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The digital asset management (DAM) buyer's toolkit.

Essential information, tips, tools, and checklists for selecting the right DAM solution for your business.

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Find the best foundation for your content.

Your job is to select the right digital asset management (DAM) solution for your organization, which may be purchasing one for the first time, replacing one that isn't cutting it, or upgrading its current solution to meet enterprise needs. This toolkit assumes that you have executive-level support to move ahead with the selection process. Most likely, you are in marketing or on the creative side of your organization, though you may be in martech, IT, or have some other role that requires you to evaluate various DAM solutions. You may have little or extensive DAM knowledge and experience.

Regardless of your reasons for considering the purchase of DAM, your role, or your DAM expertise, this toolkit can help you select, purchase, and deploy the right DAM for your organization. It lays out the DAM buyer's journey in seven steps:

Step 1: Kick off the DAM selection process.

Step 2: Ensure alignment with your people and organization.

Step 3: Ensure alignment from a technology standpoint.

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The digital asset management (DAM) buyer's toolkit.

Essential information, tips, tools, and checklists for selecting the right DAM solution for your business.

Step 1: Kick off the DAM selection process.

Just as with any enterprise solution, DAM vendor offerings vary widely in many aspects, including their capabilities, ease of use, environment, and scalability. A good way to start your DAM buying journey is to understand:

- How the various DAM solutions differ from one another
- What an "enterprise DAM" is and why you want one
- Key considerations for buying a DAM solution

Basic versus enterprise DAM.

Essentially, you have a choice between two types of DAM solutions: basic or enterprise. These differ in their capabilities, usability, scalability, customizability, and cost. They also vary in terms of deployment environment; for example, some are Software as a Service (SaaS) offerings, hosted in the cloud or on-premises, while others are cloud-native offerings.

Basic DAM.

Basic DAM appears friendly and easy to use due to its flat and simple taxonomy and metadata schema—the classification and categorization scheme used to organize digital assets. It's often a SaaS offering that's hosted in the cloud and offers a free trial version. This type of DAM is tempting to sign up for because it's fairly affordable and appears easy to get started using. These positives, however, come at the cost of its limited ability to address an organization's diverse needs.

What Is metadata, and why is it important?

The metadata associated with an asset gives information about it such as:

- Creator or author name
- Date and time created
- Location
- Camera aperture, ISO, and shutter speed
- Image resolution
- Campaign or project name
- Product model number or SKU
- Model (person, car, or product) featured in the asset
- Product description
- Product material

Metadata solves perhaps the two biggest and related challenges people want to solve with DAM—the need to easily find and reuse assets.

What is a workflow, and why is it important?

A workflow is any series of steps that your organization wants to repeat. Workflows are great candidates for full or partial automation. For example, a review and approval workflow could include a graphic designer's uploading an asset to the DAM system, review by a marketer and legal, updates made by the designer, final approval, and saving the final version in the DAM system.

Using actions or metadata to automatically trigger processes in a workflow is an important way that DAM can help organizations work more efficiently. For example, the initial upload of an asset to the DAM system could trigger a review by the marketer.

Basic DAM often lacks the right level of functionality and flexibility to meet the standard use case demands of global marketing. It almost never supports customization, instead assuming a one-size-fits-all stance. Often, it compromises or entirely lacks the advanced metadata and workflow capabilities that increase the utility of DAM. Typically, such a solution serves as a basic file repository, with limited search capabilities and user permissions.

Enterprise DAM.

In contrast, enterprise DAM is built to solve the many and complex use cases that a global enterprise organization must regularly address. It can scale, apply artificial intelligence (AI) and automation to optimize processes, engage with emerging technology, provide asset and user insights and analytics, and be easily customized for user experiences and interactions. This type of DAM offers advanced capabilities, including deep metadata and workflow capabilities.

Although enterprise DAM may be hosted on-premises, today many global enterprises have already moved or are planning to move their DAM deployments to the cloud. Cloud-native enterprise DAM can interoperate with new technologies, quickly and easily scale, and deliver operational and cost efficiencies.

Enterprise DAM can help your organization:

- **Achieve and maintain** a competitive advantage
- **Consistently deliver** the right experience to the right customer at the right time
- **Meet the demands** of increased content volume, velocity, and variety
- **Improve fiscal oversight**, rights management, and analysis
- **Optimize work habits** through the use of AI and automation
- **Easily adapt** to changes in the business and leverage emerging technologies
- **Build a sustainable, agile, and intelligent** technology ecosystem

> "CX is not a game of chance. Get prepared to play the right game."
>
> **Augie Ray**
>
> Senior Director Analyst, Gartner
> Create Powerful Customer Experience

> "Reaching true speed to market that impacts your competitive advantage requires an audit of your existing technology stack servicing marketing and creative operations—martech—and an understanding of how your organization works."
>
> **Global Director**

> Eighty-one percent of marketing leaders responsible for customer experience (CX) say their companies will mostly or completely compete on the basis of CX in two years. Yet only 22% say their CX efforts have exceeded customer expectations.
>
> **Source:** 2017 Gartner CX in Marketing Survey

Tips for buying DAM.

Purchase DAM that offers the right features, interoperates with key technology solutions, and lets users use it the way they need. The right DAM solution will support content velocity while delivering more time for innovation and creativity. It will lead to more efficient, higher quality work and more satisfied DAM users and stakeholders.

Consider these helpful tips as you navigate your DAM buying experience:

Tip 1: Focus on scalability and high availability.

Evaluate cloud solutions that scale automatically, reduce latency, rein in costs, and manage computing resources. Make sure the solutions optimize video transcoding, asset and content delivery, and workflows. Consider solutions that offer complete disaster recovery.

Tip 2: Know the value you want DAM to deliver to your users.

DAM makes your business run better. Determine what problems your users want DAM to solve. Note your users' work habits, uncover opportunities for efficiency, and understand how content moves in your organization. Identify roles and responsibilities that DAM will fulfill and how it will work with existing tools, processes, and people. Surveys can help you uncover this information.

Tip 3: Ensure DAM is extensible to meet your entire martech ecosystem needs.

DAM should enable you to easily tailor it through configurations to create the right user experience. It should also be customizable to extend its efficiencies and interoperate with other technologies and tools. Look for DAM that works natively with or interoperates with the other technologies and tools your users and company rely on like Adobe Creative Cloud solutions and Workfront.

Step 2: Ensure alignment with your people and organization.

The technology you choose is only one part of the equation for the success of an enterprise solution; the people who will use or are impacted by that technology are another part. Your DAM initiative requires organizational alignment. Consider the many different perspectives of your company, how employees and teams operate to execute deliverables, the cultural language used for communication, how you go to market and with whom, and which agencies and vendors work with you. Keeping these in mind from the start of the DAM selection process will ultimately save you time, resources, and dollars.

In this step, you'll capture information that will help you determine which DAM vendor and solution can best meet your organization's and its users' needs today and in the future. Organize and document this information; it will be useful for gaining buy-in for your solution of choice and for informing DAM roll-out priorities once you've purchased a DAM solution.

Topics covered in this step include:

- Building the team that will manage the DAM initiative
- Identifying who will use the DAM system
- Understanding how your DAM users work
- Establishing a common language and expectations for DAM

Tips for achieving organizational alignment with DAM

- Get buy-in and involvement from an executive champion or decision-maker
- Engage stakeholders from across the organization
- Ensure participation by representatives of key agencies and vendors

Build your core team for the DAM initiative.

To assess DAM solution options, you will need to recruit a core team of stakeholders from across the organization who represent the people who will use it and who have use case expertise. This team, formed of internal subject matter experts (SMEs) and leadership, will develop a governance model for managing the information gathering, vendor selection, deployment, and sustainability of the DAM solution.

To succeed, this team will need to:

- Ensure representation from and develop feedback mechanisms for DAM users who will consume assets, which may include agencies, internal sales, vendors, and in B2B companies, end customers
- Enable interested employees to get involved with DAM and a process to manage and acknowledge them
- Identify employees with skills that translate to DAM and who therefore may become your DAM power users
- Develop a neutral marketing and creative operations team that supports the tools and solutions in the organization's martech ecosystem, manages DAM sustainability and improvements, and partners with IT

What your DAM stakeholders want.

Your key DAM stakeholders include creatives, marketers, IT, and agencies. Understanding their focus and what they need from DAM can help you choose the right solution. It may also reveal gaps across your people and technology.

Creatives

I want to ideate and be creative, so please simplify the way I work. Ideally, DAM will:

- Remove the burden of entering or maintaining metadata
- Allow me to work within my creative solution of choice
- Eliminate the need for me to log in to multiple solutions
- Make the entire creative process easier
- Improve productivity and collaboration
- Reduce duplication of assets
- Increase my ability to repurpose assets
- Help me keep assets on brand
- Streamline the delivery and distribution of assets

Marketers

I want to deliver exceptional campaigns quickly and prove ROI. Ideally, DAM will:

- Help me deliver the right customer experiences
- Help me stay on brand
- Help me increase sales and improve customer loyalty
- Help me deliver assets to media outlets in the right formats at the right time
- Improve collaboration and the review and approval process
- Streamline and automate the content lifecycle
- Make it easy to repurpose content
- Show me licensing and usage restrictions up front to reduce liabilities
- Help me stay on budget
- Let creatives work independently
- Provide asset performance metrics

IT

I want to ensure systems are stable and high performing. Please don't increase my workload. Ideally, DAM will:

- Meet security and risk requirements
- Use available resources and expertise
- Optimize existing infrastructure investments
- Be maintainable and sustainable within budget constraints
- Be agile, with native integrations or APIs for interoperating with core technologies
- Be proven and credible in the marketplace
- Offer high availability, performance, and scalability
- Offer longevity and not require replacement

Agencies

I just want to deliver digital assets that my clients love. Ideally, DAM will:

- Optimize my client interactions
- Make it fast and easy to access and upload assets
- Manage the creative process from concept to production and delivery
- Improve productivity and collaboration
- Help me deliver on time and on budget
- Streamline the delivery and distribution of assets

Identify your DAM users.

Now identify your DAM users, the roles they'll have in the DAM system, and their needed depth of use and privileges. Your DAM users may be marketers, creatives, agencies, the legal department, and others. Roles for DAM users may include "content producer," "approver," and so on. A user's level of use and privileges may categorize them as a "Power User" or "Standard User," where a Power User could be a content producer or other daily user who needs rights to initiate collaboration, review and approval workflows, and other tasks, and a Standard User is one who searches, views, and downloads assets as needed.

Once you've identified your users and their roles and privileges, answer these questions:

- Do you have employees with DAM experience and knowledge? If so, who are they and what knowledge or experience do they have?
- How many DAM users do you anticipate having at launch and in the future?
  - How many will be Power Users?
  - How many Power Users do you anticipate will use the DAM concurrently?
  - How many will be Standard Users?
- Will you launch the DAM to all users at once or have a phased rollout? If a phased rollout, who will use the DAM system at launch?

Understand how your users work.

Global organizations tend to have many similarities in both people and processes. They have marketers, content creators, content consumers, vendors, and customers. They have review and approval processes, campaign kickoff processes, and others. Find those commonalities by understanding how your various users work throughout the asset lifecycle and to produce content deliverables, and by figuring out the specific use cases that DAM will help them address.

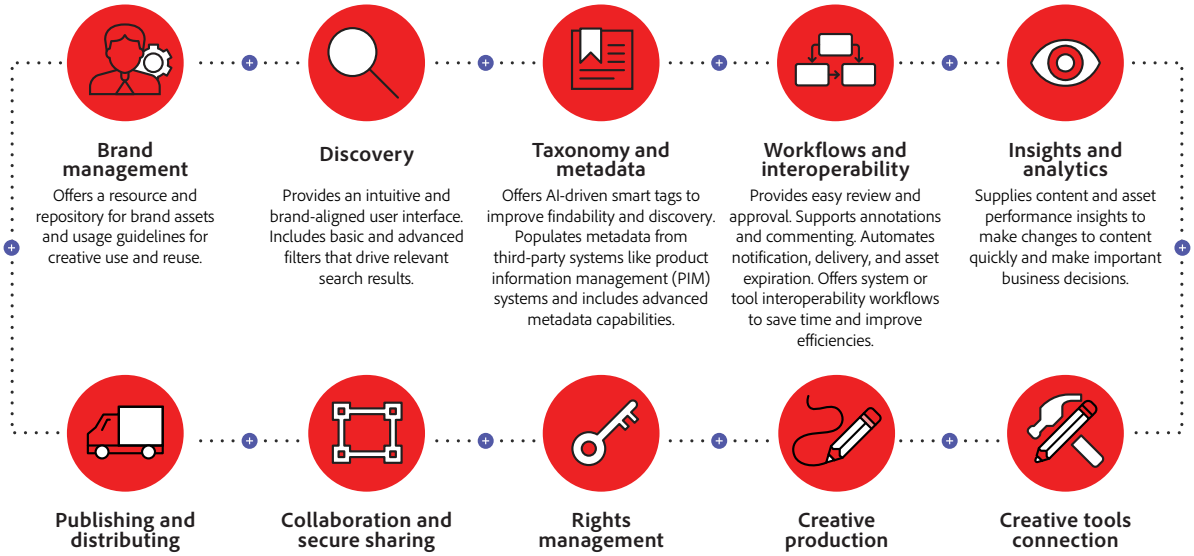
Detail your asset lifecycle and content deliverables.

Document how your marketing and creative departments work based on answers to the following questions:

- What are the use cases that best describe how your organization will use DAM?
  - Which use cases have identified problems that DAM will solve?
  - Which use cases are prioritized for immediate resolution versus phased improvement?
- What content types, formats, volume of content do you produce and for whom?
- Provide details on assets at stages of the asset lifecycle (work in progress, final but not approved, released, archived, and so on).
- Where do assets come from? Are they created internally, by agencies, or both?
  - Where do assets go? Are they delivered to content delivery networks (CDNs), media outlets, vendors, and so forth?
  - Where are assets stored at each stage of the asset lifecycle?
- What common language do your users use to describe their work, deliverables, projects, and assets?

Core capabilities of enterprise DAM.

Every modern enterprise DAM will have the following core capabilities. Which does your organization need to address its use cases?



Brand management
Offers a resource and repository for brand assets and usage guidelines for creative use and reuse.

Discovery
Provides an intuitive and brand-aligned user interface. Includes basic and advanced filters that drive relevant search results.

Taxonomy and metadata
Offers AI-driven smart tags to improve findability and discovery. Populates metadata from third-party systems like product information management (PIM) systems and includes advanced metadata capabilities.

Workflows and interoperability
Provides easy review and approval. Supports annotations and commenting. Automates notification, delivery, and asset expiration. Offers system or tool interoperability workflows to save time and improve efficiencies.

Insights and analytics
Supplies content and asset performance insights to make changes to content quickly and make important business decisions.

Publishing and distributing
Streamlines asset distribution to media outlets, CDNs, social platforms, content management system (CMS) solutions, intranets, and more in the right format and aspect ratio, applying personalization, if desired. Publishes dynamic renditions on demand for format, crop, effect, color, quality, and countless options and combinations.

Collaboration and secure sharing
Provides control over, collaboration around, and reuse of assets. Supports easily sharing assets and collections of assets via links or by publishing to portals. Adds time-sensitive access controls and permissions.

Rights management
Knows where and when you can use assets. Provides visual identifiers for expired assets and supplies a request workflow for use of assets.

Creative production
Facilitates content development, reuse, collaboration, versioning, and asset work state management.

Creative tools connection
Lets you discover, use, add, and edit assets in the creative tools that your creatives use day to day. Generates versions and renditions.

Detail your primary use cases.

Your use cases are the interactions between various roles or actors and the DAM system with the intent of achieving a desired result. Add some detail around your primary use cases using the following table as a guide. As you define each use case, you'll discover nuances of how people work in your organization.

Use case name	
Roles and actors	Who (or what system or tool) does what? List all roles and actors involved.
Current state	Provide a brief description of and context for the use case and the intended outcome.
Goal	Detail the intended goal of the use case based on the primary role. Indicate any secondary user roles and dependencies.
Interests and preconditions	List the stakeholders with an interest in the success or failure of the use case and any conditions that must be met before executing the use case.
Workflow and process	List and visually map all steps that define the use case. Include all possible extensions and variations. Indicate any special requirements or caveats. Include where the assets involved in the use case reside today and what systems or tools are used currently to address the use case.
Issues and risks	Identify open issues and risks related to the use case and resolve them before considering the use case definition complete and ready for use in informing DAM selection, configuration, and deployment.
Opportunities	Identify opportunities to: • Improve use case efficiencies • Reduce the number of supporting systems or tools • Augment systems or tools • Optimize the role of DAM in the use case • Inform automation by understanding manual and automated use case handoffs and triggers

"If it solves my problem and improves my ability to get something done the likelihood is I will use it. If adds work to my day, I will quickly abandon it."

Creative director, Los Angeles

Establish a common language for and expectations around DAM.

During every phase of your DAM initiative, from selection to purchase, deployment, and use, it is important to clarify and anchor users, agencies, vendors, and other stakeholders in these areas:

- **Acronyms:** Define company or industry acronyms that can have more than one meaning; for example, CMS can mean "content management system" or "collection management system."
- **Communications:** Set expectations and estimate the timing of aspects of the DAM initiative. Update and inform stakeholders and users regularly and acknowledge feedback.
- **Education:** Change management begins before you draft your shortlist. At every stage, share knowledge, build expertise, adopt a "train the trainer" model, and get feedback.
- **Roles:** Let stakeholders and prospective DAM users know how you want them to participate and when. Provide avenues for participation.

Organizational alignment checklist.

Use this checklist to ensure you address the user and organizational alignment a DAM initiative requires.

- ❑ Identify the decision-maker who signs the check.
- ❑ Identify an executive stakeholder and champion for DAM.
- ❑ Create a core team with cross-organizational representation to manage the initiative.
- ❑ Create a governance structure and assign resources.
- ❑ Identify and engage cross-functional internal and external stakeholders to provide input.
- ❑ Identify DAM SMEs in the organization.
- ❑ Identify DAM users, types of users, and level of usage/permission.
- ❑ Determine the problems DAM will solve for various users and user groups.
- ❑ Define DAM's role, strategic alignment, and value for each user type.
- ❑ Determine the number of Power Users and Standard Users anticipated at launch and in the future.
- ❑ Define the content journey and asset lifecycle within your organization.
- ❑ List needs from DAM and primary use cases, and detail primary use cases for DAM.
- ❑ Establish your DAM dictionary of terms.
- ❑ Develop an organizational DAM education and communications plan and designate a person to manage it.
- ❑ Determine your budget and acquire the necessary funding.

Step 3: Ensure alignment from a technology standpoint.

In this step, conduct a discovery process to ensure that the DAM solution you select meets your organization's needs from a technology perspective. Consider bringing in internal SMEs, professional services support, or consultants to accelerate your knowledge building and help you continue along your DAM buyer's journey. Activities you'll conduct include:

- Assessing the current state of your technology and operations as they relate to DAM
- Taking into account DAM capabilities that will future-proof your selection
- Identifying your must-haves and deal-breakers in a DAM solution
- Consider the value of selecting DAM that's offered as a cloud-native solution

Explore your current state of technology and operations for DAM.

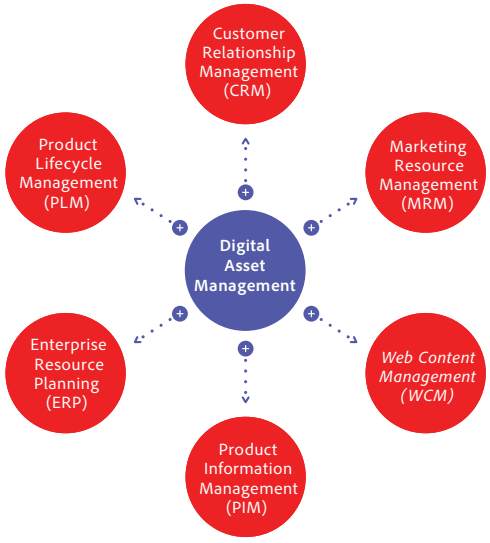
As you focus your discovery on the technology-related drivers of a successful DAM solution, you'll:

- **Identify user and system interactions and dependencies:** Looking at your use cases now and those you anticipate in the future, assess manual and system interactions to capture integration and interoperability touchpoints. Look at the content journey to identify system dependencies.
- **Identify existing authorized sources and systems for metadata:** Compile inputs and draft recommendations for definitions, schemas, relationships, and governance. Include viable authorized sources to push or pull metadata to or from DAM that should be considered during the design phase.

> "Many creative operations departments are struggling to make the business case for a DAM platform. Cost savings and operational efficiency don't cut it anymore. Our customers are looking for a trusted advisor to help them prove the impact of creative operations on their revenue streams and other mission-critical KPIs."
>
> **Lukasz Szostak,**
> Vice president, Strategic Accounts, Hero Digital

- **Know your content:** Map content types, including asset formats, from capture to production, distribution, and archiving. Note characteristics, such as asset type (video, images, audio, and so on), project elements (script, shot list, and so on), metadata (embedded, third-party system, descriptive, and so on), and any company culture or industry required data (regulatory compliance versions, geo-specific to physical facilities, and so on). Identify where this content is stored and how it is accessed and shared.
- **Outline migration requirements:** Locate the assets that you will migrate to the new DAM solution to ensure it is relevant to your users at launch. Define what makes an asset a legacy asset. Create a process and allocate the resources to curate, clean, and assure the quality of assets to reduce errors when you batch-import them to the new DAM solution.
- **Scope and prioritize interoperability and integrations:** Identify solutions, systems, and tools to interoperate or integrate with the new DAM solution, and describe how you expect those systems to act. Make a plan for solutions you will sunset.
- **Plan for sustainability and maintenance:** Users will evolve. Emerging technology will augment or replace existing tools. Budget and align resources to manage continuous feedback loops with users, assess new opportunities, and stay agile to pivot based on industry and organizational changes.

Identify the many systems you may want to integrate or interoperate with your DAM solution.



Future-proof your DAM investment.

Modern enterprise DAM offers features that can help your organization achieve content velocity by marrying data with content in the context of how your company and people work. It leverages AI to help them better manage the digital experiences they offer and support marketing and creative operations. It adds intelligence across the asset lifecycle to provide the data and optimization required to deliver relevant and engaging experiences. It provides marketers and creatives a technology backbone they can rely on that seamlessly works with existing tools and fits how they work.

Enable intelligence and efficiencies with metadata and AI.

Many DAM solutions have foundational AI and automation capabilities that can use metadata that's embedded, user generated, and from upstream or downstream sources like PIM systems, MRM solutions, and CDNs. Modern enterprise DAM combines AI and metadata to make assets more findable, drive workflow triggers, enforce rights management, reduce redundancy, associate versions and renditions, and tell you where assets came from, where they went, who owns them, and more.

Drive content velocity and support rich media.

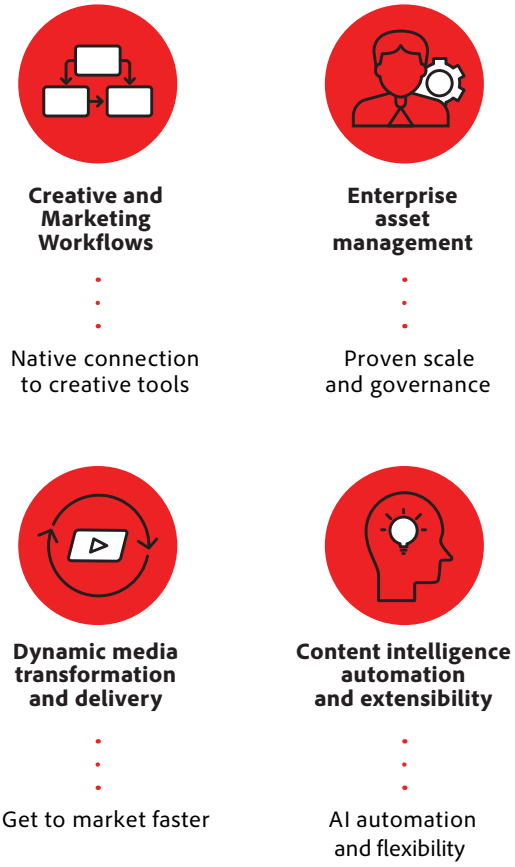
Modern enterprise DAM also includes advanced capabilities for dynamic media production, distribution, and management to improve the customer experience and speed time to market. For example, from a single master file, it can dynamically create renditions that optimize delivery to different users, screens, devices, and channels.

Capabilities for future-proofing DAM.

Consider which of the following advanced capabilities of modern enterprise DAM you might want to future-proof your investment:

- Applies metadata and tagging
  - Offers AI-driven smart tagging to add metadata
  - Supports adding company-specific tags
  - Automates workflows based on metadata
- Automates creating renditions and transcoding
  - Dynamically optimizes content for delivery to each screen and customer
  - Dynamically crops and formats content for a variety of delivery channels and outlets
- Supports video streaming, including dynamic cropping based on video focal point for various channels and screens
- Supports emerging formats such as virtual reality (VR), augmented reality (AR), and 3D
- Provides insights and analytics for performance and ROI of assets and content
- Interoperates with other marketing and creative solutions, tools, and partner solutions via robust and extensive APIs and SDKs or native connections
- Integrates with sites for photographers; public relations; partner solutions; and stock repositories for images, fonts, video, and more

Consider the broad capabilities you need in modern enterprise DAM.



Why cloud is today's choice.

Historically, the only option for a secure DAM implementation that did not suffer latency issues was to deploy technology in-house and invest in the network and security. This would reduce the time to move files from one place to another while ensuring the file maintained its quality when it reached its destination. Today, we live in a much different world: Organizations augment internal IT resources and manage costs by relying on a cloud-based technology infrastructure.

Consider the advantages of a cloud-based environment when selecting a DAM solution to meet your organization's current and future needs:

- Expands on-the-fly to meet heavier CPU demands, provides high availability, scales flexibly, supplies storage capacity, and does all these things in ways that let you closely manage deployment costs from the start
- Supports your existing technology deployments, specifically those technologies that will interoperate with DAM. Many of these, for example the project management application Workfront, are likely already in a cloud environment.
- Offers automated transcoding, technology services, and AI capabilities that drive workflow efficiencies for contextual metadata, and supplies knowledge and insights that support better business decisions
- Provides services needed to support your content use cases or offers components to automate workflows—for example, packaging assets for distribution to multiple media outlets in a variety of formats while delivering a master file to archive storage, and support for 3D or virtual reality (VR) formats
- Meets or exceeds security, industry, and regulatory requirements such as FedRAMP, SOC 2 Type 2, GLBA-Ready1, FERPA-Ready1, HIPAA-compliant, and others
- Supports single sign-on to democratize access and simplify user onboarding and management

> "The message in our research is simple—on-premises is the new legacy. Cloud is the future. All organizations, big and small, will be using the cloud in increasing amounts."
>
> **Adam Ronthal,** Senior Director Analyst, Gartner
> The Future of Database Management Systems is Cloud!

Identify must-haves and deal-breakers.

Every organization will determine which features and functionality a DAM solution absolutely must have to make the short list. Engage your stakeholders to identify the top 5 to 10 features, functionality, or other characteristics that will provide the right efficiencies and tools to improve work and deliverables now and in the future.

For example, the DAM solution must:

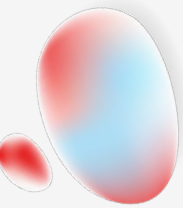
- Allow creatives to access assets directly from their creative solution of choice
- Allow users to create workflows without help from developers
- Provide extensive language support
- Meet the organization's security and compliance demands
- Provide digital rights management (DRM) capabilities
- Be offered in a cloud environment

Of course, you may find the perfect solution, but it may present a deal-breaker; for example, it's a competitor's solution, or the vendor is no longer developing new features for it, and so on. List your three to five deal-breakers as well.

Checklist for technology alignment.

Use this checklist to make sure you understand what's critical for ensuring the DAM solution you select aligns with your technology requirements.

- ❑ Document your current media supply chain and content journeys.
- ❑ Identify asset types, formats, sizes, and locations, and estimate annual growth for your current storage capacity and usage.
- ❑ Identify the solutions in your martech ecosystem that you have and will keep, will sunset, and plan to buy.
- ❑ Confirm existing software, versions, and tools that users use to do their jobs.
- ❑ Assess workflows, such as ingestion, review and approval, and creative production.
- ❑ Identify vendors and agencies who will use the DAM solution, including deliverable types, workflows, communication processes, and number and types of potential users.
- ❑ Identify features to look for in DAM that will future-proof your selection.
- ❑ Decide what type of DAM you're looking for, including deployment environment and success criteria.
- ❑ List must-haves and deal-breakers for your DAM solution.



42%
of marketers say they don't have the right marketing technology

42%
have technologies they don't use

16%
of marketers have marketing technologies they use effectively

Source: 2019 Content Management & Strategy Survey, Content Marketing Institute

Step 4: Create a short list and zero in on your front-runners.

Now it's time to narrow your candidates to a short list of three to five vendors and solutions, assess their solution fit, and further narrow the list down to a vendor of choice and a backup. Use the information you captured in Steps 2 and 3 to ensure the DAM solutions on your short list meet your organizational and technology needs. You'll also want to verify that vendor candidates have the technical and functional resource expertise required for you to be successful; for example, through offering managed services or professional services.

Once you've created your short list, you may wish to request that each vendor:

- Conduct a demo and provide technical deep-dive workshops to:
  - Address features and functionality
  - Discover how the vendor SMEs will work with your company
  - Ensure the technology is compatible with your IT and operations approach
- Provide client reference interviews to supply perspectives and key lessons learned

Next, narrow your short list to your vendor of choice and a backup by further determining if:

- Licensing, hosting, and implementation costs align with your budget and sustainability forecast
- Onboarding services are available, including data migration, taxonomy and metadata support, training resources (self-service and in-person), and in-solution help or hints
- Your initial vision and rollout plan align with the vendor's timeline

Checklist to develop your vendor shortlist.

Use this checklist to narrow down your list of vendors.

- ❑ Evaluate each candidate against the people and culture requirements from Step 2.
- ❑ Evaluate each candidate against the technology requirements from Step 3.
- ❑ Evaluate each candidate solution based on the demos, technical deep dives, and client reference interviews.
- ❑ Create a short list of three to five candidate vendors and solutions.
- ❑ Evaluate each candidate based on costs, onboarding services, and alignment of vision and rollout with the vendor's timeline.
- ❑ Consider trade-offs with each vendor and solution.
- ❑ Select your vendor of choice and a backup.

Step 5: Get buy-in for your vendor of choice.

Now that you've identified your vendor of choice, package your final recommendation for executive review, buy-in, and sign-off. In most instances, you'll need to sell the case for enterprise DAM within your organization to obtain budget approvals—sometimes even to get the go-ahead to start your selection process. Consider these ways of providing evidence of the value DAM can deliver:

- Provide a summary of DAM's immediate benefits to the organization
- Provide an estimate of the DAM ROI
- Convey the rationale for your solution choice
- Explain why cloud is the deployment environment of choice

The software you buy should be a positive force multiplier to your organization, eliminating bottlenecks and improving the ability to meet deliverables targets, handle pressure for growth, and meet operational demands day in, day out.

Immediate benefits of DAM.

Even without calculating ROI, it's fairly clear how modern enterprise DAM can offer immediate benefits to the organization. The following table shows just some of benefits that overarching DAM capabilities provide.

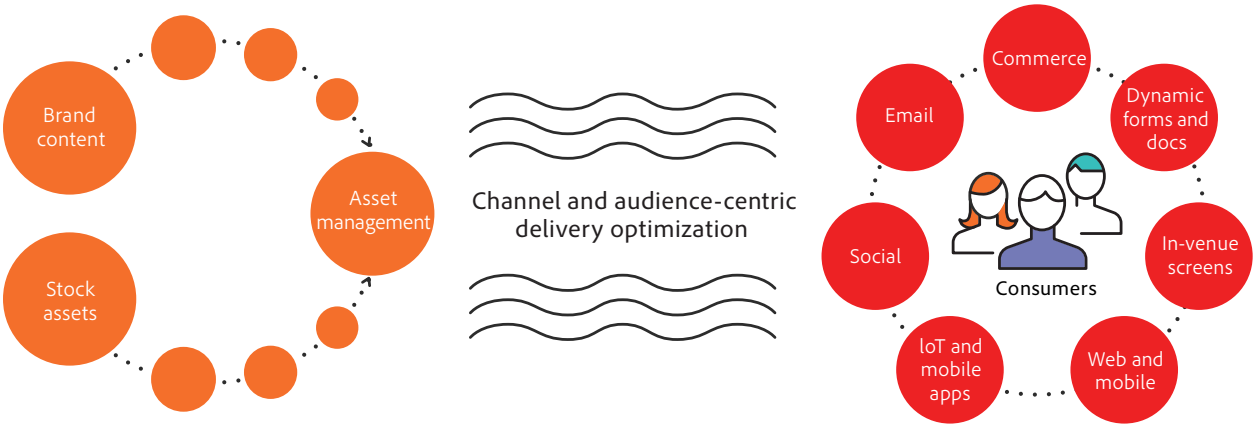
DAM capability	Benefit
Centralized, searchable storage	• Eliminates network shares, hard drives, unsanctioned online repositories, and redundancy • Provides a single repository, with easy global access from any device via a customized user interface • Increases discovery of and reuse of assets
Rights management, expired assets workflows and notifications	Mitigates asset misuse and usage rights violations and associated legal costs
Secure collaboration, sharing, publishing, and delivery capabilities for all asset types and sizes	• Assigns permissions and rights to assets and users • Puts review and approval workflows in one place for digital tracking • Securely shares assets with dynamic rendition, crop, and format capabilities enabled • Reduces latency and delivery quality issues • Removes reliance on FTPs and other file sharing mechanisms
Version control and asset relationships	• Manages version control and asset relationships automatically • Associates language and derivatives with parent asset
Asset utilization and performance insights	• Marries usage data to assets, providing reports with insights on asset and content performance

Provide an estimate of DAM ROI.

It helps to start framing DAM ROI by identifying how it pays off. Do this by plugging verifiable numbers into an ROI calculator. Adobe provides a DAM ROI calculator that produces a three- to five-year forecast of your DAM ROI and a break-even point for your investment based on the DAM value drivers that matter most to your organization. The calculator recommends that you pick your top three to five value drivers from the following:

- **Reduced search time:** Estimates the labor cost incurred by creatives and partners searching for assets pre- and post-DAM implementation
- **Reduced asset re-creation:** Estimates the labor cost of creating assets and the projected savings when fewer assets are inadvertently re-created post-DAM implementation
- **Increased asset reuse:** A corollary of reduced asset re-creation, this measure estimates the incremental profit associated with reusing high-performing assets once they're more easily discoverable in a DAM system.
- **DRM liability avoidance:** Estimates the value of more effective and efficient liability avoidance
- **Ease of sharing:** Estimates the labor cost associated with sharing assets pre-DAM and post-DAM by eliminating external sharing platforms
- **Self-service efficiencies:** Estimates the labor savings associated with diverting ad hoc asset requests to creatives from marketers, sales, and other partners to self-service solutions
- **Renditioning efficiencies:** Estimates the labor and storage cost associated with manual re-creation of standard image and video variations pre-DAM, and savings on both measures post-DAM
- **Integration efficiencies:** Estimates the labor savings associated with automating formerly manual processes of moving assets to one or more business systems
- **Creative workflow efficiencies:** Estimates the labor savings of improved project management for creative projects
- **Campaign workflow efficiencies:** Estimates the labor savings of improved project management for marketing projects involving the distribution of assets across multiple channels, audiences, and devices
- **Additional conversions due to campaign volume, tailoring, or responsiveness**: Estimates the value of improved campaign volume and performance due to more efficient production and tailoring of creative assets
- **Additional sales due to campaign volume, tailoring, or responsiveness: Estimates the additional** revenue generated from improved campaign volume and performance due to more efficient production and tailoring of creative assets
- **Additional sales of or sub-licensing revenue from assets:** Estimates the additional revenue generated from increased asset sales/sub-licensing as a result of improved sharing, discovery, and reuse post-DAM
- **Ongoing process improvement:** Estimates the savings associated with removing repetitive creative process roadblocks and bottlenecks
- **Time to market:** Most relevant for regulated industries such as healthcare or insurance, this measure estimates the reduced time to market pre-DAM and post-DAM.
- **More efficient onboarding and retention of creative, marketing, and agency staff:** Most relevant for organizations with high growth or high turnover in creative staff, this measure estimates the cost of onboarding new creative staff.

Modern enterprise DAM lets you meet the content demand for exceptional customer experiences no matter how or where your customers interact with your brand.



Consider a proof-of-concept project to validate your top candidate and backup.

Optionally, you may want to perform a paid proof-of-concept (POC) project to validate your front-runners. The POC will more clearly reveal if the solution and vendor are a fit for your organization's needs. Some guidelines to follow when running the POC include the following:

- Execute in a cloud environment for simplicity and quick turnaround.
- Specify a tight set of requirements to measure POC project success.
- Make it relevant to your company and use cases—don't overbuild it.
- Have clear expectations and the engagement of stakeholders who inform purchase and are the decision-makers.
- Outline what happens next and be clear with the vendor on your purchasing process.

The ROI of DAM

- 366% three-year ROI
- 19% higher productivity for digital assets teams
- 47% faster creation of new assets
- 84% faster rendering of existing assets
- 27% faster delivery of content by digital marketing teams
- 20% faster launching of marketing campaigns

Source: "The Business Value of Adobe Experience Manager Assets," IDC, February

Provide the rationale behind selecting your vendor of choice.

Any stakeholder needs to clearly understand why you selected the vendor that you did. Summarize the information you collected in Steps 2 through 4 to explain why. Map your requirements to the vendor and solution offerings. Be sure to explain how your choice meets your DAM needs today and is poised to meet your future needs. If you created a POC project with the DAM vendor, walk any executive stakeholders through the POC and discuss the results.

Request additional customer references.

Execute further reference checks by asking the top vendor candidate to supply end-user customers that have similar technical implementation, use cases, content types, and content volumes.

Explain why cloud Is the deployment environment of choice.

If your organization is committed to a digital transformation, you've probably realized that there's really no other choice than to run DAM in the cloud. This will become clear when you consider:

- How the cloud ecosystem can stay current with nominal effort and dollars versus an on-premises solution that incurs costs and time for updates and development and requires adaptation to emerging technologies, workflows, formats, and changes in user behavior
- The agility to expand on the fly to meet needs for heavier processing, high availability, and storage capacity, allowing cost management to be intrinsic to your deployment right out of the gate
- The ability to spin up environments quickly or take them down to test, develop, and deploy new workflows and technologies proactively to meet changing user needs and garner time and cost efficiencies
- How in-house resource constraints can be offset by or augmented with managed, technical, and functional services—SMEs who can maintain, sustain, and expand your deployment over time, including training, help desks, and troubleshooting
- The ability to democratize global access and simplify user onboarding and management
- The ability to meet or exceed security and regulatory requirements and provide performance tracking and audits

DAM solutions that require integration with several different external solutions to accommodate the complete asset lifecycle increase the burden on your IT team, degrade asset integrity, and increase potential points of failure that can halt your marketing efforts.

Checklist for getting buy-in for your vendor of choice.

Use this checklist to get buy-in for your vendor of choice.

- ❑ Show the immediate benefits of DAM.
- ❑ Create a three- to five-year forecast of your DAM ROI.
- ❑ Optionally, execute a paid POC project with your top vendor and backup candidate.
- ❑ Map your people and technology requirements to the vendor of choice.
- ❑ Execute further reference checks of end-user customers with similarities.
- ❑ Summarize and submit the recommendation to your executive stakeholder.

Step 6: Initiate the purchase.

After gaining executive approval, your next step is to negotiate the purchasing agreement. Cost factors to consider when negotiating your purchase agreement should include:

- Software licensing, including the number of users and other relevant details
- Environments, which will include a minimum of a development environment and a production environment but may also include a quality assurance (QA) environment. Be aware of the costs for hosted or non-hosted servers and storage. Check support for disaster recovery
- Whether you'll use professional services or your own internal SME resources
- Whether you'll use managed services for technical and functional support, such as for user training, onboarding, and help desk support

Checklist for initiating the purchase.

- ❑ Use this checklist when negotiating your purchase agreement.
- ❑ Verify software licensing.
- ❑ Determine appropriate environments.
- ❑ Determine the need to contract for professional services for subject matter expertise.
- ❑ Determine the need to contract for managed services to meet technical and functional support needs.

Step 7: Deploy the DAM solution.

Now that you've purchased your DAM solution, it's time to prepare to deploy it. To do that well, you need to have a DAM strategy and implementation plan that includes details on how you'll manage the DAM solution, evolve it, onboard new users, train on new and advanced features, and show ROI to continue to get budget for the DAM program.

Plan for DAM rollout.

The DAM capabilities that you roll out to users should be relevant from day one, preloaded with the right metadata options and assets. What you roll out at launch depends on your company—some organizations need to see three to five years of finished assets; others just want one year's worth to kick off the program. Data migrated to the DAM system should be cleaned prior to bulk ingestion and undergo quality assurance after ingestion.

Ensure good governance.

Update your governance model, policies, and processes for ongoing oversight and sustainability. Be sure this addresses how you'll administer system, metadata, workflows, and users. Partner with your in-house experts, managed services resources, or consultants to create the right processes to support your users and proactively manage issues and escalations, track improvements, and identify opportunities.

Maintain and evolve the solution.

Employing feedback loops provides one of the best ways to proactively acknowledge user issues, identify new capabilities, add enhancements, and improve interoperability and integrations. As you roll out capabilities, capture key lessons learned quickly and apply or adjust to how your team really uses the DAM solution versus how they thought they would. Capture this feedback by scheduling frequent check-ins with stakeholders at the onset, moving to quarterly or semiannual meetings as the DAM program matures.

Monitor DAM performance.

In addition, monitor performance of the DAM technology and manage updates and upgrades. With a cloud-native solution, updates and upgrades are continuously developed and rolled out, requiring no effort on your part. Test your disaster recovery process and systems. Schedule regular interval tests. Monitor and improve environment performance, optimizing costs by managing utilization spikes and storage movement (for example, near for work in progress and far for archiving and preservation).

Onboard new users and deliver training.

Have a plan for onboarding new users and user groups and for delivering training on new features and for more advanced uses. Onboarding is easier when the DAM user experience feels familiar. Consider developing a brand portal for accessing and uploading assets that has an intuitive and inviting user interface and that feels visually like an extension of the brand.

Use the DAM system and company's SharePoint platform or intranet for communications, help tickets, and request submission forms, as well as to provide resources such as documentation, video demos, and training materials. To pass along lessons learned, develop a "train-the-trainer" support model and create an ongoing user group—for example, organize monthly "Lunch and Learn" sessions in which you bring in experts, work though problems, or just share what is and isn't working.

Validate ROI.

To sustain support and budget for the DAM program, regularly measure success and validate your ROI. You'll also need to forecast DAM budgets periodically.

As you do all this, keep in mind that a DAM platform can change and needs to adapt to new technologies, trends, user behavior shifts, and market changes.

Checklist for DAM deployment.

- ❏ Use this checklist as you prepare for DAM deployment.
- ❏ Determine what capabilities and assets you'll have at launch.
- ❏ Set up and deploy the DAM system.
- ❏ Develop and maintain governance processes and policies.
- ❏ Develop feedback loops to address issues and get ideas for new features.
- ❏ Monitor DAM performance to ensure it is performing as intended.
- ❏ Create onboarding and training materials and opportunities.
- ❏ Regularly validate ROI and secure budget to sustain the DAM program.

Continue the DAM journey.

DAM is the foundation on which an organization's digital transformation is built, so selecting the right DAM solution is essential for the success of that transformation. This toolkit attempts to walk you through the process of selecting a DAM solution that will meet any organization's needs, recognizing that each organization will need to adjust this guidance based on its unique business and requirements.

Purchasing the right DAM is just the start of your journey. DAM is not really a project; it's a program that will shift and change over time as customer demands change, DAM user needs change, markets shift, technology evolves, and other conditions change in ways that cannot be anticipated today. A modern enterprise DAM solution should provide the flexibility to adapt to and benefit from those changes.

As a final step, consider using this guide to evaluate Adobe Experience Manager Assets, the industry-leading DAM solution from an industry-recognized vendor. To learn more about Experience Manager Assets, visit www.adobe.com/go/assets-features.

For more information.

www.adobe.com/go/aem

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