

## The self-assessment playbook for AEM Assets onboarding

This Playbook is a companion guide to the article "[Fragmented storage to a unified assets hub: A self-assessment for AEM Assets onboarding](#)" by Adobe Experience Manager Champion Vidyotma Rohmetra.

Whether you are a product owner or a practitioner, a brand manager, or even a marketer who is ready to adopt Adobe Experience Manager Assets, these discovery questions are a powerful self-assessment guide for evaluating your current infrastructure.

This in-depth playbook includes **strategic and practical questions** that you should consider but might not know to ask in your journey of transforming digital asset "storage" into "activation."

## Distinct layers for self-discovery

This guide is intended to help you *look at your existing workflows through a new lens*. This playbook provides you with a guided assessment process covering three functional pillars, each addressed with *three distinct layers in the framework*:

- **The discovery questions:** These are designed to help you and your team reflect on your current pain points and imagine your future state. They aren't just technical queries; these are designed to help look beyond the "way we've always done it" and reflect on your true operational needs.
- **The intent:** This is the "Why." Knowing why you are asking a question is just as important as the answer itself. It helps you uncover the underlying business need rather than just a technical requirement.
- **Capability translation:** Use this section to spark conversations with your creative leads and IT partners. These are real-world prompts to give you a "head start" to start mapping your requirements and learning about AEM's capabilities in the process.

## Pillars of the self-assessment framework

### Pillar 1: Current state & pain points

1. What core processes are part of our daily business/marketing workflows?
2. What features we wish should have been in our current platform?
3. Where does the team spend the most effort within the asset management lifecycle?
4. What are some repetitive processes that could be automated?
5. Are there any asset lifecycle processes that run outside of your current platform(resizing, manual sharing, etc.)?

### Pillar 2: Content Inventory, search & Metadata strategy

1. What information is currently tracked for our assets and what more should be added?
2. How can we make searching for assets easier (e.g. by folder, keyword, SKU, campaign id, brand, product category etc.)?
3. What are the different asset types that should be migrated (images, videos, documents, GIFs, 3D graphics, etc.)?
4. Is there a controlled vocabulary or an existing list of tags we should use for our assets?

### Pillar 3: Distribution & governance

1. Where do our assets go once they are approved (e.g., CMS, social media, email marketing, e-commerce, print)?
2. What level of control do we need to remove stale or legally restricted live assets from our digital channels?
3. What level of governance do we need to protect "top secret" campaign files from being leaked?
4. What level of reporting do we need to measure our assets ROI?

## Pillar 1: Current state & pain points

Ask these questions to establish the baseline and identify the ROI for moving to AEM Assets.

### 1. What core processes are part of our daily business/marketing workflows?

What is the intent?	
<ul style="list-style-type: none"> <li>Identify 'must have' functionalities that the team relies on today. This creates a baseline for success. i.e. to compare how AEM Assets makes those same tasks faster or more automated.</li> <li>Distinguish between essential features vs just "noise"</li> </ul>	
If the daily feature is.....	Translate to capabilities like.....
"Sharing assets in bulk with our vendors/merchants and internal teams"	<ul style="list-style-type: none"> <li><b>Content Hub</b> is an intuitive portal designed for marketers and creatives to manage and share approved assets with both authenticated and anonymous users by generating a link with expiration date for governance.</li> <li>Learn more about <a href="#">Content hub</a>.</li> </ul>
"Generating multiple sizes and formats of an image"	<ul style="list-style-type: none"> <li><b>Dynamic Media Image Presets</b> define how images are delivered to a specific size, quality, format, sharpening.</li> <li><b>Image Profiles</b> support bulk operations on asset folders like smart crop, pixel crop and the ability to preserve crop content across target resolution (mention about intuitiveness).</li> <li>Learn more about <a href="#">Dynamic Media</a>.</li> </ul>
"Downloading images for use in campaigns, flyers creation process"	<ul style="list-style-type: none"> <li><b>Asset Link extension</b> allows creatives to work on high-res master files without ever leaving their creative tools like Photoshop, InDesign, or Illustrator. This eliminates the "download-upload" cycle entirely.</li> <li>Learn more about <a href="#">Asset Link</a>.</li> </ul>

### 2. What features do we wish we had in our current platform?

What is the intent?	
<ul style="list-style-type: none"> <li>Quantify the "cost of inaction". (e.g. If you wish for "better searching," the intent is to learn how Omnisearch and AI-driven smart tagging will reduce hours spent manually hunting for assets.)</li> </ul>	
We wish to have.....	Translate to capabilities like.....
"A way to detect duplicate assets and avoid using redundant versions"	<ul style="list-style-type: none"> <li><b>Duplication detection service</b> identifies duplicate assets even if the filenames are different. Including notifying users during asset upload.</li> <li>Learn more <a href="#">Asset duplication detector</a>.</li> <li><b>Timeline view</b> provides an insight into asset versioning and even compares the changes made to a file and ability to restore previous versions.</li> <li>Learn more about <a href="#">AEM versions</a>.</li> </ul>

## 2 (continued). What features do we wish we had in our current platform?

<p><i>"A way to edit images without having to juggle between different tools"</i></p>	<ul style="list-style-type: none"> <li>• <b>Adobe Express</b> within AEM Assets fulfills your editing needs without having to switch between your creative tools and asset manager.</li> <li>• Learn more about <a href="#">Adobe express integration</a>.</li> </ul>
<p><i>"A way to give our vendors/agency access to a specific folder to upload their assets, without them seeing our internal project or other agency folders"</i></p>	<ul style="list-style-type: none"> <li>• <b>Asset Essentials</b> offer a user-friendly workspace to organize brand folders and set strict folder-level access controls.</li> <li>• Learn more about <a href="#">Asset essentials features</a>.</li> </ul>
<p><i>"I wish I could search for 'Summer Vibes' or 'Eco-friendly packaging' and see every relevant photo we own, regardless of what the file is named"</i></p>	<ul style="list-style-type: none"> <li>• <b>AI Search</b> is an advanced capability that understands the meaning and intent behind your query rather than relying on exact keyword matches.</li> <li>• Have multilingual product packaging?- find relevant content regardless of your query language.</li> <li>• Learn more about <a href="#">AI driven metadata tagging and search</a>.</li> </ul>

## 3. Where does the team spend the most effort within the asset management lifecycle?

<b>What is the intent?</b> <ul style="list-style-type: none"> <li>• Determine which phase of the Asset Lifecycle requires the most robust configuration.</li> <li>• Teams are more likely to adopt a new solution if it reduces manual labor and saves their time.</li> </ul>	
<i>If the effort is in.....</i>	<i>Translate to capabilities like.....</i>
<p><i>"Manual Metadata Keeping- because our teams rely on asset metadata to find product images, while marketing assets and logos are keyword driven"</i></p>	<ul style="list-style-type: none"> <li>• Assign default metadata to assets using <b>Metadata profiles</b>. For example, assets uploaded to a summer campaign folder can inherit specific metadata (<i>like 'season', 'brand'</i>) without a manual intervention by your team.</li> <li>• Learn more about <a href="#">Metadata profiles</a> and <a href="#">Bulk metadata editing</a>.</li> </ul>
<p><i>"Asset approval- because coordinating levels of approval and feedback via email is time-consuming"</i></p>	<ul style="list-style-type: none"> <li>• <b>Workflows</b> provides a digital paper trail - trigger an approval request, or just request feedback directly within the platform. Automating the transition from "Approved" to "Live." Assets can instantly push to your integrated digital channels without a single manual hand-off.</li> <li>• Learn more about <a href="#">Workflows</a> and <a href="#">Annotations</a>.</li> </ul>

#### 4. What are some repetitive processes that could be automated?

##### What is the intent?

- Uncover high-volume manual tasks (the "grunt work") that consume your team's time and are prone to human error.
- Identify opportunities for automated "housekeeping" - AEM Assets offer an extensive capability of relying on automated workflows and flexibility to build custom.

If they say.....	Translate to capabilities like.....
<p>"I have to email five people every time new assets are either uploaded, deprecated or even updated to a new version"</p>	<ul style="list-style-type: none"> <li>• Any change like a new version uploaded or a file being moved/deleted is automatically notified to the <b>"Watchers"</b>, so you don't have to. It allows any user to follow a folder, asset or collection.</li> <li>• Learn more about <a href="#">Folder subscriptions and notifications</a>.</li> </ul>
<p>I have to weekly flag images of products that are restricted for use on 3rd party vendor platforms"</p>	<ul style="list-style-type: none"> <li>• <b>Meta-data driven permissions</b> can be used to automatically restrict a certain user group from viewing, downloading or sharing assets with a certain metadata property like 'asset status' or an 'asset type'= "pdf".</li> </ul>
<p>"I have to open every image in our current platform to add meta-data to vendor shared images"</p>	<ul style="list-style-type: none"> <li>• While capabilities like Metadata Profiles and Bulk Metadata Editing is the standard way to update dozens or hundreds of images simultaneously.</li> <li>• <b>Metadata import and export</b> is another way to automatically map the data from a CSV to your assets in DAM.</li> <li>• Learn more about <a href="#">Metadata import and export</a>.</li> </ul>

#### 5. Are there any asset lifecycle processes that run outside of your current platform (resizing, manual sharing, etc.)?

##### What is the intent?

- Uncover the "Shadow DAM" - these are the manual workarounds that teams use because the current platform is failing them
- Decommission tools like WeTransfer, Dropbox, desktop image converters.
- Identify the need for enabling operations like create, read, update, delete through Assets APIs, if certain processes must stay outside.

If they do this "Outside"....	Translate to capabilities like.....
<p>"Certain metadata for our e-commerce products come from a 3rd party PIM "</p>	<ul style="list-style-type: none"> <li>• <b>Asset Compute Microservices</b> allows you to custom integrate with external systems to retrieve data and attach it to your assets.</li> <li>• Leverage <b>Content Fragments</b> to store raw data from your 3rd party PIMs and then setup workflows to marry your product images to its metadata.</li> <li>• Learn more about <a href="#">Asset compute microservices</a> or share with your development team.</li> </ul>
<p>"Certain brand teams just download raw assets to curate site banners using specialized tools. But these final versions never make it back to our current asset manager"</p>	<ul style="list-style-type: none"> <li>• <b>HTTP APIs</b> enable operations like create, modify, delete and update on digital assets for these scenarios where organizations have special home grown tools for creative artwork designing. While, Adobe creative apps use <b>Asset link feature</b> to check out a file, edit it, and check it back in as a new version or a new asset without ever leaving their workspace.</li> <li>• Learn more about <a href="#">Assets HTTP APIs</a> or share with your development team.</li> </ul>

## Pillar 2: Content inventory, search & Metadata strategy

These questions focus on "Findability" and the organization of the future repository.

### 1. What information is currently tracked for our assets and what more should be added.

What is the intent?	
<ul style="list-style-type: none"> <li>• Distinguish between OOTB properties and custom business-specific attributes that uniquely identify your assets.</li> <li>• Determine which fields are informational (descriptive) versus administrative (legal/rights)</li> </ul>	
This could be.....	Translate to capabilities like.....
<p>"Add a unique identifier to all product images for our ecommerce brand. Something our agency can rely on while sourcing such assets"</p>	<ul style="list-style-type: none"> <li>• Much like a form captures user data, a <b>Metadata Schema</b> is a customizable tool that captures the vital details of your assets.</li> <li>• Define flexible rules that isolate brand-specific content or automatically generate unique identifiers (e.g. <i>an Offer ID</i>) that your agency teams can rely on during search.</li> </ul>
<p>"Add a Business Unit identifier to distinguish assets that only support brand A and brand B. While other brands are restricted"</p>	<ul style="list-style-type: none"> <li>• Learn more about <a href="#">Metadata schemas</a> or share with your development team.</li> </ul>
<p>"Can we somehow link a campaign id to our final campaign files. Our marketers find it easy to track campaign assets by their id"</p>	<ul style="list-style-type: none"> <li>• If your team uses <b>Adobe Workfront</b> for campaign management, the Campaign ID can be automatically pushed from the Workfront project into the AEM Asset metadata when the file is "handed off" to the DAM.</li> </ul>

### 2. How can we make searching for assets easier (e.g. by folder, keyword, sku, campaign id, brand, product category etc.)

What is the intent?	
<ul style="list-style-type: none"> <li>• Identify which fields are the most "discoverable". This informs the design of the Search filters.</li> <li>• Intent is to move towards a search-first culture, reducing the time spent clicking through deep folder hierarchies.</li> </ul>	
Think beyond basics, like.....	Translate to capabilities like.....
<p>"Customizing search using attributes like <b>asset status</b> for campaign assets that undergo levels of approvals"</p>	<ul style="list-style-type: none"> <li>• Customize the search rail (the filter panel on the left in the Assets UI) by adding a 'status' filter. For instance, a campaign manager simply checks the "Approved" status filter option to see legal-cleared, final-status assets, eliminating the risk of using draft versions.</li> </ul>
<p>"Ability to perform full-text based search like 'find me images of pink frosting cupcakes'"</p>	<ul style="list-style-type: none"> <li>• While, <b>Smart Tags</b> are powered by AI models to analyze content and add tags to the assets.</li> <li>• Learn about <a href="#">How to search assets in AEM</a> and <a href="#">Smart tagging</a>.</li> </ul>
<p>"A way to quickly access frequent searches or group assets across different locations."</p>	<ul style="list-style-type: none"> <li>• If you frequently need "<i>Brand A + Approved + Instagram Banners</i>," you don't have to set those filters every day. You save it as a <b>Smart Collection</b>, and it updates automatically as new assets matching those rules are uploaded.</li> <li>• Learn more about <a href="#">Managing collections</a>.</li> </ul>

### 3. What are the different asset types that should be migrated (images, videos, documents, GIFs, 3D graphics, etc.)?

What is the intent?	
<ul style="list-style-type: none"> <li>• This is the perfect time to ask <i>"Do we really need to migrate 10 years of legacy .gifs, or can we archive them?"</i></li> <li>• The intent is to reduce migration "noise" and costs by identifying what is actually relevant for the future state.</li> <li>• Determine which "renditions" should be generated automatically. Different file types could require different processing logic.</li> </ul>	
If they say.....	Translate to capabilities like.....
<p>"We have massive High-Res images (PSD, TIFF) that we need to store and use, but they are too slow to work with"</p>	<ul style="list-style-type: none"> <li>• One master file + one URL = infinite sizes for every device. When you upload one high-res master image, AEM uses a single URL to deliver that image in any size on the fly.</li> <li>• You no longer need to store 10 different versions of the same image.</li> <li>• Learn more about <a href="#">Image presets</a>.</li> </ul>
<p>"We are starting to use 3D graphics and high-quality videos, but our current system doesn't support them."</p>	<ul style="list-style-type: none"> <li>• Get native support for 3D formats (like .glb or .obj) with an <b>Interactive 3D Viewer</b>. For video, it uses <b>Adaptive Bitrate Streaming</b>, which automatically adjusts video quality based on the user's internet speed—<i>just like Netflix</i>.</li> <li>• Provide "boutique" experiences (<i>like 360-degree product spins or 4K video</i>) directly from the DAM to your website.</li> <li>• Learn more about <a href="#">Dynamic media video profiles</a> or share with your development team.</li> </ul>

### 4. Is there a controlled vocabulary or an existing list of tags we should use for our assets?

What is the intent?	
<ul style="list-style-type: none"> <li>• Move away from "flat" keywords and toward a hierarchical taxonomy (e.g., Brand &gt; Sub-brand &gt; Product Line) to ensure consistency across teams.</li> <li>• <b>Remember! You are part of an enterprise asset manager.</b> Ensure only "approved" tags are used, preventing the metadata "clutter" (e.g., having both "US" and "USA" as tags) which ruins search accuracy.</li> </ul>	
Consider.....	Translate to capabilities like.....
<p>"Tagging by languages if you manage regional assets"</p>	<ul style="list-style-type: none"> <li>• Using <b>localized tags</b> bridges the gap between global strategy and local execution. For instance- your German team can search for "Sommerkampagne" and your French team for "Campagne d'été," but both will find the <i>exact same</i> set of assets. This ensures global consistency while allowing teams to work in their native language.</li> <li>• Formalize a tagging framework based on these <a href="#">Tagging best practices</a>.</li> </ul>
<p>"Tagging based on the appeal of assets". e.g. assets for healthcare content are tagged to 'healthcare', assets appealing to women grooming can be tagged to 'beauty'"</p>	

## Pillar 3: Distribution & governance

these questions allow you to uncover capabilities beyond storage

### 1. Where do our assets go once they are approved (e.g., CMS, social media, email marketing, e-commerce, print?)

#### What is the intent?

- Identify every “downstream system” so you can transform your DAM from a static library into a strategic engine that feeds your digital channels directly. Every time an asset is downloaded and re-uploaded elsewhere, the “Single Source of Truth” is broken.
- Hence, identify integration points that allow your DAM to power your live channels automatically, ensuring brand consistency and version control.

<i>If they say.....</i>	<i>Translate to capabilities like.....</i>
<i>“Our non-Adobe content management system”</i>	<ul style="list-style-type: none"> <li>• <b>Asset Selector</b> is a lightweight, pop-up interface that can be embedded into <i>any</i> third-party application. It allows users to browse and search your Assets library directly from within a non-Adobe CMS.</li> <li>• Learn more about <a href="#">Using asset selector</a> or share with your development team.</li> <li>• In an ideal state AEM Assets should be at the centre of your content supply chain. For instance, marketers can pull in approved assets in Adobe Express and use the <b>Express Content Scheduler</b> to publish directly to TikTok, Instagram, and LinkedIn.</li> </ul>
<i>“Social Media”</i>	
<i>“External Agencies”</i>	

### 2. What level of control do we need to remove stale or legally restricted live assets from our digital channels?

#### What is the intent?

- Determine if your DAM should simply warn you about an expiration or automatically take action by unpublishing the asset to prevent legal liability.
- Identify how AEM can reclaim manual hours using spreadsheets or calendar alerts to track asset lifecycles through automated expiration workflows.

<i>It takes hours to resolve issues like.....</i>	<i>Translate to capabilities like.....</i>
<i>“Remove a celebrity endorsed beauty image instantly from our websites, due to rights expiration”</i>	<ul style="list-style-type: none"> <li>• By setting <b>Expirations</b> for your assets you no longer need to hunt down every instance of an image on your site. Once that date hits, AEM can automatically trigger a status change. If you are using <b>Dynamic Media</b>, the public URL is deactivated, meaning the image disappears from all live websites simultaneously.</li> <li>• For assets marked as “Restricted” or “Expired”, apply rules that remove the “Download” button for everyone except administrators.</li> <li>• Learn more about <a href="#">Managing assets and expirations</a>.</li> </ul>
<i>“Manage a blunder where our social team endorsed an outdated product because they didn’t know we ended the contract with the merchant”</i>	
<i>“Our retail product images are often assigned a SKU days after they are uploaded. But we can’t prevent them from being searched and risk use of unapproved imagery”</i>	<ul style="list-style-type: none"> <li>• Customize search results to automatically filter out any assets having partial metadata.</li> <li>• Learn more about <a href="#">Metadata driven permissions</a> or share with your development team.</li> <li>• Alternatively, setup <b>folder-level permissions</b> to keep “WIP” assets in a private staging area until they are fully enriched and ready for use for the rest of the team.</li> </ul>

### 3. What level of governance do we need to protect “top secret” campaign files from being leaked?

#### What is the intent?

- Identify what and where technical "firewalls" are required to protect high-stakes campaign files to prevent accidental spoilers or premature leaks.
- Determine the balance between creating a high-security "digital vault" for sensitive files and open collaboration for the rest to ensure campaign integrity.

Few ideas.....	Translate to capabilities like.....
"Can we invoke some kind of legal agreement over the use of unreleased campaign files"	<ul style="list-style-type: none"> <li>• <b>Digital Rights Management</b> enforces asset protection by enforcing the acceptance of a license agreement before an action can be taken on the assets.</li> <li>• Learn more about <a href="#">Digital rights management</a>.</li> </ul>
"Can we automatically watermark protected files until they are release ready"	<ul style="list-style-type: none"> <li>• Add a digital watermark to your images and videos. A rule can be configured that automatically applies a watermark (e.g., "CONFIDENTIAL - DO NOT DISTRIBUTE") to every image within a folder.</li> <li>• Learn more about <a href="#">Watermarking your assets</a>.</li> </ul>

### 4. What level of reporting do we need to measure our assets ROI?

#### What is the intent?

- Your investments in DAM shouldn't be a static expense; instead help optimize your creative spend.
- Identify which type of assets are "workhorses" and which are just clutter.
- Utilize reporting and insights to your leverage.

Few ideas.....	Translate to capabilities like.....
"We spent \$\$ on a new product photoshoot—can we know which of those images are actually being used on our high-traffic pages"	<ul style="list-style-type: none"> <li>• Using <b>Assets Reports</b> you can run reports showing publication status telling you exactly when an asset was pushed to a specific delivery target. For instance, if a flyer isn't showing on the app, the marketer can instantly verify in AEM if the asset was published correctly, identifying exactly where the communication chain broke.</li> </ul>
"Can we track if our weekly flyer offers are successfully 'pushed' to our mobile app, email and website"	<ul style="list-style-type: none"> <li>• Track every time an asset is shared, including who generated the shareable link and how many times that specific link was accessed.</li> </ul>
"Can we retrace how many times a file has been shared with certain external users"	<ul style="list-style-type: none"> <li>• Generate a csv report by exporting metadata fields of your assets and analyze any missing metadata.</li> <li>• Learn more about <a href="#">Assets reports</a> and <a href="#">Assets insights in content hub</a>.</li> </ul>
"Can we easily report on assets with missing metadata"	

## Summary

The journey from dumb storage to intelligent activation starts with asking the right questions - and now you have the blueprint to lead the way. Remember to keep Adobe Experience Manager Assets at the center of your content supply chain. It bridges the gap between the people who **plan** the work, the people who **create** it, and the platforms that **deliver** it.