Brandfolder

by smartsheet

Onboarding Packages Overview

Self-Guided

Our robust webinar series will take your team through how to define taxonomy and use best practices to organize your structure. We'll review the bulk management capabilities and how to leverage Brandfolder tools to refine your workflow. Then we'll cover distribution strategies and how to ensure all of your user groups have an optimal experience within your Brandfolder. Curated supplemental resources can be found in the Implementation Toolkit, which includes a glossary of terms and highlights specific Knowledge Base articles and materials that help you prepare for launch.

Guided

Our medium-touch offering is for harder-working deployments that need more expert consultation to provide value. Your PM will coordinate a kickoff call to review the project plan, milestones and timeline; take your Admins through our carefully developed training series; guide you through user testing; and help strategize your launch approach to ensure successful user adoption and meaningful ROI.

Guided+

The training and support provided by Guided has proven successful for countless clients, but sometimes you might need some additional help getting over the finish line. Guided+ includes assistance building the structure, file migration and application of existing metadata. Using your Tags and Custom Fields we can automate the sorting and organizing of your assets to reduce Admin time spent on the initial setup.

Enterprise

This option is our highest-touch offering for complex, cross-functional team deployments that need tailored solutions and hands-on, expert guidance. Our PM team will facilitate weekly status calls to work through defined milestones including assistance building the structure, file migration and application of existing metadata, organizing content based on that metadata, in-depth admin training, and assistance in organizing launch efforts across your priority user groups.

Enterprise+

This option combines all the high-quality services of the Enterprise approach but is best suited for clients that have decentralized marketing teams or groups of editable users. We'll coordinate with your project leader to outline onboarding services across multiple teams to ensure every team is equipped with the essentials for success.

SERVICES MATRIX

	Self Guided	Guided	Guided+	Enterprise	Enterprise+
Recorded Video Trainings	✓	✓	✓	✓	✓
Training on Organization Best Practices	✓	✓	✓	✓	✓
Platform Configuration Training	✓	✓	✓	✓	✓
Asset Bulk Management Training	✓	✓	✓	✓	✓
Training on Distribution Best Practices	✓	✓	✓	✓	✓
User Testing Guidance	✓	✓	✓	✓	✓
Sample Launch Materials	✓	✓	✓	✓	✓
Named Implementation Resource		✓	✓	✓	✓
Customized Project Plan & Client Dashboard		✓	✓	✓	✓
Single-Sign-On Configuration Facilitation		✓	✓	✓	✓
Project Kick Off Call		✓	✓	✓	✓
Custom Structure Recommendations		✓	✓	✓	✓
Taxonomy Consultation & Guidance		✓	✓	✓	✓
Audience Profile and User Management Consultation		✓	✓	✓	✓
Review of UAT Feedback		✓	✓	✓	✓
Launch Strategy Guidance		✓	✓	✓	✓
CSM Handoff (if applicable)		✓	✓	✓	✓
Assistance Building Structure			✓	✓	✓
File Ingestion Assistance			✓	✓	✓
Existing Metadata Application			✓	✓	✓
Automation Setup for Asset Organization			✓	✓	✓
Assistance Creating & Populating End User Environments			✓	✓	✓
Launch Q&A Support			✓	✓	✓
Weekly Syncs				✓	✓
Workflow Consultation				✓	✓
Working Sessions for Asset Organization				✓	✓
Guest User Training for Launch (Upon Request)				✓	✓
Collaborator Training for Launch (Upon Request)				✓	✓
Monthly Touchbase with Implementation SE					✓
Dedicated Training Sessions for Multiple Teams					✓
Build Out Services for Multiple Brandfolders					✓
File Ingestion for Multiple Brandfolders					✓
Asset Organization for Multiple Brandfolders					✓

I. Best Practices in Organization and Taxonomy

- This training does a deep dive into the best practices of setting up your Brandfolder by outlining your taxonomy and translating that visually into your Brandfolder structure.
- Your Implementation Expert will provide guidance on how to categorize the different elements of your taxonomy and how best to leverage that within the platform.
- We will provide custom structure recommendations from your Client Dashboard and ensure alignment and buy-in from your team.

II. Asset Management and Workflow

- This training shows you how to leverage the tools with Brandfolder to sort, organize and QA your assets to ensure your existing content can get into Brandfolder and be put to use quickly.
- We'll cover how to increase effectiveness in your team's workflows.
- If you select Automation assistance with your plan, your Implementation Expert will work with your team to outline and apply Automations to help sort your content into your structure.

III. Distribution Strategies

- Your Implementation Expert will provide recommendations on how to distribute your content based on your unique audiences.
- The training will cover how to set up these distribution pathways and how to manage them on an ongoing basis to maximize scalability and user adoption.
- This training will ensure that your end users will have what they need to empower them while maintaining access and privacy settings to keep sensitive or unfinished content out of their hands.

Guided

Once onboarding is complete, we'll make sure you understand which avenues are available for additional assistance going forward. This may include in-app live chat and email support, or assistance from our Customer Success Associate team depending on what support package was purchased.

Guided+
Enterprise
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