

Marketing Governance

Managing Complex Asset Lifecycles using Adobe Experience Manager

May 4, 2017, by Max Barrass

The tools available to the modern marketing professional are more voluminous than ever and the processes and rigour required to effectively and efficiently use these tools and deliver in an increasingly demanding marketplace are undeniably complex. This marketing department of a major Financial Services firm which manages the development and consumption of marketing material on behalf of all business units across the organisation knows this challenge well. The governance landscape covers an ever-growing number of external partners and internal organisational departments. This means that marketing collateral was spread across numerous internal network drives and desktops, embedded in thousands of emails and linked to external providers. Meanwhile, tracking of assets, comments and review approval statuses was limited to spreadsheets, email and physical documents.

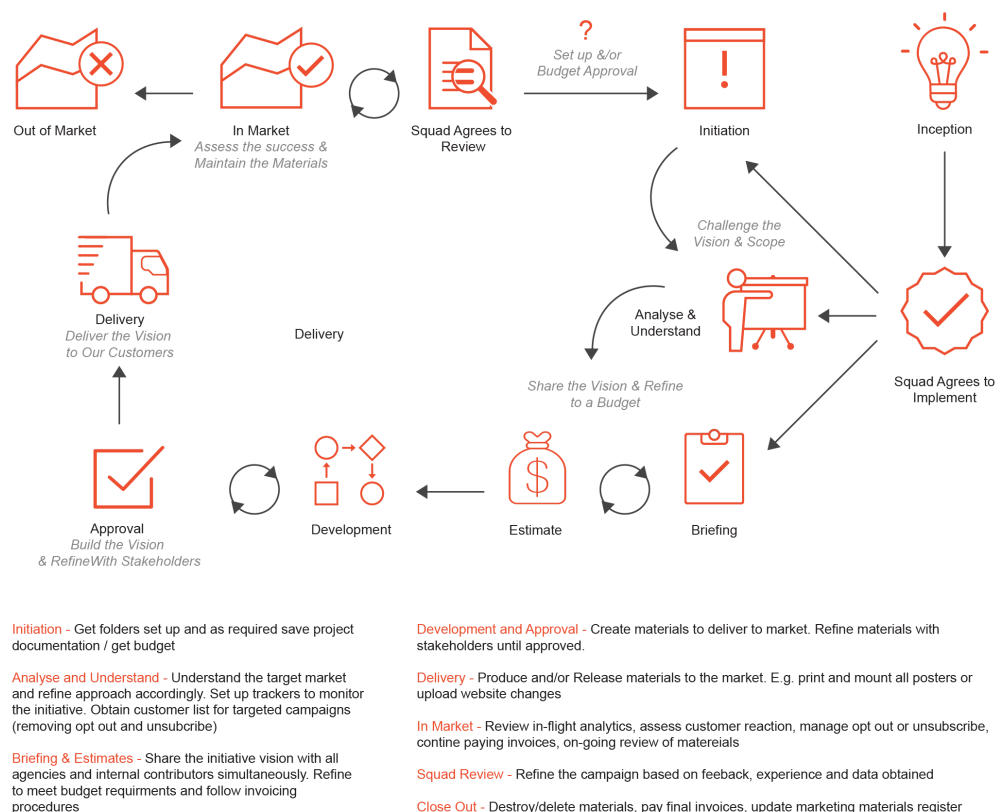


Fig 1. Existing Marketing Lifecycle

In the beginning, the small number of assets were manageable. Spreadsheets were maintained by key individuals and assets were managed in a single place. The process

worked and was expanded to cover more organisational units. Before long more than 200 people across the business were participating in management activities carried out by the marketing team. For the majority of participants, activities were simple touch points, commentary and approval actions, which were managed through curated documents and emails. For marketing managers, this process meant orchestrating authoring collaboration and numerous rounds of approval and review through email chains, documents and spreadsheets.

After partnering with Adobe and implementing Adobe Experience Manager (AEM) for managing their main site, the consumption and circulation of marketing assets accelerated and the workload for the marketing team dramatically increased. Implementation of AEM enabled the business to increase the tendency and rate at which they delivered more effective marketing content to their customers. In turn, this meant that management turnaround of assets returning from agency, being reviewed, approved and published had to change. This created an opportunity for the Global Inc Marketing team to review their management practices and leverage AEM as the enabler for their management process.

Guiding Requirements

A project was formed and in early discovery several objectives were established as the guiding requirements for maturity:

1. Create a single indexed and accessible source of truth for marketing-related assets and documentation
2. Improve the efficiency of the administration and execution of marketing initiatives
3. Reduce brand and legal risks associated with marketing initiatives by improving the auditability of approvals and key controls and making compliance to these controls easier
4. Streamline Global Inc Marketing Department governance of all marketing material
5. Improvements to the Global Inc marketing team's asset management system
6. Leverage AEM, which is Global Inc Marketing's preferred tool

Signs of success

In addition to guiding principles several critical success factors were identified across the business and marketing department:

1. Time spent on the administration of marketing initiatives is reduced (currently this is estimated to take up a third of a marketing manager's time)
2. Double handling of initiative related information is reduced
3. Documents and assets are easier to find without consultation
4. Fewer discrete documents and tools are needed to manage and track marketing initiatives

5. Feedback and approval processes require less manual intervention and happen in a more timely fashion
6. Compliance to approval processes improves
7. Self-Service training is available to staff

Transformation

Coordination of marketing activities is difficult on its own without needing to manage technical system activities. From the beginning, the objective to amalgamate and centralise management of assets meant that managing conversations around assets have to happen physically around the asset so that everyone is always on the same page. There is nothing worse than sending out copies or a link to assets to people and then realising that you sent the wrong one or missed someone from the list.

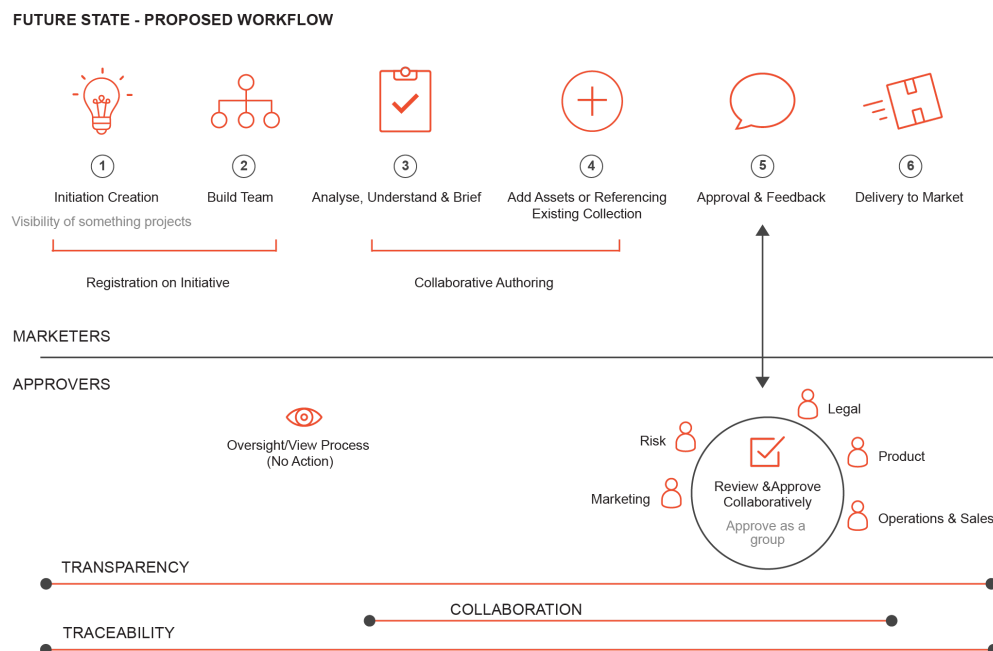


Fig 2. AEM enabled Marketing Lifecycle

In addition to complicated communication methods, numerous reports had to be prepared for individual groups and maintained over time to ensure consistency and create an audit trail of all updates. As auditing requirements evolved over time, spreadsheets were used as a management mechanism to track assets and review asset status, stakeholder involvement, location of original assets, notes etc. The master spreadsheet was located on a shared drive, allowing only one user to update the register at a time. This and many other operational issues, were making marketers' jobs increasingly involved and complicated. This prompted the need for change that led to transformation of existing process.

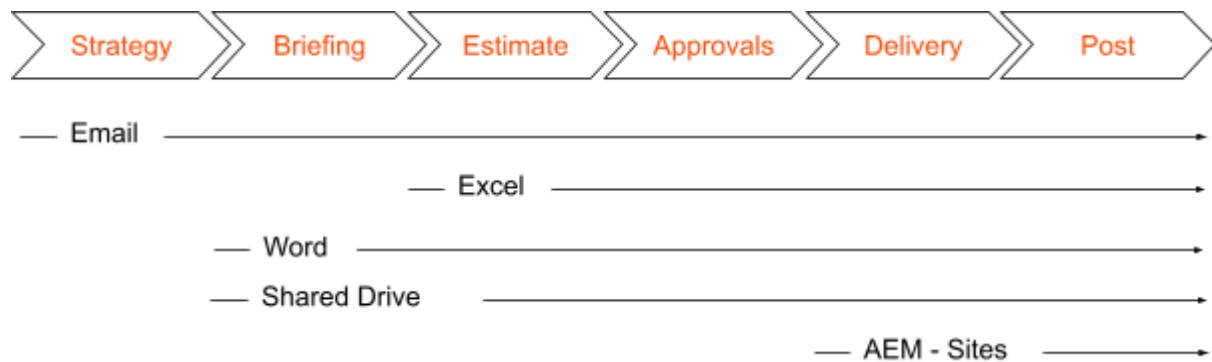


Fig 3. Existing Marketing Lifecycle Tools

Early in the transformation it was established that operationally all of the marketing communication and management activities needed to be centralised, with assets being the pivotal point and management processes providing the call to action via email. In addition to this, the ability to keep track of asset annotation, status and history (as well as managing workflows) would make auditing transparent and minimise reporting overhead.

To meet mandatory auditing requirements, all actions, annotation, updates and approver feedback on assets and workflows throughout is made viewable to everyone. This creates detailed audit trails which minimises management overheads. Furthermore, additional summary reports and summary lists were added to provide simplified and centralised access to all available information on a project, workflows and related assets—further minimising auditing overhead and effort required to prepare and conduct auditing on projects.

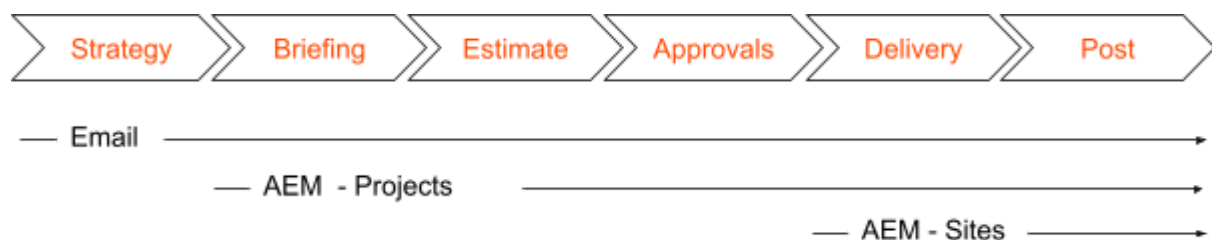


Fig 4. AEM enabled Marketing Lifecycle Tools

Leveraging existing AEM capabilities meant that several management mechanisms such as Word, Excel and Shared drive—the primary mechanisms for capturing change—were replaced by managing content in a single location, AEM, closer to the asset source. The ability to transform this tried-and-tested mechanism comes from a coordinated exercise of mapping the Business Experience to Technology Capabilities, creating a Linked Technology Roadmap for delivery.

Linked Technology Roadmap

Critical to the success of delivering business experiences with AEM comes from the ability to leverage out of the box capabilities. Deviating from existing capabilities can have a performance implication and suboptimal experience across linked capabilities. It is very tempting for teams to start afresh and build custom tech to support a given user experience. Conversely, going down the reuse path requires careful mapping of business capabilities to technical capabilities available in AEM to ensure that if any custom updates are done, their purpose is well defined and understood in a large ecosystem of functionality.

From the start of the project, it was agreed to leverage as many of the tools in the AEM suite as possible. We concentrated on Content and Configuration as to avoid complicated upgrade paths and support requirements. To achieve this, business capabilities were divided into business experiences and linked to technology capabilities and features. The definition was guided by AEM Experiences as a starting point, and business experiences were broken down to match required features. This approach avoided having to create individual experiences for different participants.

1. Initiative Management - reuse Projects Experience, update visual indicators and hide unused features
2. Initiative Information - reuse existing Projects Experience and combine it with Advanced Folder management to enable security groups for folders
3. Asset Management - Leverage existing Asset Experience with additional Check-In/Check-Out with Checkout Commenting, Download and Lock as well as Notification reminders
4. Asset Workflow - Reuse and update existing workflow wizard screens to enable Leverage Project permissions and members when creating Workflows
5. Task Collaboration - Create new workflows using new models for Asset Collaboration as well as update the Quick Actions on workflow screens
6. Workflow and Management - Create new workflows for notifying users of Workflow and Task actions, allow Marketing Managers to manage particular groups for users access

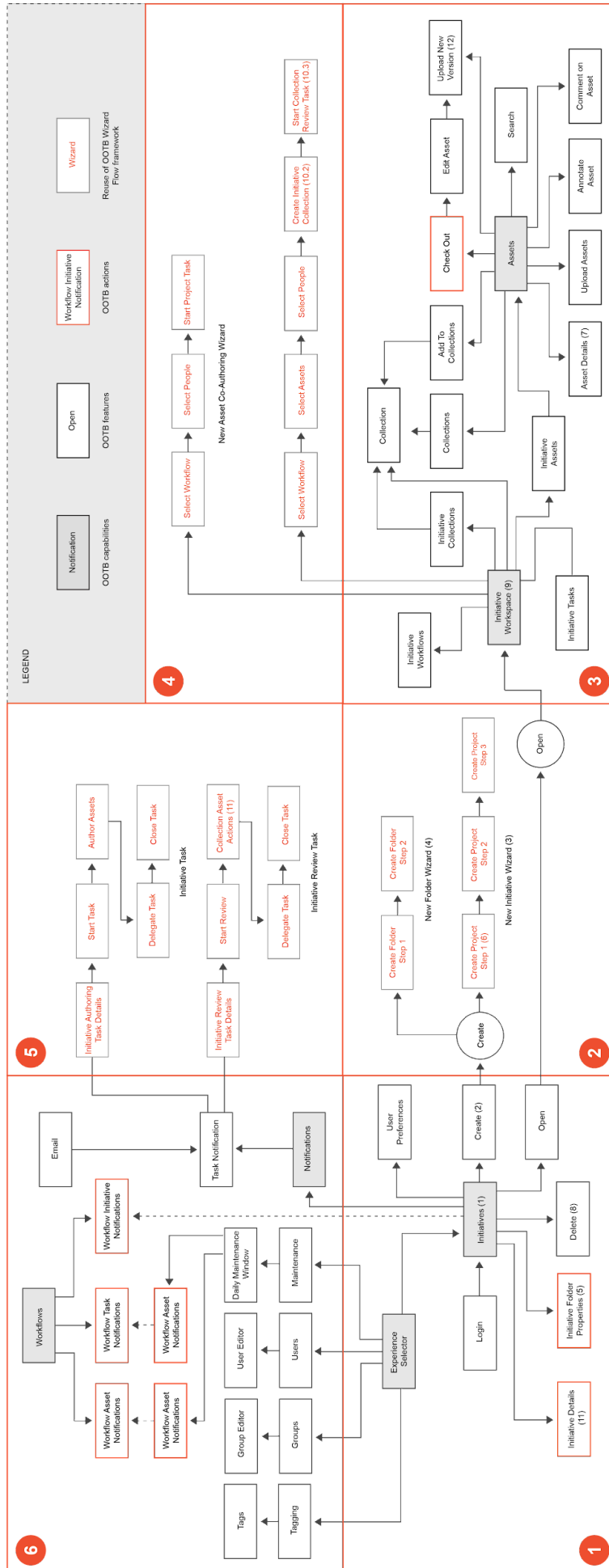


Fig 5. Linked Technology Roadmap

Outcome

Leveraging AEM, not only for the delivery of assets to consumers but also for managing the full life cycle of assets, would ensure that original marketing assets were controlled in a single place. Marketing managers interact and concentrate their effort with one set of assets and metadata, while the system transparently notifies and reminds users of their need to act. This not only minimises duplication and ensures everyone uses the right assets in the right place, but also saves time, as users can now interact with assets at the right time without needing to be involved throughout the process. This has traditionally been a long chain email list of CC's. The new process makes it easier for users to act when they are needed instead of having to read between the lines in endless emails.

Fundamentally, this transformation was more about the business change than the impact in technologies. The ability to use AEM as a central repository for managing assets, as well as governing the process, made this a solid demonstrator of leveraging tools for more than one purpose and intent. This demonstrated the ROI of the Adobe platform by leveraging AEM capabilities for organisational governance and process improvement.