Powering Global Client Collaboration with Secure File Sharing

How a Leading Ad Agency Used Egnyte Adaptive Enterprise File Services to Work with Clients

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constellation
R E S E A R C H

at a GLANCE

When one of the world's largest advertising agencies (the Agency) struggled to collaborate with its customers globally, it turned to the Egnyte Adaptive Enterprise File Services platform (Egnyte) to help account teams and clients work together.

Problem	▪ Securely sharing large files with clients around the world ▪ Ensuring everyone is working on the same version of a file ▪ Tracking changes for auditing and billing
Solution	▪ Egnyte Adaptive Enterprise File Services for collaboration on content ▪ SAML integration between Egnyte and the enterprise directory for authentication and role-based permissions ▪ Egnyte integration with Google Apps for Work and real-time sharing via Fuze video conferencing create a seamless collaboration experience
Benefits	▪ Reduction in mistakes and wasted time caused by people working on different versions of a file ▪ Improved knowledge flow based on discussions being linked directly to the files versus lost in email ▪ Provision of full audit trail of changes for history and accountability ▪ Cloud-based platform reduces IT overhead and email administration

the COMPANY

The Agency is one of the world's largest digital marketing agencies, headquartered in New York City, with more than 18,000 employees and clients in more than 36 countries. The Chief Information Officer (CIO) served as the executive sponsor of the Egnyte implementation, with support from other department heads, including the Chief Talent Officer (CTO).

Company: Global advertising agency (the Agency)

Headquarters: New York

No. Employees: 18,000+

Industry: International advertising, marketing and public relations

the CHALLENGES

One of the main tasks of a digital agency is working with clients to create the multimedia assets used in their sales and marketing campaigns. The process is very collaborative, starting with gathering requirements, then brainstorming, multiple rounds of drafts and edits, followed by review, approval and production. Before Egnyte, it was difficult to share files and discuss changes via email. Some of the main challenges were:

- **Sharing large files with clients:** The content created for clients can range from small banner ads for use on websites to high definition videos for online or television commercials. The planning, authoring, reviewing and revising of these files is highly collaborative and involves many changes. Emailing files back and forth is not an option as the files a) are too large, b) require version control and tracking, and c) become difficult to collaborate on as email-based discussions quickly become disorganized and out of sequence.

- **Keeping track of changes:** The collaborative authoring process for a campaign requires many iterations for each piece of content. It's critical that the Agency be able to track all changes so that it can review the history of all the decisions made as well as invoice the clients accurately for the work that was done.

the TECHNOLOGIES

- Egnyte Adaptive Enterprise File Services
- Google Apps For Work
- Fuze Video Conferencing

- **Enforcing security policies:** Based on both internal and industry rules, it is critical that all external parties (i.e. clients) register and authenticate before accessing any content. Therefore, all tools the Agency uses must be able to integrate with the corporate directory and security policies it has in place.

- **Enabling anytime/anywhere access:** As the Agency grows (both organically and by acquisition), real estate becomes a costly issue, especially in major cities. Users need to work from anywhere, including areas with low bandwidth. Traditional telepresence systems are costly and require dedicated hardware.

the SOLUTION

The CIO along with other department leads started a multi-year technology refresh that focused on platforms with strong cloud-based and mobile features. The project began by replacing their legacy email system with Google's productivity suite, Google Apps for Work. Google Apps was used not only for email and calendar, but also word processing, spreadsheets, file-sharing and web-conferencing all via a single integrated offering. However, although this provided a good solution for internal communication and sharing, it

did not meet the requirements for working externally with the Agency's clients.

After an extensive review of cloud-based file sharing products, the Agency chose Egnyte's platform as its external collaboration tool. Egnyte was chosen for the following reasons:

- **Secure access:** The first thing the Agency required was that Egnyte integrate with its SAML-based authentication framework. (see Figure 1) Due to auditing requirements, this authentication is required in order to provision an account for each client that will access the shared content. Due to the flexibility and thoroughness of the Egnyte API, the Agency was able to custom code the required integration, meeting its security needs without creating an overly complex solution for its customers.

Figure 1. Architecture for Client Access to Secure File Sharing
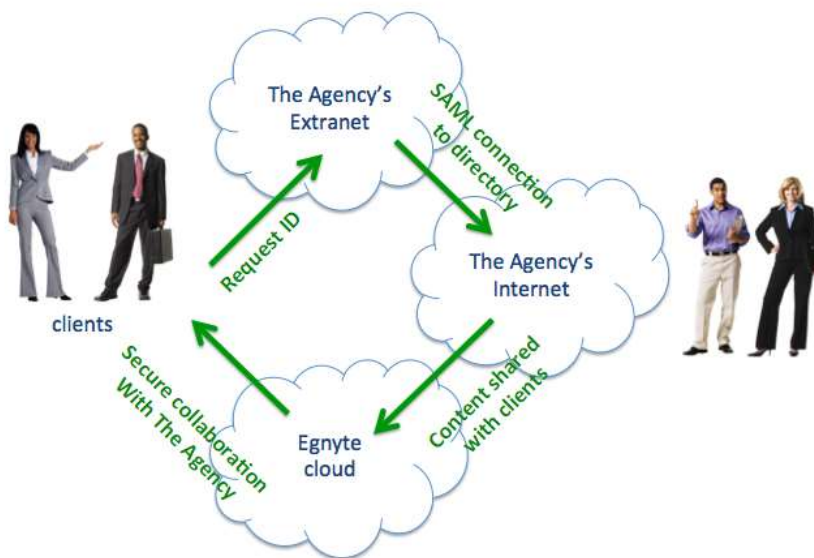

- **Performance:** Typical office documents (word processing, spreadsheets, presentations) range between five and 50 megabytes each, and most file-sharing tools handle these just fine. However, a typical engagement with an Agency client involves files ranging anywhere from 500 megabytes to five terabytes each. Egnyte enabled these files, created with products like Final Cut Pro, Adobe Audition, Articulate and others, to be uploaded and downloaded quickly so that time is spent working on the projects, not watching status bars.

- **The right content to the right people.** Due to very strong compliance regulations, the Agency requires strict control over both users and content. In the old days, when creative content was delivered to clients via couriers, the Agency knew exactly what packages were sent, whom they went to, and what time they were delivered. The Egnyte software ensures the Agency can maintain strong control over users and content:

o Granular level of activity tracking allows the Agency to track events specific to each client, folder and file so that all activities can be audited and invoiced accurately.

o Files can be locked for editing to prevent two users from making changes at the same time.

o Links to a shared file can be set to expire after a specific date or a specific number of clicks to ensure strong security and control. (see Figure 2)

o Automated notifications keep users informed about changes in the files.

o Multiple-domain capability prevents user access to competitive accounts, enabling the Agency to have customers who are competitors while being able to assure them that project teams only have access to certain accounts.

**Figure 2. Advanced Security Sharing Options**
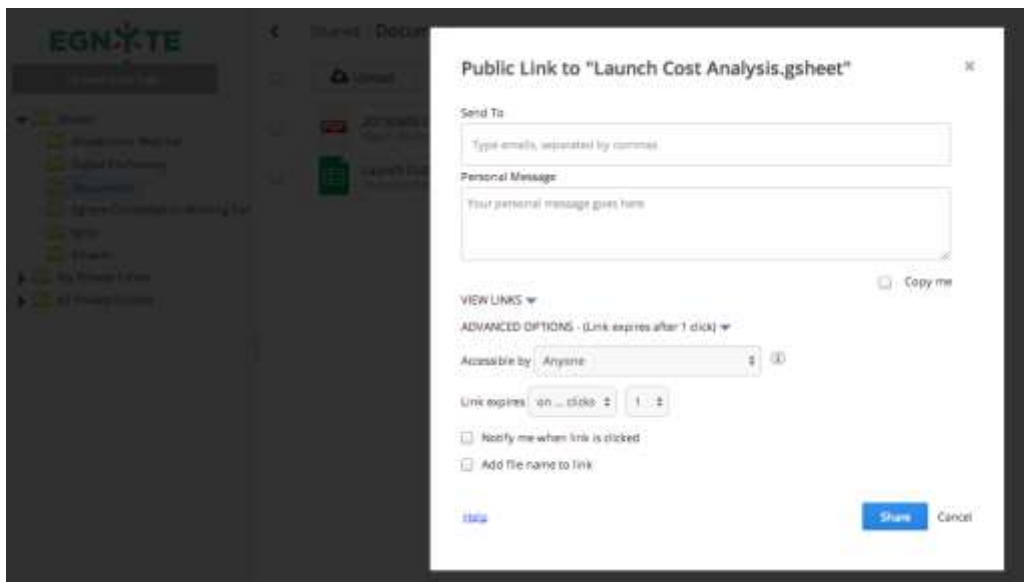
- **Partnering, not just purchasing:** After speaking with Egnyte's senior leadership and product management teams, it was clear to the Agency's executives that this would be a partnership, not just a purchase. While many players in the file-sharing market understand the needs of consumer-grade tools, the Agency felt Egnyte understood the complexities of enterprise requirements such as scalability and security. Egnyte has worked with the Agency to help with integration and customization, ensuring that the Egnyte platform seamlessly blends with the other enterprise software systems used at the Agency, ranging from email and calendar tools to the company Intranet.

- **Integration with mission-critical enterprise software:** While the Agency uses Google Apps for sharing small files such as spreadsheets and presentations internally, it turns to Egnyte for sharing content externally with clients. Having a different tool

for use with clients forces employees to take explicit action to share a file versus simply (and perhaps mistakenly) adding a client's email address while sharing an internal file with colleagues. Since Egnyte can import content from Google Apps with a single click, this extra step is not a burden for employees and helps safeguard against internal files being accidently shared with clients. (see Figure 3)

Egnyte also adds several features that Google Drive does not have, such as restricting the number of times a file can be downloaded and an expiration date that restricts how long the file share remains available. Both of these features help the Agency maintain the level of control over content that is required.

Agency users can utilize integrations with Google Apps and other productivity tools including Microsoft Office, Salesforce.com, and QuickOffice.

Figure 3. Google Docs Integration within Egnyte

Google Docs and other file types in a global file structure
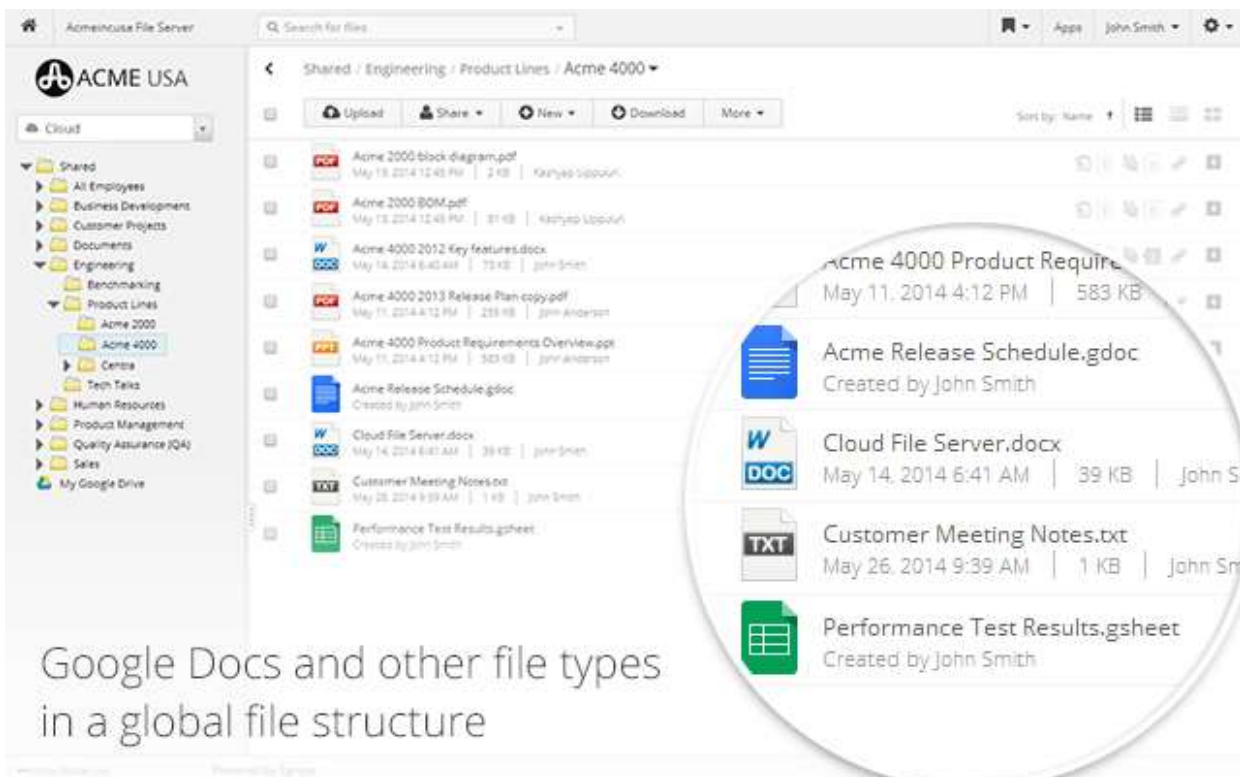
- **Real-time collaboration with Fuze:** Previously, the Agency used expensive Cisco Telepresence rooms to collaborate with clients in remote locations. The problem is that these systems require extremely expensive hardware on both sides. By switching to Fuze for real-time collaboration, the Agency is able to easily share files from Egnyte into a Fuze videoconference, where anyone can participate from his/her computer, phone or tablet. In these meetings, designs are reviewed and improved onscreen,

eliminating the typical back and forth exchanges that lead to confusion and costly mistakes.

the IMPACT

The use of Egnyte has taken off inside the Agency. There are currently five separate cloud-based file domains, supporting almost 25,000 users globally who are actively collaborating on almost 1.2 million files. The largest of these domains supports more than 21,000 "power users" who share files of all types and sizes with employees and clients.

The Agency has seen three important improvements since integrating Egnyte into the processes it uses with clients:

- **Reduced project delivery times:** The shift from emailing files back and forth to sharing them via secure online folders has removed a great deal of complexity and confusion, resulting in faster turnaround times for the collaborative process of creating advertising content.

- **Improved accuracy of content:** Due to version control, fewer mistakes are being made due to people looking at out-of-date versions of content.

- **Increased customer satisfaction and trust:** Clients have reported that the new process, including the authentication with the Agency's portal, makes them feel more comfortable sharing information in secure folders versus emailing them.

the TAKEAWAYS

Files are at the very heart of the creative process that takes place between the Agency and its clients. Egnyte's enterprise-grade solution, along with its integration with other business tools, have enabled the Agency and its clients to create, review and publish content easily and securely. Egnyte has been a win-win for the Agency's account teams, clients, and IT and compliance teams.

Key lessons learned include:

1. **All primary stakeholders must be involved.** In order for the Egnyte solution to be a success at the Agency, cooperation was needed between IT, security and legal to ensure the solution was able to integrate with the required systems and meet compliance regulations.

2. **Integration with existing business workflows is critical.** People don't want to use multiple tools to get their job done. In this case, file sharing was woven into the creative process as seamlessly as possible, enabling both employees at the Agency and clients to work with very little disruption to the process they already knew.

3. **Access anytime/anywhere is a critical component to successful adoption.** Advertising is a very time-sensitive industry. It was very important to provide the Agency and its clients secure access to the creative content they were collaborating on from work, home or in transit.

the RECOMMENDATIONS

Picking the right software platform is not a checklist exercise. You need to do more than just compare the features of Vendor A against those of Vendor B. A few key areas to focus on include:

1. Will the platform be able to support the existing business processes already in place or will it require extensive retraining?

2. Will it integrate with the existing enterprise software tools that your organization uses or will it be a stand-alone solution?

3. Make sure the vendor is not just selling you software, but is partnering on your success. Does the vendor provide services to help with implementation? Will it listen to your unique requests or try and force you into a one-size-fits-all solution? Does it have a partner ecosystem that can enhance and extend support and functionality?

About Constellation Research

Constellation Research is an award-winning, Silicon Valley-based research and advisory firm that helps organizations navigate the challenges of digital disruption through business models transformation and the judicious application of disruptive technologies. This renowned group of experienced analysts, led by R "Ray" Wang, focuses on business-themed research, including Digital Marketing Transformation; Future of Work; Next-Generation Customer Experience; Data to Decisions; Matrix Commerce; Safety and Privacy; Technology Optimization and Innovation; and Consumerization of IT and the New C-Suite.

Unlike the legacy analyst firms, Constellation Research is disrupting how research is accessed, what topics are covered and how clients can partner with a research firm to achieve success. Over 300 clients have joined from an ecosystem of buyers, partners, solution providers, C-suite, boards of directors and vendor clients. Our mission is to identify, validate and share insights with our clients. Most of our clients share a common trait - the passion for learning, innovating and delivering impactful results.

Organizational Highlights

- Founded and headquartered in the San Francisco Bay Area in 2010.
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- Serving over 300 buy-side and sell-side clients around the globe.
- Experienced research team with an average of 25 years of practitioner, management and industry experience.
- Creators of the Constellation Supernova Awards – the industry's first and largest recognition of innovators, pioneers and teams who apply emerging and disruptive technology to drive business value.
- Organizers of the Constellation Connected Enterprise – an innovation summit and best practices knowledge-sharing retreat for business leaders.
- Founders of Constellation Executive Network, a membership organization for digital leaders seeking to learn from market leaders and fast followers.

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