



**CORESHOP**  
SOLUTIONS FOR PIMCORE

## BUYER'S GUIDE



# Selecting a DAM

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# Ever wonder if literally herding cats would be easier than managing your digital assets?

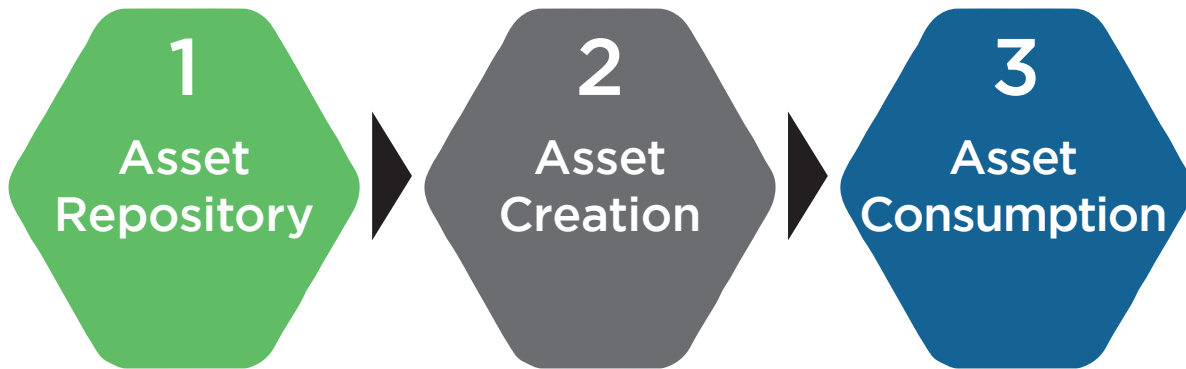
Consider the challenges of wrangling felines: They don't do what they're told; they hide when you look for them; and they let you know they're tired of you petting them by sinking their claws into your hands. Digital assets don't do what they're told either. Universal updates of assets are often anything but universal; you end up putting what you want into one asset and the rest just sit there.

Assets can also be pretty hard to find, hiding on local systems, shared network drives, email, IM, and cloud storage solutions all across the enterprise. And, just when you think Ever wonder if literally herding cats would be easier than managing your digital assets? you've got your assets tamed, their high costs of reproduction and the inefficiencies of managing the assets sink their claws into your budget yet again.

However, while the best technology for herding cats involves tuna fish, a can opener, and hope, the best technology for managing digital assets can actually solve your problems.

The right digital asset management (DAM) system will keep track of all your assets, creating efficiencies that cut your overall costs and potentially boost topline by getting campaigns launched faster.





The faster marketing projects are executed, the faster they start driving top of funnel leads.

And it will do this while giving you the flexibility to adapt and specialize messages for a huge number of channels and touchpoints.

Because of this, DAMs are now the central hub (some say the 'heart') around which marketing teams, as well as their agencies and partners, operate. As the need for these systems has increased so has the difficulty of evaluating them.

That's because:

- There are an increasing number of DAM solution providers;
- Boundaries separating DAM from adjacent product categories are blurring; and
- There are several different deployment options.

This guide will help you sort through the alternatives to find your best solution for digital asset management.

### Breaking Down DAM Capabilities

Different DAM solutions offer different capabilities. While a large number of features look impressive, it's important to be sure they are actually useful to you. It's helpful to think of DAMs as providing three broad capabilities, the 'core' asset repository for organizing and storing, asset creation for building, and asset consumption for using.

## 1 — Asset Repository

The first feature to consider when selecting the right DAM is a core digital asset repository. Digital assets can't be managed via hide and seek. A system where each user has their own stash of documents and/or images will create chaos, inefficiency, and waste. Every organization, regardless of its other needs, must have a centralized asset repository if it's to have any hope of controlling and managing its assets. This is the heart of any DAM.

## 2 — Asset Creation

Next, DAM can help with the creation of assets through workflow and collaboration tools. Workflow management tools may seem like nice-to-haves, but think carefully before passing on them. They are a must if you have multiple departments and/or agencies working together to create digital assets. Workflows make it faster and easier to revise, review and approve assets. And their repeatability ensures that everyone uses the same, highly transparent process. Workflow management tools also accelerate asset creation by predefining stages and roles, letting you know the status of every asset and what needs to be done with it instantly. These tools will save you money through speedier and more efficient asset creation.

## 3 — Asset Consumption

Lastly, how assets are used comes down to people and systems. What is your reason for organizing and centralizing your creative assets? Do internal users need to have direct access to access or do they have to request them from other people?

Providing a way for employees to search for and download assets on their own is, for many organizations, a key value proposition for having a DAM. The off-loading of manual requests of marketers and creatives for the assets to something that is self-serve is oftentimes a big enough ROI on its own to justify a DAM. This also helps ensure brand consistency by both empowering employees to find what they need, but also ensure that only the latest, approved assets are used.

Do you need other marketing systems to allow assets to be used across different channels including (but not limited to) websites, mobile, social, advertising, etc? This will increase speed to market, while decreasing costs from having this work done manually. These systems can also save you money by automating the removal of expiring or retiring assets. This insures you don't get penalized with licensing fees and any associated legal risks. It also means you don't have to worry about older assets from past campaigns competing or conflicting with the newest messaging. So how do you choose? This 5 step process will help you select the right DAM.



# Step 1: Know Your Goals

Like every good business decision, knowing your goals is a good place to start when selecting a DAM. Once you know your prioritized goals, you can begin to understand who the stakeholders and users are and how their participation in the selection helps achieve those goals. In turn those stakeholders can help determine key capabilities and components that will make them.

Some goals you may want to consider:

Streamline the production of digital assets

Improve overall quality, consistency, and “on-brand” of assets being created particularly in organizations with distributed marketing teams.

Make it easier for the organization to have a “system of record” for all the creative assets leaving no question on where to find them, what’s approved and what’s most current.

Alleviate manual requests being made of the marketing team to provide various people and groups specific files ( logos, product images, sales collateral, campaign assets, head shots, etc.)

Master brand consistency.

Make it easier for marketing to work with external design agencies.

Decrease the time it takes to get assets integrated into digital marketing campaigns and customer experiences.



# Step 2: Know Your Users



Build your list of stakeholders, the people across your organization, and even outside of it, who will be interacting with the DAM. Stakeholders usually include, but may not be limited to, digital marketing, designers, photographers, agencies, demand generation, sales, partners, and IT. Then understand what their access

and roles will be with the DAM. Do they contribute and manage assets, or are they solely “consumers” of those assets? What about external contractors and agencies? What will their roles be? Some stakeholders will have more than one role.



# Role Worksheet

| Stakeholder          | What is their role?<br>(see next chart) | How many are there? |
|----------------------|---|---------------------|
| Digital Marketer     |   |                     |
| Marketing Operations |   |                     |
| Marketing Demand Gen |   |                     |
| Designer             |   |                     |
| Photographer         |   |                     |
| Videographer         |   |                     |
| Legal                |   |                     |
| Brand Manager        |   |                     |
| Content Manager      |   |                     |
| Partner Manager      |   |                     |
| Other                |   |                     |





## Example of role and access terms

| Role/Access          | Description  |
|----------------------|--|
| Contributor          | A person who can add assets to the DAM   |
| Asset Creator        | A person who creates assets using graphic design tools such as Adobe CC                        |
| User Admin           | Assign and manage access, groups, roles in DAM   |
| Taxonomy Admin       | Responsible for the standardized set of keywords to be used                                    |
| 'Consumer' of assets | Someone who will need to search and find assets within the DAM                                 |
| Asset Reviewer       | A person who will give feedback on the design and aesthetic of the asset as it's being created |
| Asset Approver       | Someone who has to give the OK to asset before it can be published                             |

# Step 3:

## Know Your Requirements

Ask each of your stakeholder groups what their most common challenges are and use their feedback to develop a list of requirements that a DAM solution must meet. Be sure to really understand the use cases and only then, prioritize those requirements as must-have, should-haves, and could-haves. This helps you differentiate between the really important requirements and the nice-to-have requirements. Consider a forced ranking exercise. Alternatively, you can also give stakeholders a “budget” (say \$100 in imaginary dollars) and ask them to spend their dollars on the requirements that are most valuable to them.

DAM systems span the gamut of capabilities from the basic for small teams, to extremely complex for sophisticated large enterprise teams. Like most things, there are trade-offs in terms of ease-of-use, complexity, and cost. We’ve provided a basic list of requirements typical of organizations utilizing a DAM.

Keep in mind that you may have additional requirements you want to assess.



# Requirements Worksheet

| Key Requirement  | Description  | Ranking | Who it's important to |
|--|--|---------|-----------------------|
| Workflow & Approval Management                                       | Manage the process, steps and tasks required to create a new asset.  |         |                       |
| Collaborative Asset Review   | For people in the asset review cycle to add comments, markups, and feedback to asset proofs.   |         |                       |
| A portal for employees to access assets                              | An easy access point for employees to search and download approved assets on their own.<br><br>Access control by region/department/role may be required. |         |                       |
| Controlled asset access for external users                           | Provide a secure, self-service way of sharing approved assets with contractors, agencies, partners, etc.   |         |                       |
| Make branding guidelines available self-serve for agencies to follow | A self-serve access point to get approved branding guidelines such as logos, color palettes, product images, etc.  |         |                       |
| Allow designers to work within Adobe CC tools directly               | An Adobe CC plugin for designers to access the DAM.  |         |                       |
| Access to Stock Photography libraries                                | Search for 'stock' images directly from within DAM.  |         |                       |
| Organize assets within a folder structure                            | Place assets into a folder hierarchy   |         |                       |



# Requirements Worksheet

|  |  |  |  |
|--|--|--|--|
| Organize assets with keywords/tags                                       | Assign keywords and tags to assets. Advanced systems offer machine learning to help identify images and suggest keywords |  |  |
| Custom metadata fields   | Create custom fields that are assigned to assets   |  |  |
| Reporting and analytics on asset usage                                   | Understanding of what assets are being used and by who   |  |  |
| Direct access and utilization of DAM assets from other marketing systems | For example, utilizing approved assets for creating web banners, blogs posts, email campaigns directly from the DAM      |  |  |
| APIs   | Programming interface for integrating with other systems and customer applications                                       |  |  |
| Other:   | Other:   |  |  |

# Step 4: Know Your Deployment Options

There are several deployment models available for DAM. DAM options include on-premise, private cloud, and Software-as-a-Service (SaaS). The emergence of cloud-based systems has split DAM into two-and-a-half categories of solutions; on-premise software and SaaS offerings. The half category

is a hybrid called private cloud. It was created by on-premise providers trying to emulate the benefits of SaaS by offering their single-tenant software in a cloud environment.

You should choose the option that best supports your needs and, of course, conforms to the IT reality of your business. You'll also need to decide whether integrations with other enterprise applications will be necessary, as well as determine how those will be accomplished.

For digital asset management, enterprise used to rely on systems with on-site proprietary software, purchased and managed by IT, which were anything but user friendly. The emergence of cloud computing has changed that. Now the software and computing infrastructure are sold and managed as a service.

This means marketers, not IT, can take a more decisive role in buying solutions.



| On-Premise   | Private Cloud   | SaaS  |
|--|---|---|
| PROS   |   |   |
| <ul style="list-style-type: none"> <li>- Best for heavy customizations</li> <li>- Data on-premise Control</li> <li>- Local performance</li> <li>- Integration flexibility</li> </ul>   | <ul style="list-style-type: none"> <li>- Equipped for moderate customizations</li> <li>- Data in Cloud</li> <li>- Security/control</li> <li>- Minimal IT dependancy</li> <li>- Relatively fast to implement</li> <li>- Lower start-up costs</li> <li>- Somewhat scalable</li> <li>- Accessibility</li> <li>- Basic resilience/failover</li> </ul> | <ul style="list-style-type: none"> <li>- Fast implementation</li> <li>- Data in cloud</li> <li>- Lowest IT dependency</li> <li>- Auto upgrades</li> <li>- Accessibility</li> <li>- Low start-up costs</li> <li>- Scalable</li> <li>- Resilience/failover</li> <li>- Low total cost of ownership</li> <li>- Low risk</li> <li>- Easy integrations</li> <li>- Best multiple-location performance</li> </ul> |
| CONS   |   |   |
| <ul style="list-style-type: none"> <li>- Limited accessibility</li> <li>- Responsible for maintenance</li> <li>- Responsible for upgrades</li> <li>- IT-dependent</li> <li>- Deployment time</li> <li>- High start-up costs</li> <li>- Not easily scalable</li> <li>- High risk</li> </ul> | <ul style="list-style-type: none"> <li>- Responsible for maintenance</li> <li>- Responsible for upgrades</li> <li>- Data off-premise</li> <li>- Usually work with third parties for hosting</li> <li>- Web-dependent</li> </ul>   | <ul style="list-style-type: none"> <li>- Limited customization</li> <li>- Data off-premise</li> <li>- Web-dependent</li> </ul>  |





## Step 5: Make Your Decision

Now it's time to research your options by mapping your DAM goals to your stakeholders' requirements, and your preferred deployment approach to your budget. Having completed the DAM selection preparation described in

this paper, your DAM evaluation should now be easier and more focused, allowing you to select the best DAM for your organization more efficiently.

