

# **BEST PRACTICES GUIDE**

**How To Choose A Digital Asset  
Management Solution**



# Involve Key Stakeholders From The Start

After you have decided your organization should implement a digital asset management (DAM) system, you need to evaluate which solution is right for you. To start this, you should select key stakeholders and engage them early in the process.

By involving the right people early on, you will get a better idea of your organization's needs and pinpoint any bottlenecks and pain points. Choosing a DAM solution to meet these needs will help improve buy-in, increase adoption and ensure you achieve the results you desire.

## Step 1: Identify Your Internal & External Stakeholders

Identifying the key stakeholders - anyone who creates, manages or needs access to assets. Engaging the right people from the beginning will help you gain a holistic view of your entire workflow and determine what you need from a DAM system.

Fortunately, a DAM system improves day-to-day operations and benefits many, so pulling the right people into the conversation shouldn't be difficult. Simply reach out to everyone you identified and ask them to participate in the process. Anyone who has a vested interest in its success will make an excellent internal champion.

## Who Are The Stakeholders? Anyone Who Will Benefit From Efficient Asset Management.

- Creative Team Leaders
- Marketing Team Leaders
- Photographers
- Designers
- Managers
- Vendors
- Distributors
- Customers
- Partners
- Social Media Coordinators
- Customer Service Agents
- Sales Reps
- Others:

## Step 2: Get IT On Board

IT's involvement from the beginning can be critical to a successful and rapid implementation. IT has a unique view of your entire network and they are fully equipped to help analyze workflows, bottlenecks, etc. Your IT department will also understand the technical requirements of a DAM system.

Their expertise is helpful in selecting a solution that will integrate well with your existing [and future] infrastructure, business applications and workflows. If your organization does not have IT resources, there are DAM systems - such as Extensis Portfolio™ - that are easy to implement. Using Integration and Consulting Services can also be a good option.

## Step 3: Uncover What Solution Will Work Best

Once you've assembled your list of stakeholders, talk to them about their pain points and try to determine what workflow and process improvements will help alleviate pressures on their department. Collaborate with them on what solution will work best. Use your stakeholders to:

- + Define current processes and workflows to understand how assets are being managed
- + Identify pain points, bottlenecks and limitations in current processes
- + Prioritize what is most important to solve first and determine what can be solved later
- + Identify what is required for a system to be successful in the short and long-term

Ultimately, any digital asset management system is designed to increase organizational efficiency - a goal nearly everyone should get behind and support as long as they can see how it directly benefits them. Involve Key Stakeholders From the Start // Choosing a DAM System Extensis also offers Integration and Consulting Services.

More information on these services can be found [here](#).

# Analyze Your Current State

One of the biggest obstacles people face when determining how their organization will incorporate a DAM solution into their workflow is answering the initial question of “How do I get started?” It can feel like a daunting task to analyze your entire workflow. Frequently, this leaves people afraid that they’re going to

“get it wrong”, which keeps them from getting started altogether. Digital asset management isn’t about getting it “right” or “wrong”. It’s more important to come up with an initial plan based on input from the stakeholders and get started using what you know. Your DAM system will evolve over time as your needs change, the

number and types of assets change, and as you learn and implement more best practices. To help you kick this process off, we’ve provided questions to serve as conversation starters with your stakeholders. Jot your answers down to identify how you are currently handling and accessing your assets.

## Workflow Discovery & Analysis

Understanding how people acquire, create, organize, distribute and archive assets in your organization can help you address any workflow bottlenecks and plan for the future.

An effective DAM solution will enable your team to operate more productively by complimenting existing processes or replacing inefficient workflows.

As part of your analysis, explore the following questions with your teams:

01

### What Is Your Existing Workflow?

- Assets are routed from one user to the next
- Teams collaborate in real-time

Describe workflow:

02

### Who Creates, Edits, Approves And Consumes Assets?

List people involved:

03

### Are Responsibilities Divided Across Teams?

- Yes
- No

List teams involved:

04

### Where Are The Pain Points And Bottlenecks In Accessing Your Assets?

List pain points:

05

### Does Anyone Need Access To Your Digital Assets Outside Of Your Organization?

Check all that apply:

- Partners
- Vendors
- Clients

List:

06

### What Is The State Of Your Asset Inventory?

- Estimate how many assets you have:
- Estimate current storage space:
- What is your expected storage needs?

Notes:

07

### What Type Of Assets Do You Have In Your Collection:

- Images
- PDFs
- Videos
- Presentations
- Word Docs
- Text Files
- Others:

List specific formats:

## Workflow Discovery & Analysis

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### 08

#### Do You Need Continual, Quick Access To All Your Assets, Or Do You Archive Assets Periodically?

- I need quick access to all my assets 24/7
- I need quick access to current assets and occasionally archived assets

Notes:

### 09

#### Where Do Your Digital Assets Currently Reside?

Check all that apply:

- Central File Server
- Individual Desktops
- Mobile Devices
- Social Media Channels

List specific locations:

### 10

#### Do You Have A File Naming Convention?

- Yes
- No

If yes, what is the structure?

## Infrastructure Assessment

Understanding your current and expected infrastructure requirements can help you establish a more accurate budget, define specific IT support requirements and identify other resources necessary to ensure your DAM solution is implemented smoothly and quickly. Work with your teams to assess:

### 01

#### What Software And Hardware Do You Already Have?

List details:

### 02

#### What IT Resources Do You Have To Support The System?

Notes:

### 03

#### Are There Others Systems That You Need To Integrate With?

- Yes
- No

If yes, what systems?

Examining your current processes and infrastructure can serve as a baseline for establishing the criteria you will use to select the right system for your organization. It will also give you a better understanding for where a DAM system can improve your processes, which is key in maximizing the effectiveness of your solution.



# Develop Your Selection Criteria

After analyzing your current state and existing workflow, work with your stakeholders to develop a list of criteria for choosing a DAM system. This will help streamline the selection process and ensure you pick the best solution to meet your current and future needs.

## Key Considerations Should Include:

01

### Ability To Scale

What is the projected growth of your asset collection?

- Less than 100,000
- 250,000 to 500,000
- 100,000 to 250,000
- Over 500,000

Notes:

02

### Cross Platform Capabilities

What platforms does the DAM system need to support?

- Mac
- Windows
- Mix of Both

Other:

03

### Ability To Integrate With Other Business Systems

Do you need the DAM system to integrate with other business systems?

- Ecommerce
- Collection Management Systems
- Single Sign-On

04

### Accessibility Of Assets Through Web Portals

Do people need access from any location on any device at any time?

- Yes
- No

List who needs access:

Do you need a way to securely share assets with people outside the organization?

- Yes
- No

05

### Hosting Options

Where do you intend to host the solution?

- On-Premise
- Mix of Both
- Cloud

Notes:

06

### Implementation Time

How fast do you need to be up and running?

- Less than a month
- One to two months
- Three to six months
- Other

Timeline notes:

07

### Mobile Support

Do you need to give remote contributors the ability quickly and easily upload assets from mobile devices to the central repository?

- Yes
- No

If yes, list:

08

### Total Cost Of Ownership

What's your initial budget to implement the DAM system?

What is your annual budget to support the system?

Notes:

## 09

### Ease Of Use For All Skill Levels

Who will be using the system, and how will the system need to accommodate varying skill levels across a cross-functional team?

List users and skill levels:

## 10

### How Much IT Involvement Is Required

Do you have IT resources available, or does the system need to operate with minimal resources? Will involving a third party expert be beneficial (see next page for how to evaluate consultants)?

Notes:

## 11

### Licensing Options:

How many people will need to access the system to retrieve assets?

- Less than 10
- 10 to 25
- 25 to 100
- More than 100

Notes:

## 12

### How Many People Will Need To Upload Assets Into The System?

- Less than 5
- 10 to 25
- 5 to 10
- More than 25

Notes:

## Tips to keep in mind when evaluating DAM systems:

### Bringing In A Third Party Expert

DAM projects involve people, processes and technology. Good digital asset management consultants are experts in all three, and can help map out who will work with the system and how they will work with it so you aren't left with an expensive digital paperweight.

Good DAM consultants are skilled at enabling collaboration between stakeholders, defining workflow processes, and managing technology requirements to provide comprehensive solution. For organizations that have limited or no IT resources, bringing in a third party can help things go smoothly. For those with IT resources, it may still make sense to have an expert involved so the system is up and running within days vs. months and to accelerate adoption.

### Web Demo

Rather than settling for a canned demo, ask for a targeted demo based on your unique needs. It's helpful to share your selection criteria with vendors to ensure all your requirements are addressed. Additionally, make sure you involve your stakeholders so any questions get answered upfront.

### Trial Software

It may be beneficial to try before you buy. A trial can help you get a feel for how the system will fit into your workflow and satisfy your requirements.

### Customer Referrals

Ask to see examples of how existing customers are using the software, request case studies and get referrals for organizations similar to yours.

### When Evaluating Consultants:

- + Set your goals: Are you hiring someone to help with just the install, or will you need them to have expertise in workflow, training and/or support? Both are very different skillsets.
- + Develop a list of screening questions: You and other stakeholders will be working closely with this person, so be prepared to interview prospective consultants to make sure they are a fit for the project.
- + Ask for references: Do not use someone that cannot provide a substantial list of successful engagements that you can contact.

# CONTACT

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