Content and Operation Strategies Around a Successful DAM Solution

How National Geographic Prepared for DAM

Henry Stewart Toronto Briefing

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Who Am I?

Results-oriented executive manager with 20 years of experience managing large commercial image archives to digitally encode, preserve, make accessible and monetize archived content.

- **National Geographic** – 4 years
  - Led major implementation of media asset management system.
- **Corbis Motion** - 3 ½ years
  - Led efforts to migrate to a digitized workflow for the efficient search and delivery of moving image assets.
- **Getty Images** – 12 ½ years
  - Managed the film and video assets for Getty brands including The Image Bank, Archive Films and Energy Films.

Planning for DAM

Planning for DAM

- What are the business requirements?
- Who are the key business stakeholders to best define these requirements?
- What are the operational expectations from a DAM implementation
  - Preservation?
  - Digital workflow?
  - Lower cost to market?
  - New business opportunities?

Planning for DAM

- What are the executive management expectations from DAM ?
- How will DAM effect the user experience and ultimately create the revenue opportunity, operational efficiencies and ROI that is anticipated?
  - Important to consider during all phases.
- What key metrics will identify if targets are being met?

Planning for DAM

- Start at the end of the process and work backwards.
  - What are the user needs to meet business goals?
  - **Listen**
    - Make what you hear the foundation of planning
  - Document the existing workflow
    - This will help to identify opportunities for improvements
    - You need to understand the ENTIRE food chain!
    - Define, document and get agreement on the scope of the project, the needs, and timelines

Planning for DAM

- Start at the end of the process and work backwards.
  - Where is the pain?
    - Can key stakeholders in the current workflow identify their pain points? How would they improve their processes?
    - During the planning at NG we spent an enormous amount of time talking with the primary users of the legacy systems.
      - Regular meetings to go over distinct parts of the process.
      - Meetings continue for on-going tasks like Metadata and Cataloguing standards

Planning for DAM

- At National Geographic Digital Motion,
  - the tech build was initiated and underway
  - understanding of the user / business needs was still being captured.
- Storage and System infrastructure install continued while we worked on gathering info to confirm / identify immediate business needs, operational requirements, staffing, training, and process refinement.
- Throughout the discovery process try to flag what can bring the most value and potential ROI from the start.

What about the Content?

What about the Content?

“I’m sitting on top of an Everest-sized mountain of content”

Where do I start?

How do I prioritize?

What about the Content?

- What content is priority and why?
  - Depending on business model it can be defined by a variety of factors
    - Condition, Format and Stability of original asset
    - Is it an obsolete or soon-to-be obsolete format?
    - What is the subject matter of content? Do you know?
      - What type of media?
        - film, video, photos, audio, documents, props, artifacts, etc
    - What are the rights?
    - What are the pressing business needs from the collection that will bring the most relief to the front lines?
    - A combination of all of the above

What about the Content?

- The type of media in a content strategy is second to understanding the processes needed to manage, find and deliver the content.
- There are different technology issues managing different types of content but the prioritization is separate.

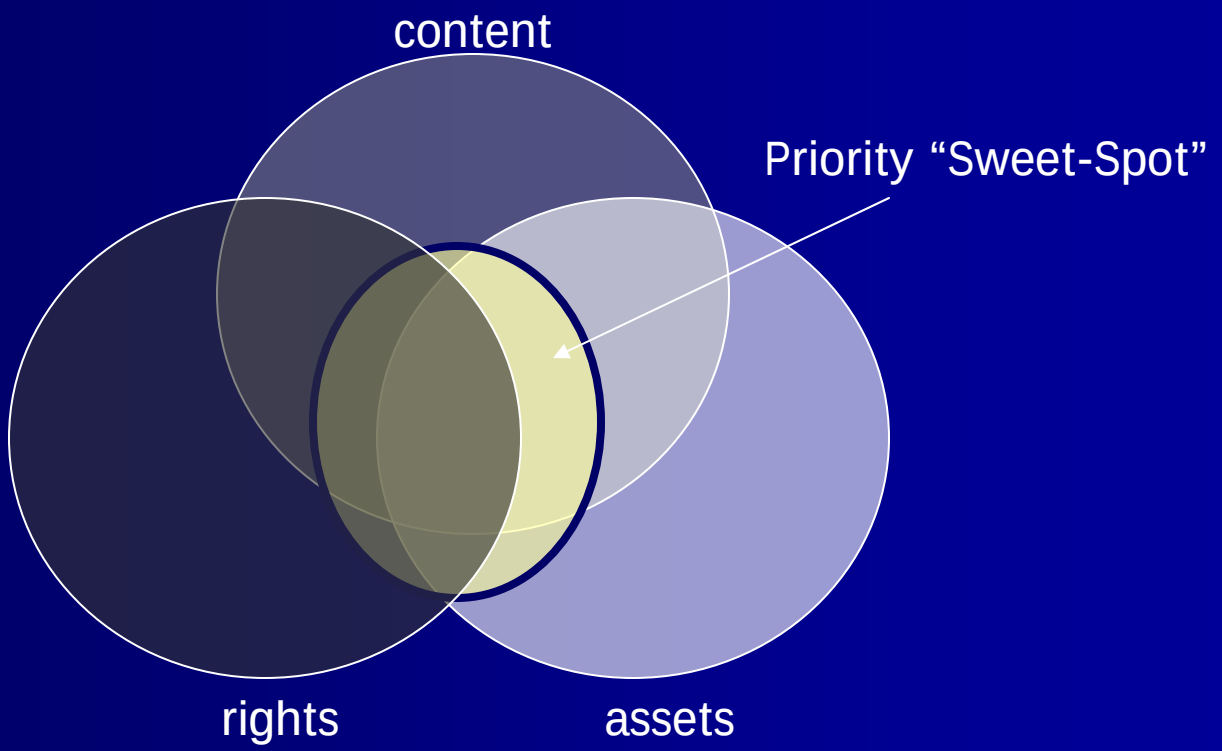
What about the Content?

At National Geographic we used a 3 point assessment to direct prioritization overall

- Content Gap Analysis
- Preparation and Condition of Physical Assets
- Rights Confirmation
  (aka “the 10,000 foot review”)
  - Rights staff reviews production records, legal binders and other records available to confirm overarching rights info and determines ownership as well as any specific limitations on use or re-distribution.

The priority of the ingest cue is dynamic and can shift on the results of these variables

Content strategy



What about the Content?

- How do Rights Issues factor into the Content Strategy?

> “ Know your rights....these are your rights!”
> courtesy of The Clash

What about the Content?

- Rights are an enormous part of the content strategy.
  - Created a alpha numeric rights coding system to communicate the basic rights information about any searchable asset.
  - Rights Code communicated the info for users to make informed decisions about contents re-use without requiring support from the legal department.
  - If you don't know the rights then there is no point in doing all the work if it can't be used.
- Ownership is not enough.
  - Do you have any talent, music, location, artifact restrictions?
  - What about geographic embargos on usage?
  - Market holdbacks or restrictions?
  - Is it a derivative of something else?

Resource Management & Operations

Resource Management & Operations

- Which resources will be obsolete or redundant?
- Which roles will be redefined by the new workflows?
- What current tasks and jobs will change and how?
- Do you have to create, staff and train completely new function groups?
  - Do you already have the knowledge base in the organization?
    - If not, how do you create new functionalities and areas of unique expertise?

Resource Management & Operations

- DAM will change the operation
  - Where are the efficiencies and opportunities?
  - Do you have internal resources to repurpose to new tasks created by DAM?
    - Who will you do the training and how?
    - Training of existing staff vs.
    - Training new hires
      - You don’t need to un-train them
- Should you outsource certain aspects of the process?
  - It may be a more efficient use of internal (smart) resources to focus them on the unique challenges of your content and content ops and outsource the more vanilla (generic) efforts accordingly.

Resource Management & Operations

- DAM redefined the entire NGDM operation
  - Focus was on processing content thru the virtual factory that DAM became to create commercially viable assets for resale
  - Entire functions and departments were created and staffed where there had been none
  - Other functions were eliminated or redirected to handle new or expanded duties
  - Tasks that brought no value to the process were abandoned or moved to a “on demand” status.

Resource Management & Operations

- Staffing through the course of the project included:
  - Created, Staffed and trained for:
    - 10 new cataloguing positions for a new cataloguing department
    - 3 rights specialists
    - Content manager and content review staff
    - 2 additional archive coordinators
  - Repurposed existing staff to fill roles as:
    - Cataloguing Supervisor
    - Cataloguing Standards Manager
    - Archive Supervisor
  - Technology Support expanded with:
    - 2 broadcast technicians to manage video systems
    - IT Systems engineer
    - Database Administrator
    - Project Manager

This effort has yielded nearly 100,000 clips, thousands of hours of outtakes, shorts, and programs available thru web-based intranet tool

Metadata Strategy

Metadata Strategy

- What are the main terms that drive your business needs?
  - How are they captured?
  - By who and when?
  - How do you maintain consistency?
  - How do you identify new data needs and create taxonomy?
  - Will data link with other systems?
    - Will it drive process automation?
  - Does XML and metadata standards play a role in your strategy?

Metadata Strategy

- Where should you actually start?
- **Collaborate** on the metadata requirements with key business stakeholders
- Start the process about data needs early.
- Factor in the value, importance and trustworthiness of legacy data

  OR….

  Is this an opportunity to selectively filter and clean data before carrying old problems into a new environment?
- Look to industry standards as a starting point if you can; but identify YOUR needs and expectations.

Metadata Strategy

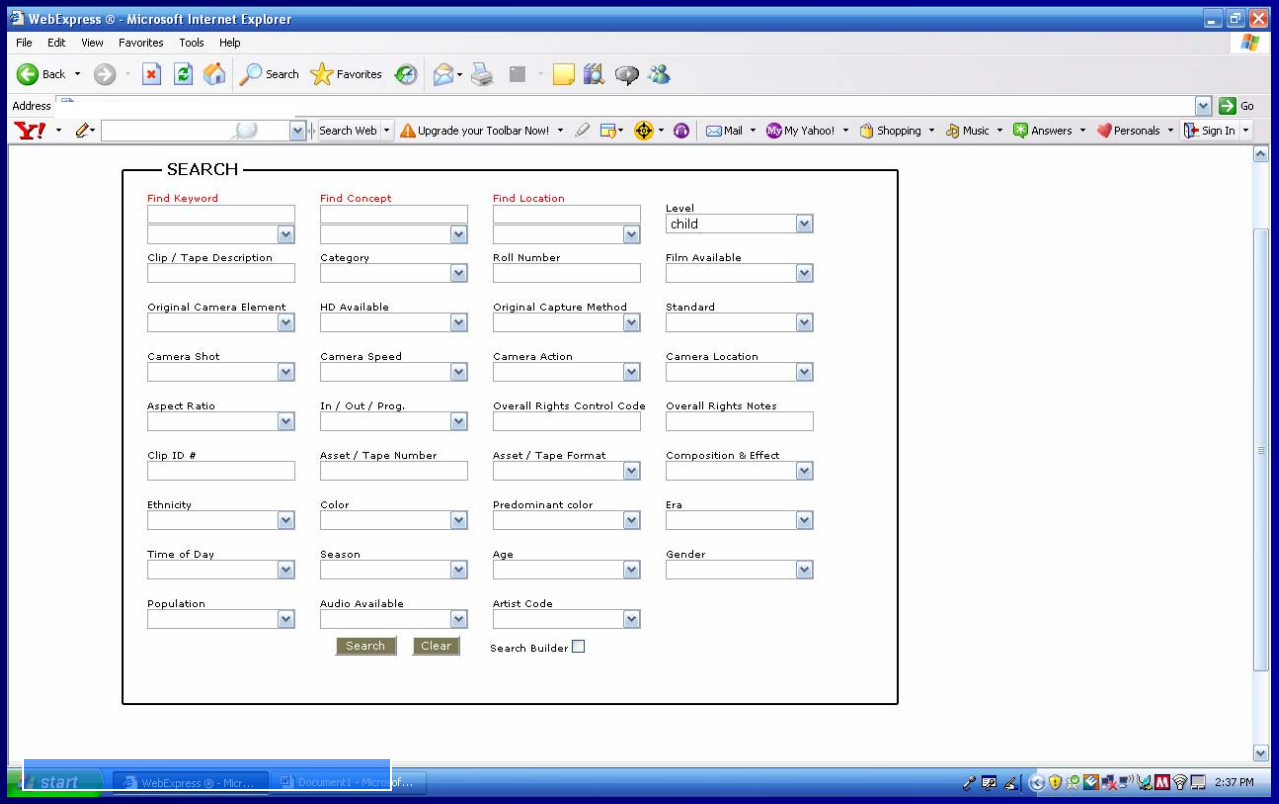
- How much metadata is enough?
  - At NatGeo, we streamlined and kept to a “Less is more” approach.
    - Search yields visual results eliminating the need for previous style of dense, flowery, descriptive cataloguing
    - Search driven by keywords
      - What are you looking for?
      - 20 good search results vs. 100 OK ones is the goal

Metadata Strategy

How does Cataloguing work at NG Archive?

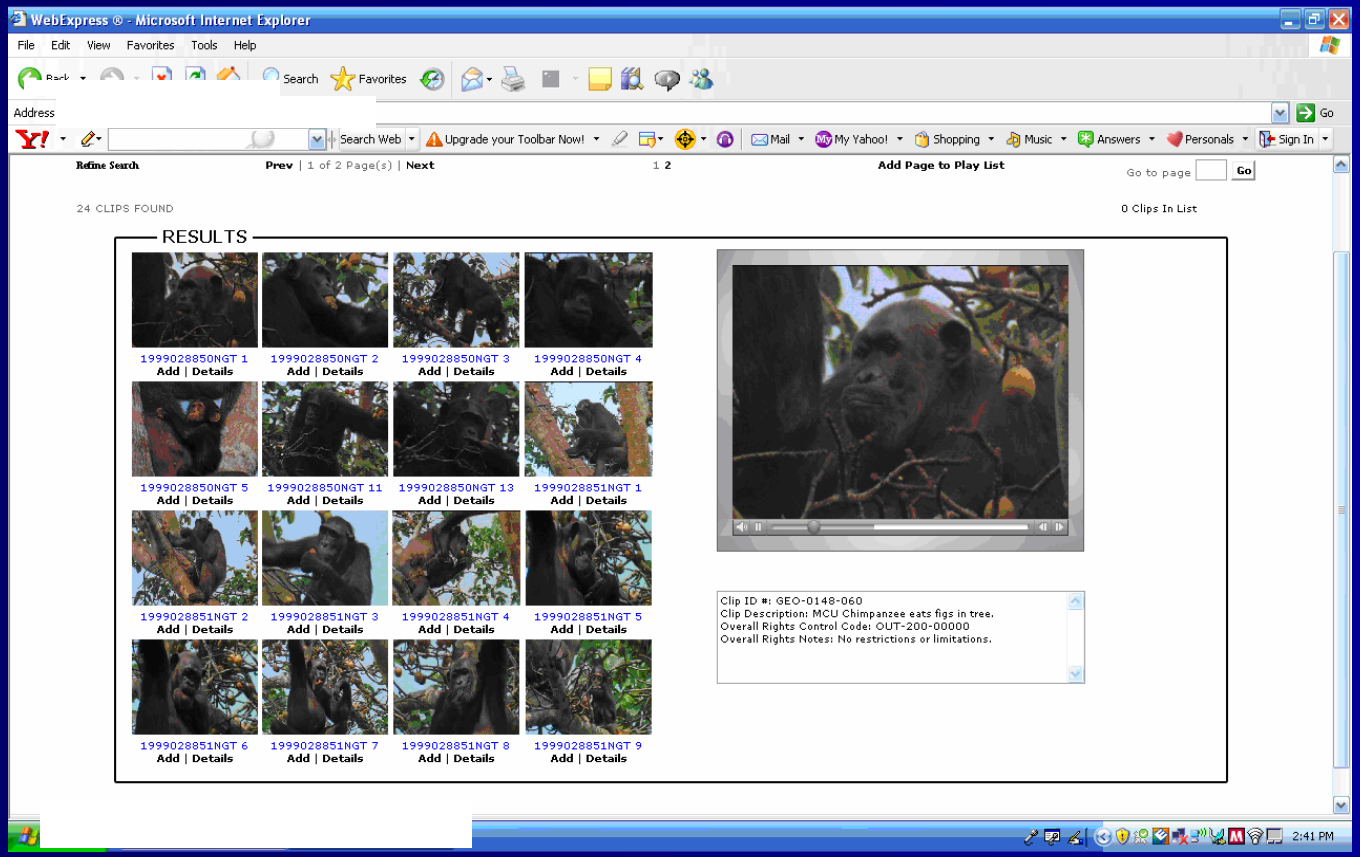
- Created an NG-specific cataloguing style guide that outlines in detail the “rules” for cataloguing to suit our specific needs
- Basic and broad contextual and conceptual keywords and categories based on a standardized language, style and hierarchy about the entire tape.
- Detailed contextual and conceptual keywords and categories based on a standardized language, style and hierarchy **FOR EACH CLIP** and each tape asset in its entirety (Outtake, program master, etc).
- Cataloguing style remains constant regardless of who entered the data...consistency is paramount!.
- Overall we have had a complete shift in the methodology and resources for cataloguing

Intranet Search



- Search controlled attributes, each attribute when combined with another will further filter and limit the results of a search.
- Power Search across Indexed Database is also available

Intranet Search Results



- Search controlled attributes from asset to context to rights within research profile
- Attributes, when combined will further filter and limit the results of a search.
- Power Search across Indexed Database is also available

Summary

NG DAM Recap

- All published assets stored in DAM are catalogued with structured metadata
- DAM also manages:
  - Physical and digital asset info
  - Rights information via
    - Unique alpha-numeric code that communicates rights to internal users
    - Standardized rights summary for external users
  - Intranet used to manage & facilitate production workflow for key processes such as cataloguing, content review and rights data management.

Summary

- Don’t forget the basics !!
  - What are the current business needs?
  - Who are the key stakeholders and benefactors?
  - What are the future needs and expectations?
  - How will this benefit your operation and the ROI?
  - What is the best way to apply to limited resources to gain maximum impact?
  - What is the metadata strategy? What data is critical to daily business / search needs.
    - What is user search behavior?

- DAM solutions are not exclusively a technology problem…and technology alone will not be your savior.

Questions?

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