



Adobe Experience Manager Content Governance Playbook.

Understanding roles, workflow, and implementation.

Organizations must ensure that all content complies with internal standards for creation, labeling, usage, and maintenance. Maintaining these standards for public-facing materials helps preserve brand identity. Clear, internal guidelines for authoring digital assets are necessary for smooth workflows. Having processes in place for reviewing and refreshing content keeps everything up to date.

Guidelines and processes for managing digital assets fall under the umbrella of content governance. This playbook will explore:

- What content governance is and how it impacts development
- Adobe Experience Manager Sites and Assets implementation
- Metadata and why it's important
- How to use Core Components
- Roles associated with content governance, workflows, and collaboration
- How to keep your content governance up-to-date post-implementation

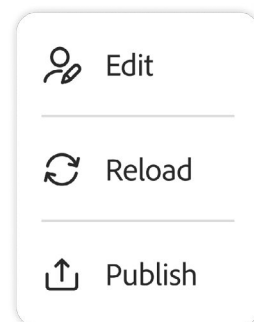
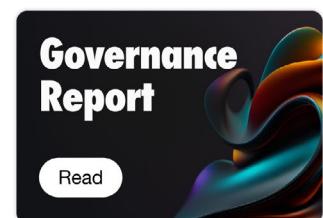


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I want to know what content governance is.

Content governance is the set of policies and processes that govern a company's content supply chain. It helps establish a framework that your team can use to guarantee guidelines, distribution, and standards are met throughout the content lifecycle.

Why is content governance important?

Content governance is essential to an organization. It affects the overall success of content supply chains and an organization's reputation and brand. It can safeguard content accuracy and consistency with a brand's strategy and quality. With built-in content governance, Adobe Experience Manager Sites and Assets can help streamline how you govern your content and provide you with necessary tools to manage your content supply chain.

What is the relationship between content governance, system governance, and legal and corporate governance?

Content governance is always shaped by its legal and technological setting. Experience Manager content governance is informed by documented legal and corporate governance and overall system governance defined for the system architecture. Examples include:

- Legal and regulatory requirements to hold all marketing materials for seven years will inform content lifecycles and workflows for produced content.
- System governance standards for user group creation and access control are tied to Experience Manager folder structures and will influence content strategy and governance. System governance and asset governance need to work together to achieve security and usability.
- Internal corporate governance that disallows the use of machine learning (ML) or artificial intelligence (AI) impacts the activation of certain Experience Manager features.

Why is content governance important during implementation?

The development team should be involved in the content governance strategy during initial discussions and throughout the implementation phase to help configure necessary safeguards in Experience Manager, such as custom workflows and functionality that aren't provided out-of-the-box by Sites or Assets. In addition, your site administrator will help with setting up the proper groups, permissions, and policies for continuity throughout the process.

I want to know five essential actions a developer should take when implementing Sites and Assets.

- 1. Connect and configure new content.** To implement a seamless workflow of new content into Experience Manager you need to set up and configure connectors such as Adobe Asset Link. This allows for the controlled flow of new content into Experience Manager and the easy reuse of approved content when creating new assets.
- 2. Create custom workflows and approval processes.** Experience Manager Sites and Assets include many useful workflows, but there are often situations when it's necessary to extend them to add processes or functionality.
- 3. Implement a process for archiving and saving sensitive content.** Many industries have strict requirements for how to save, store, and archive content. Often there are custom processes in their content governance that teams need to implement to fulfill these requirements.
- 4. Make sure that any custom fields or functionality are added to the asset lifecycle.** You'll sometimes have to add additional metadata to images or automate new processes. In these instances, developers will make sure that the new custom functionalities meet business requirements.
- 5. Define page templates.** Developers and administrators can enable Experience Manager Sites to set an overall structure and layout of pages. You can predefine a set of components and functionalities along with specific on-brand styles to give your pages a consistent look and feel across your customer experiences.

I want to understand the handoff from developer to content authors and practitioners.

During handoff the development and authoring teams should confer with each other to clarify what's already been built and customized and answer any questions. The development team also needs to provide documentation for configurations the authoring team needs to address. It can also be helpful for the development team to share sample pages and sample structures for the authoring team to use when building out additional content.

I want to know the top five essential factors an author or DAM administrator should take when implementing Sites and Assets.

- 1. Organize your content.** Structure your content and assets in an intuitive manner for easy future use. Useful examples of how your content can be structured, particularly for distribution in multiple languages, can be found at [Adobe Experience League](#).
- 2. Create a taxonomy strategy.** Without a taxonomy strategy, tags created in Experience Manager can become hard to find and manage for your team. Taxonomies can be organized hierarchically, with broad categories at the top and subcategories below. Quick start best practices around tags and taxonomies can be found at [Adobe Experience Manager tutorial documentation](#).
- 3. Ensure metadata compliance.** Adhering to internal standards for metadata is an important part of asset management. This enables both team members and external search engines to be able to find your assets easily.
- 4. Assign permissions to groups.** Permissions need to be tested for every group so they can properly engage with content. Thoroughly test all permissions and understand what users and groups can and can't do. An example security matrix is below.

Security Matrix

#	User Group	Operations/Permissions																	
		View	Search	Upload	Edit Pages	Delete Pages	Create Tags	Edit Tags	Create/Edit Users	Delete Users	Share	Approve Content	Publish Content	Edit/Upload Brand Portal	Brand Portal Access	Collections Upload	Collections Delete	Create/Edit Metadata	Delete Metadata
1	System Admin	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
2	Author	x	x	x	x		x	x			x	x		x	x	x	x	x	
3	Creative	x	x	x							x	x			x				
4	Quality Assurance (QA)	x	x								x	x			x				
5	Product Owner	x	x								x	x	x		x				
6	Leadership	x	x								x	x			x				

- 5. Comply with regulations and guidelines.** Manage and maintain content for accuracy and meet any regulations and company guidelines. Establishing content guardrails is crucial not only for brand consistency but also for meeting 508 compliance and consent or cookie management requirements.

I want to gain a deeper understanding of metadata.

Assets should always include metadata. Adding metadata has multiple benefits. It makes it easier to find assets, both for your team and end users. It also allows search engines to better find your images and experiences.

Metadata, subhead, and tagging considerations

Organizations should agree on which metadata fields are optional and which are required. This will make it easier for your authors to find assets. For example, most companies require a title and

description for each asset, but the creator and usage terms of an image may be optional.

Smart Tags are keywords powered by Adobe Sensei generative AI that are applied to assets upon upload. The system identifies relevant terminology and applies the corresponding text-based tags to customers' assets. Smart Tags help add descriptive keywords that facilitate search and findability. Customers may also train the algorithm to use their own terminology through enhanced Smart Tags.

For more information and best practices on tags and taxonomies please see [these best practices](#).

If the correct Smart Tags aren't being applied, use Smart Tag training to help train Adobe Sensei to properly tag your assets according to your brand guidelines.

Companies should define a clear tagging and taxonomy strategy before uploading and tagging their content. If a strategy and approach to how you tag your assets is not clearly defined, tags may be created and used in a chaotic or ad hoc manner. This can lead to unorganized, unused, and misused tags that are difficult to maintain.

I want to understand best practices with Core Components.

Core Components are the building blocks to any successful implementation. Here are some best practices for using Core Components with Experience Manager:

Separation of concerns

Separate the back-end logic from the presentation layer of a component. Use sling models for the back-end logic and HTML template language (HTL) for the view. This allows for a clear distinction between business logic and the front end of a component. This also makes components more flexible and reusable.

Adaptability

Designing components with reusability in mind is key. You shouldn't build large monolithic components that can only be used in one location. Instead, build modular components that can be reused on multiple pages and built upon in the future.

Custom components versus Core Components

It's a good idea to use as many Core Components as possible to cut down on development time, but that may not be possible in all cases. Many clients use custom components in some capacity, and there are instances when custom components are needed. These include:

- Design elements and functionality unique to your business
- Integration for custom or internal APIs
- Advanced user interactions

Custom components are often extensions of core components, as opposed to completely new components.

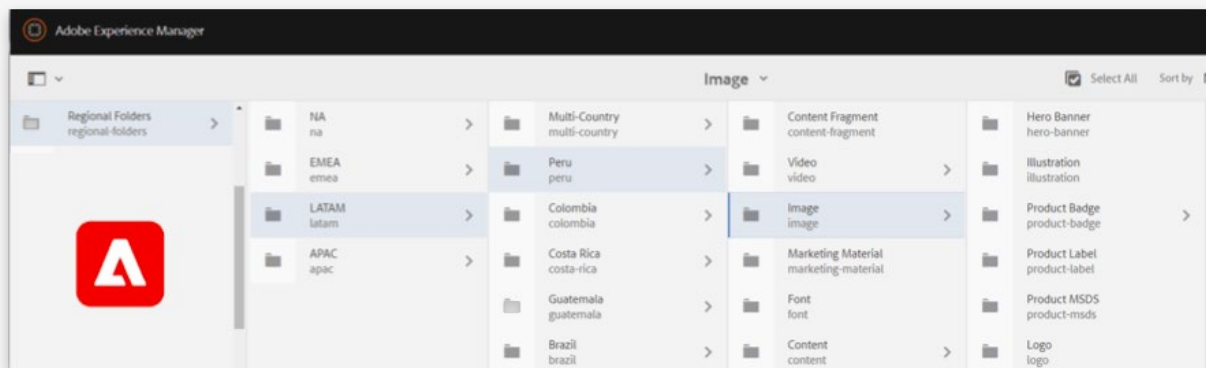
Super authors versus content authors

Most large teams include one or more super authors. The super author will typically be able to create templates, assign permissions within those templates, delete content, and perform other actions, such as generating reports.

Content authors usually only have access to certain content. For example, they won't be able to edit global elements like the header or footer, and they won't be able to delete or move assets or content. Content authors are almost never able to publish pages to the live site. They need to go through the proper approval workflow to get content approved and published.

Example folder permissions and user groups

- Business unit (BU) specialist in North America (NA) is part of "NA-BU specialist" user group and is granted permission to upload content into NA folder, but not into EMEA, LATAM, APAC.
- BU specialist in LATAM is part of "LATAM-BU specialist" user group and is granted permission to upload content into LATAM folder, but not into EMEA, NA, APAC.



I want to understand roles and teams before and after implementation.

Every organization and team structure are different, but the roles that follow are the most common. These team members support during the implementation phase and are the primary stakeholders for the tools after the implementation.

Large team for Sites and Assets

- **Product Owner (1):** The product owner is the primary stakeholder who oversees the project from beginning to end. The product owner works with the marketing team to understand the business logic and how it can be translated to the technical team.
- **Technical lead and architect (1):** The technical lead and architect is the primary technical stakeholder. They work with the implementation team on architecture principles and technical alignment. The technical lead is also the owner of permission management but can train administrators on how to update permissions. They lead a seamless handoff of technical documentation and alignment with business users and authors.
- **Development team (2-4):** The development team takes responsibility for bugs and issues that come up post-launch and is tasked with creating technical documentation to assist with the handoff process between the technical team, business users, and content creators. They can also assist during initial implementation.
- **QA team (3-5):** The QA team's primary responsibility is to test experiences, both from a functional and non-functional perspective. They help identify and report issues and work with developers to help fix and mitigate them. A QA lead usually manages the team, along with 3-4 QA engineers to assist in the testing. QA is normally introduced after the first couple of development sprints and once some of the core development has been built and can be tested.
- **Content author (3-4):** A content author's main responsibility is content creation for the website and other experiences. Content authors work across Experience Maker Sites and Assets, uploading assets applying metadata, and authoring components that align with the marketing objectives. Content authors can be engaged throughout the implementation process and should start authoring content as soon as templates and components become available.
- **Digital asset management (DAM) administrator (1-2):** A DAM administrator focuses on Experience Maker Assets structure, governance, and organization. They will often have more advanced controls than an author, such as the ability to generate reports or develop strategies around archiving and optimizing storage in the DAM.

Optimizing storage and properly organizing your DAM can save a company time and money. In addition, a DAM administrator can also train and support new users in your organization. This is usually more efficient and affordable than hiring an outside consultant.

Small team for Sites and Assets

- **Product owner (1):** A product owner will often do several tasks, including management and content creation. Product owners on a small team will often help QA the site.
- **Content author and DAM administrator (1–2):** Smaller teams typically require just one content author or DAM administrator, who usually is part of the marketing department.
- **Technical lead or architect (1):** The technical lead or architect on a small team is the primary technical stakeholder. They can also help with development.
- **Developer (1):** Development team sizes vary but a developer is always necessary to help with new functionality and to address technical issues.

Risks

Without dedicated content governance, a DAM system faces several significant risks.

- **Uncontrolled asset accumulation:** The DAM risks becoming a dumping ground for assets, compromising its utility and organization.
- **Erosion of protocols:** Adherence to protocols may decline, even if only a few users bypass them, setting a precedent that encourages others to place assets wherever convenient.
- **Incomplete asset tagging:** Time constraints on projects may lead to assets being uploaded without the necessary metadata or tags, reducing searchability and accessibility.
- **Ambiguity in asset naming:** The presence of assets with unclear filenames (e.g., "test1.jpg," "newtest.pdf") may increase, complicating asset retrieval.
- **Future reimplementaion:** If the DAM becomes cluttered by poor tagging, poor naming, and so on, user frustration may escalate, leading to the possibility of an expensive reimplementaion within 5 to 10 years to restore manageability.
- **Difficulty in change management:** Reduced adaptability: Managing DAM updates and changes as business needs evolve will grow more difficult and compromise both efficiency and adaptability.

Collaboration between technical experts and practitioners.

DAM administrators oversee the implementation and use of Experience Manager

Assets. However, their roles can be quite different. A digital asset manager deals more with governance and communication, while a DAM administrator handles the technical side.

Digital Asset Manager (Functional)

- Manages Experience Manager Assets to support all lines of business and for all channels and is the subject matter expert on DAM content and processes.
- Uses Assets reports and periodic audits to check on governance and identify non-compliance items. Helps this business or partners bring content into compliance.
- Develops and maintains governance of metadata standards, DAM folder structure, and taxonomy.
- Documents DAM processes and standards and communicates to partners.
- Stays informed of the latest business needs and trends and conducts routine user experience research to make sure the metadata structure and taxonomy is meeting the needs of all users.
- Implements routine DAM clean up and archiving practices.
- Serves as point person for asset inquiries.
- Helps train new and existing users, providing support as needed.

DAM Administrator (Technical)

- Employs system reporting, monitoring tools, and periodic audits to measure the technical health of Experience Manager Assets and identify risk.
- Implements structures and permissions defined by internal Adobe teams or DAM administrators.
- Provides guidance to development teams and business lines about system architecture on how to use Experience Manager Assets.
- Documents procedures for building and managing Experience Manager Assets features, components, and tools.
- Trains business team members and development partners so new functionality for Experience Manager Assets meets technical requirements and gets tested and implemented as required.
- Schedules installs of new software releases and application system upgrades. Also evaluates and installs patches and new applications.
- Acts as the subject matter expert on Experience Manager technical governance and performance.

Best practice tip: Early collaboration and communication between the technical team and practitioners are key. Both teams should be communicating to make sure that what the technical team creates is in alignment with expectations from the business and creative users.

I want to see an example of user, group, and workflow examples.

Below is a practical illustration of user and group profiles, and a security matrix detailing their permissions.

- Authors create the page or edit an existing page. They upload and modify assets including metadata and tags triggering the specific approval workflows.
- Creative teams view, upload, and edit assets and content.
- The development QA team has view access only. They perform functional sanity testing and make sure there are no visual errors. They also check for accessibility and analytics.
- Product owners have final sign-off and approve the content.
- Leadership receives notification once the page and associated assets have been published and approved.

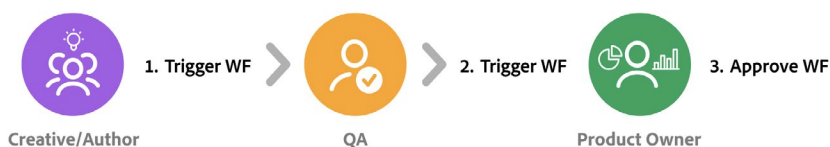
Large team workflow

1. **Creative** creates content for experiences.
2. **Authors** upload and configure content, including metadata, which triggers the workflow.
3. **The QA team** checks the entire page and takes the workflow to the next step.
4. **Product owners** have final sign off on changes and workflow approval.
5. **Leadership** sees the results once workflow is approved and an email is sent to the leadership group.



Small team workflow

1. **Creative** creates and authors content and triggers the workflow.
2. **The QA team** checks the entire page and takes the workflow to the next step.
3. **Product owners** have final sign off on changes and workflow approval.



I want to better understand how to evaluate the role of a DAM administrator.

As your DAM system matures, the role of your DAM administrator becomes increasingly pivotal.

- **Institutional knowledge:** Over time, your DAM administrator will accumulate a wealth of institutional knowledge, becoming an invaluable resource for managing your digital assets effectively.
- **Team scaling:** As your content and ROI grows it becomes possible to expand your team. These team members would work under the DAM administrator to efficiently manage the increased volume of content ingestion.
- **System development:** Deep system knowledge enables DAM administrators to assist with development and future enhancements as business grows or needs evolve.
- **Enhanced recommendations:** With extensive hands-on experience, the DAM administrator will be in a prime position to make informed suggestions for system improvements, further optimizing the DAM's performance and user experience.

Be sure to review this with your recruiting team when looking to fill the role of a digital asset manager.

I want to understand governing with Experience Manager post-implementation.

After initial implementation, there should be regular check-ins between the technical and business teams. These check-ins should discuss user experience, identify issues, and gather feedback on any new features or functionality. In addition, further processes should be defined and established for reporting bugs or technical issues encountered by authors and business users. The technical team should address these issues promptly and communicate updates to authors and business users. Implementing these processes will improve system efficiency and enhance the experience of your end users.

Considerations at three months

Governance committee: Best practice is to establish a governance committee as part of discovery and implementation. The stakeholders who provided direction on features and functionally can help select the business and technical representatives who will continue to uphold taxonomy and permissions needed for the long-term health of the system.

Workflow optimization: After the initial implementation your team may find that steps within your content workflow are either too complicated or insufficient. It's good to review and optimize your content workflow to maximize productivity.

Additional training: After the initial implementation it will become clear where your team needs additional support or training. Platform-specific details like enhancing metadata, adding custom attributes, or adding new products or integrations to workflows typically require additional support.

Considerations at six months

Roles and responsibilities: After the initial implementation is complete and your team has established and optimized some of your content workflows, it's wise to review roles and responsibilities. Often, there are roles such as QA or content authors that will no longer be needed at full capacity. These team members will often move to different projects or find different roles within the current project.

Considerations at 12 months

Regular process and standard reviews: A year after your implementation your team should review all current processes and workflows to check that they fit your current business needs and requirements. They may find that some processes no longer fit current needs or that optimizations can be made to enhance productivity. Review current processes to maximize productivity every year.

Content tracking and optimization: After the first year of implementation, review your content strategy and performance. For example, assess whether some calls to action outperform others or whether some images are more impactful than others. Review how your content is performing with your analytics team to check that it's being tracked, and then take the proper actions to enhance it.



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