

Frontify Metadata Workshop Strategy for YouGov

Objectives

The goal of this workshop is to establish a **clear, scalable, and user-friendly metadata structure** in Frontify that aligns with YouGov’s business needs. We will:

- ✓ Define a **metadata taxonomy** that improves searchability and usability.
- ✓ Establish **consistent tagging practices** across all assets.
- ✓ Check metadata supports **automation, integrations, and governance**.
- ✓ Align metadata **across Frontify and SharePoint** for seamless content management.

 July 17

Workshop Timeline & Structure

Phase	Description	Owner	Timeline
Phase 1: Pre-Workshop Prep	Gather insights on existing metadata structures (Youniverse, SharePoint, current DAM). Identify inconsistencies & gaps.	YouGov Team, Frontify, Charley	1 week before
Phase 2: Workshop (Live Session)	Hands-on session to define categories, fields, and automation rules. Validate with live examples.	All stakeholders	Scheduled Date
Phase 3: Testing & Refinements	Apply initial structure to test assets, review usability, refine taxonomy.	Content Owners, Alex, Seb	1 week post-works hop
Phase 4: Implementation & Governance	Roll out metadata structure, train users, establish governance & maintenance plan.	Charley, Frontify, YouGov Teams	Final 2 weeks

Workshop Agenda & Key Topics

1 Introduction & Goals (15 min)

- Overview of metadata’s role in DAM success.
- Challenges YouGov is currently facing.
- Alignment between **Frontify, SharePoint & YouGov’s workflows**.

2 Current State Analysis (30 min)

- Audit findings from **Youniverse, SharePoint & Frontify's existing structure**.
- Identify gaps & inconsistencies in metadata usage.
- Review real-life examples of assets in **marketing, sales, and product** teams.

3 Building the Metadata Framework (45 min)

✓ **Key Categories** – Define **global metadata fields** (e.g., asset type, usage rights, owner, expiration date).

✓ **Tagging Strategy** – Create a standardized **taxonomy and controlled vocabulary**.

✓ **Automations** – Discuss **how metadata can power workflows, permissions, and content recommendations**.

✓ **User Access & Permissions** – Define metadata-driven **user access rules** for marketing, sales, product, and creative teams.

4 Testing & Live Implementation (30 min)

- Apply the proposed structure to **test assets** in Frontify.
- Check **searchability, filtering, and governance workflows**.
- Adjust taxonomy based on usability feedback.

5 Governance & Maintenance (30 min)

- Assign **ownership** of metadata management.
- Define **ongoing QA, auditing, and review cycles**.
- Set up **training & onboarding resources** for new users.

Solutions & Best Practices

♦ Structuring Metadata in Frontify

- Use **standardized field names** across all workstreams.
- Keep **core metadata fields mandatory** (e.g., title, usage rights, tags).
- Leverage **dynamic metadata** for automation (e.g., pulling dates from SharePoint).
- Ensure metadata **supports cross-platform integrations** (Google Sheets, API-based content updates).

♦ Solutions for Common Challenges

Challenge	Solution
Inconsistent metadata usage across teams	Standardize required fields & tagging policies.

Difficult search & filtering	Use structured metadata with categories & subcategories.
Keeping metadata up to date	Assign metadata owners and automate expiration rules.
Integrating metadata across platforms	Align Frontify metadata with SharePoint fields.

Post-Workshop Next Steps

-  **Refine taxonomy** based on workshop feedback.
 -  **Implement metadata in Frontify** with test assets.
 -  **Review and approve structure** before full rollout.
 -  **Train key users** on metadata tagging & maintenance.
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♦ Final Notes

- **Metadata is the backbone of DAM** – if done right, it ensures scalability and efficiency.
- Frontify metadata should align with **SharePoint to create a seamless content experience**.
- Ongoing **review cycles and automation** will keep metadata relevant and useful.

Is there any additional rule you would like to add to define your content?

1. Keep Subfolders & Apply Metadata in Batches

Pros:

- Maintains existing organization, preventing frustration from teams.
- Reduces manual work for people managing the documents.

Cons:

- Requires going into each subfolder individually to apply metadata.

How to do it:

- Enter each subfolder, select all files, and apply metadata in bulk.
- If rules are consistent across subfolders, it's a one-time effort.

2. Remove Subfolders & Use CSV Bulk Upload

Pros:

- Faster metadata application if CSV allows bulk updates.
- Avoids the manual step of applying metadata folder by folder.

Cons:

- Could create pushback from teams who rely on folder organization.
- May require restructuring naming conventions to compensate for lost folders.

How to do it:

- Check if Frontify's CSV import allows bulk metadata assignment.
 - Export current document list, structure metadata in a CSV, and re-import.
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3. Hybrid Approach: Keep Subfolders but Use CSV for Metadata

Pros:

- Keeps organization intact while streamlining metadata application.
- Minimizes workload for both structuring and metadata assignment.

Cons:

- Requires testing if CSV can work with subfolders.
- Some manual setup to ensure correct metadata mapping.

How to do it:

- Keep subfolders but bulk-apply metadata using CSV if Frontify allows it.
 - Confirm with a test batch before full implementation.
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4. Duplicate Structure: Keep Folders for Organization, but Apply Metadata at File Level

Pros:

- Allows teams to retain their folder structure while still benefiting from a metadata-driven system.
- Prevents the issue of lost organization.

Cons:

- Some extra work if metadata must be assigned at the file level.
- Users will need to search by metadata instead of browsing folders.

How to do it:

- Keep subfolders for visual organization.
 - Assign metadata at the file level so that search functions work effectively.
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Immediate Next Steps for Today's Meeting

- **Test CSV Import:** Check if Frontify allows bulk metadata updates via CSV.
- **Prepare Example Folder:** Show both the subfolder and no-subfolder approaches to get feedback.
- **Confirm with Teams:** Ask them if keeping subfolders is critical or if metadata can replace structure.
- **Have a Backup Answer:** If Frontify's tools don't work well, be prepared to propose manual batch updates.