

# BEGINNERS GUIDE TO DIGITAL ASSET MANAGEMENT WORKFLOWS

## A GUIDE TO GETTING IT RIGHT

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A DCG TOOL

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# DIGITAL ASSET MANAGEMENT WORKFLOW SUCCESS

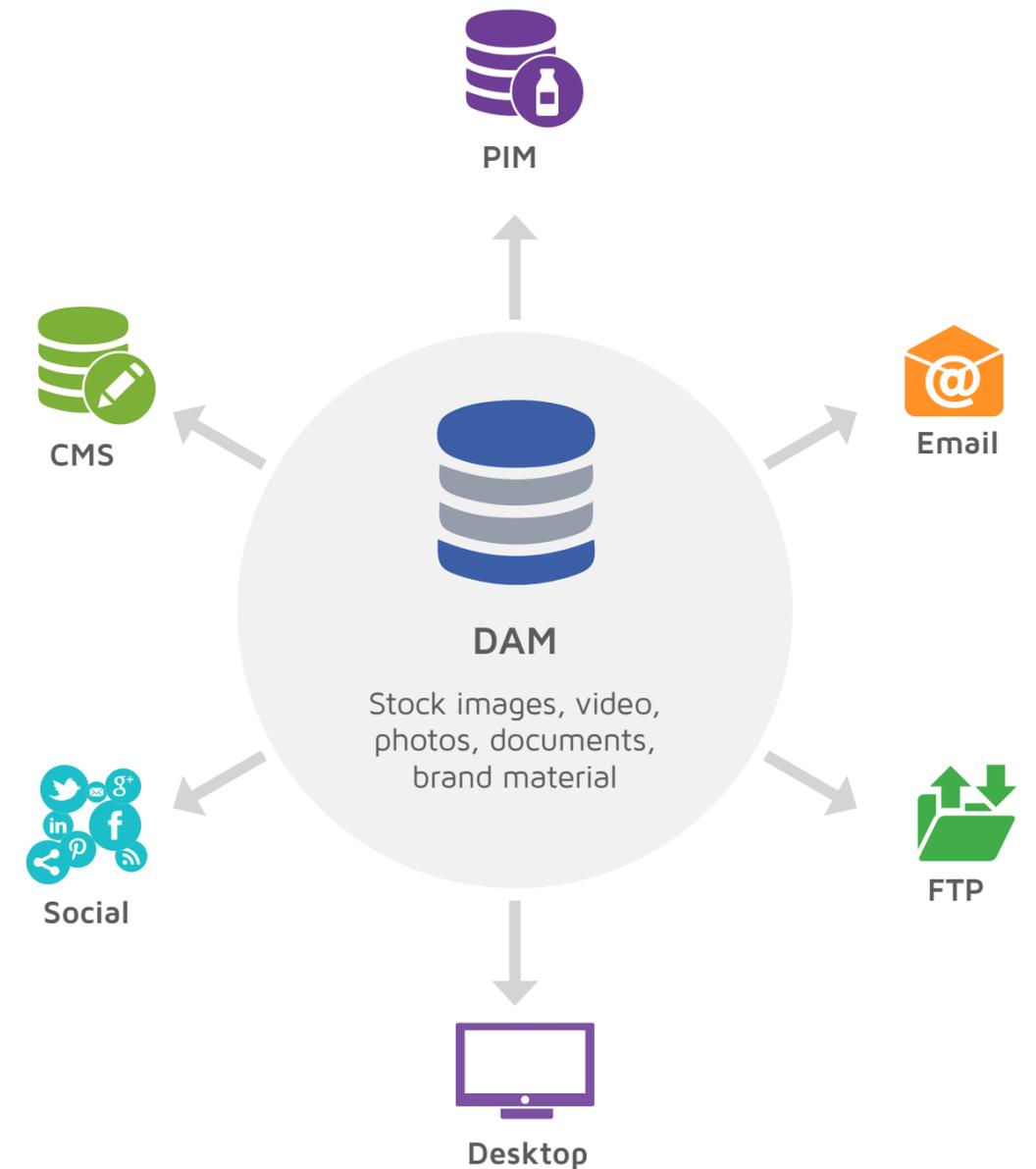
This Guide is for all team members involved in the process of digital asset management (DAM). Whether you are a DAM system administrator responsible for setting up the platform or a marketing director tasked with overseeing digital assets and their management within the organization, this guide will provide you with the information, tips, and checklists for creating and maintaining an effective digital asset workflow strategy and schema.

# WHAT IS DAM WORKFLOW AND WHY SHOULD I CARE?

Within a digital asset management (DAM) system, workflows power the lifecycle of a digital asset – from ingestion to distribution to archiving. Workflow processes enable the sharing and distribution of assets.

This sharing of files can be triggered automatically via metadata or manually by a user. The distribution can be to just about any destination, such as a user's desktop, the enterprise content management system (CMS) or product information management (PIM) solution, or for larger files (i.e., videos), an FTP site.

Regardless of the task at hand, each step in a workflow has a specific step before it and a specific step after it, unless it is the first step, or the last step in a one-way, finite process. In a linear workflow, the first step is usually initiated by an outside event, like the need to ingest a new image into a digital asset management (DAM) system. However, if the workflow has a loop structure, the first step is initiated by the completion of the last step. In the case of a digital asset, that could be the approval of an initial brand template that would then kick off the generation of the associated brand assets.



## WHICH WORKFLOW TOOL SHOULD I USE WITH MY DAM?

When starting a DAM project, there are several options to consider when choosing your workflow technology. Most DAMs come with some type of embedded workflow engine. In addition, many marketing related systems (content management, marketing resource management, marketing automation, etc.) have built-in workflow functionality that may have been leveraged ahead of implementing a DAM with its own workflow capabilities. Also, there are dedicated, stand-alone workflow tools that are specialized for Project Management & Tasks. Deciding which to use when is part of the planning and structuring of the workflow process. Ultimately there are three options for DAM workflow when other workflow tools exist:

1. Use only the DAM workflow to drive all DAM related processes.
2. Integrate and use the existing workflows and DAM workflow systems together.
3. Keep the existing workflows and DAM workflow systems independent of each other.

Here are a few things to consider when making the decision for which is best for your company:

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- 1. Do the existing workflow processes need to be integrated in with the DAM workflow processes?**

If current workflows have no impact on or need to interact with the DAM then in most cases it makes more sense to leverage the DAM workflow capabilities.

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- 2. Are the DAM workflows simple (submit/review/approve) or complex (ideation through archive)?**

The simpler the workflow needs, the more it makes sense to keep the process internal to the DAM solution. Once the workflows get more complex – tracking resource allocation, project costs, billing, etc. or have complex audit requirements, then it may make sense to leverage the capabilities of an MRM (marketing resource management) solution in addition to using the DAM workflow capabilities.

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- 3. Can the existing workflow solutions be integrated to the DAM?**

In most cases the answer to this question is “yes”. But before making the decision on which workflow tool to use in your DAM impacted management processes, be sure to understand if and how existing tools (CMS, MRM, etc.) can be integrated with the DAM.

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- 4. Are the existing workflow tools well established and accepted?**

Change for the sake of change often just results in disruption. If existing workflows work well and users willing utilize the tool, then it makes sense to assess the tool’s ability to support the DAM workflow needs to find a balance between what the DAM can best offer in addition to the established workflow solution(s).

## WHY BOTHER? DOESN'T EMAIL WORK JUST AS WELL FOR WORKFLOW?

If it is just you and one other person, email might work fine to collaborate, share, and manage tasks and assets. But even with just two people, let alone a team, there are benefits to applying a more formal, structured process to digital asset management. Think about the time wasted trying to figure out which is the most recent version of a file. Or who has the final say on when something is considered approved. Not having a process flow to systematically manage digital assets can be costly in terms of resource and asset management, not to mention accountability. •

## EVERYONE LIKES ROI

Workflows are one of the most effective ways to monetize and maximize your DAM system's ROI. Here are just some benefits that even a simple workflow process can deliver:

- Workflow can help simplify complex and/or convoluted processes. Simply modifying the order of the steps can make the process more efficient, as does streamlining independent steps to run simultaneously as opposed to sequentially.
- Tasks must be assigned to people with the appropriate skills, rather than to just anyone who needs work to do. This translates into improved communication and adherence to the process which will result in a higher quality of assets!
- Workflows typically follow a sequential order, ensuring that all steps have been completed correctly and checkpoints met before moving forward. But in more complex situations,

tasks can also be run in parallel. The constant movement of the workflow means that a person whose part is finished can immediately pass the asset on, so it doesn't sit around where it can be forgotten or lost.

- Visibility is improved. Tracking can allow a staff member to instantly check the status/progress of an asset. A workflow process allows the key people to see the critical processes at every point, identifying problems and bottlenecks, and to monitor end-to-end performance throughout.
- Workflows create a record of what occurs in the system. An audit trail shows who did what action, and when. This allows for analysis for improvements, as well as audit reports where needed or regulated.

Combined, these benefits can add up to large financial savings through gained efficiencies and improved quality of the asset output.

# 01

## DAM WORKFLOW: THE BASIC QUESTIONS TO ASK BEFORE GETTING STARTED

Understanding the parts needed to build something can help make the construction or configuration smoother. There are core components to a successful DAM workflow process that should be considered before actually mapping out the process, here are a few topics to consider:

1

### Asset Repository

Asset Repository: Will there be a single asset repository, or multiple repositories, used at the various stages of the workflow?

2

### Metadata, taxonomy, and keywords

How will metadata be captured? Will there be custom metadata fields to track the assets' status? What common taxonomy or keywords will be used to describe and annotate the assets within the workflow process?

3

### Progress tracking

What stages will be used throughout the workflow process? Which stages are mandatory for all processes? Do workflows need to be auditable? What are the reporting needs?

4

### Files

How will files be shared among users for collaboration?

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### Access

How will users obtain the files – via the DAM system, a dashboard, or a web page? How will they be notified of pending tasks – email, SMS, dashboard at login? Will users need web access to access, edit, upload, or apply metadata? Will any users need mobile access to complete tasks (upload images, approvals, etc.)? What levels of access (author, editor, approver, publisher, legal, etc.) are needed within the process stages? See Table 1: Roles and Responsibilities for suggested role/task alignment.

## MORE ON ROLES AND RESPONSIBILITIES

Defining levels of access should be driven by the role (author, editor, approver, publisher, legal, etc.) not the individuals executing the role. Individuals can be assigned multiple roles if necessary. This simplifies the definition of roles and the enablement of access to multiple team members without having to create individual access models for each workflow participant.

Table 1: Roles and responsibilities

DAM Workflow Capability	Editor	Reviewer	Approver	Publisher	Administrator
View assets	✓	✓	✓	✓	✓
Submit comments	✓	✓	✓	✓	✓
Create, revise, and delete assets	✓	✗	✗	✗	✓
Send files for approval	✓	✗	✗	✗	✓
Approve assets for publication	✗	✗	✓	✗	✓
Revert status of file from pending approval to draft	✓	✗	✓	✗	✓
Revert status of file from approved to draft	✗	✗	✓	✗	✓
Publish content	✗	✗	✗	✓	✓

## METADATA ASSET TYPES



### Workflow ID

Identifies which workflow is applicable for the processing/ approval of the asset.



### Approval status

Indicates where in the approval workflow process the asset currently sits. For example:

- AR = Awaiting Review
- UR = Under Review
- RR = Revisions Required
- AP = Approved



### Publish status

Indicates where in the workflow publishing process the asset currently sits. For example:

- P = Published
- S = Staged
- W = Workflow
- N = No status

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## SETTING UP FOR SUCCESS

You've selected your DAM system. Now it is time to set up its workflow. As with most tasks, setting a path forward with measured steps and checkpoints can help you reach your destination.

DAM workflows are quite typical across organizations and industries. A typical digital asset related workflow has the following steps, or a subset of them:

1. Asset ingestion.
2. Complete metadata fields as required/pertinent.
3. Amend/edit/annotate originals as required.
4. Arrange files per agreed-upon structure.
5. Share asset files with other members within and outside the organization.
6. Archive files.

In addition to the above workflow stages, some DAM systems enable users to track a digital asset from ideation through the creative review process, and then through its use and eventual archiving. This guide focuses on the standard steps noted above.

### WORKFLOW SET-UP CHECKLIST

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Map existing processes.

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Brainstorm DAM workflow process flows.

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Identify processes that can be automated via DAM workflow

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Review/document DAM-related processes, manual and automated, in DAM and other systems (i.e., CMS).

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Gather affected DAM stakeholders feedback and requirements.

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Determine user access types, roles, and responsibilities.

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Simplify DAM workflows as much as possible.

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Test workflows for efficacy and logic.

# 03

## STRUCTURING THE WORKFLOWS

The complexity of the workflow depends on the complexity of the task at hand. Regardless of the complexity, each workflow should be structured with consideration to these points:

1. **The goal of the workflow.** What need is it addressing?
2. **The necessary tasks.** Keep the workflow as simple as possible; steps can always be added if necessary.
3. **The roles involved.** Don't think about the people individually, but about what roles need to be engaged in the process. This will keep the workflows relevant through any staff changes and company reorganizations.
4. **Can users assign tasks or will this be dictated up front by the rules of the workflow?** In the case of manually assigned tasks, primary and back-up task assigners should be accounted for to ensure coverage in case of time off, departures, or reassignments. Back-up for assignees should also be defined.
5. **What will be automated?** Which tasks will be automated (renditions, publishing to external channels/systems, etc.), and which will require user intervention (review, approval)?
6. **What other workflow systems are available?** Looking to existing processes can be helpful in streamlining the DAM workflow process. Leverage existing workflows where it makes sense, but consider the benefits of managing digital asset related tasks (reviews, versions, approvals, etc.) within the DAM system before using or integrating external workflow functionality into the DAM.

Following these best practices and reviewing the workflows periodically will allow you to more easily adapt and evolve the processes as the affected teams' needs change, and as your DAM capabilities and requirements mature.

## BALANCE IS CRITICAL TO SUCCESSFUL WORKFLOW

Workflow is meant to create efficiencies and prevent bottlenecks. This requires a delicate balance between ensuring that controls are adequate and not making them so restrictive that people abandon the automated process mid-task. If controls are too onerous, users will simply go back to maintaining personal asset silos and emailing each other files. Once this happens, they are unlikely to return to the workflow system for their asset production and management. Alternatively, if there are not adequate checks and balances and the workflow is overly simplified, assets may be incorrectly approved (i.e.: too soon), costing the company money and brand reputation. These types of scenarios, as well as ad hoc situations, need to be evaluated and risks/opportunities assessed.

Following are three examples of a DAM workflow process: simple, moderately complex, and extremely complex.

- **Simple: Ingest, review, and approve flows.**

Use case: A new licensed image is acquired and needs to be catalogued into the DAM system with all relevant metadata attached to the file.

- **Moderate: Multiple steps, with multiple contributors, and perhaps a required audit trail.**

Use case: An insurance company is developing a philanthropic promotional advertisement that includes its logo as well as branding from the charity and other supporting agencies. Reporting on the process is requested for bill-back purposes.

- **Complex: Multi-step, interdependent, cross-functional, cross-firewall, consensus-based paths.**

Use case: A multifaceted, brand-based campaign is being developed by a blended agency and internal team that will produce multiple media-type outputs (image, video, banners, etc.) using original, existing, and licensed assets.

## WORKFLOW ROLES AND RESPONSIBILITIES

Individuals may be assigned to multiple roles.

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**Editor:** Creates new assets, edits and deletes existing assets.

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**Reviewer:** Reviews assets under development/revision. Provides feedback and commentary.

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**Approver:** Approves assets for publication.

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**Publisher:** Publishes approved assets.

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**Administrator:** Oversees DAM systems, periodically reviews workflow processes for efficiency and effectiveness. Makes recommendations for improvement.

The diagram below provides a maturation guide to getting workflow implemented and established:

**STAGE 1: MANUAL**

- No real standardization.
- Assets managed in silos.
- No automated processes or tracking.
- No process documentation.

**STAGE 2: TACTICAL**

- Basic asset management processes documented and standardized.
- Informal, simple, workflows being used.

**STAGE 3: AWARE**

- Formal (simple, and some moderate) workflows established and documented.
- Workflow roles defined.
- Basic workflow metadata captured

**STAGE 4: ENABLED**

- Automated workflows in place.
- Complex workflow processes established
- Workflows incorporate multiple systems and resources (internal and external).

**STAGE 5: SYSTEMATIZED**

- Workflows are regularly monitored and refined for optimization.
- Workflows established and standardized across all DAM user groups.
- Regular performance measurement and action taking place.

**NEXT STEPS**

- Audit processes
- Document necessary workflows
- Identify key workflow roles
- Look to other systems for existing workflows to link into or use as best practice.

- Refine workflows and implement some automation
- Formalize DAM workflow roles

- Automate where it makes sense.
- Implement end-to-end workflows
- Integrate DAM workflow with other systems/repositories

- Automated workflows in place.
- Complex workflow processes established
- Workflow training part of DAM onboarding.
- Set up DAM monitoring and analytics processes.

# 04

## MAKING THE MOST OF WORKFLOW FOR YOUR DIGITAL ASSETS

### EFFECTIVE AND EFFICIENT = SIMPLE AND STREAMLINED

If you have never developed or used a workflow before, take your time. Start by implementing workflows for basic processes (content ingestion, approval, archiving), before moving on to full or automated process flows. Reviewing and revising workflows as you augment their capability and automation will help establish workflow processes as a standard part of your DAM system's use. Efficient workflows will make employees' jobs easier, and in turn will increase their use of the tool. Instituting standards and creating measurable performance indicators will help track gains in efficiency and enable continuous improvements and evolution of the workflow processes' effectiveness.

### MAKING THE MOST OF THE OUT-OF-THE-BOX WORKFLOW FUNCTIONALITY

Using the out-of-the-box (OOB) workflow tools – that is, the functionality that comes with the DAM solution and that business users can easily configure (read: drag and drop) without IT help – will help ensure that the workflow processes are tailored to meet the business need, not the other way around. If every minor change requires technical support such that business users cannot test and refine the process themselves as needed, the DAM workflow processes will likely be discarded for other tools or, even more likely, users will revert to their manual processes and local storage. Both scenarios would drastically deplete the value of the DAM solution and negatively impact the efficiency with which digital assets are managed.

## AUTOMATE WHERE POSSIBLE AND WHERE IT MAKES SENSE

Many DAM systems allow users to update and automatically track changes to specific custom fields and keywords, so users can efficiently locate files that are routed to them via specific status settings. Limiting each field's nomenclature to a predefined list allows consistency in workflow tracking and ensures that files aren't misplaced.

The table below gives examples of metadata that may be automatically assigned to a digital asset as a result of an automated workflow.

Custom Field	Licensing Usage	Routing
Items in the predefined list	<ul style="list-style-type: none"><li>■ Royalty-free</li><li>■ Restricted</li><li>■ Print and web</li><li>■ Print only</li><li>■ Web only</li><li>■ Licensing renewal required</li><li>■ Internal use only</li></ul>	<ul style="list-style-type: none"><li>■ Copywriter</li><li>■ Art director</li><li>■ Manager</li><li>■ Web designer</li><li>■ Quality Assurance</li><li>■ Archivist</li></ul>

## OPTIMIZING WORKFLOW CHECKLIST

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Maximize the use of OOB workflow functionality.

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Train users on OOB workflow functionality.

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Establish a plan (governance) for regularly reviewing workflow processes.

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Check workflow roles for alignment with the tasks being executed.

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Automate workflow processes where possible and logical.

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Set up DAM metadata to align with other systems and track asset-workflow-related status.

# DAM WORKFLOW BEST PRACTICES

Developing strategic and logical workflow processes takes time and consideration. Here are a few tips to keep all that hard work paying off:

- Take the time to gather workflow-related requirements. Ideally, this is done during selection of the DAM solution to ensure that the chosen technology has the required workflow capabilities.
- Set up workflows to facilitate, or automate, the creation, ingestion, management, distribution, and archiving of digital assets.
- Automate with business rules and metadata where possible, and where it makes sense.
- Set up your metadata to include workflow status of assets. See the [“6-Step Guide to Metadata Success”](#) for more related metadata recommendations.
- Establish a DAM governance model to support and develop the standards, glossary, roles, responsibilities, and workflow processes needed.
- Review and revise workflow processes as the company’s needs and user base matures.
- When selecting a solution, ensure that business users can (mostly) manage the workflow processes with OOB functionality.
- Use OOB workflow functionality as much as possible.
- Train users with the proper permissions on how to use the workflow functionality – set-up, testing, monitoring, dashboards, reporting – within the DAM.

## KEY TASK CHECKLIST

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Select a DAM solution that enables business-user configuration, testing, and evolution of workflow processes’ OOB functionality.

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Consult with current and potential DAM system stakeholders, including external resources.

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Align DAM workflow metadata with company metadata standards.

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Simplify and automate workflow steps where possible and where it makes sense.

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Enact a governance structure to help actively manage, improve, and mature DAM workflow processes.

# ABOUT DIGITAL CLARITY GROUP

Digital Clarity Group is a research-based advisory firm focused on the content, technologies, and practices that drive world-class customer experience. Global organizations depend on our insight, reports, and consulting services to help them turn digital disruption into digital advantage. As analysts, we cover the customer experience management (CEM) footprint – those organizational capabilities and competencies that impact the experience delivered to customers and prospects. In our view, the CEM footprint overlays content management, marketing automation, e-commerce, social media management, collaboration, customer relationship management, localization, and search. As consultants, we believe that education and advice leading to successful CEM is only possible by actively engaging with all participants in the CEM solutions ecosystem. In keeping with this philosophy, we work with enterprise adopters of CEM solutions, technology vendors that develop and market CEM systems and tools, and service providers who implement solutions, including systems integrators and digital agencies.

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