WoodWing

Checklist: **choosing and implementing a DAM solution**

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Choosing a DAM is an exciting first step towards the digital transformation of your asset management.

Correctly implemented and managed, a DAM will turn chaos into control, paving the way for enhanced collaboration, productivity, and brand consistency.

Implementing your DAM should be a fast and efficient process; usually completed in under 12 weeks.

Your software vendor - or their approved implementation partner - will lead the process. But you'll need to provide guidance on your needs, as well as manage the project internally.

Here's a checklist of things you'll need to consider and do when choosing and implementing a DAM solution.

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1

Selecting your DAM

Consult the right people - and ask the right questions - to ensure you choose the most suitable DAM solution for your business needs.

- ☐ Speak to your IT department to discuss viability, technical requirements, and available support
- ☐ Identify your product requirements - consider conducting a MoSCoW analysis of different user needs
- ☐ Research solutions, considering:
  - ☐ **Functionality** - does it meet the needs of your MoSCoW analysis?
  - ☐ **Ease of use** - intuitive software makes user adoption easier
  - ☐ **Integrations** - can it integrate with the rest of your software stack if needed?
  - ☐ **Cost** - make sure the cost aligned to your business needs
  - ☐ **Storage and scalability** - does it have capacity for your current and future needs?
  - ☐ **Security** - how will it protect your digital assets?
  - ☐ **Implementation support** - some vendors offer different levels of support
  - ☐ **Ongoing support** - how much help's included in your license agreement?
- ☐ Do demos of your shortlisted solutions

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Project planning

Once you've selected your DAM, it's useful to create an implementation plan.

- ☐ Identify a project team - ideally comprising representatives from any team that will use the DAM, as well as your IT department
- ☐ Create a project plan covering all stages, from product research to ongoing maintenance (remember that the project doesn't end with implementation - think now about how you'll onboard users, maximize user adoption, and maintain the system)
- ☐ Consider how, when and what you'll communicate about the project (see Section 4)

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Preparing for implementation

In consultation with your software vendor, think about:

- ☐ **User groups and permission levels** - Who can access the system? What do you want people to be able to do – eg upload, download, view, edit?
- ☐ **File structure and taxonomy** - How do you want to categorize assets so that they can be found easily through browsing?
- ☐ **Keywords** - What keywords will help users find assets through search?
- ☐ **Metadata** - What metadata do assets need to include so people have all the information they need about them? Will these be different for different file types?
- ☐ **Workflows** - Do you need to build any specific workflows – eg to approve uploaded assets?
- ☐ **Templates and crops** - Do you require bespoke templates or download options – eg specific crops for social media?
- ☐ **Integrations** - Do you need to integrate your DAM with other software? How will this be managed?
- ☐ **Initial upload** - What criteria will you use to decide which assets to upload to your DAM initially? How will you locate and get access to those assets?

4

Communicating about your DAM

Keep colleagues in the loop about what you're doing and why. It'll help them prepare for change and lay the foundations for successful onboarding.

- ☐ Think about communication as part of your project plan
- ☐ Consider what people need to know and when - this will depend on the scale of your rollout
- ☐ Consider working with your internal communications team - if you have one - to create an effective communication plan
- ☐ Gain senior buy-in for the concept - they can advocate for the system and cascade important information
- ☐ Identify project champions and challengers - use an influence/interest matrix to decide who to engage with most closely
- ☐ Invite feedback, listen to concerns and allay fears - there's nothing to be scared of but people can be naturally resistant to change

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Onboarding and user adoption

To achieve your desired outcomes and ROI, you need staff to use the system. A user adoption plan is essential.

- ☐ Think about onboarding and user adoption as part of your project plan
- ☐ Decide whether you'll roll out the system to all staff or selected teams initially
- ☐ Consider how you'll onboard colleagues: in-person training, from you or your software vendor; online tutorials; written help documents; phone, email, or chat support...
- ☐ Think about ways to incentivize user adoption - such as gamification
- ☐ Plan for onboarding future staff - for example, including training in staff induction

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Ongoing maintenance

Like a puppy, DAM is for life. You can't just 'set it and forget it'. Maintain your DAM to see maximum efficiency and ROI.

- ☐ Appoint an 'owner' for your DAM - someone who is responsible for its ongoing maintenance and development - otherwise it can easily get neglected
- ☐ Consider whether your DAM is large enough to require a full-time digital asset librarian - this may be the case in large organizations
- ☐ Retire and archive older assets at agreed intervals - this can be automated
- ☐ Keep user lists up-to-date to prevent unauthorized access by former staff or contractors
- ☐ Update the system when prompted to do so by the vendor - this ensures your DAM stays secure and functions at the optimal level
- ☐ Stay alert to opportunities for further integrations and automations

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