io integration

STREAMLINED MARKETING WORKFLOWS
improving productivity and growth through automation

Automation

Business

WORKFLOW

Process

Strategy

Technology

Indicator

// INTRODUCTION

Creative and advertising agencies, production houses, and marketing firms all have one thing in common — aside from their focus on creativity; that's the ongoing challenge of managing workflows, assets and resources.

Just a few years ago this challenge was even greater, before the adoption of technologies and software designed to make life easier. The fact is that many agencies made it work, using paper-based systems for everything from briefing and traffic, to sign-off and delivery, and adding to headcount as clients grew and the list of assets expanded exponentially. You don't need to watch an episode of Mad Men to remember the days of mock ups being circulated agency-wide for checking and approvals, complete with sticky notes and random scribblings. For many of us, this is still a process that is in recent memory.

But ultimately even the most efficient agencies reached a tipping point, which saw them consider these new technologies as enablers instead of threats. Whether it was the loss of a client, or the delivery of out of date materials, or a failure in the sign-off process that pushed them into thinking about technology, the fact remains that over the last 15 or so years management software and solutions have become core to these organisations in terms of their operations, as well as in winning new business.

Companies began investing in digital workflow tools, asset management technologies and approvals solutions, all designed and delivered with the aim of streamlining operations.

Skip forward to today, and the role of technology has never been more important. In our omni-channel, customer experience-centric, global marketing environment the sheer number and type of assets, from videos and graphics, to adverts, logos and scripts, is staggering. Along with this rise in content, comes a rise in complexity.

// CHALLENGES

For B2B and B2C businesses alike, the aim of the sales and marketing process is to attract and retain customers by boosting engagement with them and delivering targeted, personalised communications to help guide their buying decisions. Or, as Peter Drucker, the father of modern management consulting, said: "Because the purpose of business is to create a customer, the business enterprise has two–and only two–basic functions: marketing and innovation. Marketing and innovation produce results; all the rest are costs. Marketing is the distinguishing, unique function of the business[1]."

And whether innovation or marketing is in-house, via a creative agency (or several), or using a combination, the challenges remain largely the same: managing the creation, approval, storage and distribution of various digital assets.

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1 https://www.forbes.com/2006/06/30/jack-trout-on-marketing-cx_jt_0703drucker.html

Which - if any - of the below platforms does your company use to distribute content?

91%

83%

70%

68%

43%

28%

15%

Source: Hubspot - The 2017 State of Content Marketing

https://blog.hubspot.com/marketing/2017-state-of-content-marketing

// MORE CONTENT, MORE COMPLEXITY

According to the Content Marketing Institute, 70% of B2B businesses say they will be generating more assets in 2017 than they did in 2016[2] . The need for more content is driven by a number of factors — increasing competition, improving the customer experience and ensuring all avenues in the omni-channel environment are covered. The millennials, the 'always-on' generation's demand for up to date rolling content is contributing to this troubling trend for brands.

Despite the increase in asset creation, there is little evidence to suggest that there is a similar rise in recruitment. As a result, agencies are tasked with delivering more material with the same, or even fewer, resources, highlighting the need for a streamlined and efficient workflow. From briefing and creation, to approvals and distribution, tools like digital asset management (DAM), project management and even resource allocation software can play a significant role.

As the need for more assets increases, there are a number of internal challenges that add to the complexity of the environment. In any agency, it is the deadline (not always the customer) that is king. With more expected by customers in shorter time spans, the efficiency of the overall process becomes a major driver. With less time wasted looking for assets, updating team members and management or using manual review and approval processes that can easily be managed by digital tools, working to tighter deadlines need not be a major challenge.

In addition, the number of assets is sometimes surpassed by the number of stakeholders in the process — from different client teams and individuals, to multiple agencies and others in the media supply chain. All of whom need to be able to access the content, make amends and issue sign-offs. With time a key consideration here it is not possible for the workflow to be linear; instead multiple people need to make their changes at the same time and usually there are several layers of approval. To ensure all changes are actually made and that approvals are given on the right versions of assets, this process needs to be mapped, understood and auditable for good governance. This is particularly important for those companies who operate in a highly-regulated environments where third party investigations are commonplace.

Again, digital tools bring an additional element of efficiency and accuracy to operations, making sure the relevant people are notified that their action is required, and then capturing the changes for account teams to execute.

The integrity of the approval process is especially important with multiple departments, agencies and regions involved. Different regions have different requirements — governed by cultural factors, legislative drivers and regional relevance. As a result, users need to ensure they are distributing the correct content, in terms of both version and relevance.

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2 http://contentmarketinginstitute.com/wp-content/uploads/2016/09/2017_B2B_Research_FINAL.pdf

What are the biggest challenges your company has had over the last year with content marketing? (answers by percentage)

61

To few staff

51

Lack of budget

49

Internal politics

35

Poor delivery from agency

22

Restrctive brand rules

22

Media rates

Source: Hubspot - The 2017 State of Content Marketing

https://blog.hubspot.com/ marketing/2017-state-of- content-marketing

// TECHNOLOGY AS AN ENABLER

Introducing technology into a workflow ecosystem is less about replacing the "human" element of management, and more about bringing added efficiency and accuracy to the process, while also facilitating better collaboration between teams and users. Technology should be seen as an enabler — to meet deadlines, complete projects and ultimately win new business.

For smaller agencies or start-ups and brands, the use of technology is especially important in pitching for new business because part of the process is selling not only creativity and innovation, but also capability. Increasingly these businesses are hoping to attract large, global clients which means the contract includes the creation, management and delivery of multiple assets, across regions and even across different brands. Agencies are tasked with assuring prospects that they have those capabilities to deal with such a large and ongoing task, from staff and resources, to the underlying technology that supports it all. Having the right technology in place also helps businesses meet stringent service level agreements regarding performance and availability, that clients might insist on.

// BUSINESS CONTINUITY, DISASTER RECOVERY AND RESILIENCE

Technology is not only used in allocating resources, managing workflow and streamlining the approvals process. It goes deeper than that. Businesses that rely on their networks and internet connectivity to operate — across a building, different cities or countries — face a major threat in today's climate; disruption and downtime. Caused by a number of factors from human error, to cyber crime and even adverse weather, businesses need to assure their clients that they have well documented plans and technology in place to mitigate the risk of downtime, and be able to continue operating during a crisis (business continuity) or recover quickly afterwards (disaster recovery).

For agencies that are effectively hosting and storing their clients' data (digital and video assets), there is more to consider from a business continuity perspective. This includes data backup — preferably off-site or in the cloud — and having some form of failover in place in case the network fails or the company's initial systems are inaccessible.

// DATA PROTECTION

Regardless of industry, security remains a top concern for businesses of all sizes. For agencies that means keeping their own data and intellectual property, as well as that of their clients. In addition, for clients in highly regulated industries, such as financial services or insurance, there are additional governance issues that agencies need to deal with (such as data privacy or data sovereignty) before they can win that new business.

The technology they use can, in fact, help them give prospective (or even current) customers the assurance that they are compliant and have the controls in place from an IT point of view to mitigate any risk. Whether that's to do with managing user names and passwords, or ensuring that only clients (or even staff) with the right credentials have access to the right data and information on a shared platform.

// THE TECHNOLOGY VALUE ADD

There are a number of technologies in the agency environment that can add significant value to workflow management, overall efficiency and productivity, and ultimately help attract new customers.

In much the same way, technology can be used to streamline processes across the business; from backend systems such as billing, project management, resource planning and traffic solutions, to client-facing tools that help manage sign-offs, approvals and distribution.

Typically the latter comes with a white labelled customer portal, where clients can not only access all content and assets that are generated for them, but also get a limited view of in-progress items in order to give feedback or approvals. This is a growing requirement for both clients and agencies, whether internal or external, as it also gives both parties greater control over processes — especially when dealing with multiple brands, regions, agencies and channels.

// DIGITAL ASSET MANAGEMENT

Digital asset management is one of the technology solutions that can help streamline agency workflows. It has the power to improve productivity, collaboration and efficiency, which all impact on the bottom line. In addition, technology like DAM can also reassure prospects that you have the capacity and capability to deal with their business, particularly when working across multiple brands, regions and channels.

» Search

One of the major barriers to efficiency and productivity is the inability to find what you're looking for. Now imagine you're an agency working on multiple clients, with multiple brands within those clients, operating across various regions and channels. You've likely got assets stored in various states of approval, in a number of places, including (unhelpfully) desktops, the company server and the cloud – in some cases, flash drives. The process involved in searching for a specific asset often takes far too long.

With a DAM, you can centralise all your assets, making sure only the latest or completely signed off and approved versions are available. This ensures that the entire company, as well as the client, is working off the right version of the asset, or using the completed and approved one.

» Control

Version control is a major challenge for anyone working on creative assets. From brief through to approval there are a number of iterations hanging around. Often there can be confusion over which is the FINAL FINAL, or the ABSOLUTE FINAL, or the NEW FINAL that someone may or may not have made changes to. A DAM can take that complexity out of the equation by building an asset library where all files and folders are easily located, viewed and accessible.

» Secure

With the prevalence of mobile and distributed working there is a real possibility that files may get lost (a misplaced laptop or drive) or stolen. If assets are saved all over the company network and on individual team members' laptops, tablets or drives, this risk is even greater. However, by storing assets in a central, secure location, such as those provided by DAM platforms, the risk can be effectively mitigated through access control, encryption and backup options.

» Accurate

One of the issues you may face is delivering the right asset at the right time to the right channel. Once assets are approved, they need to be distributed to individuals, agencies or third-party organisations. A DAM will ensure that you're always using the correct assets by keeping files organised and centralised. It also allows you to organise assets according to relevance and newness so that anyone — client or an external stakeholder with permission rights — can easily see them. And to make the process even more efficient, the DAM can automatically send the right files to the right people in the workflow.

// CONCLUSION

Digital asset management is one of the technology solutions that can help streamline agency workflows. It has the power to improve productivity, collaboration and efficiency, which all impact on the bottom line. In addition, technology like DAM can also reassure prospects that you have the capacity and capability to deal with their business, particularly when working across multiple brands, regions and channels.

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ABOUT IO INTEGRATION

IO Integration is a leading global expert of marketing technology, content, and digital asset management (DAM) solutions for top brands, agencies, and publishers. We help you centralize and automate the processes of creating, producing, managing, sharing, and publishing digital media and marketing communications so you can boost productivity, lower costs, and enhance your brands.