

# Digital Asset Management Implementation Playbook

A best practice guide to help organizations prepare for a successful DAM implementation



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## Introduction

Thanks to cloud-based technologies, digital asset management (DAM) system implementations are becoming less tedious and time-consuming than in the past. That said, before you start down the path to implementation, it's helpful to know what to expect from any DAM implementation project, including how your vendor can support you.

The best practices in this playbook outline the key things you should expect from a DAM system vendor and what you can do to ensure everything goes smoothly before, during, and after implementation.

Overview

# What to expect with implementation

Understanding a vendor's implementation process before committing to a DAM system purchase is important. The DAM vendor should have an established process that they can coach you through as you're getting started.



## Key stages of a DAM system implementation

Your DAM implementation will span five stages: planning; foundation; assets and metadata; branding and user experience; and go-live and onboarding. These stages will take you through milestones you need to complete for a successful implementation. When shopping for a DAM system, ask potential vendors how they're able to support you through each of the five implementation stages. Vendors should provide you with educational sessions, support materials, and exercises around key topics that will make your implementation a success.

1. Planning	2. Foundation	3. Assets and metadata	4. Branding and user experience	5. Go-live and onboarding
Site and launch goals	Comprehensive overview of DAM site	Uploading digital assets	Dashboards	Testing
Team roles and responsibilities	Governance and security	Metadata tagging, editing, and importing	Site branding	User onboarding and training
Implementation process and expectations	Search and upload structure	Asset engagement (e.g., search, order, share, embed, publish)	User management	Communication plan and launch
Milestones and timelines	Site configuration		Portals	Post-launch success plan

### **Implementation is a team effort**

While you and your vendor both play a critical role in driving the success of your implementation, the vendor should provide you with direct access to an implementation expert who will guide you through the process of system setup and launch. After launch, full-service DAM vendors should then transition you from a short-term implementation expert to an ongoing account manager who serves as the point person for your organization's long-term customer experience.

### **Implementation is not a solo endeavor**

"I've learned that proper delegation will actually get you across the finish line a lot faster and a lot better than if you try to do it all yourself."

#### **Mike Michonski**

National Production Director  
Total Traffic & Weather Network



Before

# Planning for implementation

Planning is an important part of your DAM system implementation. It can mean the difference between a long, arduous launch and one that is clearly executed and optimized.



## Setting DAM goals for your organization

Organizations invest in a DAM system for a number of reasons, but their motivations aren't as different as you might think. There are some common goals — or desired outcomes — that organizations want to achieve through a DAM system investment. When choosing and setting up your system, ensure you're accounting for the goals you want to achieve.

### Value is a journey

It's important to realize that value is a journey and it's not realistic to achieve all desired outcomes simultaneously — and you may never need to achieve all of them. But all DAM system activations start with the first goal on our list — organizing content in one system. After this, organizations introduce other objectives in varying combinations and phases.

Most organizations begin with a few objectives that are most foundational to their DAM success, and then eventually move onto more advanced goals, including those that require the activation of both DAM and product information management (PIM) capabilities.

### Tips and tricks

While you may have a general understanding of the desired objectives you are expected to reach with DAM, it's a good idea to document them at the start of your DAM journey. This ensures that everyone can reference, work toward, and measure success against the same goals.

## Typical goals for a DAM system investment

**Organize content in one system** where team members and external partners can find exactly what they need.

**Create an integrated martech stack** so that content is available wherever it's needed.

**Consolidate redundant tools** for content storage, file sharing, and collaboration into one system for all team members.

**Ensure brand consistency** by aligning all content creators and communicators to published brand guidelines and standards.

**Publish brand-approved content** for team members and external partners to use.

**Repurpose the best-performing content** to save time and valuable resources.

**Monitor content effectiveness** by understanding where and why teammates publish content and measure how well it engages intended audiences.

**Minimize the risk** of content rights and usage violations.

**Streamline workflows** for sharing proofs, collecting feedback, and getting approvals from each reviewer.

**Launch products faster** by simplifying the way e-commerce product listings are assembled and distributed.

**Expand into new e-commerce channels** while meeting the organization's unique requirements for product data and content.



### Identifying your unique DAM system needs

A DAM system is configured to meet your unique needs as an organization. Knowing who will use your DAM system and what assets they need to access will help you facilitate the best setup and user experience possible.

### Who will use your DAM system?

The primary users of your system have different needs. Once you know who they are, you can plan for their requirements and workflows as you go through system setup and implementation.

## Common user groups

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### Creators

Photographers  
Videographers  
Graphic designers

The people who create new assets or modify existing ones, upload and download assets, and enter metadata.

### Contributors

Marketing managers  
Brand managers  
Coordinators  
Assistants

The people who upload, review, or organize assets, and enter metadata.

### Consumers

Creators and contributors  
Sales  
Public relations teams  
Marketers

The people who search, download, share, embed, and publish assets.

**Who will spend a lot of time looking for, downloading, and sharing your assets?** During the planning stage of implementation, identify your creators, contributors, and consumers — both inside and outside of your organization. Then, interview or survey them to determine how to provide each group with the most helpful DAM experience.

### Determining the assets that should go in the DAM system

Assessing what assets you currently have and want to put in your DAM system will help guide your site structure, metadata strategy, and asset allocation (active versus archived assets).

**You most likely have a mix of asset types to add or migrate, including:**

**Images:** Illustrations, photos, and artwork

**Data visuals:** Charts, graphs, and diagrams

**Logos:** Corporate branding files, product logos, and brand logos

**Documents:** Excel, PowerPoint, Word, and PDF files

**Design files:** InDesign, Illustrator, and Photoshop files

**Video and audio clips:** Edited and unedited footage

**Scanned or digitized analog assets:** Images of print news clippings, photos, and packaging

**Other assets:** Compressed archives (like ZIP files), CAD files, landing pages, and animations

The DAM vendor you select should be able to provide you with a comprehensive list of best practices to guide your asset migration process and help you identify which assets belong in your DAM system. While not an exhaustive list, here are a few examples of strategies to keep in mind:

#### Are your assets hiding?

In order to migrate your assets, you need to know where they are.

To find them, be sure to check these common hiding spots:

Shared servers (the most common location)

FTP and intranet sites

External hard drives or employee computers

Cloud-based storage and distribution tools like Dropbox or Box

CDs and DVDs

Storage boxes with analog assets that need to be digitized or scanned for upload

**Stick to hi-res:** Only add final, high-resolution assets to your DAM system, rather than low-resolution or in-progress assets. This ensures that only high-quality, final assets are leveraged throughout your organization.

**Dedupe assets:** When gathering your assets, you may find that the same file exists in multiple places. Dedupe your assets before migrating them into the DAM system. If you can't do this easily, ask your DAM vendor if they can do it for you.

**Account for file conversions:** DAM systems automatically render or transform assets into new file types at ingestion. Ask your vendor which automatic file conversions are available in the system and only upload the necessary file types.

**Remember design files:** Designers often want access to a ZIP file containing all of the assets that went into a particular design deliverable (e.g., fonts, a PDF preview, linked files). In addition to the final asset you upload for non-designers, make sure to also upload packaged ZIP files for your designers so they have all related assets in one place.

### Start simple and build from there

When you're in the thick of planning for implementation, it's easy to overthink how to organize and identify which assets belong in your DAM system. But this process doesn't have to be complicated. Do your homework. Learn how different users interact with assets, and then simplify how you can best meet their needs. In the end, you need a system that's easy for both admins and users to manage and maneuver, so start with a simple approach and evolve from there.

“Keep it really simple to manage, simple to understand. Then, you can add on complexity after that.”

#### Richard Carlson

DAM system admin at Behr Paint Company

## Establishing your DAM implementation team

In addition to having the support of a vendor implementation expert, you need to establish your own implementation arm of the team. Identify three to five core people who are responsible for making the system a success within your organization. And remember, just because someone is involved in vetting and selecting your DAM system doesn't mean they belong on the implementation team. Instead, seek out people who will be hands-on and engaged during the day-to-day work that comes with an implementation.

### Sample implementation team

#### Vendor lead

Vendor implementation expert who guides the setup and launch process from start to end

#### Power users

Representatives from different teams throughout your organization who inform the DAM system experience

#### Champion

DAM advocate who generates excitement and rallies internal support throughout implementation and beyond

#### Administrator

Dedicated admin who owns and manages the system before, during, and after implementation

**Does IT need a seat at the implementation table?** If you plan to integrate other tools and systems with your DAM solution, you may want to include a technical lead on your implementation team.

#### How much time and staffing should go into DAM administration?

Resource recommendations vary by company size.

**Large enterprise:** one to two full-time admins

**Enterprise:** one full-time admin

**Mid-market:** one part-time admin (about two days per week or 50-60% of their time)

**Small-to-midsized:** one part-time admin (about two days per week or 30-40% of their time)

#### DAM system admin

A DAM system admin plays a critical role in driving the ongoing long-term success of your DAM strategy and solution. If you decide to make the investment in a DAM system, you absolutely need an admin to manage and maintain the system, engage users, help you reach your desired goals, and keep the organization focused on the benefits of DAM. A DAM solution is an investment — and a dedicated admin is the best way to get the most value out of your purchase.

During

# Key components of the implementation process

Now that you have an understanding of what goes into the planning phase of implementation, it's time to discuss the actual implementation. Here's what your team can expect.



## Site structure and configuration

As you're probably realizing, you don't just turn a DAM system on and start using it. Rather, you and your vendor need to work together to structure and configure your DAM site to accomplish your goals and meet the unique needs of your organization.

### Tips and tricks

Ask your vendor about their approach to training and education. The right vendor won't just show you what to do; they will give you the background and ongoing strategic insights to empower you and your team to make smart decisions about your DAM system well after your implementation is complete.

### Examples of feature sets to structure and configure

- User roles and permissions
- Search structure and metadata
- Security groups
- Upload profiles
- Conversion formats
- Dashboard messages and site branding
- Links to top searches and collections

Although features like the above are embedded functionality in many DAM systems, configuring them to meet your specific needs requires effort. Because of this, you must understand the role your DAM vendor will play in this process. What kind of education and training will they provide? Do they simply show you your options, or do they coach you through the entire decision-making process? Can the vendor complete your site configurations for you, or is this your responsibility? Furthermore, what level of support does the vendor offer weeks, months, and years after your implementation is complete?

Asking the right questions will ensure you get the level of service you need to confirm your system is set up optimally, easy to maintain, and flexible enough to meet your changing business needs down the road.





“If anybody is thinking about implementing a DAM [solution], they really need to have an ongoing plan for maintenance, metadata control, asset control, [and] user engagement — or else it will just be a failed piece of technology.”

**DAM system admin**  
Autodesk

## Governance

Governance is the guiding information that prevents your site from becoming a messy dumping ground full of outdated, hard-to-find content. It’s the driving force that ensures users can securely access the exact assets they need — no more, no less.

A great way to get site governance right is by creating a governance document. A governance document is the guidebook for your DAM system. It establishes consistency and outlines the processes and rules for how admins should manage the system and how internal and external stakeholders should use it.

## What to include in your governance document?

### User roles and permissions

Every system user gets a secure login, which authenticates them to a role and a set of permissions. Your governance document should define who has what level of access to which assets and how they can interact with them.

#### Determine who can:

- Upload, download, and share assets
- Add or edit metadata
- Convert assets to different formats before accessing them
- Embed assets or share links
- Build ads or collateral from system templates

### Metadata

Metadata is the language of the DAM system and the reason users can find the assets they're searching for. Your governance document should outline how you expect metadata to be handled and the rules you will use to keep it accurate and consistent.

#### Set rules around:

- File-naming conventions
- Processes for uploading and tagging assets
- Which metadata types to use (e.g., keywords, descriptions, asset type, source, rights management information)
- Controlled vocabularies and fields (e.g., dropdowns, autocompleter lists) to keep spelling and terminology consistent

### Rights management

Certain assets may require special management or protection to prevent licensing agreement or copyright violations. Your governance document should outline the procedures and features needed to ensure compliance.

#### Consider using:

- Roles and permissions to restrict asset usage to user groups
- Metadata fields to tag and group assets by rights data
- Watermarks to prevent unauthorized screen captures
- Document attachments to append usage information to assets
- Prompts that require users to identify how they plan to use an asset prior to receiving access
- End-user license agreements to communicate and get user buy-in on policies and usage terms

### Regular meetings to stay on track

During the planning stage of implementation, you and your vendor will lay out the major milestones and associated deadlines you will work toward during implementation. Once implementation is underway, plan for regular status calls to keep your milestones in view and your progress on track.

You will know your implementation is complete when you've completed every milestone you and your vendor established.

### Typical implementation milestones

- Assets located and collected
- Naming conventions defined
- System structure configured
- Assets uploaded
- Assets tagged with metadata
- Site branded
- User accounts created
- Admin and general user training complete
- System launched to a beta group (if using)
- System launched to all users

### Getting the most out of implementation meetings

While your vendor team should be on time, responsive, and prepared to address questions, you must also be prepared. Make sure your team:

- Attends all required implementation meetings
- Comes prepared to each session
- Completes homework that been assigned between sessions
- Has questions ready for the vendor team

## Training

Effective training is the catalyst that drives a strong ROI for your DAM system. Make sure a vendor’s training is comprehensive and that their training style and resources will set you up for long-term success.

### Tips and tricks

All vendors approach training differently. Some may conduct training throughout the entire implementation process, others may take a “train the trainer” approach, and some will save training for the end of implementation. Ask your vendor what kind of training you will receive. Also, confirm exactly what kind of training is included in your subscription and what is above and beyond so you can budget accordingly.

### Vendors use a combination of different training tactics, including:

- Live webinars led by a vendor account representative or onboarding coach
- Recorded training videos
- In-person training sessions
- Online training modules
- Online knowledge base of how-to articles
- Customer discussion forums (usually for admins and strategic contacts)

Training will look different for each of your user groups depending on the roles and permissions established in your governance document. Your system admin will need the most comprehensive training because they will oversee the entire system. Based on what other user groups need to do in the system, you and your vendor can determine what they need to learn — whether that’s how to search, download, embed, publish, share, upload, or tag assets.

• **Effective Training** >

• **User Engagement** >

• **Site Use** >

• **Strong DAM ROI**

## Site launch

When it's finally time to roll your site out to users, you'll want to approach your launch with the same thoughtfulness and strategic mindset as you took in the steps leading up to this point. Depending on your business goals for DAM, you'll likely take one of three launch paths.

1. Soft launch to a small pilot group before rolling the site out to all users
2. Phased launch to multiple staggered groups of users over the course of several months
3. Hard launch to all users at once

### Signs to determine which launch path is right for you:

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#### 1. Soft launch

You prefer to test drive your site and make updates before opening it to all users.

You do not have an urgent business need to launch the site and can allow four to 12 weeks for pilot testing.

You have five to six power users from different teams (e.g, marketing, creative, IT) who can commit to testing assignments and providing detailed feedback.

#### 2. Phased launch

You prefer to test drive your site and make updates before opening it up to all users.

You have a group of users who need access to the DAM site before others. This is common with a rebrand where marketing teams need earlier access to new assets.

Onboarding and training your users feels overwhelming and you want to manage the process in a more controlled, phased manner.

#### 3. Hard launch

You have a strong business need to get assets under control as soon as humanly possible.

You have an event, like a campaign or all-company meeting, that your DAM site needs to be ready for.

You have an experienced admin who is prepared to manage a more complex launch.

You and your assets are organized and you have people and time to dedicate to the core components of a site launch.

#### Tips and tricks

Regardless of the launch path you choose, you should create a communication plan to announce your new DAM system to stakeholders. This plan should include messaging that highlights the benefits of DAM to each user group, as well as promotional tactics to drive user adoption and excitement.

After

## Keeping your DAM system functional and usable

Once your DAM site is up and running, you will need to care for it through continual site maintenance, audits, user training, and engagement initiatives. With the right attention, you can set yourself up to meet your DAM goals year after year.



## Ongoing site maintenance

Continual and consistent maintenance will help keep your DAM system clean and your user base happy and engaged. A set schedule outlining weekly, monthly, quarterly, and annual admin duties is one way to make site maintenance more manageable. And remember, it's also helpful to include user or stakeholder engagement opportunities in the schedule.

### Sample maintenance schedule

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#### Weekly

Check uploads for empty or incomplete metadata fields and duplicate files.

Assign assets to categories and/or collections.

Delete conflicting and/or redundant assets.

Watch upload/download activity to understand who is doing what.

Address login requests and unapproved orders.

Review and resolve pending support tickets.

Monitor DAM system alerts and fix areas of concern.

**User engagement opportunity:** Watch user activity to identify user training topics.

#### Monthly

Review and delete inactive users.

Review and update user roles for unauthorized users.

Review expired assets.

Improve site usage by sharing tips, content highlights, and new capabilities with users.

Review site analytics for optimization opportunities.

**User engagement opportunity:** Provide leadership teams with data highlights, including user stats, that prove the ROI of the DAM site.

#### Quarterly

Review permissions and security groups.

Delete or expire irrelevant assets and collections.

Make site updates to keep the login page, portals, and landing pages fresh and exciting for users.

**User engagement opportunity:** Solicit user feedback with a survey, meeting, or casual conversation.

#### Annually

Review site policies and ensure your governance document is up to date.

**User engagement opportunity:** Have a party to celebrate your DAM wins and users.

#### Tips and tricks

Use the analytics available in the DAM system to monitor usage data. Knowing which assets users prefer can inform maintenance decisions and focus admin clean-up efforts on the most critical areas.



### Tips and tricks

While a full site audit is incredibly beneficial, it's not always possible to conduct one all at once. Tackling an audit in stages can make it feel more manageable. One way to do this is to start with one asset type or section of the site before moving on to the next.

## Site audit and refresh

If the DAM system starts to feel messy or cluttered, a cleanup might be in order. A site audit is a larger endeavor than maintenance tasks and aims to make the DAM system operate more effectively.

The best way to start an audit is to identify the issues you need to tackle. By doing so, you can better inform the direction of your audit and measure your success after it's completed.

### Common DAM issues:

- Users can't find what they need.
- Users are downloading outdated or off-brand assets.
- Unaccessed user seats are inflating subscription costs.
- Contributors are confused with how to tag or categorize assets.
- New brand guidelines need to be incorporated.
- A new department is looking to use the DAM system.
- The site is simply due for a full inspection!

### Whatever the reason, an audit will encompass a variety of tasks related to:

**Asset analysis:** An inspection of every asset or a group of assets to identify metadata changes and which assets should be archived or deleted. As you might guess, this can be a time-consuming task.

**Site structure:** A high-level inspection to determine if current categories still make sense for users and to evaluate the intuitiveness, simplicity, and organizational alignment of the site's structure.

**Security:** A full security inspection that looks at the relevancy and necessity of roles and asset groups and ensures users have access to only the assets they should. Setting up a test user to review permission settings and confirm all is working as expected is helpful.

### **Continued training and user engagement**

Training and engaging users isn't a one-and-done endeavor. As your user base grows and new system features, capabilities, and enhancements become available, you'll need to train users and continue to show them the value of adopting different aspects of the DAM site. Plus, nobody will remember how to do everything perfectly the first time. Retraining, reminding, repositioning, and continually adopting new ways to train and keep users engaged are a huge part of making the DAM system a success.

### **Look to the super users**

Who are the rockstars of your user base? These are the individuals leveraging the system more than anyone else to upload, download, search for assets, and more. Ask them for feedback on how to make the site better and even consult them for ideas on how to engage other user groups. Then, turn your super users into DAM advocates and influencers, so they can spread the good word about the benefits of DAM and all it has to offer. Sometimes, regular recognition and praise is enough to motivate your super users to help you boost adoption.

### **Follow the data**

Review site analytics to better understand how users are engaging with the DAM system to better determine where to focus engagement and training efforts. For example, if user activity is particularly low in a certain region, you can increase training and engagement efforts in that location. Or, if certain user groups aren't sharing or publishing certain asset types, you can find out why. There will always be areas to boost engagement and training; figuring out where to focus efforts is critical.

### **Stir up enthusiasm**

While there may be a lot of enthusiasm about the DAM system in its early days, it takes work to keep that energy flowing. You must keep users interested and excited from day one. Celebrate the wins (even the little ones). Make sure people feel heard and recognized for their DAM achievements. And find fun ways to promote and communicate the value of DAM. If learning about DAM is a good time and people see how it can make their jobs easier, adoption and site engagement will follow.

### **Creative ideas to train and engage users**

- Site scavenger hunts and games
- Contests and rewards for power users and system advocates
- Casual drop-in DAM sessions
- Parties, high-fives, and pizza to celebrate milestones and successes
- A clever name for your DAM site
- Team-building excursions and activities
- Lunch and learns
- Short and clever videos with quick DAM system tips or tricks
- A weekly or monthly DAM newsletter

## Conclusion

Although no two DAM implementations are the same, they all require teamwork. We hope the proven strategies and best practices outlined in this playbook will help you identify the right DAM partner for your business and support you before, during, and after implementation. If you need anything, don't hesitate to [reach out to our team](#) at Acquia for guidance, tools, or resources to help maximize the value of your DAM investment.

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