



A Crash Course in Marketing Work Management





Shash Cates

Product Marketing Manager,
Workfront



Logan Mallory

Sr. Digital Marketing Manager,
Workfront



THE MODERN MARKETER

PART ARTIST • PART SCIENTIST

**Does more
with less**

**Increasingly
innovative**

**Up on the latest trends
and technology**



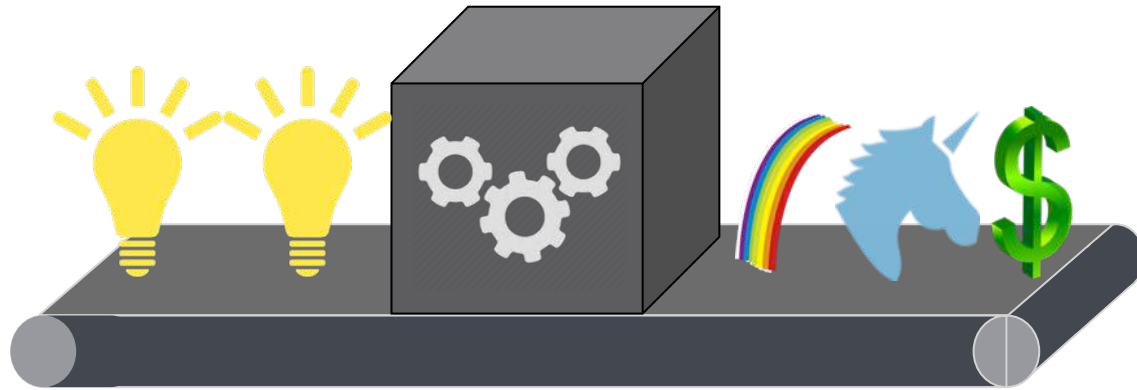
**World-class
creativity**

**Ready for whatever
comes their way**

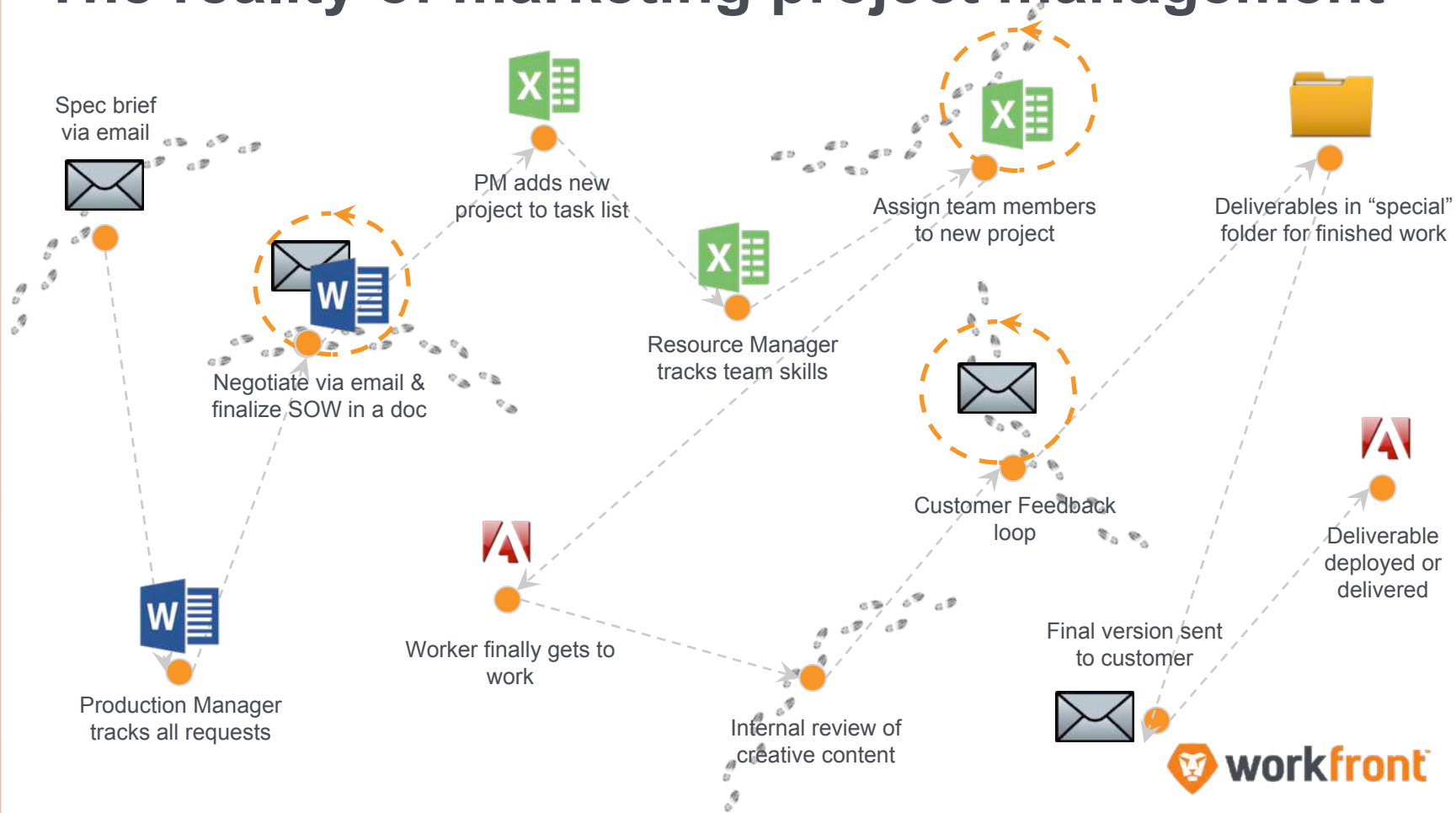
**Attends marketing
technology conferences**



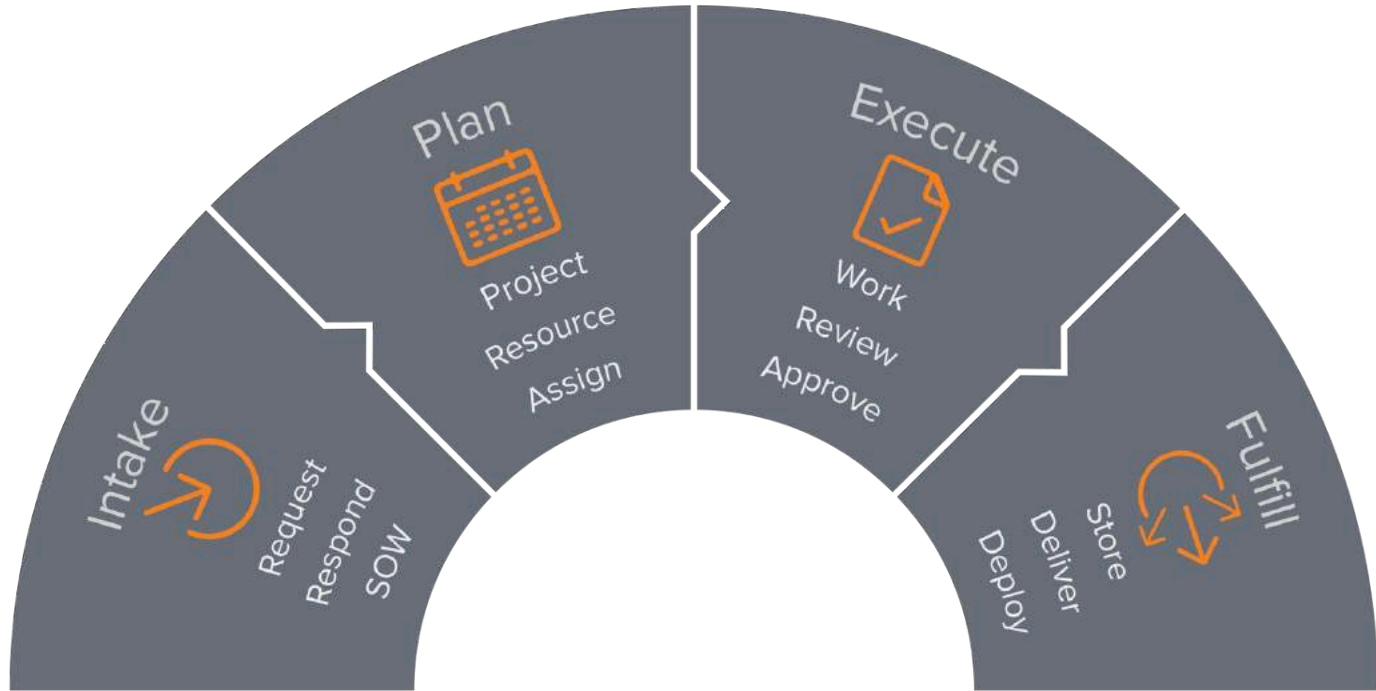
What marketers are asked to do...

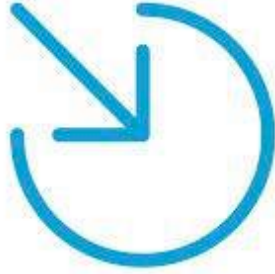


The reality of marketing project management



Tackling the phases of project management







Intake

The process of receiving a work request, along with its supporting documentation.

Project Intake



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GARTNER DID YOUR RESEARCH FOR YOU

Workfront is a Leader in Gartner's 2016 Magic Quadrants for Cloud-Based IT PPM Services & Marketing Resource Management


[DOWNLOAD IT REPORT](#) [DOWNLOAD MARKETING REPORT](#)




Hello! Can I answer any questions for you?




Requests from 501-1,000 Coworkers

What is LinkedIn?Join TodaySign In

**Workfront**
Computer Software
501-1000 employees






15,259 followersFollow


HomeCareers

workfront

Workfront is a cloud-based Enterprise Work & Project Management software that helps marketing, IT, and other enterprise teams conquer the chaos of excessive email, redundant status meetings, and disconnected tools. Unlike other tools, Workfront Enterprise Work Cloud is a centralized, easy-to-adopt solution for managing and collaborating on all types of work through the entire work lifecycle, which improves team productivity and executive visibility. Workfront is trusted by thousands of global enterprises, like Cars.com, Cisco Systems, Covario, National Geographic, Schneider Electric and Trek. To learn more, visit www.Workfront.com

Specialties
Enterprise Work Management, Project Management, Task Management, Resource Management, Team Collaboration, Help Desk & Issue Tracking, Work Planning, Work Communication, Performance Management, Work Intelligence

Workfront employees

Rachael Mitchell
Enterprise Net New Account Development M...
[See how you're connected](#)

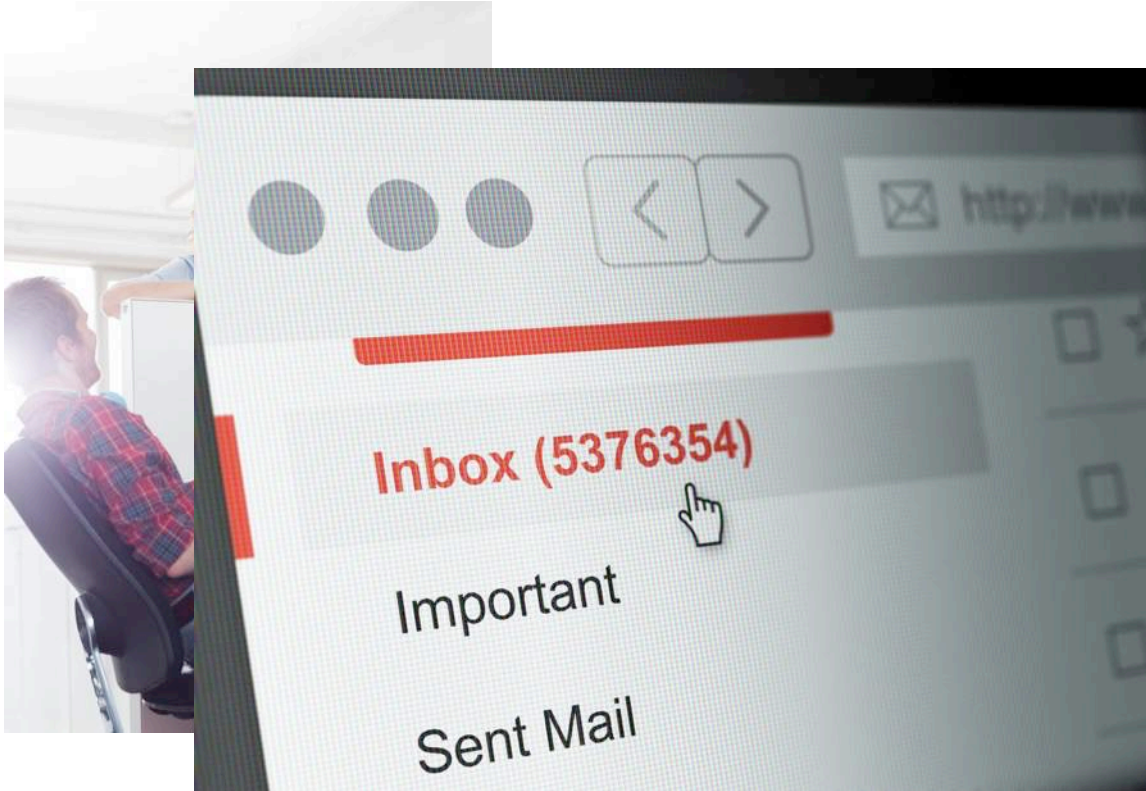
Careers
**Interested in Workfront?**
Learn about our company and culture.
5 jobs posted
[Learn more](#)

Problems of Project Request Intake

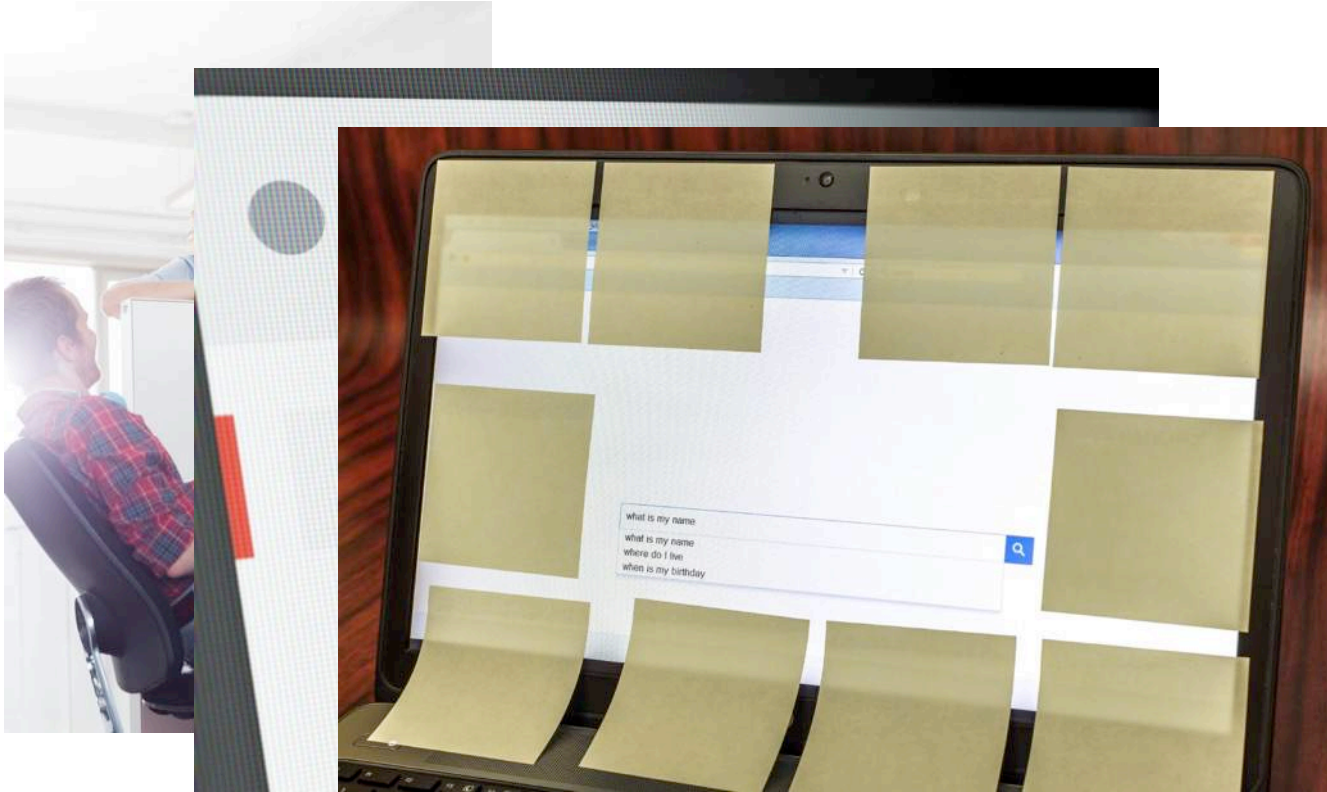


#MarketersRule

Problems of Project Request Intake



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Problems of Project Request Intake

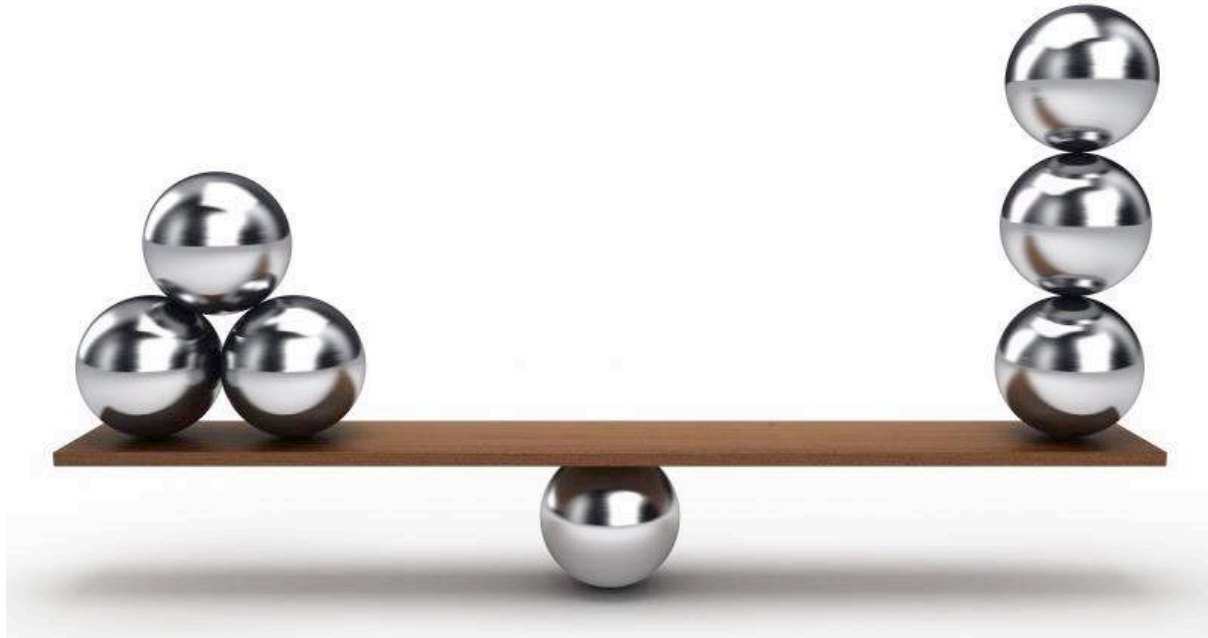


The Balance of Project Intake

“Too much intake red tape will lead to an underground economy of projects that escape portfolio oversight, while too little intake formality will lead to a wild west of approvals that could overwhelm the PMO. Finding the right balance of intake formality for your organization is the key to establishing a PMO that has the ability to focus on the right things.”

-Infotech.com

Balance Between Various Needs



Ideas for Streamlining Requests

1. Create an email address where all project requests are received (i.e. requests@company.com)

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3. Leverage work/project management software
4. Shared Google Doc

Ideas for Streamlining Requests

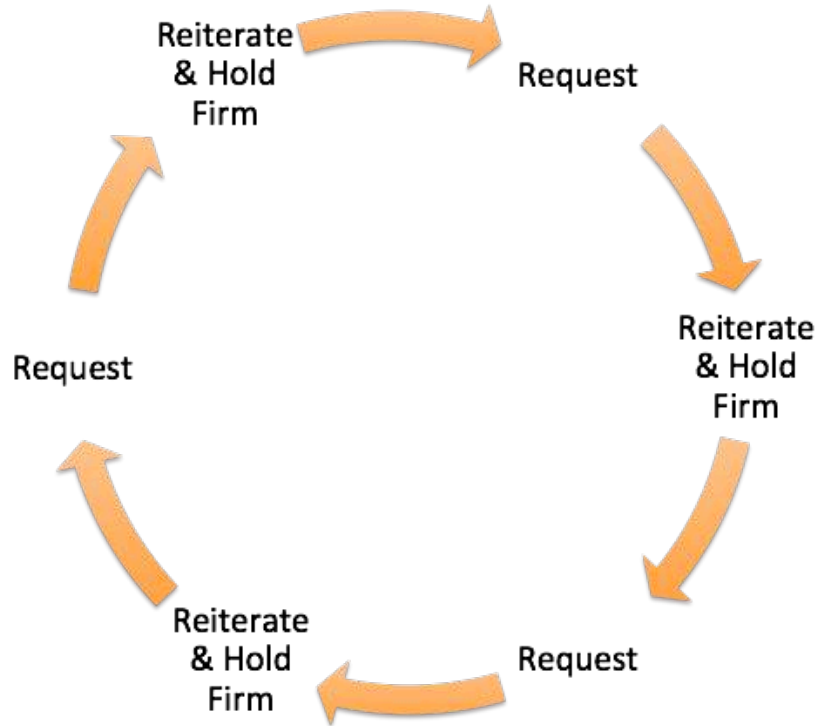
1. Create an email address where all project requests are received (i.e. requests@company.com)
2. Use a shared folder where requests are submitted
3. Leverage work/project management software
4. Shared Google Doc
5. Use a request form (more to come on this topic)

Spread the word



#MarketersRule

Implementing Your Intake Process



Tips for Request Forms

#1 Apply the Goldilocks Principle

Not too long, not too short...just the necessary information.

The screenshot shows the 'New Request' form in the Workfront interface. The sidebar on the left contains the following elements:

- Navigation: My Work, Projects, Reporting, People, **Requests**, Timesheet
- Buttons: New Request, Requests I've Submitted, All Requests
- Section: Select a Request Type
- Dropdown: Website Requests
- Section: Website Requests
- Dropdown: Website Graphic Requests
- Section: Website Graphic Requests
- Dropdown: Banners (selected)
- List: Icons, Screenshots, Wallpaper

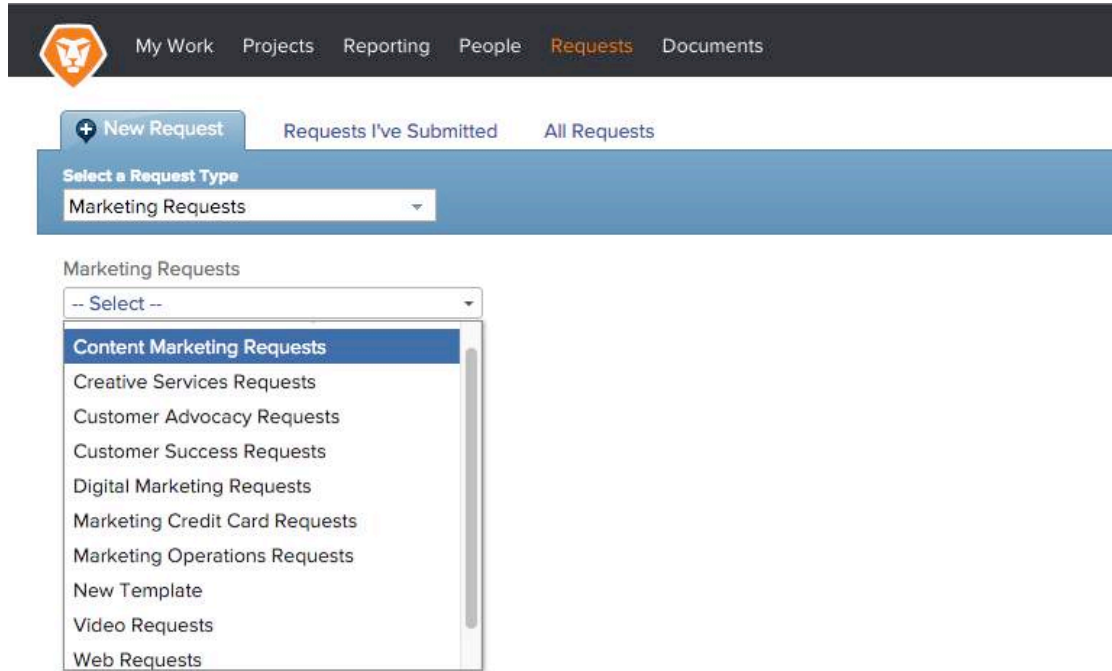
The main form contains the following fields:

- Request Name:
- Description:
- Priority: Normal (dropdown)
- Documents: Add Documents button, Or drag and drop here to attach...
- Asset Details: Live Date, End Date (date pickers)
- Web Area: -- Select -- (dropdown)
- Suggested Dimensions:
- Copy:
- Buttons: Submit Request, Cancel

Footer: ©2000-2015 Workfront formerly AtTask, Inc. All rights reserved. Learn more about Workfront™, formerly AtTask®

#2 Simplify By Using Multiple Forms

Different deliverables may require different forms. Be realistic.



The screenshot displays the Workfront user interface. At the top, a dark navigation bar contains the Workfront logo and menu items: 'My Work', 'Projects', 'Reporting', 'People', 'Requests' (highlighted in orange), and 'Documents'. Below this, a secondary bar shows tabs for '+ New Request', 'Requests I've Submitted', and 'All Requests'. A blue bar below the tabs contains the text 'Select a Request Type' and a dropdown menu currently showing 'Marketing Requests'. The dropdown menu is open, revealing a list of request types: '-- Select --', 'Content Marketing Requests' (highlighted in blue), 'Creative Services Requests', 'Customer Advocacy Requests', 'Customer Success Requests', 'Digital Marketing Requests', 'Marketing Credit Card Requests', 'Marketing Operations Requests', 'New Template', 'Video Requests', and 'Web Requests'.

#3 Focus on the facts



#4 Make the form useful to you

- What information do you need to determine priorities?
- Are there enough fields for you to understand what the “customer” wants?



Plan

If you
fail to plan,
you are planning
to fail.



B. Franklin

jmarkmiller.net

Problem: Making Accurate Work Estimates

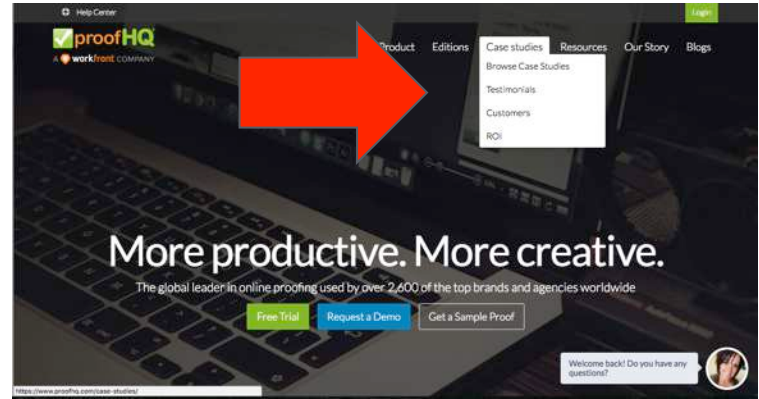


Solution: Break Work Into Smaller Tasks

Big projects...



And small(er) ones...



Key elements of Website Transition

Analysis

Determine top traffic driving content

Identify key product marketing pages

Merge

Map fields from old theme to current version
Implement RSS feed and merge applicable content

Build

Update WP theme
Annotated mocks (mobile)
Copy for new product pages
Required web development

QA

Manual QA
Automated QA

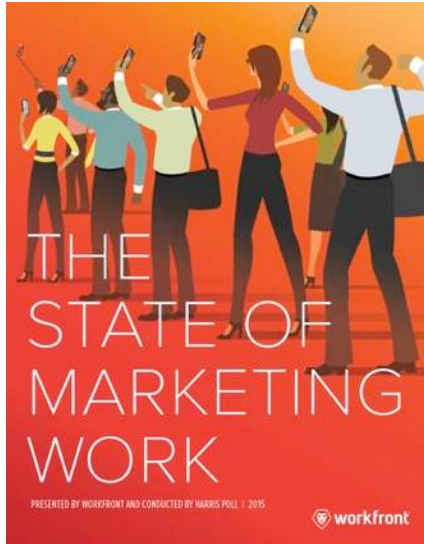
Launch

301 Redirects
Content Deploy



Solution: Break Work Into Smaller Tasks

Big projects...



And small(er) ones...



Optimize Workflows for Better Planning

1. Keep track of workflow as you're working on projects

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1. Keep track of workflow as you're working on projects
2. Make improvements as you go

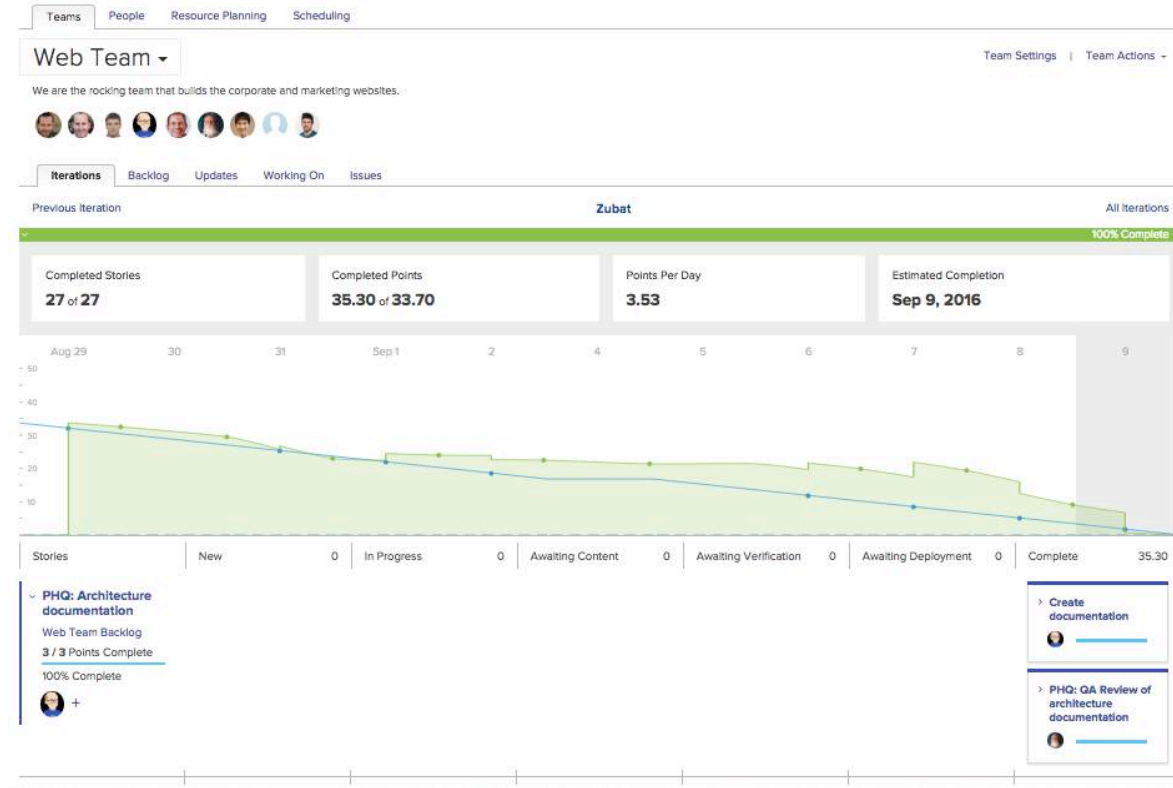
Optimize Workflows for Better Planning

1. Keep track of workflow as you're working on projects
2. Make improvements as you go
3. Document what works and what doesn't

Optimize Workflows for Better Planning

1. Keep track of workflow as you're working on projects
2. Make improvements as you go
3. Document what works and what doesn't
4. Create repeatable templates

Find Tools That Accommodate Your Team



Creating a Schedule

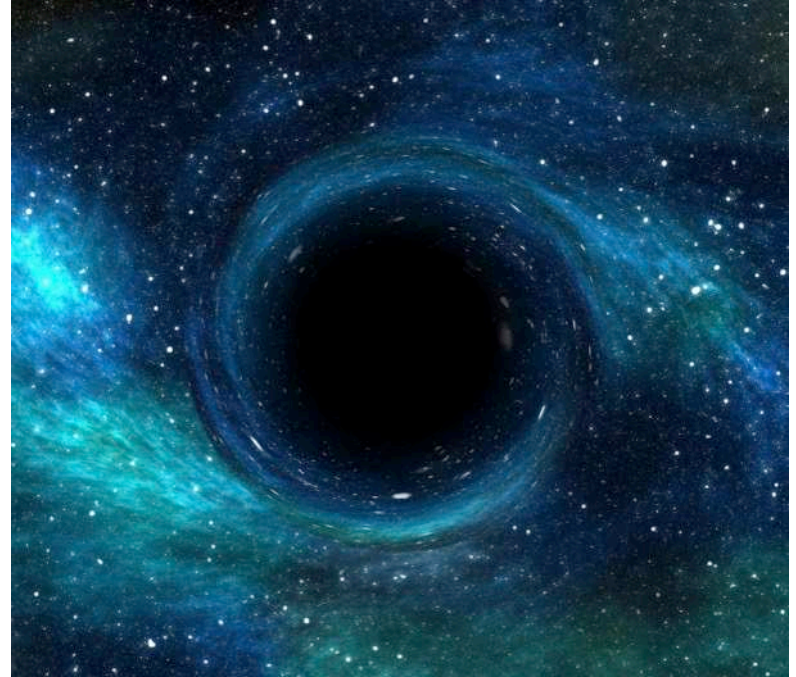
Problems with Creating Schedules



- You overpromise and underdeliver
- You don't really know how long things take
- Everything is due yesterday

Understand your queue

- How long do your typical tasks take?
- What has your team already committed to completing?



Communicate frequently

Estimate what you can get done in a period of time



Keep stakeholders in the loop as you go through the process





Execute

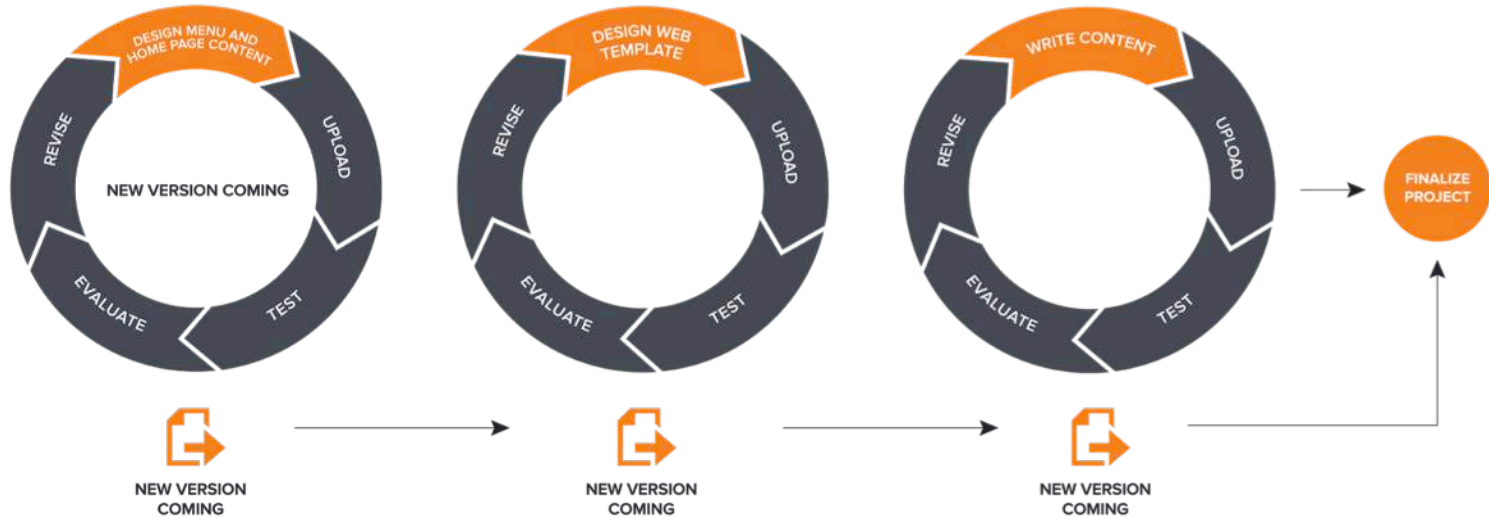
Agile: A Different Way to Work

Traditional Project Management



The traditional approach to a website redesign project follows a very linear, step by step process.

Agile Workflow



The Backlog

Dances with Wolves ▾

Solutions Marketing Agile Team



Iterations

Backlog

Updates

Working On

Issues

Export ▾

Filter

All ▾

View

Stories Completed ▾

Grouping

Time ▾

<input type="checkbox"/> ▾ Name	Start Date	End Date	Total Points
▼ Past Iterations (38)			
<input type="checkbox"/> 2016_0404_0415_Dances1	4/4/16	4/15/16	22.06
<input type="checkbox"/> 2016_0418_0422_IsThereAVicePresidentsClub	4/18/16	4/22/16	41.4
<input type="checkbox"/> 2016_0425_0429_SeemedLikeAGoodIdeaAtTheTime	4/25/16	4/29/16	91.14
<input type="checkbox"/> 2016_0502_0506_OneIsTheLoneliestNumber	5/2/16	5/6/16	54.25
<input type="checkbox"/> 2016_0509_0513_NoonIsReadingThis	5/9/16	5/13/16	133.38
<input type="checkbox"/> 2016_0516_0520_MyKidsGottaEat	5/16/16	5/20/16	139.7
<input type="checkbox"/> 2016_0523_0527_WereEmbarrassedForRob	5/23/16	5/27/16	94.26
<input type="checkbox"/> 2016_0531_0603_BrentBirdFanClub	5/31/16	6/3/16	35.39
<input type="checkbox"/> 2016_0606_0610_450IsCloseEnough	6/6/16	6/10/16	22.38
<input type="checkbox"/> 2016_0613_0617_WastedPotential	6/13/16	6/17/16	52.89
<input type="checkbox"/> 2016_0620_0624_ItsNotMyFault	6/20/16	6/24/16	73.11
<input type="checkbox"/> 2016_0627_0701_SCRUMFerDayzzz	6/27/16	7/1/16	69.18
<input type="checkbox"/> 2016_0705_0708_PhoneItInFridays	7/5/16	7/8/16	76.4
<input type="checkbox"/> 2016_0711_0715_IGuessWereRobbingIt	7/11/16	7/15/16	33.26
<input type="checkbox"/> 2016_0718_0722_ApologyRound	7/18/16	7/22/16	35
<input type="checkbox"/> 2016_0725_0729_BurndownMoreLikeBurnedOut	7/25/16	7/29/16	38.95

A blurred black and white photograph of a sprinter in mid-stride, overlaid with a large orange number 2 and the text 'The Sprint'. The image has a dark, moody aesthetic with horizontal motion blur. A solid orange vertical bar is on the left side, and a diagonal orange shape is in the bottom-left corner.

2

The Sprint

Dances with Wolves ▾

[Team Settings](#) | [Team Actions](#) ▾

Solutions Marketing Agile Team



Iterations

Backlog

Updates

Working On

Issues

Unplanned

All

+ New Story

Plan Iteration

→ Export ▾

More ▾

View

Assignment Status ▾

Iteration Name

Sunburst Release 2.0 Iteration 2

Start Date

Aug 29, 2016

End Date

Sep 9, 2016

Focus

80 %

Capacity

120

Goal

Total Points: 0/96

Save

Cancel

<input type="checkbox"/> Name	Assigned To	Team	Assignment	Last Update ↓
<input checked="" type="checkbox"/> [Why WF companion piece] Write new content (based on Joe's clarification)	Shaswati Cates	Dances with Wolves	Requested	5/27/16
<input checked="" type="checkbox"/> [Why WF companion piece] Update ticket with new screenshot	Shaswati Cates	Dances with Wolves	Requested	5/27/16
<input checked="" type="checkbox"/> Review and Approve	Robert Oscanyan	Dances with Wolves	Working	5/26/16
<input type="checkbox"/> Add tags to general marketing assets in Boulder Logic	Natalie Ward	Dances with Wolves	Working	5/26/16
<input checked="" type="checkbox"/> Add tags to agency assets in Boulder Logic	Natalie Ward	Dances with Wolves	Working	5/26/16
<input checked="" type="checkbox"/> Update: Add YA to agency case study snap shots	Natalie Ward	Dances with Wolves	Working	5/26/16
<input type="checkbox"/> General Marketing Customer Success Snapshots	Natalie Ward	Dances with Wolves	Working	5/26/16
<input type="checkbox"/> Review updated matrix and add to DAM	Natalie Ward	Dances with Wolves		

Dances with Wolves ▾

Team Settings | Team Actions ▾

Solutions Marketing Agile Team



Iterations Backlog Updates Working On Issues

Export ▾

Filter

All ▾

View

Standard ▾

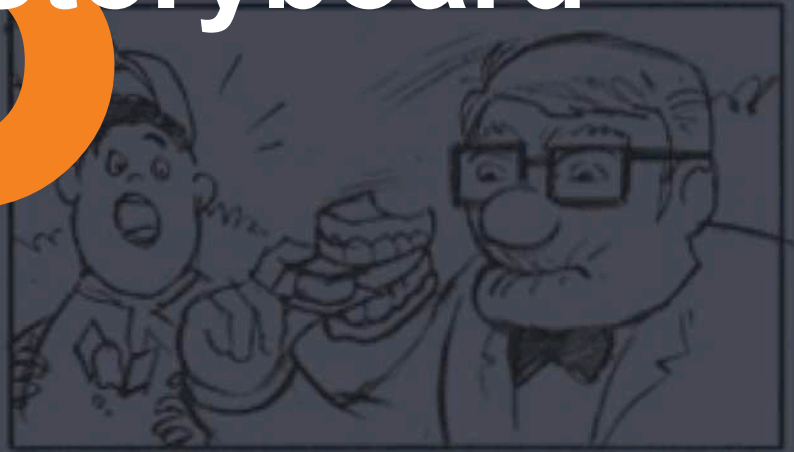
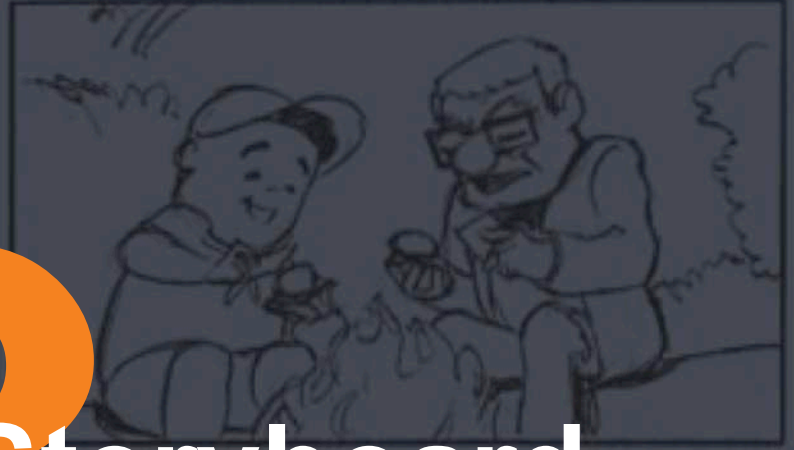
Grouping

Time ▾

<input type="checkbox"/> ▾ Name	Start Date	End Date	Total Points	Points Completed
▾ Past Iterations (6)				
<input type="checkbox"/> 2016_0404_0415_Dances1	4/4/16	4/15/16	21.81	21.81
<input type="checkbox"/> 2016_0418_0422_IsThereAVicePresidentsClub	4/18/16	4/22/16	41.35	41.35
<input type="checkbox"/> 2016_0425_0429_SeemedLikeAGoodIdeaAtTheTime	4/25/16	4/29/16	91.11	91.11
<input type="checkbox"/> 2016_0502_0506_OneIsTheLoneliestNumber	5/2/16	5/6/16	54.25	54.25
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<input type="checkbox"/> 2016_0516_0520_MyKidsGottaEat	5/16/16	5/20/16	139.7	139.7
▾ Current Iterations (1)				
<input type="checkbox"/> 2016_0523_0527_WereEmbarrassedForRob	5/23/16	5/27/16	94.25	89.25
▾ Upcoming Iterations (6)				
<input type="checkbox"/> 2016_0531_0603_BrentBirdFanClub	5/31/16	6/3/16	40.38	0
<input type="checkbox"/> 2016_0606_0610_450IsCloseEnough	6/6/16	6/10/16	1.38	0
<input type="checkbox"/> 2016_0613_0617_WastedPotential	6/13/16	6/17/16	0.38	0
<input type="checkbox"/> 2016_0620_0624_ItsNotMyFault	6/20/16	6/24/16	18.38	0
<input type="checkbox"/> 2016_0627_0701_SCRUMFerDayzzz	6/27/16	7/1/16	0.38	

The Visual Storyboard

3



Fall Campaign In-Store Banner Ads



Project Owner
Admin User

Edit Project | Project Actions -

Status: Current Condition: On Target Planned Completion: Jul 30, 2016

Tasks Project Details Updates Documents Issues Risks More +

View Agile -



- Screenshots for Adobe webpage

0 / 8 Hours Complete

0% Complete



Add Subtask

- Edit designed catalogue

0 / 16 Hours Complete

0% Complete



Add Subtask

- Provide edits to product catalogue

0 / 42 Hours Complete

0% Complete



Add Subtask

- Create a matrix that justifies the price increases

- Messaging - final

0.83 / 1 Hours Complete

83.33% Complete



Add Subtask

- Design

- New Adobe Integrations webpage

25.60 / 32 Hours Complete

80% Complete



Add Subtask

- Updated design and content on agency brochure

- Marketing launch: Andie's Food Whitman

- Gather requirements

2 / 2 Hours Complete

100% Complete



- Messaging

- Messaging - creation

8 / 8 Hours Complete

100% Complete



- Messaging - edits

4 / 4 Hours Complete

100% Complete



Continually Measure & Evaluate

Agile for Your Team



Where do we begin?

We're Agile...ish

Team Agile

We got this!

Get Started:

- Agile perspective
- Pick a timeframe
- Feedback

Where do we begin?

We're Agile...ish

Team Agile

We got this!

Get Started:

- Clarity on work, resources, “stuff”
- Realistic timeframes
- Tools and processes that work

We're Agile...ish

Where do we begin?

Team Agile

We got this!

Get Started:

- Adapt Agile to fit you
- Use Agile to respond to change
- Leverage Agile to be more responsive

Team Agile

Where do we begin?

We're Agile...ish

We got this!

Get Started:

- Use Agile for bigger efforts
- Commit to dates past one sprint
- Adopt and scale Agile
- Document processes

We got this!

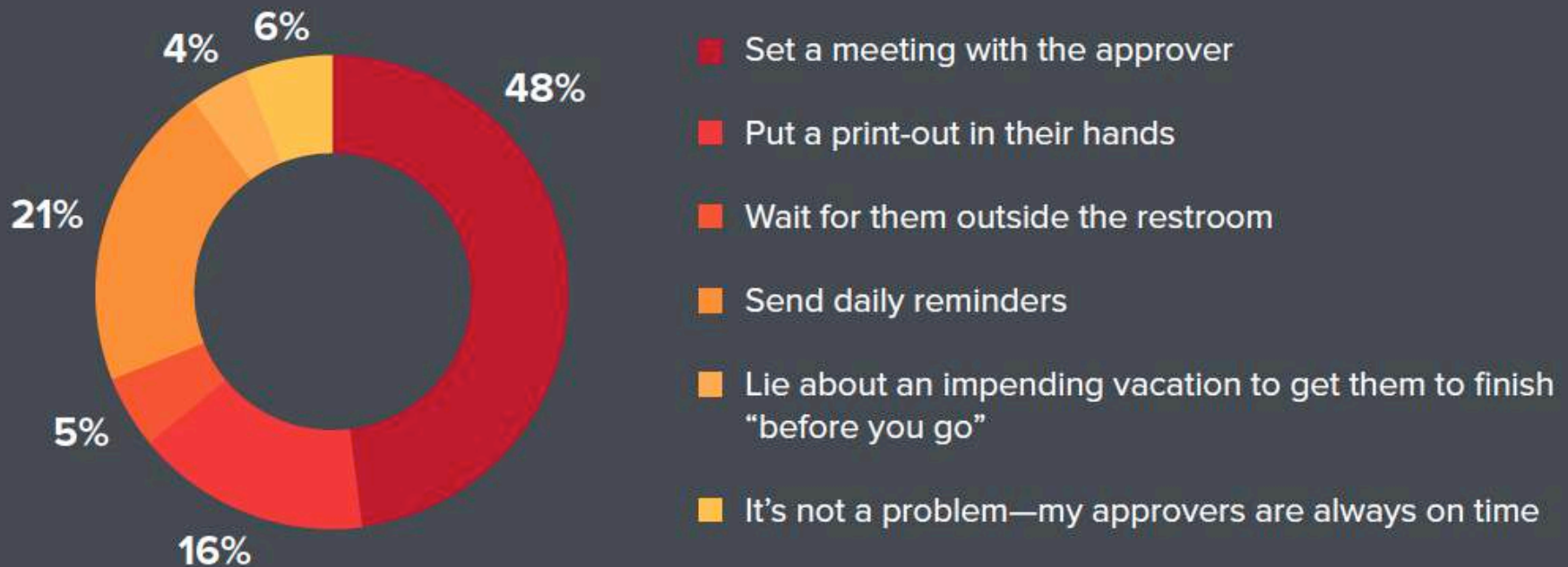
Where do we begin?

We're Agile...ish

Team Agile

Review & approvals

What is the surefire method for getting people to approve content?



Automated reviews and approvals

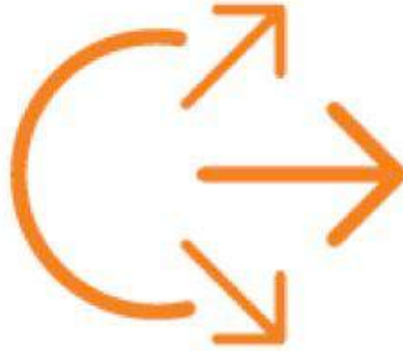


- Automate multi-stage digital review and approval proofing
- Use existing templates or create workflows from scratch
- Kick off either sequential or parallel multi-stage reviews
- Automatically move from one stage to another based on reviewer decisions

Interactive rich media proofing



- Proof dynamic interactions on live websites
- Provide point-in-time comments on pop-ups, animations, videos, and banners
- Verify all links work properly
- Proof static URLs
- Upload web source files for pre-URL static or rich media proofing



Fulfill

Content and assets created...now what?



www.shutterstock.com - 428053450

CONSISTENCY
IS 



1976



1977



1998



2002



2007

**MICRO
SOFT**

1975 - 1979

MICROSOFT
CONSUMER PRODUCTS
A Division of Microsoft Inc.

1980 - 1981

MICROSOFT

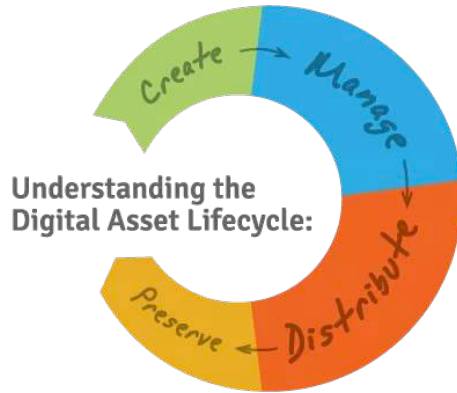
1982 - 1986

Microsoft®

1987 - 2012



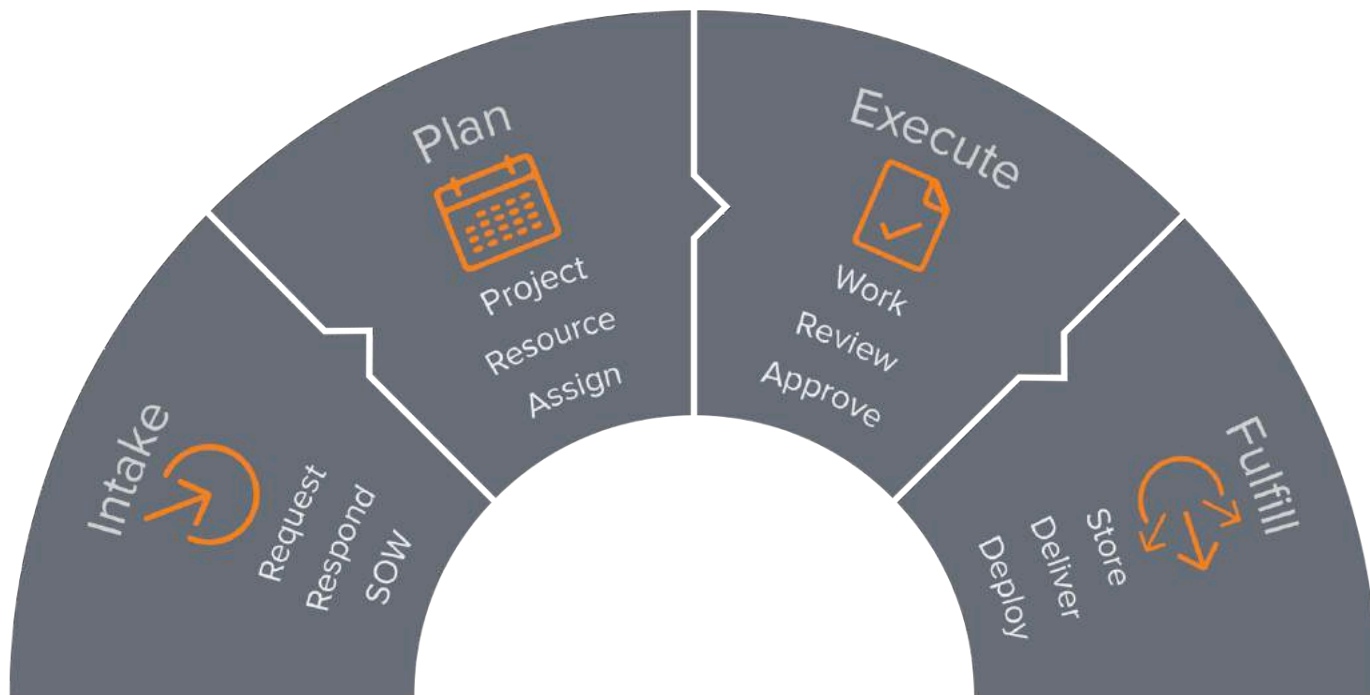
DAM: Homebase for your brand story

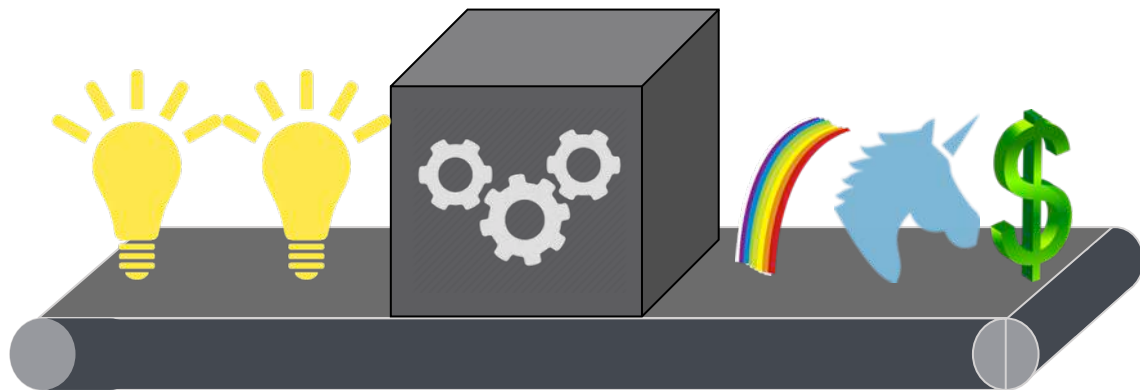


- Consistent branding
- Deliver content to and through many channels in many formats
- Quality of user experience - find and retrieve
- Better visibility = leverage

- Ingest
- Secure
- Store
- Transform
- Versioning
- Regulate
- Search
- Preview
- Publish/share







#MarketersRule

3M	NBCUniversal	Comcast	 daltile®	 Celanese	DRAFTFCB
 MERCK	Vistaprint	GYO creating brand energy	DELL™	intuit.	HBO®
SONY	RAPP		 workday.	girl scouts 	 Weatherford®
GoPro	 TREK	 LexisNexis™	GREY group	 CISCO	 MEN'S WAREHOUSE
 FAIRVIEW	TOMMY HILFIGER	HUMANA.		amazon	 Electrolux

Q&A

- Visit workfront.com/demo to learn more about Workfront for marketing teams.
- Get the complete guide to Marketing Work Management at bit.ly/MWMGuide.
- Questions? Email info@workfront.com.

