BEST PRACTICES

The Photo Managers is the leader in the photo management industry. Professional photo managers have worked with thousands of clients around the world since 2009. Throughout this time we have developed the following best practices. These are procedures for all aspects of photo management projects that result in optimal outcomes for both the photo manager and their clients.

These best practices are a resource for The Photo Managers community and demonstrate our leadership in the industry. They will continue to evolve, given the technical nature of photo management. We recommend their adoption, helping ensure a respected profession and satisfied clients.

Further details about each set of best practices can be found in the certification modules. The resources listed provide more in-depth information and guidelines from respected sources.

Best practices reviewed by Certified Professional Photo Managers Peter Bennett (FotoFlow Solutions), Kate Jacus (The Photo Curator), Julie Kessler (Picture This Organized), Adam Pratt, (Chaos to Memories), and Laura Woolsey (Memory Forward)

CLIENT MANAGMENT

- Establish effective communication with clients from the beginning of the relationship and send progress updates throughout.

- Complete a thorough client needs assessment to define the project scope and timeline.

- Educate the client about options for sorting, preserving, and sharing their photo collection.

- Have a contract in place to protect both you and the client.

- Use project management tools to stay on track and on budget.

- Surprise and delight clients by returning their project in a special way.

- See: Module 2 – Client and Project Management

PHYSICAL PHOTOS & MEMORABILIA

- Gather all photos into one place and create an inventory for planning purposes.

- Remove photos from any non-photo-safe storage, such as magnetic albums or shoeboxes.
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- Sort chronologically or by theme, using ABCs method when appropriate.

- Scan 2-D and small 3-D memorabilia on a flatbed scanner.

- Photograph or video 3-D objects.

- Use the same naming convention to rename images and save in the digital photo hub.

- Consult a conservator if photographs or objects are damaged and require repair.

- See: Module 3 – Physical Photos & Memorabilia

RESOURCES

Photo Organizing Made Easy by Cathi Nelson
An overview of photo organizing projects from gathering photos to sharing in various ways.

Care, Handling, & Storage of Photographs, Library of Congress
General information with some helpful resource links.

Find a Conservator, American Institute of Conservation
Locate a conservator in the US.

Find a Conservator, Canadian Association of Professional Conservators
Locate a conservator in Canada.

Find a Conservator, The Institute of Conservation
Locate a Conservator in the UK and Ireland.

DIGITIZATION

- Help the client organize the physical photos, negatives, and/or slides before digitizing.

- Use a photo scanner or DSLR camera scanning setup, not a scanning app on your phone or an "all-in-one" printer.

- If possible, remove photos from albums before scanning.

- Keep the equipment clean and dust off photographs, negatives, or slides before scanning.

- Scanner settings should be 600 dpi for prints, at least 2400 dpi for slides, and at least 3000 dpi for negatives. Consider scanning as TIF files to retain the most digital information.

- For audio and film/video digitization, we recommend that you outsource to a trusted vendor unless this is a focus of your business.

- See: Module 4 – Digital Photo Organizing

DIGITAL PHOTO ORGANIZING

- If the client has both digital and print photos, it's best to deal with the digital first as they are more vulnerable.

- Gather all photos into one place.

- Create a chronological file structure.

- Save images to a digital photo hub separate from any photo management software and back up often.

- Various software options help you remove duplicate and similar photos.

- Update metadata to capture information about the photos for easy searching.

- Create a chronological file structure and an image naming standard such as YYYY-MM-DD-Client Name-Photo Info-Sequence.

- Ensure image capture dates are accurate when possible and inform client of potentially inaccurate or missing capture dates.

- Retain any work the client has done with identifying images: folder names, album names, names on the back of photos, etc. as keywords/metadata.

- Utilize facial recognition software and GPS data for adding more keywords/metadata.
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- Provide the client with both a digital and hard copy of the taxonomy (list of the keywords used).

- Use the 3-2-1 backup method: 3 backups of the photos, on at least 2 types of media, 1 of which is offsite.
- See: Module 4 – Digital Photo Organizing

STORAGE

- Educate clients about replacing digital media every 4 – 5 years, as well as the privacy concerns relating to cloud storage.
- For physical photographs, audio & video, and memorabilia, long-term storage should be in containers made from archival materials.

- Collections should be stored in the main part of a house or office (not in basements or attics), with stable room temperature and 50% humidity conditions.
- See: Module 5 – Save & Share

SHARING

- Have sample photo books, websites, or other products to show clients and help in the decision making process.
- When recommending a company for photo books, photo sharing websites, photo gifts, etc. be confident that they are a trusted resource.
- Educate yourself and the client about online privacy issues and terms of agreements for cloud storage.
- See: Module 5 – Save & Share