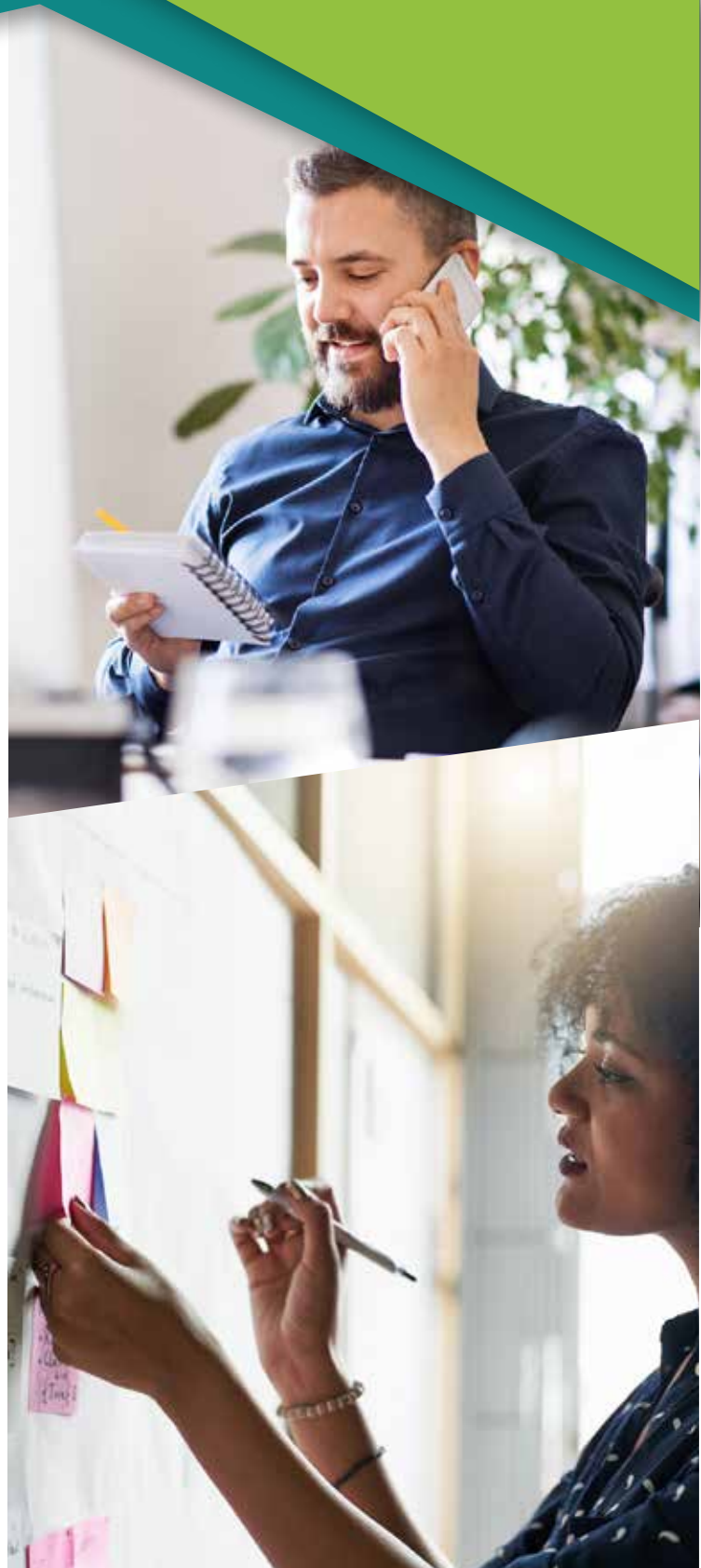
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How it all began.

In 1988, MerlinOne pioneered the use of digital images in newspaper publishing, recognizing the early need for database-driven digital asset management systems in a deadline-driven industry. Since then, the way people produce and share content has drastically changed. We're now in a fully digital and mobile world where everyone's content is way more than king, it's their entire universe. At MerlinOne, we're on the pulse of how teams are approaching their content management today and we are constantly envisioning how they will do so tomorrow. From news to corporate, universities to non-profits, healthcare institutions and all company types in between, our customers depend on their Merlin every stage in the content cycle.

1988 PHOENIX PHOTO TRANSMITTER

1992 1ST MERLIN DAM IS BORN

2003 1ST SAAS

2014 MERLIN GOES 100% WEB BASED

2016 HIPAA COMPLIANCE

2018 MX BASIC UI

2019 ENHANCED AI ROLLOUT

What we're about.

Our values.

"All of our customers receive the white glove service no matter how big or how small. The dedication we have to them is unquestionably the MerlinOne competitive advantage."

David Tenenbaum
CEO MerlinOne

Empower

Passion

Integrity

Reliability

The Merlin difference.

We're not just your standard out-of-the-box DAM solution, we're your partner. Your challenges are our challenges. It doesn't matter what the climate is like, we're in the trench with you every single step of the way.

60K+ users world wide

135+ companies served

300M+ assets managed

Countless happy customers

Where all the magic happens.

Contact info We're here to answer all your questions! Feel free to drop us a line any time.

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