



io integration, inc.

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getting started with digital  
asset management and  
creative workflow solutions

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# how to select and implement effective, profitable systems for your organization

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## *executive summary*

If you work in an advertising or design agency, a corporate marketing organization, or a printing or publishing firm, you may be thinking about adopting workflow management technologies to help your team boost productivity, reduce overhead, and mitigate business risk. The most effective of these solutions deliver tremendous efficiencies that can directly benefit your bottom line, reduce time to market, and help ensure output quality by facilitating strict control of brand usage. At the same time, because they represent a substantial investment, they need to deliver maximum ROI. But how should you go about selecting the right technologies for the unique needs of your organization, and how will you effectively integrate them into your workflow?

## leading creative workflow solutions: an overview

Key workflow solutions for creative professionals include digital asset management (DAM), workflow automation, remote proofing, web-to-print publishing and digital capture.

DAM systems offer a centralized location in which you can efficiently store, organize, manage, access and distribute files such as images, layouts, PDF files, and video clips. By giving team members quick, easy access to files anytime and from anywhere in the world, DAM systems help staff focus on core creative work instead of time-intensive, costly file searches and re-creation of missing assets. (It is estimated that the typical end user in a creative organization spends 15.5 days out of 200 searching for files, and it can cost a company up to \$400,000 each year to re-create lost assets.<sup>1</sup>) DAM systems also save time and money by eliminating the need to post files to multiple locations or deliver them via FTP, discs or drives — and they eliminate the costly same file exist in multiple places. DAM systems offer numerous additional benefits, as well, including the ability to create secure, private web portal sites customized for specific clients, partners, or teams. Above all, a robust DAM solution should offer benefits that span the entire content life cycle, from creation to management, distribution to storage and disaster recovery.

- Workflow automation solutions enable you to streamline the creation of a variety of file types and automate your production workflow processes. That means you can replace manual, multi-step processes for checking document integrity, converting files, distributing files, and other common jobs with workflows that save manpower and help ensure timely, accurate output. You can also enable team members to track the flow of projects from start to finish via a web browser and completely automated review, approval, and collaboration cycles. This allows for complete visibility, ensures that no production step is missed, and even facilitates time tracking to help your team manage workloads and measure productivity improvements and time savings.
- Remote proofing systems offer color-accurate, monitor-based proofing. These systems allow collaborators to share, review and mark up color-accurate proofs in real-time or at their convenience, eliminating the time and expense associated with using paper proofs. Web-to-print or multi-channel publishing solutions enable your organization to produce professionally designed, targeted publications more efficiently than ever before. Make documents available online as

<sup>1</sup> Ron Roszkiewicz. (2006). *Assessing the Value of DAM Systems for Advertising Agencies*. Retrieved from [http://roguebutterfly.com/documents/Adv\\_ROI\\_white\\_paper.pdf](http://roguebutterfly.com/documents/Adv_ROI_white_paper.pdf).





templates, and allow them to be dynamically altered in a controlled environment. The best systems also enable message delivery across multiple channels such as print, web, video and mobile, while maintaining strict control of key brand elements including logos, imagery and typography.

- Digital capture technology gives photo editors, photographers and art directors a way to more efficiently manage massive libraries of images. With digital capture, you can quickly and securely upload, review and select images. And you can take advantage of powerful metadata search functionality and rights management features that speed up your workflow and protect your creative property.

### *the challenge: implementing the right system*

While each of the above workflow solutions delivers increased productivity, cost savings, and brand control, their variety and complexity present challenges. What type of system will give you the greatest and most immediate benefit? How will a new system fit in with the software tools or workflow solutions you already have in place? Is your hardware platform robust enough to handle new system components?

Perhaps most importantly, you don't want to invest in expensive technology and then find that no one uses it. To avoid internal resistance to adoption, you need to ensure that key employees are effectively trained in the use of your new system so they can champion the technology and its benefits as they train others.

In order to successfully design and implement the most effective system for your organization, you need to identify an integrator who does more than just install software and configure hardware. You need a partner who can advise you throughout the process, from needs-assessment to purchase, implementation to ongoing support. Your system integrator must:

- Fully understand the day-to-day workflows and requirements of creative teams
- Know the technology landscape and be able to advise you on the benefits and limitations of each market offering as well as each solution vendor
- Be expert at implementing proven technology solutions, customizing them to fit your workflow, and demonstrating how to use them to maximum benefit
- Be able to deliver your system on time and within budget

### *integrator experience and methodology: what to look for*

First and foremost, integrators who serve creative professionals should have deep knowledge of their clients' industries as well as their day-to-day workflows and associated pain points. Integrators who have hands-on experience in fields including advertising, graphic design, printing and publishing can better understand the flow of your projects from concept to completion. They are familiar with common process bottlenecks and issues, and they can help you find the right technologies to address them.

Technology expertise is, of course, vital. Good integrators know the entire solution market and every advantage and disadvantage of each system and vendor. They constantly evaluate new technologies for effectiveness and possible fit within different types of organizations. And they communicate with you post-implementation to discover what's working well and what, if any, bottlenecks or weaknesses still exist.

Implementation expertise is also essential. The best integrators have years of experience successfully installing systems for leading ad agencies, marcom departments at Fortune 500 companies, and major commercial printers and publishers. Their partnerships with market-leading solution providers ensure that their technical knowledge is always up to date. And they've received technology certifications and even industry recognition for their work.

But in addition to proven experience designing and customizing world-class workflow systems, your integrator should have a rigorous methodology for working with creative organizations. A successful engagement should begin with a thorough, on-site audit of your current workflow and technology resources. This discovery process will ensure that the integration team fully understands your unique challenges and desired outcomes. During an audit, integration team members should conduct in-depth interviews with key players from creative, IT, and related groups, shadow people at their workstations, and review your LAN setup to discover exactly how different people interact with assets, and how projects progress from department to department.

Next, your integrator should mine the audit data for common themes. Are people in several departments having trouble locating assets, or is there a lack of consistency in corporate branding across regions? The resulting implementation plan should propose technology solutions that address those issues and deliver immediate efficiencies. And since few systems work exactly as desired right out of the box, the plan should detail any system customizations, both of newly purchased systems and of overall system design.





The subsequent system deployment should follow an agreed-upon schedule, and your integrator should work closely with collaborators at your site, provide regular status updates to key team members, and test the new system. You should expect post-implementation training as well as continued support and process improvement to ensure your complete satisfaction.

Finally, integrators should understand and respect budgets and timelines, delivering systems that fit within the frameworks established up front.

### implementation timelines: a general guide

Implementation timelines vary depending on a number of factors related to system complexity and organizational makeup. And it's important to note that even a quick, technically smooth installation is no guarantee that staff will use the system properly — or at all. Internal processes and support must be in place to ensure that the system is used as intended, which is why it's important to choose an integrator who can provide thorough technical training as well as guidance on workflow best practices.

Provided that the effort has the full support of managers, as well as, individual contributors across creative and IT functions. Implementation of a DAM system should take about a week from the time software and hardware components arrive on site.

Once management signs off on a DAM implementation plan, a typical one-month timeline looks something like this:

- Two weeks to receive system components once they've been ordered
- Two days to set up, configure, and test hardware
- One day to deploy and test the new system
- Three days to train system administrators
- Two days to train end users

For custom workflow efficiency solutions that include workflow automation, remote proofing and/or other system components, implementation can take additional months to complete.

### the system integrator: a strategic business partner

By investing wisely in workflow technologies, creative organizations can realize efficiencies, boost innovation, and even take business in previously unimagined directions — all benefits that directly contribute to company success and shareholder value. That's why it's essential to choose the right system integrator. You need a long-term strategic partner who can help you navigate an ever-changing technology landscape

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IO Integration is a leading system integrator and strategic partner to some of the most productive and forward-thinking companies in North America. McGarryBowen, **Advertising Age Magazine's 2010 Agency of the Year**, is one such partner. "IO Integration has gone above and beyond for us," says Connie Savino, the agency's Executive Director of Graphic Services. "They are so much more than sales and service — they are helping support our business visions."

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## integrated workflow and asset management for creative organizations

IO Integration is one of the leading system integrators in the United States, specializing in the Xinet digital asset management solution, iBrams integrated brand management solution, high-end server-based automation, and web-based comprehensive approval and production tools that provide profitable workflow solutions for creative organizations.

For more information about IO Integration, or to discuss workflow technology solutions that can benefit your organization, please, call [408-996-3420](tel:408-996-3420), or visit [www.iointegration.com](http://www.iointegration.com).

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