

# GUIDE TO CONNECTING YOUR DAM

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# GUIDE TO CONNECTING YOUR DAM CONTENTS

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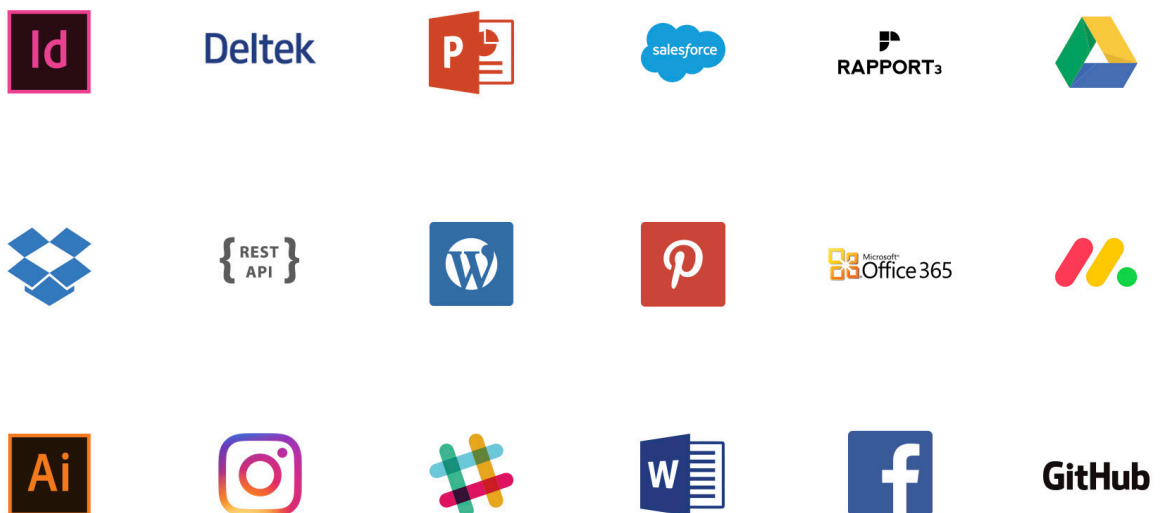
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# GUIDE TO CONNECTING YOUR DAM

**Digital assets are extremely valuable to your business; they enable you to connect with your customers and showcase your skills, services and expertise. There are now countless ways to capture and view digital files, which means the volume of digital assets is growing exponentially.** Firms that rely heavily on images, such as those within the AEC and Real Estate industries, have enormous image libraries full of incredibly valuable business assets. However, the value can only be redeemed if those assets can be found and used, easily and across multiple devices. Digital assets are a product in their own right, the digital representation of a company's physical offering, and one that needs to be managed. This is where Digital Asset Management (DAM) comes into play.

DAM systems enable firms to get the most out of their digital assets. On a basic level, they offer a storage system, but it is much more than this. The storage within DAM systems is extremely well organized and easily searchable. With DAM, assets are managed throughout their lifecycle and users are able to find, share and amend them at a touch of a button. DAM becomes a central repository for managing, organizing and retrieving your firm's most valuable resources. What this means for your business is that your marketing team become more efficient and effective. You are able to react more quickly to business opportunities, ensure you retain brand consistency and have confidence that your assets are being used correctly at all times.

As organizations become increasingly driven by technology, their marketing software is becoming both more sophisticated and more diverse. Technology is being built specifically with the needs of AEC and Real Estate firms in mind, allowing you to work in a way that makes the most sense to your business. Not only is there DAM, helping manage digital assets, but products to manage the entire sales funnel, automate marketing processes and improve knowledge management. Firms need to determine which solutions are right for their business, but also which will work well together. If technology doesn't work well together it can do more harm than good; the ideal is that it connects seamlessly and improves and simplifies workflows and processes.



DAM systems are becoming an essential part of the technical infrastructure. Having the right DAM that can directly link your assets to other technology solutions is vital. DAM needs to be central to your sales and marketing tech stack. By linking DAM to the technology solutions your teams use every day, you can increase its value and the value of your other software. OpenAsset offers integrations to ensure its digital asset management solution connects seamlessly to your other marketing technology. In this guide, we'll talk you through how integrations can benefit your organisation and the value that DAM will add to your tech stack.

# 01. CONNECTING YOUR TECH STACK

While technology is there to make our lives easier, there is a level of complexity involved when using multiple platforms simultaneously. Ultimately, there is little point in implementing the best technologies for your business, if your platforms don't talk to each other. Every system that you select as part of your tech stack will have its own workflows and ways of making operations more efficient. However, the process of moving from one system to another can be both manual and time-consuming. If technology isn't properly integrated, it becomes an overall management burden, which in practice can make it a lot less efficient than it promised to be.

Connecting your technology stack and driving automated workflows through your project management process can provide significant value to your business. It is vital, however, that each part of your tech stack is set up correctly and properly integrated to deliver increased value.

## Integrations Between Common Tech Platforms

Our tech stacks are growing in size and complexity every day. Not only is there technology to help with managing digital assets but also automating marketing processes, managing resources, and improving knowledge management. When deciding upon any new piece of technology, it is fundamental to determine whether it will work with existing platforms. The idea being that integrated technology will connect seamlessly, improve workflows and simplify processes.

Some of the common technology platforms that work well together and are often integrated within an AEC tech stack include:

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- **Cosential** - a proposal automation system that integrates seamlessly with a broad range of third-party applications and web services. Integrations help you work more quickly and more efficiently while maximising the power of your data.
  - **Salesforce** - the largest Customer Relationship Management (CRM) system on the market. The technology combines lead management, marketing automation and sales data to drive lead conversion.
  - **Dynamics** - another CRM solution, Microsoft Dynamics is great for boosting lead tracking, sales, and assisting with cloud-based business applications. The system transforms customer behaviour into valuable data insights.
  - **Wordpress** - the content management system (CMS) that powers over 30% of websites on the internet. Users build everything from blogs to full-blown websites and thousands of plugins allow for simple integrations with common platforms.
  - **Deltek** - an Enterprise Resource Planning (ERP) solution built to help project-based businesses. Software solutions enable superior levels of project intelligence, management and collaboration.
  - **Deltek PIM** - Deltek's Project Information Management (PIM) system is uniquely tailored to AEC companies and provides central access to enterprise-wide and project-specific information.

When integrated correctly, these platforms, as well as others, enable businesses to improve project focus, target and nurture leads more effectively and increase efficiency. Having the right blend of technologies means that return on investment (ROI) can be easily monitored and improved upon.

## The Benefits of Integrating Common Tech Platforms

As well as the overall benefit of increasing efficiencies and improving project focus, each integration offers its own list of benefits:



### Deltek with Salesforce

Being able to share opportunities, account and contact information from Salesforce to Deltek allows for a much more streamlined process. Estimates, proposals and project plans become much simpler to put together, saving time and money.



### Cosential with Deltek

Connecting your financial system and project automation system, allows you to prepare accurate submittals faster, ensure data integrity and boost marketing data with financial data.



### Wordpress with Dynamics

Connecting your CMS and CRM creates powerful portal solutions. You're able to design forms and insert them in your site, collect leads without any coding and build customised record views.

## How Easy Are Integrations?

Connecting technologies within a tech stack can be a daunting process. However, the complexity of integrations will depend on the technology that you have selected as well as the tools that you use to carry out the integrations.

When it comes to integration, it's best to look for APIs that integrate nicely with your existing systems. Tools that offer open or public APIs, using RESTful technology, will be the easiest to integrate. This technology is the industry standard and will ensure that the integrations you put in place are future-proofed.



## Removing Repetitive Tasks with Workflow Automation

As well as more complicated integrations between your tech platforms, workflow automation can make a significant difference. Manual, time-consuming tasks can be transformed into sophisticated processes, meaning that your employees have more time to focus on the things that matter.

Workflow automation tools can help you quickly automate tasks and become more productive. Some of these use web apps and some are entirely offline. Desktop-based tools can be used to implement triggers to automate workflows within your computer. Meanwhile, the real growth area in workflow automation is in cloud-based providers who use API calls from web apps to trigger preset actions. These tools enable functions to be performed inside platforms without needing to log in within your browser.

One of the leading online workflow automation tools is Zapier. It has over 750 different apps that it can integrate with. Everything from the likes of Gmail, Slack and MailChimp can be integrated, automating repetitive tasks without any need for coding or relying on developers to build integrations.



## How to Project Manage Integrations

The best approach to integrations will always be a staggered one. Trying to integrate all workflows and technologies at once can add complexity and impact success. Integration should be an evolving process within your business and, as such, should be approached logically.

The best way to know where to start is to look at the pieces of technology that have the power to yield the most benefit. These will be areas where your employees waste the most amount of time, frequently repeating manual processes. Building incremental success with your integrations will help you to drive change management.

In addition, at each stage of the integration process, you'll want to evaluate the results. You need to be sure you're getting the expected value and that the integration is indeed helping you to automate workflows and increase efficiency.



## 02. WHY A CONNECTED DAM AT YOUR FIRM IS LONG OVERDUE

As we've touched on, DAM on its own creates a considerable amount of value for AEC and Real Estate firms. Managing the vast volume of digital assets, especially images, is a monumental task for marketing teams. DAM enables assets to be found easily and saves a tremendous amount of time that is often lost searching for assets. More than that, DAM makes assets easier to use and repurpose, it ensures they are always on brand and enables you to get the most value out of each and every one. However, to see the most significant benefit from DAM, you need to consider how it will work with your other technology. We have come to expect the systems we use every day to offer integrations that allow them to speak to each other; DAM should be no different. By integrating DAM with other systems, you can provide a more seamless user experience, increase performance by overlapping functions and create a connected practice.

## DAM: An Invaluable Piece of Your Tech Stack

**Having a DAM system in place will make a massive difference to your AEC or Real Estate firm, but connecting it to your other marketing technology will take it to the next level.** If you're considering implementing DAM, or already have DAM, you'll know the importance of proving its worth. With so many other pieces of marketing technology on offer, DAM can sometimes seem like a nice to have. However, when you consider the impact a connected DAM can have, it increases the value of your other SaaS products, significantly improving the efficiency of teams across your business.

**By creating a well-integrated tech stack that is connected through a digital asset management system, you'll be able to:**



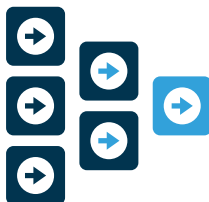
**Improve focus on projects** - by integrating technology that works in the way you do, you'll be able to effectively showcase your firm's specific project experience. Your tech stack should organize, centralize and connect project details with visual assets so you can demonstrate how your firm is unique.



**Boost your efforts** - You'll be able to achieve more effective lead nurturing, more productive sales conversations and ultimately more won opportunities through maximizing the use of your digital assets.



**Prove ROI** - if you connect your technology you will be able to see an end-to-end picture of your marketing and business development efforts. What's more, having the right integrations will give you the chance to measure the overall value of your investments.

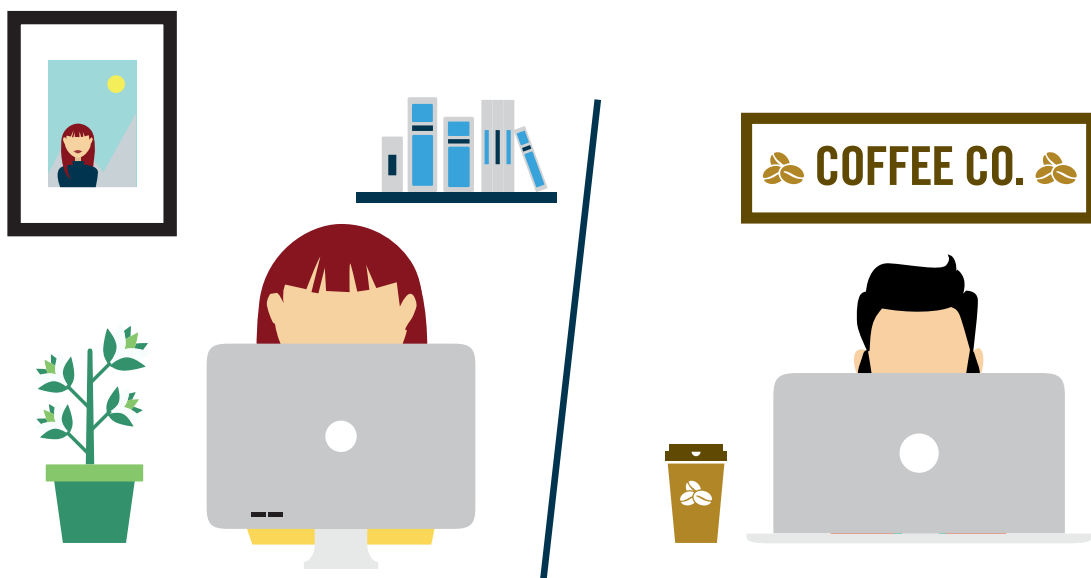


**Increase efficiency** - the right mix of technology will allow you to remove repetitive processes, automate everyday tasks and simplify workflows. Once your team is less consumed with production-oriented tasks, you'll have more time for business development.

## DAM Streamlines Workflows

**OpenAsset's DAM solution has been specifically catered for project-centric organizations with a real need for improved workflows.** Seamless integration of DAM with your existing technology stack will allow you to connect the information, data and visual assets your teams use every day. With data synchronized across your different platforms you will be able to get more value from your data but with zero additional effort. Not only are you able to get more value from both your data and assets, but you will increase the scope of what you can produce. Streamlining workflows will make your teams more efficient, relating to a measurable increase in ROI from DAM.

There are a lot of factors to weigh in when contemplating the right mix of technologies for your business. To deliver the greatest benefit to AEC and Real Estate firms, DAM systems should be project-focused but also cloud-based rather than on-premise. By being cloud-based, DAM enables users to access assets stored in the system from anywhere, significantly increasing its versatility. This is ever more important as our workforces become more mobile, a cloud-based solution like OpenAsset gives you and your employees the freedom to work anywhere and always be able to react to opportunities when they arise.



## 03. Key Integrations: Where Will You Get the Most Value for Your Business?

**DAM is often seen as the ‘single source of truth’ for digital assets and their data, but that doesn’t mean it is the only place this can be found and utilised.** Content libraries can be searched through within many different systems, to get the fullest value from DAM you need to consider integrations. In the digital age we live in, it’s only right to expect software to integrate with the tools you already use. Ensuring you’re able to create the essential integrations with your DAM system will enable you to connect your digital ecosystems in a meaningful and holistic way.

Having a DAM that is project-based, and tailored to your specific industry needs, will allow integrations with key technology systems to deliver the best results. You’ll need to consider which systems are most important to your business and ensure that your DAM solution will be able to integrate with them. Connecting your DAM to the solutions you use most often can streamline your workflow and make DAM the visual hub of your tech stack.

## Deciding Which Integrations to Implement

To decide which integrations to set up for your DAM system, you'll first need to review which integrations are available. As we've just discussed, if you've chosen a DAM solution that has been designed with your industry in mind then there is much more chance that it will include integration with the key tools you use. Once you're aware of all the possible integrations available with your DAM, you'll want to consider where the most value would be added for your business. **For example:**



Do you have an ERP system such as Deltek which, if integrated could reduce the effort to keep both systems up to date and reduce inconsistencies in data?



Would an integration with your CMS allow images to be put on your website automatically saving you time and effort?

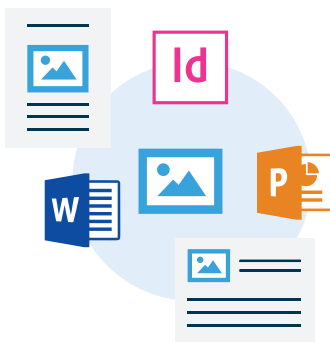


Could an integration with a CRM such as Salesforce allow the automatic creation of a DAM project from a closed won opportunity?

You'll need to consider all of the overlaps between your business platforms and decide where the most value lies. Having a DAM at the center of your technology stack, and connecting it to the tools you use day in and day out, has the potential to improve workflows, produce better materials and free up time for strategic business tasks. To do this, however, you need your key tools to integrate seamlessly.

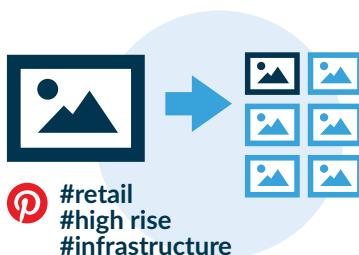
## 04. DAM INTEGRATIONS - WHAT CAN BE DONE?

**As with most things in life, with enough time and money anything can be done.** This is why, in the first instance, it's essential to work out which integrations are most important to your business and will deliver the greatest value. As a project-based DAM, OpenAsset has been explicitly designed for the way AEC and Real Estate business operate. This means that it is possible to integrate it with all of your central technology systems. Integrations with different systems all deliver their own benefits to your organization:



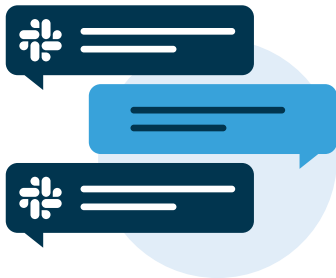
### Document Creation

Integrating DAM with publishing platforms like of Word, InDesign and PowerPoint enables your employees to create documents easily and effectively. All of the assets required will be simply packaged, so they are easy to find and use. What's more, there will be no more broken links. You can have confidence that every piece of material produced is of the highest quality.



### Social Media Management

Integrating with your key social media platforms will allow you to pull assets into your DAM system. If you see interesting or inspirational content on Pinterest, Instagram or Twitter, you can quickly add it to your DAM. On top of that, you can automatically upload images from social media channels if they're shared using specific keywords.



## Communication

You can ensure your teams are in touch and up to date by integrating your DAM with tools such as Slack. By linking your DAM to your internal communications system, you can create more awareness of your digital assets across your firm. Slack can send notifications when a new project or file has been uploaded into your DAM to keep teams up to date. Meanwhile, email notifications can be sent to your admin team, so they are alerted when anything new is uploaded into your DAM.



## Project Management

Project data can be simplified by connecting DAM to your project management software. Integrating with DAM allows you to conveniently upload approved assets to your DAM along with all of their relevant metadata, saving you valuable time when searching and working with your company content.



## Software Development

You can use third-party solutions, such as Zapier, to support the heavy lifting on integrations. By connecting web applications, you can automate repetitive tasks without the need for coding to build the integration. You can also use APIs to create your own custom integrations with DAM.



## CRM and ERP

Synchronizing data with systems such as Deltek Vision can help to save time and reduce inconsistencies. Meanwhile, by integrating your CRM, such as Hubspot or Salesforce, you can ensure that project lists are kept up to date without any additional effort.



## File Storage

Integrating DAM with file hosting services such as DropBox and Google Drive reduces the amount of time it takes to manage your files. You can also reduce the time it takes to keep project lists up to date by integrating with Google Sheets and Excel.



## Content Management

Ensure images on your website are automatically updated by linking your DAM with your CMS platform, such as WordPress. What's more, it works both ways. Not only can you automatically upload new images to your CMS when they are uploaded to your DAM, but you can automatically upload images to your DAM when they're uploaded to your CMS.



## 05. HOW TO CONNECT YOUR DAM

**There are multiple options for connecting DAM when it comes to your business.** It all depends on the resource you have available and the technical skill within your team. You will need to consider the type of integrations there are and the resource required to configure them. There are three principal ways in which integrations can be set up:



**REST API** - using an API takes more time and will need some technical support, but it does allow for pretty much fully customizable integrations. At OpenAsset, we can provide you with documentation and recommended best practices to help your team build API integrations.

**Connectors or wrappers** - vendors do the heavy lifting to support integrations with the software their clients use the most. There is often a cost to these, but they offset the need for as much technical support for significant and valuable integrations.

**Automated integrations through third parties** - third parties, such as Zapier, make it easy to connect applications through triggers that kick off automated workflows. For example, you can connect your DAM to your CMS and automate a project creation in OpenAsset when you win an opportunity in Salesforce.

Using one of the methods above, it's possible to successfully build an integration between OpenAsset and almost any other system that uses modern programming language. As well as simplifying the process of configuring DAM within your existing tech stack, integrations will allow you to optimize repetitive and time-consuming processes. With integrations, you can streamline commonly-used workflows for people in your organization and ensure you get the most out of your DAM system.

## 06. WHAT TO DO NEXT

If you don't have a DAM in place, the first port of call is to find the right DAM for your firm. We have a plethora of resources available to help you make the right decision for your business:



**Guide to Getting started with DAM** - this ultimate guide will help you through all of the stages of selecting and adopting a DAM system. It will help you assess the needs of your business, show you what to look for when evaluating and selecting a DAM and give you tips on how to successfully implement your chosen DAM.



**ROI Calculator** - our simple calculator helps you to quickly and simply see the potential value your firm could expect from adopting DAM.



**How to Write a Business Case for DAM** - everything you need to create a compelling business case for DAM including how to calculate ROI, how to make the most of your DAM trial and how to engage your team and ensure success.

If you already have a DAM, now that you have a list of where your integrations will add the most impact and time savings, contact your customer support team to ensure you maximise your DAM. If you're with OpenAsset, check out our integrations section or email us on [support@axomic.com](mailto:support@axomic.com)



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