Production Automation for the Direct Team

project definition, technology evaluation, and methodology

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project definition

project objectives

AT&T account is serving as a catalyst for us to quickly adopt a technical platform that automates data-driven procedures around versioning, data and matrices. In account management, page production and date arenas, too much work is being done manually. The margin of error is high, the work is cumbersome, and the processes not scalable. More and more, I'm hearing of mechanized approaches to this kind of work; and there is a specific threat at our doorstep with another AT&T agency embracing this technology quickly.

STRENGTHS

→ Service: The processes supporting a mission of "putting the clients' needs first" are definable, repeatable and adaptable.

→ Strategy: Marrying creative concepts with statistical facts to generate compelling, measurable and successful marketing campaigns from beginning to end.

→ Experience: Motivated, intelligent and experienced people make it all work providing a breadth of services and expertise across all marketing channels under "one roof".

→ Pertinence: Striving to strengthen the connection between the brand and each potential consumer, by making personally relevant products and services offered by the client.

→ Actualization: A client list of Fortune 500 organizations that realize the value of service provided.

WEAKNESSES

→ Standard modes of production and communication have not been established across all departments or divisions.

→ Labour is applied to tasks better suited for centralized and automated processes. The common view keeping—old habits in place—is that the upfront costs of automation are prohibitive.

→ Tracking of process metrics does not exist. Most feedback mechanisms are narrative and/or manual. There is no centralized view of company wide metrics in real time.

→ Error ratios are increasing with the ever-quickening rate at which our clients wish to modify the nature of their campaigns—from data and analytics to creative and production, all the way to the press, inbox and the web.

OPPORTUNITIES

→ To define, identify and actualize these processes in such a way that they are easily repeatable and adaptable; leveraging real time feedback mechanisms in order to increase efficiency, quality and productivity.

→ To unite processes between departments and divisions in order to maximize efficiencies and minimize risk, improving upon the foundational mission of serving the client.

→ To realize fully a true one-to-one marketing connection, by digitizing processes and optimizing workflow in order to create and produce increasingly personalized marketing vehicles.

→ To optimize capacity and efficiency of human resources and the agency as a whole by a minimum factor of 2X; while incurring a minimal effect to the overall size of the current workforce.

THREATS

→ "The Market": Marketing is faster, more efficient and more cutthroat than ever.

→ "The Client": Wants more of everything now.

→ "Up Start Agencies": Companies like **Group O** and **BrandMuscle**—who did not even exist as competitors two years ago—are quickly gobbling up portions of the market that SolutionSet should own. And, they outshine SolutionSet on efficiencies that still have yet to be realized by the agency.

→ "Ourselves": Errors, missed opportunities and old habits.

SUCCESS METRICS

This project will be successful when:

QUANTITATIVE

→ Demonstrated over time a YOY measurement of efficiencies with respect to revenue by resource.

→ ...

QUALITATIVE

→ Success is implementation of a technology platform that satisfies the included requirements.

→ ...

project requirements

considerations based on initial analysis

An initial analysis of software offerings shows that no particular software product satisfactorily meets all the needs as they have been described, nor as they are outlined below. This same analysis suggests three possible methods by which to satisfy these requirements.

→ Acquire best of breed components; work with vendors to customize and integrate these components and to provide a unified suite of tools meeting the stated goals and requirements.

- ¬ Pros:
  1. Allows the agency to modify, update and control the hardware, software, processes, and content that they manage.
  2. Provides a highly customized solution that can be integrated across divisions and departments.
- ¬ Cons:
  1. The Agency is largely responsible for maintaining the overall system, assuring that updates to vendor components do not result in the breakage of any of the rest of system.
  2. Application development would in some instance require additional fees be paid to vendors in order to extend core functional needs not already covered, or adaptable through other means.
- ¬ Requires:
  1. All components must have a **SDK** or an **API** allowing the core functions of application to be accessed and used as part of a greater solution.
  2. Internal team for integration process and rollout
     - (1) Project Director/Sr. Project Manager
     - (2) Senior Engineers,
     - (1) Senior UI Developer
     - (2-3) Print Production Specialists

→ Select a Software As A Service partner who will provide a unified suite of tools meeting the stated goals and requirements. This relationship offers some interesting opportunities and poses some potentially high-risk exposure to the Agency.

- ¬ Pros:
  1. The responsibility for maintenance and development of the tool falls squarely onto the shoulders of the SAAS partner.
- ¬ Cons:
  1. Creates a level of interaction where all changes (to code, logic, templates, workflow, etc…) must be specified and implemented by said partner, increasing costs, lead times and turnaround for deliverables.
  2. In almost every instance the approach of a SAAS firm has been to integrate deeply into the agency business and to participate in the sales cycle and decision processes of the agency.
  3. Agency loses the direct ability to modify, update and control the hardware, software, processes, and content that they manage.
  4. May restrict the satisfaction of the requirements based on level of access assigned to and ability of the SAAS partner to integrate with internal systems (e.g. finance and data).
- ¬ Requires:
  1. Vendor must be highly responsive to agency needs.
  2. Vendor must provide a tool that meets all the functional requirements.

→ Update and modify internal specifications that already exist and complete the development and unification of internal tools (e.g. conduit, 4cite, Xinet).

- ¬ Pros:
  1. Allows the agency to modify, update and control the hardware, software, processes, and content that they manage.
  2. Leverages agency talent and prior investments to create a completely tailored suite of tools that meets all the stated goals and requirements.

- ¬ Cons:
  1. Squarely places all the responsibility for maintenance and administration of the system on the agency once the system is built. The agency is not a development firm, and obtaining and retaining the resources necessary to do this can be expensive.
- ¬ Requires:
  1. The Executive Team must have a high level of buy-in, commitment and oversight in order to make this project successful.
  2. A highly skilled and agile team who can work across lines in order to bridge all necessary gaps in resources or knowledge.
  3. Appropriate Funding.

general requirements

CROSS PLATFORM AND CROSS BROWSER WEB ACCESS AND COMPATIBILITY

→ All base level functions must be accessible back to IE7 on a Windows XP platform.

→ Optimized features are supported for internal users only taking advantage of advances in the HTML and CSS specifications, and modern JavaScript methodologies.

SINGLE POINT LOGIN ACCESSIBLE USING ANY BROWSER OR COMPUTER

→ active directory compatible

→ SSL/TSL, ACL

MULTI-STREAM OUTPUT CAPABLE

→ Native file creation and synchronization supported across systems and the desktop for Adobe InDesign.

→ XHTML (html and email), PDF, Image Formats {see Production: Rendering Engine}

feature requirements

This feature set seeks to leverage the opportunities and threats by addressing defined weaknesses and building upon core strengths thereby realizing massive gains in efficiency across the entire unit. As such, the necessary features of a solution may be broken into four distinct modules: Project Management, Data Management, Production and Asset Management. Each module subsequently has specific sets of features necessary to support the agency's processes.

PROJECT MANAGEMENT

Many of the identified weaknesses in the SolutionSet Direct process are central to the fact that particulars of a project/job are not unified or easily accessible. This can be explained by many things, most importantly there is no central input/management mechanism for information pertinent to a project/job. As part of the overall solution the **Project Management module** must include User Administration (Relationship Manager), Project Administration (Project Manager), and a Dashboard with informational views and access points to all functional aspects of the system.

→ Relationship Manager

This set of functionality deals with user administration, and should support standard Access Protocol connections (i.e. AD, LDAP). It should also allow for the creation of Roles, Groups/Teams and the assignment of Users to both. There are three levels at which these functional requirements should act: The Agency, The Client (account) and The Vendor (manufacturer). The Relationship Manager allows the administrator to define permissions, build teams and create relationships between the Client, Agency and Vendors in a flexible manner, supporting all other aspects of the workflow.

- AD and LDAP access management and user management compliant
- SSL/TSL access compatible (PORT 443)
- Potential tie in for HR/Financial systems to support budget reporting based on billable rates or more specific resource data.

→ Project Docket

The Project Docket represents a set of functionality that serves as the meeting point for all other system functions. A project is initiated by submitting basic project information to the system, adding milestones and deliverables, associating assets and data, and setting up the workflow and communication chain necessary to manage and complete a project. From that point forward anything that happens within the project, as it is defined, is tracked and is viewable. The Project Docket and the associated “Page Dockets” become version and communication repositories representing the entire physical production history of a campaign.

- Business Info Manager

  This can be a very simple interface in which to enter basic project information such as Job Codes, Budget information, and other TBD data fields pertinent to a job. This could also be a very powerful point of connection to financial systems, allowing a real time view of resources and utilization based on workload and demand.

  - ¬ Associate Job Codes & Budget Information
  - ¬ Associate Client/Account Information
  - ¬ Potential connections to MAS/NetSuite business tools
- Schedule Manager & Views

  The backbone of the project, the Schedule Manager brings together all the aspects of the project in one place. Through simple associations of information the user joins resources and assets to create a task. Milestones associate related tasks to Calendar dates and define which triggers & actions are used within a particular project workflow.

  - ¬ Create Tasks
    - Choose Task Type {Create Task types, see Production: Workflow Engine}
    - Associate Team Resources and Production Assets
    - Set Timeline for task (#D:#H:#M:#S)
  - ¬ Define Milestones
    - Associate related tasks
    - Calendar Dates for deliverables, releases and key meetings
    - Associate Actions with project triggers (events) {see Production: Workflow Engine}
    - Conflict highlighting and resolution tool
  - ¬ Schedule Views
    - Week, Month, Year :: Past, Current, Future
    - Gantt Chart Project +> Milestones +> Tasks
- Media Manager

The Media Manager defines what media type(s) the project will produce and the overall structure of a project (pagination). Users associate templates and assets for each “page” and version of a project.

- ¬ Final Media type(s) (i.e. INDD/IDML, Image, PDF, XHTML [HTML, email], XML, FLASH, etc…)
- ¬ Pagination
- ¬ Template Selection {see Production: Template Engine}
- ¬ Associate Asset Repository {see Asset Management}

– Project Data Profile

The Project Data Profile associates the Account Profile from the Data Management module where business logic (data rules) particular to Client/Account are created and managed, and extends those rules for a specific project. The Project Data Profile also associates data sources to be processed through these rules, and defines the relationship to Data Field Placeholders in templates.

– Project/Page History and Communications

This set of functionality appears as “component objects” in other portions of the system. One set of tasks that may be associated with a Project or “Page” supports soft proofing, direct edits, and approval/rejection of changes. Additionally by associating Project Identifiers all emails, changes and comments are directly associated with the production asset from initiation to delivery. Thus everything that happens in a Docket can be accessed through a “history view”.

- ¬ Versions {see Production: Versioning}

→ Dashboard

The Dashboard is a personalized view into the system based upon user permissions and assigned tasks. At each level of interaction users have made clear that they want one place to go where they are able to see all of their essential information. Executives want to see graphs and charts showing real-time reporting of key Project and Business metrics. Project and Production Managers want to see schedule and resource allocation charts, and more narrow views of project and business metrics. All users need to be able to access tasks assigned to them and view project updates, deliverables and communications quickly and easily.

- – Real Time Views
- – Historical/Progressive Views
- – Default Daily view of Milestones and Tasks
- – Search & Advanced Search
- – Quick Links to Other Permitted Functions

DATA MANAGEMENT

The largest potential margin for error at SolutionSet Direct is related to data management and how a particular data set is attached to and merged with a particular project/job. This set of functionality directly ties the SolutionSet strategy team to the creative and production workflows—effectively joining modeling and segmentation with page building and asset delivery. The **Data Management module** must support the following functions: a Historical Data Repository, List Management, Analytics Tools, Planning, an Account Profile manager, and a Project Profile manager.

→ Historical Data Repository

→ List Management

→ Analytics tools

→ Planning

→ Account Data Profile

PRODUCTION

The **Production Module** must support four key components of the system, Templates, Rendering, Workflow and Versioning. Template generation and management is key to the success of this automation system. Template management includes development, handling and maintenance of mechanical layouts, component objects, styles, and data field placeholders. The rendering engine is a multi-channel output mechanism that outputs media based on the parameters of the Project Profile, Data Profile and Template selection in association with the desired output type. Workflow Management is the conceptual binding of the system; a customizable library of automated tasks brings together Schedules with Assets and helps to manage necessary communications. Version Management provides the tools necessary to track and manage all iterations of an asset over the project life cycle.

- → Template Engine

  The template engine should be perceived as an object-oriented library of InDesign layouts, Component objects and styles. The template engine should also support the import/creation and management of data field placeholders. The template engine should also manage associated assets (i.e. fonts).

  - ¬ User must be able to quickly and easily access templates and template information.
  - ¬ Import of and synchronization with Adobe InDesign files.
  - ¬ Define/Modify Template type and usage
  - ¬ Assign permissions for templates, and to portions of a layout, in order to support processes and roles as assigned to a particular project where a template is used.
  - ¬ Replicate/Modify existing templates, component templates, tagging and data field associations.

- → Rendering Engine

  The rendering engine is largely not a UX function. Mainly the rendering engine generates all views and final output files for a project by associating the Project Profile, Data Profile and Template selections into viewable and/or deliverable media formats supporting the development and delivery of assets associated with a campaign.

  - ¬ Required Output Types
    - – .indd, .idml
    - – .pdf
    - – .jpg
    - – XHTML
      - ▪ html pages
      - ▪ email
  - ¬ Nice to have Output Types
    - – .doc
    - – .ppt
    - – .swf
    - – .svg
    - – audio formats
    - – video formats

- → Workflow Engine

  The Workflow Engine has two primary functions; it acts as a library and management tool for actions, and it supports the creation and management of workflows. A workflow is a series of automated tasks (actions), activated by defined system events (triggers), the workflow builder supports the association of tasks with trigger events in order to define and automate/track much of the project life cycle. The system should come with a standard set of actions that are most common to this type of need, and should also allow for the creation of custom actions as they become necessary.

- Action types manager
  - Default Action set (i.e. email notify/confirm, assign task/template/file, move/archive, deliver, comment)
    - Define needed protocols, templates and access controls
  - Custom action creator
- Workflow builder
  - Create workflows by associating actions to process triggers.
  - Save workflows
  - Edit /Replicate existing workflow

→ Version Management Engine

The Version Management Engine should support the creation of "Version Repositories" and provide the *Docket: History View* with all information regarding changes to a particular asset as they relate to that Docket. All files being worked on locally are "checked out" of a repository, and synchronized with the system on key file events (e.g. open, save, close, refresh). Given correct permissions Dockets, "Pages" or portions thereof may be reverted to earlier states in the process if the need arises.

ASSET MANAGEMENT

Asset Management is a fairly specific segment of technology that serves the needs for storage, asset management and asset access within an organization. The **Asset Management module** must meet the requirements described below as well as all functions common to such systems.

→ AFP & SMB accessible published volumes

→ Web Browser accessible views of published volumes

→ Print Queue and Output Routing management

→ Metadata and XMP Integration

The DAM should utilize and make Adobe XMP metadata available to users worldwide by automatically reading and enabling its editing for any Adobe file, including InDesign, Photoshop, Illustrator, and Bridge—even for users without access to the source files. Users should be able to view set metadata in their native applications, search it in the database, and view and set it directly from a Web browser.

→ Collections

Associated assets that can be grouped, viewed, managed and utilized based on common metadata information. Share collections with other users and with clients. Use collections as repositories for production assets.

→ Asset Browser

This feature allows local and remote designers to place assets directly into an Adobe InDesign file from the DAM, without ever leaving the layout application. With secure login access to Asset Browser built into InDesign, users can access, preview and search for assets with simple, efficient navigation. Additional scripts further enhance Asset Browser's functionality by placing the metadata associated with an asset directly into the file along with the image. With this feature, layout, placement and formatting—even localized pricing and language information—is automated for simplicity, reliability and speed.

→ Linked Files Viewer

The Linked Files Viewer offers a visual representation of all the files in which an asset is currently being used, providing easy access for quick edits or modifications. This feature makes tasks, such as changing a corporate logo, quicker and more reliable. Linked Files Viewer tracks asset usage, so you don't have to.

→ Annotations

The Annotations feature facilitates efficiency throughout the review process—for local and off-site users—by offering a simple, centralized method for providing review comments. Every reviewer with proper permissions is able to comment on the same, centrally located document, while viewing comments made by other reviewers. Simplify participation and save time during review cycles with Annotations.

project team

Name	Project Role
Michele Drohan	Project Sponsor
	Project Manager

Project Schedule

This section lays out the project schedule and interdependencies.

1. Week 1: Refine project objectives, define project team roles and responsibilities, develop vendor evaluation template
2. Week 2: Research software solutions, select 3-4 programs to be evaluated
3. Week 3: Schedule product demos