

A guide to evaluating online proofing tools in 60 minutes or less



The review and approval process is an integral part of every creative project. It can be complex, labor-intensive and inefficient. Today's online proofing solutions provide tools that simplify and facilitate the process. However, determining whether a solution meets your organization's requirements can seem a daunting and time-consuming task. This guide is designed to help you dramatically shorten the time it takes to determine what capabilities your online proofing solution must offer to match your organization's needs now and into the future.

The guide highlights major issues you will want to take into consideration as you evaluate online proofing solutions. Addressing these issues will help you focus quickly on the capabilities you need from an online proofing solution.



Invest 60 minutes now, save hours later

In 60 minutes or less, you will have the information you need to evaluate a solution, make an informed decision and move forward with confidence.

1. What is your current review and approval process?

- ✓ Which groups, departments and individuals participate in the process?
- ✓ Are reviews sequential or parallel? If sequential, what is the order?
- ✓ How many review cycles do materials typically undergo in your current process?
- ✓ What specific problems are you experiencing in the current process?
- ✓ What is driving you to consider moving to an online review and approval process?

Be sure that the solution you select will work within your existing workflow and offers flexibility to improve your workflow easily.

Talk to your stakeholders to understand the issues that your organization faces with your current process. Getting their input will help you justify the implementation of a new review and approval system and ensure high levels of user adoption when you deploy.

Understanding whether there has been an event or change in your business that has created the impetus to implement online proofing. This will help you make the business case for your solution. Examples might be the implementation of a new regulatory structure, or a new client win.

2. What types of content are being reviewed and approved and what are typical volumes?

- ✓ What kinds of materials are you reviewing and approving — marketing collateral, web pages, videos, podcasts, packaging, newsletters, advertising, press materials?
- ✓ Which file types do you use e.g. PDF, Adobe InDesign, Microsoft Office, audiovisual, SWF?
- ✓ What is your average monthly volume? How many pages are there in a typical document?
- ✓ Is your workload consistent day-to-day or does it tend to vary?

Most organizations produce a variety of materials. It is important that you take into consideration the types of collateral and media you will be reviewing and ensure that your solution provides the appropriate workflow and review tools. For example, if you produce catalogs, you will probably need to be able to do page-by-page reviews instead of having to review a single, large document. Producing text-heavy material will require text markup tools more than drawing tools.

You should also consider the file types that are used to create your materials to make sure that your online proofing solution works with each e.g. Adobe InDesign, Microsoft Word, SWF or web pages.

Most organizations also experience peaks in workload. You will want to check that your solution provides the flexibility you need to handle fluctuations in volumes, storage and the numbers and identities of reviewers.

3. What sharing options does your approval process require?

- ✓ How many reviewers are there in a typical approval?
- ✓ Who typically reviews proofs? Are proofs shared with internal team members only or are there external team members who need to see them?
- ✓ Do your external reviewers need to have logins and passwords?
- ✓ Do you want your proofing tool to be branded with your logo?

It is important that your online proofing tool provide easy-to-use, intuitive sharing options both for internal and external users. Decide whether all of your external reviewers will need to have usernames and passwords to access proofs or whether some will be allowed access via an email invitation.

Be sure that the tools you select support your external user access requirements. Verify that the solution can be customized to comply with your company's branding guidelines.

4. How do you want reviewers to provide feedback?

- ✓ Do you need drawing and markup tools or do you need only text commenting tools?
- ✓ Do you want to be able to attach files to comments?
- ✓ What kind of measurement and navigations tools will you need in order to comment on the proof?
- ✓ Do you need a collaborative capability that will allow reviewers to comment on previous feedback and participate in interactive discussion threads?

If you are primarily reviewing design materials you will need a solution that offers sophisticated drawing tools. If most of your materials are text, text markup features are critical. Also be aware of other review tools that you might need such as the ability to attach files to comments.

If feedback and collaboration are an important part of your review process, you will want to ensure that your solution provides robust tools that support and facilitate collaboration. You will also want to look closely at the commenting tools.

5. Does your review and approval process require reviewers to make a formal decision?

- ✓ Does your review and approval process require every reviewer or only some of the reviewers to make a decision? Is there a final or primary decision maker?
- ✓ Will you need to customize decisions for your organization?
- ✓ Does your process require decision reasons to be specified?
- ✓ Do you need to comply with standards that require you to confirm the identity of the person submitting the decision?
- ✓ Does your compliance process require you to have electronic signatures?

Online proofing tools typically provide a standard set of decision buttons. Make sure that you will be able to add decision buttons if necessary and that the tool offers sufficient flexibility to allow you to support different roles in the process such as reviewer only, reviewer and approver, primary decision maker or final decision maker.

Also establish whether you will need to add fields to collate justifications for decisions. If you are required to have confirmation of the identity of individuals submitting decisions, ensure that your solution supports electronic signature functionality.

6. What systems and security capabilities will you need and what does the solution provide?

- ✓ What are your organization's security requirements for creative assets?
- ✓ Does the tool you are considering require any systems or security capabilities you cannot meet?
- ✓ What kind of storage does the solution provide and who hosts storage?
- ✓ How frequently is the solution updated?
- ✓ What are the solution's current service level statistics?
- ✓ Does the solution require users to maintain multiple user names and passwords or does it support single sign-on with SAML 2.0?

It is important to confirm that your online proofing tool can support your organization's technical security requirements. Be sure to evaluate the tool's security strengths and weaknesses and determine if the level of security it offers is acceptable to your organization. Ask your solution provider to provide you with details about storage hosting to be sure that your documents will be stored safely.

You should also determine whether a provider will be updating and developing additional capabilities to meet changing needs. Checking the frequency of new product version releases is a good way to gauge a provider's focus in this area. Verify service level statistics to evaluate the reliability of the system. If the system uses SAML 2.0 to support single sign-on, you will have full control over the authorization and authentication of your users.

7. Will you need to integrate the solution with other systems such as project management or production tools?

- ✓ Are there any existing systems or processes that will need to integrate with your new online review and proofing tool?
- ✓ Are the systems or processes already integrated with the tool or will you need to integrate them?
- ✓ What will integration cost?

If proofing workflow is part of the larger production or project management process, you may want to add proofing functionality to existing tools rather than implementing a separate system.

It is important to be sure that you will have the ability to integrate other applications with the proofing tools both immediately and as your requirements change. At a minimum, the solution provider should offer you guidelines for API integration.

If your project management or production system is widely used, it is possible that the online proofing tool will already be integrated with it. Look for applications already on the market that will meet your requirements and that can integrate easily or that are already integrated with the solution to reduce time and expense to implement. Be sure to calculate the cost of integration with existing systems.

8. What is the cost of the solution, what benefits does it deliver and what can you expect in terms of return on investment?

- ✓ What will you have to pay for the solution and are there additional charges if you add users or storage?
- ✓ Are there any additional costs for training, support, and setup, installation, consulting hours or integration with existing systems?
- ✓ Will you need to make upfront investments in hardware or software to implement the solution?
- ✓ What benefits and results have current users achieved using the solution you are considering?
- ✓ How much improvement can you expect in terms of the time it takes to complete the review, revision and approval process? Will the tool reduce time and effort to manage proofs and by how much?

It is important to set up benchmarks that will quantify the results you expect to achieve after the tool is implemented. To calculate the impact on productivity, you need to understand both your current performance and costs for the tool. Be sure to include up-front expenditures such as hardware and software as well as costs of services added to the product and further maintenance expenses to determine ROI accurately. Your supplier should be able to provide you with average return on investment statistics from existing installations to help with this calculation.

9. What does implementation of the online review and proofing tool require?

- ✓ What resources will you need and who needs to be involved in the implementation?
- ✓ Will implementation require any changes to workflow?
- ✓ How long will implementation take?
- ✓ How will you measure the success of the implementation and how quickly can you expect to achieve a return on your investment?

Your solution provider should be able to provide you with a clear understanding of what is involved in implementation and the average payback period for existing customers. Look for a solution that can be set up quickly and that will allow you to start working with the system after basic administrator training. Be sure the solution can be adjusted to your workflow instead of requiring your team members to learn a new workflow. This will result in more productivity sooner and less time to realize a return on your investment.

The average implementation should take about four weeks. Establishing SMART goals based on assumptions of how long implementation will take is a good way to measure the success of your organization's implementation. The longer it takes to implement the system, the longer it will take to see a return on your investment.

10. What kind of training and support will you need?

- ✓ What training resources does the vendor provide?
- ✓ Are training and support for new customers included in the initial cost or do they require an additional fee?
- ✓ Will your team need to be available for training immediately in order to start using the tools as soon as implementation is complete?
- ✓ Will you want to have all team members trained or should training be limited to internal trainers who will then train other members of the team?

Discuss training with the solution provider. You will need to understand how complex the tool is and how much training your team will need. Be sure you understand how long training should take and what training documentation and reference materials you will be given to use following formal training. You should expect to receive training documents and videos free of charge as part of the training package. It is possible that there will be additional charges for customized training guides or initial set up services. Be sure costs for these are included in the price of the solution before you purchase it.

Ideally, the tool should be intuitive enough that people will be able to work with its basic functionality without extensive training. You may want to consider training internal trainers to provide the review team with whatever support they need. This can be a cost-effective way to get everyone the training and ongoing mentoring they need to maximize effective use of the review and approval tools.

11. What tracking and reporting capabilities do you need?

- ✓ Will you use a dashboard or do you prefer email notifications?
- ✓ Will the proof owner want to receive updates throughout the process or only when the review is complete?
- ✓ What reports will you need to provide to management, the review team or to maintain an audit trail? Does your system have any unique reporting requirements?
- ✓ Do you need any custom fields?
- ✓ Do you want to be able to export the reports to a spreadsheet?

Think about the reports and metrics you need and confirm that you will be able to access and extract that information easily from your online proofing solution. You may need a combination of dashboard and email notifications to track projects. Ensure that your project managers and reviewers can adjust notification settings to suit their personal preferences. It is always good to have options for adding customized fields and collecting additional data for more detailed and personalized reporting.

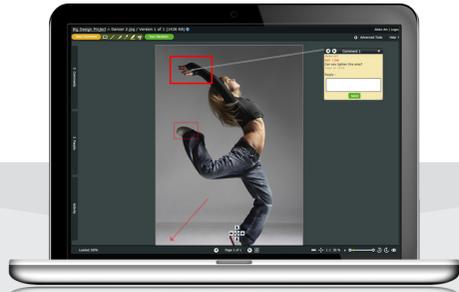
12. Are there any audit and compliance regulations you need to follow?

- ✓ Is your approval process subject to regulatory or brand compliance?
- ✓ What specific regulatory requirements do you need to meet?
- ✓ Will auditors ask you to provide detailed records of the entire review and approval process, including such information as when the proof was created, comments and who made them, changes and decisions?
- ✓ Will you need to be able to review historical approvals?

Ensure that your online proofing solution meets all of your audit and compliance requirements. The solution needs to be capable of recording all steps in the review process and should include a time-stamping capability. It should also let you archive and store document in such a way that they will be accessible at any time should the need arise.

About ProofHQ

ProofHQ is an online proofing solution for marketing teams of any size in any industry who need to deliver marketing projects faster and more efficiently. Unlike email and hardcopy proofing, ProofHQ enables review teams to collaborate simultaneously on creative content. ProofHQ streamlines approval workflow and can be used across all media including print, digital and audiovisual. It measurably speeds up project delivery and significantly reduces management time, revisions, errors and costs.



Start 14-day free trial with ProofHQ and discover the benefits of online proofing yourself.

Try it now!

<https://www.proofhq.com/html/free-trial.html>



Read our free white paper!

"Measuring the business value of online proofing" Discover how ProofHQ customers have measured their online proofing ROI.

Download now!

<http://info.proofhq.com/roi-white-paper>

For more information about ProofHQ please visit www.proofhq.com
or email us at contact.us@proofhq.com or telephone us US: +1 408 916 1097 UK: +44 20 8133 1106

