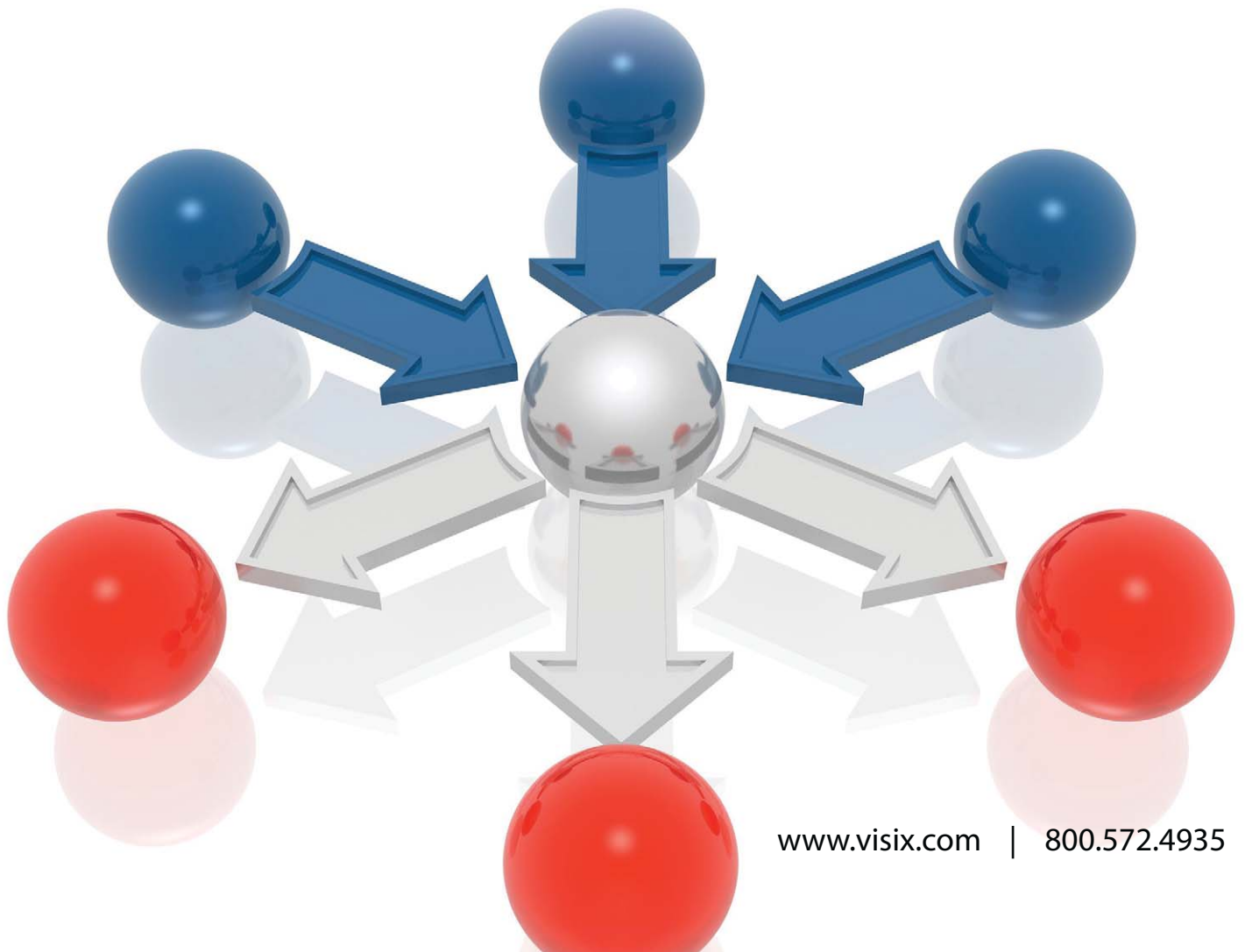




# Best Practices for **Managing** **Your Digital Signage**

DIGITAL SIGNAGE WHITE PAPER



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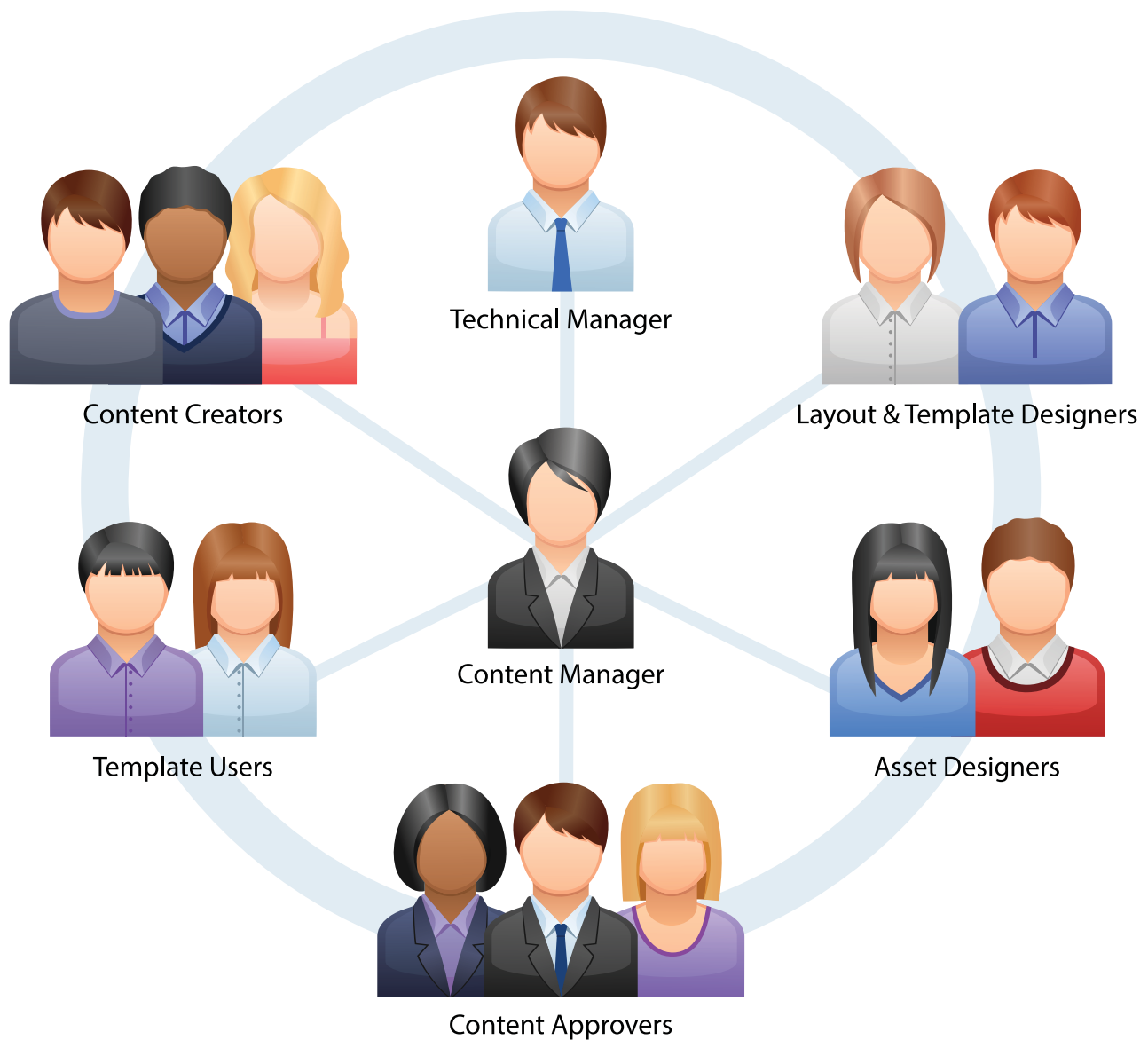
We're here to help! If you have any questions about your application or our products, please contact us at **800.572.4935** or **salesteam@visix.com**.

For your digital signage (DS) to be successful, it's crucial that you get buy in at every level. Simply launching the system and handing out passwords isn't enough. If someone doesn't "own" the system and content, your digital signage becomes an orphan.

Often, one team is responsible for buying the system, and then they hand it over to others who may not have any idea what to do with it. That's why consulting and training for everyone involved is critical – both at the initial launch and on a regular basis – in order to stay abreast of new technical features as well as get creative inspiration once in a while.

## Who Does What?

It's essential to publish fresh, exciting content on a daily basis, so you need to have a solid plan of who does what. Successful DS deployments usually include the following key personnel:



## Technical Owner/Manager

This is often the person who purchased the system, so they already have a working plan in place. The Technical Manager is usually someone from your IT department, and they'll be responsible for implementation, licensing, system security, and technical and network issues.



Security usually involves setting up password requirements for the users and roles defined by your Content Manager, with a system in place for canceling or issuing passwords whenever needed. A lot of people use Active Directory to manage all of their passwords in one place. (Active Directory authentication allows AxisTV users to log in if they have an account in an Active Directory domain. This offers users a faster, more secure, and more scalable authentication system and saves time for administrators by avoiding individual account configuration.)

There's a good chance that your Technical Manager will want to partner with your Content Manager when coming up with naming conventions. IT standards are often already in place for other network naming systems, so your Technical Manager will want to weigh in on how you name your DS components, too. *(Keep reading for more on naming conventions.)*

Since the Technical Manager will implement your system, they'll set up your software and hardware default settings right out of the gate, and handle software and hardware updates over the life of your system. They should also be made aware of any problems with the system, so they can resolve the issues and request support from vendors. Having an internal system for DS users to report errors or issues to your Technical Manager is a good idea.

## Content Owner/Manager

This person is often someone responsible for employee/student communications, marketing or public relations. They drive your overall communications strategy.



The Content Manager should determine the overall look of your screens, the content displayed, and what goes where on each display layout. You may want to show corporate content that comes from HQ in one block, with localized messages, weather and news in other blocks. Your Content Manager is the person who devises this plan.

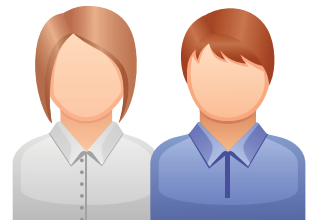
Once your Content Manager has outlined what is going on the screens, they'll need to define naming conventions for the various parts of the system – layouts, playlists, players, tickers, media, etc. – so standards are in place as your content management software grows in size and scope. They'll likely partner with your Technical Manager for this task.

Next, they'll need to assign user roles and privileges to determine who's allowed to create content, for which players, and whether or not their messages require approval before going to the screens. The Content and Technical Managers can then work together to set up passwords and privileges.

Once this is done, your Content Manager should put all of these policies in writing. *(Keep reading for more on digital signage policies.)*

## Layout and Template Designers

Your Content Manager may not be able to brand the entire system on their own, so they might need some other folks pitching in at the top. Your Content Manager can stipulate logos, color schemes, fonts and other elements they want to remain consistent, and Layout and Template Designers can bring those ideas to life.

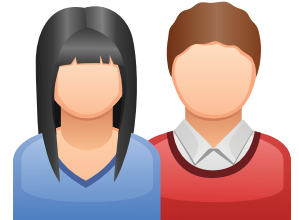


Message templates within your DS software are standard designs that limit what Content Creators can alter. A template is usually a predetermined background, title and font styles – just like a blank form. This protects your branding and saves your Content

Creators time, since they just have to write in their text (and maybe add an image) and their message is ready to go. Your team may also want to create matching PowerPoint templates since many people are more familiar with creating in PowerPoint than within your DS software.

Layouts are the placement of items on the screen – blocks for messages, tickers, date/time, etc. – with a branded frame that matches your standardized look. These are created by your Layout Designers to ensure that you always have a good mix of content on your displays. *(Keep reading for more on message and layout practices.)*

Layout and Template designers are normally assigned their individual roles by the Content Manager. They'll need rights to access all of the playlists and media players for which they're designing.



## Asset Designers

Asset is just a fancy word for all of your images, videos, PowerPoints and other file types that you bring into your DS system. Asset Designers are your creative team – sometimes students, often a graphic design or marketing department – who use third-party software (Photoshop, Flash, etc.) to create digital communications.

Your creative team is a great resource for content, so make sure they're up-to-speed on your DS goals, policies and submission processes. Their projects may not always be designed for playback on your digital signs, so make sure they are the right aspect ratio and resolution – you don't want them to stretch or scrunch on the screen.

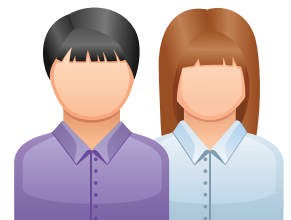
Your Asset Designers don't necessarily need access to your content management software at all. If they do, a simple Content Creator privilege will suffice. If these folks will be contributing a lot of your content, you may want to give them a test player to review their designs before they publish to the system.



## Content Creators

The beauty of a distributed content management system is that you can invite a lot of different people to submit DS content. These Content Creators usually have permission only to create messages from your DS or PowerPoint templates. In some cases, you may also want to give them the rights to import other types of assets.

Keep in mind that the more people you have contributing, the harder it will be to maintain your brand and design standards. Your Content Manager may want to set permissions so that anything submitted by Content Creators has to be approved before it hits the screens.



## Template Users

Template User is the most basic role for a DS system. These folks can only submit messages that they create within your fill-in-the-blank message templates. This is a quick, easy way to let less experienced communicators/designers contribute to your communications.

## Content Approvers

You want to make sure design standards are met, that messages are scheduled to the correct playlist and layout, and that no inappropriate content slips through.

Content Approvers can be department heads, lead designers or your Content Manager. They review anything submitted by Content Creators and Template Users and confirm that their messages are accurate and appropriate. They should have permissions in your system that allow them to edit any messages created using templates for quick fixes like typos.



## Naming Conventions for Digital Signage

Good management of your DS system begins with naming conventions that make sense.

Making sure that everyone understands what goes where is crucial to efficient message publishing, and having naming standards in place comes in handy as you add more user accounts, playlists, media, player hardware and screens to your system.

### Sample Naming Conventions

#### Media Player(s)

Your Technical Manager will likely handle the hardware for your system, but your software users will need to know where each item is, because each player is attached to a particular screen. When they schedule a layout to a player, they'll need an easy name to identify where that player publishes to.

Location is the most important element in naming your players:

- Building Name / Building Number
- Location

Examples for players in Atlanta, Seattle and St. Louis:

- ATL\_Lobby
- ATL\_Breakroom
- ATL\_MeetingRm1
- ATL\_MeetingRm2
- ATL\_Lounge
- SEA\_Lobby
- SEA\_Breakroom
- SEA\_MeetingRm1
- SEA\_MeetingRm2
- SEA\_L1\_Elevator
- SEA\_L2\_Elevator
- STL\_Lobby
- STL\_Breakroom
- STL\_MeetingRm1
- STL\_MeetingRm2

#### Layouts

Your designers need to name layouts with as much information about the way it looks as possible. You may or may not have preview capability in your software every time you need to choose a layout, so a descriptive name is important.

- Location/department
- Display resolution
- Number of content blocks and type
- Theme

Examples:

- Theme1\_1920x1080\_1win\_ticker\_clock
- Theme1\_1920x1080\_2win\_ticker\_clock
- Theme1\_1920x1080\_2win\_offset\_ticker\_clock



## Message and Ticker Playlists

Each layout will likely incorporate several playlists in different zones on the screen. Therefore, you'll need names that are instantly recognizable for both people creating layouts and your Content Creators, who have to publish individual messages to the appropriate playlists.

If you have non-standard aspect ratios, like 16:9, vertical or date/time content blocks, use dedicated playlists for each of those, so you don't get squashed or stretched content on the screen.

Examples:

- ATL\_16:9\_MainMessages
- ATL\_4:3\_Events
- ATL\_9:16\_Events
- ATL\_4:3\_News/Traffic
- ATL\_MeetingRm1
- ATL\_MeetingRm2
  
- SEA\_Lobby
- SEA\_Breakroom
- SEA\_MeetingRm1
- SEA\_MeetingRm2
- SEA\_Reserved
- SEA\_Reserved
  
- STL\_16:9\_MainMessages
- STL\_4:3\_Events
- STL\_9:16\_Events
- STL\_4:3\_News/Traffic
- STL\_MeetingRm1
- STL\_MeetingRm2

## Messages & Tickers

Since most of your daily DS activity will be creating messages and tickers, you should standardize those naming formats. This is especially important if you have Content Approvers or other people managing a large library of messages and media over time.

Examples (Location, Department, Description, Timeframe):

- Corporate\_401K Enrollment 2014
- Cincinnati\_Marketing\_Events\_Oct2014
- Athletics\_Video\_GameTickets\_101214
- OrgTV\_Weather\_3Day\_Ticker\_Daily



## 10 Steps to Digital Signage Policies

By publishing standardized policies about how to create, manage and deliver your DS messages, you can streamline workflows and improve your messages' content and look. In addition to telling people how to go about creating and posting messages, you can also avoid cluttered playlists and ensure that the look of all of your content meets your standards. Policies are also useful because people can be self-sufficient and not take up valuable staff time asking the same questions again and again.

Let's go through some basic steps for creating DS policies:

### 1. Discuss appropriate and inappropriate content

Do you have any prohibitions regarding images, language or topics? Do you have to comply with FCC or other regulations? Give some guidelines as to what is and is not an appropriate message – this will save hassle, embarrassment, and liability.

### 2. Include identity guidelines for fonts, colors and logos

List any specific fonts, colors and logos you use to create a cohesive look. This is especially important when you've created branded layouts or templates.

### 3. Give some basic design tips

Not everyone is a trained designer, so some helpful tips on creating messages can go a long way towards making your content look better.

### 4. Outline acceptable file formats

Do you prefer imported graphics to be JPEGs? Can people import audio, Flash or video files? Maybe you want content to be created in PowerPoint and then imported? Make sure you cover all file types your audience might want to use.

### 5. Clearly define the submission and approval process

Let people know who's authorized to submit content, who approves that content and how long it'll take for their message to get published. If they have to sign up for an account, how do they do that? Be sure to detail all types of users and roles in your policies.

### 6. Explain distribution channels and endpoints

Explain the basic publishing flow of your digital signage. Some playlists may go out to all displays, while others feed single screens. Others might send to desktops or RSS readers. Content creators need to know where their message will show up so they can design with the screen's environment in mind.

### 7. Publish browser requirements and IT security policies

Depending on your network and software, you may need a particular version of a browser to avoid problems. Also, have your IT staff spell out any security or firewall policies that might affect your system.

### 8. Include user names and passwords

You may not want to publish approver credentials here, but make sure to have at least your default login in your policies. The last thing you want is to have breaking news that can't go out because someone's forgotten their password.

### 9. Provide contact information for questions

Hopefully, your policies are clear enough that users won't have a lot of questions, but things can sometimes get hectic and unpredictable. Tell your users who they can contact, and how, if they have questions or problems.

### 10. Publish your policies

Put your policies somewhere that people can easily get to them, like on a website or intranet. People often remember things visually, so you may want to include screenshots of forms, templates or the software interface. The main thing is that your policies are clear and concise, but still contain all the information your users need.



## Digital Signage Policy Example - OrgTV

OrgTV is our in-house digital signage system that serves to communicate throughout our organization and deliver news, recognition, alerts and information to employees and visitors. Our online content management software allows approved employees to contribute messages and media to the system. We have a range of roles and privileges set up in the system: Content Creators, Template Users, Content Approvers and Administrators. (See the intranet for a current list of contacts.)

### Content

OrgTV is a tool to improve our communications, workflows and corporate culture. It is here for the benefit of everyone at the company and should not be used in an unprofessional manner or in any way that might offend your coworkers or visitors. The same care should be taken with this medium as with office conversations, emails, social media posts or other communications. (See our corporate communications policy on the intranet for details.)

When scheduling content, a definitive time period must be chosen – no messages should be scheduled without an end date.

### Identity Guidelines

OrgTV messages should comply with our published identity guidelines (see the intranet for details). Branded layouts and message templates have been provided to ensure the screens always look their best and represent our brand accurately. When creating content outside of OrgTV, please follow these basic rules, whenever possible:

- All designs should be 4:3 to fit in the layout content blocks
- Choose colors from our approved color palette
- Use the Myriad Pro font set for all message text
- Do not insert our logo into messages (it is already on the screen layout)

### Design Tips

To improve your messages so that you'll grab more attention:

- Use contrasting colors to make important information stand out. At a distance, people see light text on dark backgrounds better than dark on light.
- Don't overcrowd the message: Remember that screens may be viewed from far away, so messages need to be clear and concise.
- Use images with transparent backgrounds - make sure they don't get stretched or scrunched in your design by maintaining the correct aspect ratio.

### File Formats

Approved Content Creators can import PowerPoint, JPG, PNG, SWF and WMV files into OrgTV. Branded PowerPoint templates are available upon request. Template Users are restricted to fill-in-the-blank templates for fast message creation.

### Submission & Approval

Identified employees at the corporate and departmental level have access to OrgTV. The OrgTV team and department managers will have Content Approval privileges for messages submitted by those with Content Creator or Template User status only. Most messages will be approved the same day if received during business hours, and no corrections or edits are needed. Wordy messages, or those with errors, will be edited or returned for revision. Special requests for graphics or backgrounds must be submitted at least ten (10) business days in advance to the OrgTV Content Manager.

### Distribution Channels

OrgTV is organized very simply for maximum impact. All displays show corporate content in one content block, departmental content in a second block, and date/time and weather at all times.

There are two (2) displays in the lobby, two (2) near the elevators, and eight (8) in the hallways and offices. We also have a Screensaver Option available to anyone who would like the corporate content to play on their PC (contact the Technical Manager to set this up).

### Browser Requirements

To create messages from your own computer, you will need to have the most recent version of Internet Explorer. If your version of IE is not at least version 11.0, contact the Technical Manager.

### User Names and Passwords

Users must contact the Technical Manager for an account login and password for OrgTV. A brief training/orientation will be provided for each approved user. If you have forgotten your credentials and are unable to reach the Technical Manager, contact the Content Manager for the default login.

### Additional Questions

If you have any additional questions or comments, or experience any issues with the system, do not hesitate to contact us:

- General feedback – Content Manager
- Hardware, software or firewall issues – Technical Manager
- Special content design requests – Content Manager

## Best Practices for Message Scheduling

What can you do to schedule the content you've created to maximize message retention and increase audience action?

Much like with the content creation process, we find that more frequent exposure is better than longer exposure. So repeat your messages rather than scheduling them to stay on screen for longer time periods.

Message duration – how long the message actually stays on screen – should vary according to content and audience, but we have some best practices for message scheduling that serve as good guidelines to work from.



1. Schedule your messages for anywhere from 5-12 seconds
  - Read the message backwards to get a good sense of how long it might take a first-time reader to take in the message.
  - Increase or decrease the message duration as needed for your audience, message content and display location.
  - In busier locations you may use shorter message duration to get as many messages in front of the audience as possible in a short time.
  - In slower traffic locations like waiting rooms, lobbies and checkout counters, the message duration can be a little longer because you have, relatively speaking, a captive audience.
2. The average rule is that viewers need to see a message seven times before they take it in.
  - Schedule messages in different layouts, at different aspect ratios, on different backgrounds, in different colors, and/or on different displays to vary and reinforce the message.
3. If you're using QR tags or want viewers to photograph something on the screen, make sure you allow enough time for their phones to register the images.
  - We recommend 10-20 seconds message duration for those types of messages.

Remember to keep messages clear and concise, and start communications at least one month before an event or deadline.

## Best Practices for Playlists and Layouts

In addition to scheduling the messages themselves for maximum impact and retention, you should manage playlists and layouts to enhance content, and make sure audiences see and remember your communications.

1. Playlists should have about 7-10 messages in busy areas with lots of foot traffic. At approximately 7 seconds per message, the entire playlist would play in about one minute, looping to increase message frequency.
2. It's a good idea to have at least one item that does not change on the screen. We recommend using layouts and date/time as the consistent element. Too many items changing on the screen at once can be distracting to viewers, so the layout serves as a solid foundation for the messages that are changing on screen, and date/time is information everybody always needs.
3. You will also want to consider using themes (branding, seasonal, holidays) that tie your messages together. This creates another stabilizing element to support the changing messages. We recommend changing themes at least every ninety days.

Change your look to keep people interested:

- Content – daily
- Layout – hourly
- Background and layout designs – every 6-12 months

## 6 Tips for Training New Digital Signage Contributors

At some point, you're likely to have to provide some DS training to new content contributors or managers. Here are some tips to get you started:

### 1. Start with the familiar

One of the ways you can help new DS users get accustomed to your content management software is to start with familiar tools and concepts. Start by teaching users how to import content they have already created, or can create in familiar applications, to ease their fear of having to learn a lot of new tools right away. This serves as a gentle introduction to the new way of doing things.

### 2. Introduce concepts one at a time

There's a lot to learn in a new software application. Take your time and organize the information you want to share in concept blocks. When teaching importing, for example, show all the different ways to import content and how they can be used effectively. Then move on to another concept block, such as creating text messages.

### 3. Show real world examples

Help your users see how they can best use new software tools by demonstrating message creation in a relevant, real-world context. So if you are training bank employees, create messages about CDs and checking accounts to help them envision the type of messaging they could create. If you're training university employees or students, show them how to schedule content on a schedule they may already be familiar with such as Monday, Wednesday, and Friday or Tuesday/Thursday.

### 4. Create silly content

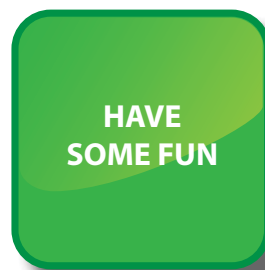
On the other hand, sometimes creating silly content - like announcements for a pizza party on Mars or an air drumming competition - can help lighten the mood and lift some of the stress that interferes with learning something new.

### 5. Observe your audience carefully

Take note of signs of stress and anxiety. New users often feel intimidated when learning new software tools. This could be for a number of reasons - they're in the middle of a big project, they don't understand, they feel out of their element, they're distracted. Make the training environment less stressful by being sensitive to their moods and concerns.

### 6. Take your time and follow-up

Speak slowly and distinctly. Offer snack and restroom breaks if the training session is more than 90 minutes long. Break the training up into smaller, more manageable concept "bites". Give your users time to process what was covered, then follow-up in a few weeks to see whether or not they have any questions or concerns.



## Common Mistakes

Let's talk about the top mistakes we see people make after they've bought a DS system.

### 1. Mounting the screens too high

No matter how great your messages look, no one can see them 20 feet in the air. Before you mount your screens, you need to think about screen heights and viewing angles from the sides, so people can read your text. Also, if you have interactive screens, they have to be mounted where people can easily touch all the way to the top of the screen, and you should take into consideration ADA guidelines for those who are disabled and in wheelchairs.

### 2. Trying to do too much on the screen

Your software comes with a lot of options, but you don't need to show everything at once. Remember: your goal is to deliver information. Your message gets lost if your screen is packed with so much that viewers can't pick out the different things you're telling them. You're better off using different features at different times to keep drawing people in and keep them interested.

### 3. Letting messages get stale

If you've left something on your playlist too long because you forgot about it, chances are your audience has, too. Keep it fresh by showing new content every day, and show things more often for shorter time periods verses running one thing on the screen all day long. Stale content just becomes part of the background and gets ignored. New content is what keeps your audience coming back.

### 4. Not updating your software

In addition to keeping content fresh, you need to keep your content management software fresh as well. New software features will let you do more with your messages more efficiently. And don't forget to update hardware once in a while, too.

### 5. Using audio where you shouldn't

In public areas like lobbies, lounges, or cafeterias, you may want to use audio on your screens for videos or TV channels you're piping in. But if you're running something with audio somewhere that people are working and need to concentrate – especially if it repeats a lot - you may end up annoying your audience more than attracting them. Also, noisy acoustic environments may drown out audio messages.

### 6. Forgetting the call to action

Everything you publish should prompt the viewer to do something – and they can't do that unless you tell them how. So make sure your messages direct people to where they can get more information or take the action you want them to. This will help you with measuring ROI, which we talk about in [another white paper](#).

Hopefully, with the advice in this and our other white papers, you can avoid these mistakes so your digital communications can thrive.

Want to learn more? Contact us at [salesteam@visix.com](mailto:salesteam@visix.com).