Sitecore Content Hub DAM-PCM Pre-Implementation Questionnaire

Note for our Partners: Not all questions here will be relevant to every client based on their goals and the Content Hub product and services package they have purchased. Please review and revise prior to sending. This document could be provided to the client following the initial project kickoff and can be completed by the client in parallel with end user/admin training PRIOR TO STARTING DOMAIN MODEL WORK..

Please complete the following questions to the best of your ability prior to beginning work on the domain model spreadsheet. We encourage a "divide and conquer" approach for completing this worksheet to start getting the right stakeholders engaged in the project. If additional info or context is needed for any of the questions, please reach out to Partner Technical Advisors team.

Project Team
Helps to get to know project team!

1. Who will be involved in the defining the data requirements and structure for your Content Hub solution?
2. Who will own the completion of the first deliverable? (*Domain Model excel sheet*)
3. What is your internal process for approving/signing off on requirements, design, and scope for this project?
4. Who on your team will be completing Content Hub training?
5. Is there anything else about your project team that we should know?

Legacy Solution & Project Objectives
Helps to understand where client is coming from and what they are looking for out of Content Hub.

6. What is your current digital asset management solution? If you do not currently have one, please describe how assets are currently managed.
7. Are there any other legacy systems that Content Hub will be replacing?
8. Please provide your data model/schema for the current solution (*if applicable*)
9. What are the limitations of your current/legacy solution?
10. Are there any limitations in your current workflows and processes?
11. What features and/or processes work well in your current system that we need to ensure are replicated in Content Hub?
12. What are the top 3-5 things you would change about your current solution?
13. Are there any features or capabilities in Content Hub that your team is particularly excited about?
14. What does a successful go live look like?
15. Is there anything else we should know about your legacy solution?

Asset requirements – DAM
Content Hub's DAM is your client's new, central repository for your digital assets. Before you dig into defining the structure of this solution, it's important to understand how client's assets are organized today and what metadata is important in describing them.

16. What types of assets will live in the DAM? (*images, video, audio, pdfs, etc.,* [*click here for the full list of supported file types*](#))

17. Provide a list of all asset metadata fields that exist in client's current solution
    a. Identify and remove any legacy fields that do not be included in Content Hub

18. Are there any new metadata fields that need to be created?
19. Provide lists of all controlled vocabularies associated with each asset metadata field that will be included in Content Hub. (*These will be used to populate your Option Lists & Taxonomy metadata fields in the DAM*)
20. What metadata would client like to appear as facets on your asset search page?
21. Are there metadata fields that need to be applied conditionally? (*ex: Photography assets might require a photographer's name*)
22. What questions do client have about how assets are stored in Content Hub's DAM?

Product requirements – PCM
PCM (Content Hub's product entity) allows our clients to store product attribute details, specifications, images, videos, and other brand content. Helps to understand what product information will be housed in Content Hub and how client would like to use PCM.
23. Please provide an overview of how client's products are organized – Ex: brands, product categories, product families, etc.
24. Provide a list all metadata fields associated with products that exist in current solution (*or need to be added as a part of this project*).
25. Are there any existing metadata properties that client does NOT want to bring into content hub?
    a. Any that need to be re-evaluated, consolidated, or revised?
26. Provide lists of all controlled vocabularies associated with each product metadata field that will be included in Content Hub.
27. Are there metadata fields that need to be applied conditionally? (*ex: A product family with unique metadata*)
28. How frequently will new products be imported to Content Hub? Modified?
    a. Who will be importing and modifying products and associated metadata?
29. Do client's organizations products present any unique challenges or requirements that we need to keep in mind?

Content Hub User Groups
As our partners begin the project, they would want to understand who will be using Content Hub and make sure they are capturing any metadata that might be used to drive permissions and security.
30. Who will be the users of Content Hub? (*please differentiate between the different Content Hub modules (eg DAM, PCM) where applicable*)
    A. Internal
    B. External
    C. At go-live vs. fully mature solution
31. Please document client's most common use cases. Outline how power users, admins, and other cohorts of users navigate their daily activities in current system to identify inefficiencies.
32. How do client currently determine who can view/edit/review/publish/etc. specific assets or groups of assets? Please share any documentation if available.
33. Do client have any other unique challenges related to user groups that we should be aware of?

34. What questions do client have about Content Hub's user groups?

Additional Considerations
35. What systems will interact with Content Hub?
    a. Upstream
    b. Downstream
36. What is the total number of assets that will be included in the initial migration?
37. What legacy systems currently hold assets that will be migrated into Content Hub.
38. What is the total size of the assets that will be included in the initial migration?
39. Are there any deadlines which are critical to the success of the project?
40. Is there anything else that client would like partner's implementation team to know prior to beginning this project?