

Fail to Plan – Plan to Fail



*Software Confusion Reduced.
Improving software selection by identifying objectives.*

By Lyle Bunn

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The Content Management Software selection decision is often difficult to make by the end user or integrator because the description of various capabilities and their value is poor or not provided in the context of use and operational costs. But often this confusion is due to the end user or integrator not having adequately defined the business goals, operating environment and scope of the digital signage system they want to install. This article provides a guide to better align the software selection decision by better identifying the requirement and testing the application scenario.

There is not a single deployment of Digital Signage or Digital Out-of-Home (DS/DOOH) that has not wrestled with software selection... and some projects, at times appropriately, change their media management platform (i.e. the software) several times during project deployment.

The complexities of the price /performance equation underlie the challenge of the selection process and the extent to which there is a problem becomes clear when evaluating software proposals.

A 90/10 proportion of DS Software applies (Fact)

DigitalSignageDirectory.com has 770 listings in 4 categories including “Content Management and Distribution Software,” “Network Management”, “Control Systems” and “Content Creation Software”. While an estimated 350 unique software systems for media management are available, most of these have limited installed base, are new to the market or tend to target particular applications, vertical markets or channels. About 2 dozen software systems drive 90% of the million displays deployed in North America DS/DOOH.

All software is created equal. (Myth)

Not all software is created equal, nor does it perform in the same way. Major plateaus of functionality exist, and the strength or weakness in software become clear as networks grow or changes are experienced in the number and type of displays, channels, playout groupings and dayparts, the amount and format of content, changes in display layout, input from various sources and the quality level of media playout expected.

Other primary factors in software selection include the operating system, formats of media that can be efficiently handled by the system, the cost of operations for display layout, playout group management and dayparting and ease of content (including ad “campaign” placement. Harris Corp *InfoCaster* for example, offers ease of use and low-cost operations in large scale systems and uses media in a wide range of native formats from ingest to display to assure optimal presentation of live action and product imagery.

The stability of the software provider including the sourcing approach (i.e. direct vs. from a reseller) and the decision to use “software as a service” (SaaS) vs. acquisition/licensing should be made in the price/performance analysis as software has been assessed as best suited to the need.

A product comparison guide such as is available from the Digital Signage Association helps to illustrate the differences. This is especially useful as an input to the requirements definition, but it takes a sharp eye to discern the differences between software packages when they are compared on a spreadsheet of features, and an even sharper eye when the software appears in a proposal.

Comparisons become meaningful when the requirement is well defined.

Different software is better suited to different situations (Truth)

Typically, software selection becomes more refined as the media objectives are defined and refined, and operating approaches related to the network are clarified. Deciding on a software without the full benefits of this planning in the process can result in unsatisfactory levels of flexibility, overall cost, usability and ultimately, to the success or failure of the system.

End users and system integrators need to first establish what is to be accomplished with a particular digital signage initiative. Digital signage is simple a communications device, and the communications objectives must first be defined so that other key aspects of the project can be addressed including the number, size, type and placement of displays, software selection, connectivity, content ingest and scheduling as well as impact measurement.

Functional needs change. (Mercilessly!)

“Scope creep” is the term used to describe the expanding, unplanned scope and changes in a project. The costs, disruptions, delays and frustration that it causes are best mitigated by in-depth early stage digital signage planning and by assuring enough technology capability to meet possible future requirements.

During a panel presentation hosted by Digital Signage Magazine during Digital Signage Expo '09, which was attended by several hundred end users and suppliers, the CEOs of several primary software vendors, unanimously cautioned against under-specifying

software, collectively observing and advising that “greater software functionality offers greater system use-ability.” Major software providers, which having collectively seen virtually every deployment as noted in the 90/10 section above, agree that under-specification of the media management element (software) leads to the under-performance, operational over-expense or ultimately, failure of a network in virtually every case.

“Scrimping leads to scraping” could be the watch-phrase during software selection. Appropriate tools must be applied to efficiently achieve communications objectives. “Cant’t do’s,” “work-arounds,” stale content and operating inefficiencies are typical symptoms of under-specified software.

The 3-step plan for selecting software.

The clichés apply: “Fail to plan, plan to fail,” or “If you don’t know where you are going, any road will take you there, and you will never know when you have arrived” or “Any achievement from poorly defined goals is through luck alone,” or “a project without an intent or plan merits nothing – priorities, with plans, deserve resourcing.”

An objective, “technology-agnostic” digital signage services provider such as *Digital Display & Communications - The Full Picture* can provide independent counsel to best serve network needs.

A structured approach to software selection can, and will reduce ambiguity, confusion, frustration, time and cost while assuring, most importantly, that the most appropriate software is selected for the requirement.

The high-level, 3-step approach, each defined in more detail as follows are:

- a) Define the communication needs and intents.
- b) Define the project path (size, scope, applications).
- c) Select software based on the expected scenario.

a) Define the communication needs and intents (The Critical Success Factor)

Digital signage can be a revenue-generating “business” based on 3rd party advertising revenues, but is typically used to improve core business and communications goals such as sales lift in retail and consumer service environments, reduced perceived waiting time, improved awareness on the part of staff, students or patrons, or to improve the experience offered by a location. Tangible benefits might also include cost deferral/avoidance. Some examples of network objectives include:

Revenue growth:

- a) Ad Revenues: Payment from suppliers or third parties for ad display.
- b) Sales Lift: Revenue from product or service sales including up-sell and cross-selling

- c) Increased Margins: Sales of products prior to discounting or from sales early in the stock cycle.
- d) Advance Orders: Achievement of sales prior to receiving a product shipment or in advance of service delivery needs. Advance orders improve cash flow and “scoop” sales that might go to competitors.
- e) Staff Training: Better training on sales approaches, or product features and benefits can improve in-store staff productivity.
- f) Loyalty member growth: Direct membership fees, increased sales and revenues derived from increased visit frequency, participation and list rental.
- g) Website traffic: Improving web traffic can increase online and in-store sales, and generate increased banner ad revenues, as well as gift and loyalty card sales. Gift registry offers additional engagement.

Cost Deferral:

- a) Reduced printing, distribution, installation, removal, damage and discarding of printed materials. (100% message posting can be provided by digital signage).
- b) Reduce management travel costs to locations when the digital signage network is also used for staff communications for product knowledge, motivation, safety and compliance communications, merchandising plans, communicating corporate values and directions, etc. Improved employee communications can reduce costs related to staff replacement and result in improved customer service through a better-informed and skilled employee.

Engagement Objectives

Many positive impacts of dynamic signage are subjective and less easily quantified. They do however lead to the tangible measures of improved revenue and brand impression through improved visit experience, product/service awareness and propensity to buy. Some examples of engagement objectives are as follows.

Improve the experience in the environment

- Improving the relevance of an offering to environmental conditions, trends and fads.
- Improving the in-store experience by adding audio, visual and information.
- Making the retail environment more unique and interesting.
- Making shopping more fun.
- Aligning with community and demographic interests with relevant information.
- Inexpensively refreshing the environment – in particular for frequent visitors.
- Entertaining the co-shopper or companion.
- Inform the shopper of new product and service offerings.
- Providing changing, interesting, target market visuals relative to other retailers in the product vertical or mall “district”.

Increase shopper attention

- Pulling traffic into retail-service space from public space, walkways, mall area.
- Increasing shopper dwell time.
- Deepening the “loop” of patrons to browse the store more fully.
- Increasing shopper visit frequency.
- Creating awareness of programs such as gift cards, loyalty, on-location events or offerings, sponsorship, community involvement, etc.

Align with and fuel consumer aspirations

- Solidify user loyalty.
- Present multiple scenarios/aspirations for the patron (i.e. the “glow” of joyfulness, a fun/healthy lifestyle, good times, relationships achieved, etc.).
- Align products or services with movie trailers, music videos, destination clips to provide customers with a cultural touch-point to associate with the message.
- Correlate products and services with emotional moments that shoppers can relate to.
- Reinforce messages delivered using other marketing collaterals.
- Put the product in a lifestyle context (i.e. a good book during holidays)

Clarify the offering

- Presenting visually how a product will work, look and move when in use.
- Profiling features and benefits.
- Visually demonstrating how a product “goes with” another (i.e. scarf with jacket)

Present a “call to action”

- Propose a purchase or enquiry.
- Display in-store promotions
- Issue electronic coupons
- Present limited time, in-store offers.
- Pre-sell incoming products

Offer ways for the customer to engage

- Promote loyalty programs, gift cards, gift registry and website
- Promote special events
- Provide the reason for a future visit.
- “Humanize” staff by profiling their attributes and capabilities.
- Motivate engagement through other approaches that improve discourse between the brand and the consumer (i.e. contests, text message voting, etc.)

Communicate “values”

- Present examples that illustrate the organization’s goals, attitudes and values
- Motivate, inform and train employees (directly or through ambient display)

- Improve the sales-focused partnership with suppliers.

b) Define the project path (size, scope, applications).

Media management software selection will also consider the overall life or planning horizon of the network including in particular the growth in the number, type and configuration of displays, playlists and content as well as interfaces with other systems.

Approaches to operations and sources of future funding will be considered since actualizing future opportunities may be impaired by the software under-specification.

Digital signage has the inherent capability to present images and messages that “speak to” and engage viewers to compel actions. The software selection decision should consider the required strengths in the following areas of capability include:

High quality presentation of the media in order to make the visual images as appealing and compelling as possible. This is in part achieved by using media in its richest possible, “native” form through the digital media supply chain. Reducing the need for media reformatting and transcoding reduces the degradation of the media.

“Local” input and control of a predefined area of the display or the playloop can enable individual locations to schedule and present information relevant to achieving their goals through local branding and promotions.

Ease of campaign placement. Defining parameters such as the date, time, location and other display criteria allows media to be presented to best achieve the intended results.

Content “layering” to “localize” content to improve revenue achievement. Compiling and rendering media spots in multiple content “layers” is a very efficient way of managing campaigns while having graphics, text, pricing and other elements reflect the local environment, demographic, weather, events, celebrities/personalities, inventory and other situations.

Ease of message targeting by display location, target demographics, time and specific circumstances.

Ease of use to allow for cost-effective operations and maximizing the benefits that digital signage.

Interface with data inputs and integration with other systems such as point-of-sale, inventory and traffic patterns so that media presentation and revenue achievement are maximized.

c) “Test-drive” the potential software on the expected scenario.

Using candidate software in an expected network scenario will very clearly identify strengths and limitations and is a suitable “test drive” of the software options.

Just as the test drive of a possible future vehicle would include its usual passengers and cargo on expected road conditions in a typical usage scenario, the same should apply to a software test drive.

The software test drive would include developing and ingesting content, performing screen layout, creating playloops and defining display groups. It would measure the steps, dependencies and time required to change these elements. If for example, a restaurant deployment is expected to include 5 different dayparts corresponding to upsell and motivating future visits, and displays are to be located at an order counter and pick-up area, then 10 playloops with suitable content would be used in the test drive. Content for multiple weather conditions or other content-change triggering factors would be simulated in the test drive. Updates with “local” content would be updated as would a typical refresh of the playlists within the network. Content would be created and campaigns scheduled as well, if this is expected to be part of the operational system.

In addition to enabling an analysis of strengths, weaknesses, opportunities and threats (SWOT) of the candidate software in its intended technical and operational configuration, the investment in applying a typical operating scenario offers strong indicators of ongoing operating costs associated with achieving the communications results and intended outcomes.

In conclusion, selecting the right media management tool for the requirement is of critical importance to a Digital Signage/Digital Out-of-home project, and can be achieved by applying objectivity and time-tested system development lifecycle approaches.

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Additional tools/templates for project planning are at www.LyleBunn.com – Resources. In particular;

- *The “Why” of Digital Signage*
- *Network Description Template*