Original Article

The state of digital asset management: An executive summary of CMS Watch's Digital Asset Management Report

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ABSTRACT CMS Watch's *Digital & Media Asset Management Report* – excerpted here – is a 200+ page guide to digital asset management (DAM), first published in May 2008, and now in its second edition. The report features head-to-head comparisons of over 20 DAM solutions, as well as a comprehensive overview of the business case for DAM and DAM best practices. The foundation of our research was dozens of interviews with everyday users of DAM systems, as well as extensive consultations with industry veterans. To order your full copy of this report, please visit <http://www.cmswatch.com>.

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INTRODUCTION

At CMS Watch, we recently conducted a 6-month research project, which is ongoing, critically evaluating 20 digital asset management (DAM) tools and looking at the overall DAM market. Because we take a *Consumer Reports*-style approach, carrying out extensive interviews with users of the software products, we were able to gain deep insight into how well DAM software is meeting the everyday needs of businesses.

DAM technology has made significant strides in maturity, but it remains a highly fragmented and specialized industry, where many customers are forsaking 'name' players in favor of niche or hosted solutions. DAM vendors generally 'grew up' specializing in a specific area, be it photo library services (useful for museums and traditional publishers), brand asset management (for managing graphics and other brand collateral) or video management/management of time-based assets (vital for broadcasters).

Many buyers of DAM technology pick their vendor based on their area of specialization, and rightly so, as few vendors perform very well in more than one or two scenarios.

It soon became clear to us that a critical evaluation of the DAM market had never really been conducted before. When we first approached vendors about participation, we were often asked how much we 'charged' in order to be a part of the report. But our goal was not to create a piece of marketing fluff or partake in payola; rather, we wanted to provide a truly objective analysis based on customer experience.

We interviewed over 100 users of DAM products and reported their real experience with each system and company. We worked with several DAM industry veterans who informed our analysis, and most vendors were shocked (and sometimes horrified) by our evaluations, simply because it is so clear that many DAM system users, and implementers of enterprise DAM, are not getting their needs met by today's

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DAM solutions. In fact, getting to the end point of successful enterprise DAM involves a heavy amount of work in the area of DAM operations and BPM, and DAM software is really only a small part of the picture.

THE DAM MARKETPLACE AND VENDORS

We break up the marketplace into three tiers, roughly from those that are more complex and appropriate for enterprise-scale implementations, to those that are simpler and more appropriate for workgroup or departmental implementations (and thus usually cheaper). Note that just about every vendor calls themselves an ‘enterprise’ DAM vendor. As we constantly see across the 10 areas of content technology we analyze, this is a term that is relatively meaningless when it comes to understanding what a system can really do. There are large and small enterprises. When we put a vendor in an ‘enterprise’ category, it has been tested in large, Fortune 500-type environments with hundreds of thousands or millions of assets, across multiple geographies.

ENTERPRISE DAM

- Open Text: Artesia DAM
- Interwoven: MediaBin
- EMC: Documentum Digital Asset Manager
- ClearStory Systems: ActiveMedia
- North Plains TeleScope
- IBM: FileNet/Ancept Media Server

These vendors we consider the ‘major players’ in the arena of DAM and media asset management (MAM). Three of them (Open Text’s Artesia, EMC’s Documentum DAM and Interwoven’s MediaBin) are tools that came of age on their own, as products of independent companies, before bigger ECM players gobbled them up. Note that MediaBin and Artesia, in particular, largely continue to operate as entities quite separate from their corporate parents, whereas EMC’s Digital Asset Manager little resembles the original product, Bulldog. ClearStory and North Plains remain the two major pure-play DAM vendors, whereas IBM’s partnership with Ancept Media Server, although not a single-company solution, offers an interesting paired offering for MAM in particular.

What all these vendors have in common is that they’re quite malleable platforms, platforms that you should consider if DAM or MAM are core to your business. They are also rather expensive (\$100k on the low end and half a million on the high end, just for licensing), and are designed to integrate with larger ECM or enterprise architectures. However, that does not happen easily: adopting and maintaining any of these tools takes a great deal of work.

MID-MARKET CHALLENGERS

- WAVE Corporation: MediaBank
- ADAM Software: ADAM
- Canto, Inc.: Cumulus
- Widen: Media Collective
- MediaBeacon: R3volution Enterprise DAM Suite
- Chuckwalla: Chuckwalla 5.8

DAM and MAM tools fulfill many different needs, and some of the most common scenarios for DAM are workgroup, or departmental, whereby a marketing team needs to manage all the assets related to a brand. In these situations, it is rare that those assets are used outside of a core marketing or creative team (until the final product, such as a brochure, is created). There is heavy need for integration with desktop applications such as Quark Xpress or Adobe InDesign, and also collaborative commenting as marketing collateral is created.

Occasionally, these scenarios will need to scale up, to agency models whereby assets need distribution well beyond a single creative team to partners and customers. At some point, these departmental DAM systems may need to integrate with larger enterprise platforms. These vendors thrive in these workgroup or agency scenarios, but in some cases are challenging the larger enterprise vendors as they take on larger and more demanding DAM and MAM scenarios within existing client bases. They tend to offer solutions at lower price points (in some cases, starting as low as US\$5k), but are not as proven with large (250k+) collections of assets as the Enterprise DAM vendors.

Widen, a Software-as-a-Service (SaaS) vendor, is by far the largest vendor of the four in terms of staff and revenues, and challenges ClearStory for SaaS business. Canto is known for its strong workgroup thick client (but not enterprise

implementations), whereas ADAM and WAVE take a platform approach, allowing for extensive customization of their tools. MediaBeacon is a pioneer in various forms of XMP support. Chuckwalla, meanwhile, focuses on pre-press and e-learning.

LIGHTWEIGHT DAM

- Microsoft: Microsoft Office SharePoint Server 2007
- Oracle: Universal Content Management 10gR3
- Day Software: Communiqué DAM

There are vendors for whom DAM is not a core focus, but who offer some lightweight DAM functionality such as asset ingest, preview and download, or even some simple transformation functions. Do not consider these if you have intense DAM needs, such as those described below in our publishing and video scenarios. However, if your DAM needs are basic and you are looking to invest in web content management in tandem with DAM, or already have Microsoft SharePoint in-house, you may be able to take care of some of your DAM requirements without looking elsewhere.

SCENARIO-BASED ANALYSIS

We analyze DAM tools across three dimensions:

1. *Creation and management services*, which includes the ability to ingest assets into a system and manage them through a lifecycle.
2. *Assembly and delivery services*, where assets are aggregated into a final 'product' and delivered to a final output medium for publication.
3. *Architecture and administrative services*, including the underlying architecture and user interfaces.

To some extent, content and management could be looked at together with assembly and delivery services, but they are architecturally distinct environments, and not all products cover both ends of the spectrum particularly well.

By understanding your specific needs and opportunities in each dimension, you can begin to construct the outlines of a new DAM system. You will also have a roadmap for evaluating the

suitability of various package offerings to your particular scenario.

Explicitly or not, DAM tools target different business scenarios. Understanding your own situation and how your scenario fits the different packages better or worse enables you to see deeper into their relative strengths and weaknesses *for your particular circumstances*. We do not believe there is a 'best' or 'top' DAM vendor; we believe there are appropriate tools for certain situations.

As part of our analysis, we identified 13 common scenarios against which vendors can be judged. These are useful for understanding which types of products tend to work better for which type of projects. We describe a few here.

- (1) *DAM library or photo archive*: One of the most common starting points and basic uses of a DAM system is as a digital asset library or photo archive. In this scenario, your DAM system functions as a common, centralized place to catalog and store all of your digital photos or assorted assets. These assets may be at the end of a creative process, older or less frequently used. The archive becomes a reference for historical use of the assets; for generation of new ideas, such as using an old picture in the new brochure; for recreating a scene, such as seeing what the set for a photo shoot looks like; or as a single definitive catalog to determine what the organization owns.
- (2) *Brand management*: Every company has a brand or product to manage. Corporate communications and marketing departments use the brand library to store and find common brand elements, logos, style guides, documentation and finished pieces. You may share those assets with both internal teams and external agencies and partners. In some instances, you may focus on a single asset type, such as cataloging all logos or online banner ads. Simple brand management requires basic metadata support, basic packaged transformations to provide approved renditions for various media, security to control asset access and visibility, and a simple folder structure to facilitate navigation and search across brands.
Multi-lingual brand management adds on the need to support simultaneous access to the same assets in multiple languages. As such, every piece of metadata for every asset must exist in all the languages required by the installation. Not only

must the DAM system support a multi-lingual metadata model at the asset level, it has to support workflows for creating and maintaining that metadata in all the necessary languages.

- (3) *Marketing asset production and distribution:* Marketing groups commonly create and assemble marketing collateral in conjunction with internal or external design or creative groups. This effort may require creating multiple pieces of marketing collateral simultaneously or in parallel, and there may be significant shared copy and assets between the pieces. Typical adopters of DAM in this scenario are manufacturing companies; retail, hospitality, and consumer product companies; companies with national or global brands, and ad agencies.
- (4) *Ad production:* Print ads are often compound assets. Creatives must be able to work with that asset, upload it and download it, without having to explicitly 'package for output' from the creative tool and manually store it in the DAM system. They need to version the asset, version assets within it and manage a configuration of a compound asset and its content over time. This is the typical ad production scenario that requires DAM.
- (5) *Catalog production:* In this scenario, catalogs of images and product information are produced. Deep compound asset support is required, along with multi-page document storage, retrieval and versioning. One of the trickiest elements of this scenario, but one where a DAM can really deliver, is leveraging 'where used' relationships – the DAM's ability to determine which compound documents use which assets. Typical adopters include retailers, manufacturing companies, content or product aggregators, and traditional print catalog companies.
- (6) *Short form video production:* Short form video production refers to the creation or production of video that is less than 30 min long. It usually refers to commercials, advertisements or other promotional video. This type of video has become common form in organizations that use video for corporate, marketing or product communication.

DAM systems might serve as a repository for video and help to manage the review between production and reviewers. Unlike a web content management system (WCMS), a DAM system might store a combination of raw video footage, clips and works in progress at various stages and

digital forms. Rather than passing around videotapes, sending clips by e-mail or logging onto an FTP site to retrieve and view the video, the DAM system is the vehicle for sharing and communicating. It provides a secure, controlled and integrated environment in which to review, and in some cases edit, the video.

- (7) *Broadcast video production:* One of the original areas for DAM was broadcast news production. By integrating the broadcast infrastructure, including nonlinear editing suites, scheduling systems, playout devices and video feeds, the DAM system gave the broadcaster access to historical and archived video content to integrate with the live feeds during a video editing session. With the increasing demand for all-digital broadcasts, from the shoot through transmission and archival, DAM systems will play an increasing role in the production workflows, and will have a permanent home in the newsroom. Broadcast news production is among the most demanding and complex of DAM applications.

Although we only list a few here, there are over a dozen unique business situations where DAM is appropriate. Tellingly, our vendor evaluation process revealed that few vendors performed well in more than two or three scenarios. As you consider DAM tools, be sure to remember that by no means does one tool fit all.

TYPICAL PITFALLS AND BEST PRACTICES

We also found in our analysis that most DAM system customers who end up disappointed can trace their problem to an inadequate and/or unstructured technology selection and implementation process. It is essential to follow a methodical review process based on actual system and usability testing rather than long lists of check-box requirements. Throughout this process, you want to assess the vendor as much as (or more than) you would the product. The following are key areas of exploration here:

- maintenance and support;
- integration and partnerships;
- strategy and roadmap;
- viability and stability.

DAM projects, like all IT endeavors, can easily fail. It is essential to follow the lessons of others

who have gone before you. Among the dozen best practices we identify in our report, these stand out:

- obtain strategic direction, a suitable budget and a mandate for necessary changes;
- involve system users in the selection, design, implementation and testing of the system;
- understand the different roles and motivations of consultancies, integrators and vendors;
- anticipate future expansion in both your number of assets and your technical architecture.

CURRENT TRENDS

As we spoke with DAM industry veterans, system users and vendors for our research, several trends emerged:

- *Larger adoption of XMP for managing metadata around assets:* While most vendors boast support for Adobe's standard that allows metadata to 'travel' with an asset, not all support of XMP is created equally. Some vendors extract XMP metadata from an asset as it is ingested into the system and store it in a separate repository, whereas others (such as MediaBeacon) keep the metadata and asset as one, but still use the XMP information to manage the asset. Vendors are likely to continue to focus on XMP as a key way to unlock and manage an asset's metadata.
- *Renewed focus on digital rights management (DRM):* Although maintaining digital rights is vital in many DAM and MAM scenarios, few vendors have a solid solution to this need, and are looking to create one. If DRM is an important need for you, be sure to look at how a vendor's DRM capabilities stack up when you create your short list.
- *Lack of real asset workflow solutions:* Compared to the other technologies we cover at CMS Watch, DAM systems have comparably weak workflow capabilities. Many DAM processes are complex, and many asset managers have required third-party tools in order to create truly automated workflows.
- *Increased need for enterprise system integration, DAM to Web CMS in particular:* Many asset managers wish to distribute end-products via the web, and thus have a business need to merge these two technologies, making this an easier bridge to cross. As such, many asset managers and industry veterans

see the concept of the DAM system as the 'single source of truth' as a bit antiquated, as *the repository* needs to serve multiple platforms.

- *More focus on web clients versus the traditional desktop client:* As with WCM and enterprise search tools, vendors are trying to design more dashboard-like experiences for their web clients, and so far, few have achieved the same functionality with web clients as they have with the desktop thick clients.
- *Divergent product builds:* DAM vendors historically have spent a lot of time doing implementation, and as a result, there are a lot of aggregate end-solutions out there that are not necessarily part of the core product. As a buyer, be cautious, and make sure what you see is what you are going to get.
- *Workgroup solutions hitting the ceiling:* Some of the smaller vendors we evaluated face challenges as their customer asset bases grow, requiring them to integrate with more complex enterprise systems.
- *Increase in SaaS-based DAM:* Widen, a pure-play SaaS vendor, has seen quite a bit of growth since early 2007, and ClearStory experienced an uptick in the SaaS area during Q1 2008 despite other corporate turmoil in late 2007. North Plains recently debuted an 'on-demand' service. Other vendors may jump on the SaaS bandwagon.
- *Generally weak video support leading to third-party investments:* Although many vendors support video, it has not quite worked out as the uber-video-production-and-management supertool early DAM proponents envisioned. Part of the problem is the bandwidth required. Many customers of existing DAM products look to buy an Avid server or an Apple Final Cut Pro server to manage and serve video assets. As such, DAM vendors continue to miss the mark on video.

Despite the continued 'on the cusp' feel to the DAM market, DAM's big moment never seems to arrive: always the bridesmaid, but never the bride. As such, many DAM 'leaders' were recently on the brink of extinction; some were saved by their now-ECM parents, whereas other vendors chug along as 20-person shops with a core platform on which they build custom solutions for long-term clients.

As custom components continue to get built and snapped on, and the size and number of

assets continues to increase, many industry veterans question which, if any, of the existing DAM vendors will be able to keep up. DAM never enjoyed the huge explosion that the WCM market did, and we question whether it ever will. DAM's path is more a winding road

than a trajectory, with descents and ascents, and all the passengers wondering whether they will ever reach the top, and curious as to whether the view will be worth all the ups and downs. Only time will tell.