A Crash Course in Marketing Work Management
Shash Cates
Product Marketing Manager, Workfront

Logan Mallory
Sr. Digital Marketing Manager, Workfront
The Modern Marketer

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...
Spec brief via email

PM adds new project to task list

Assign team members to new project

Internal review of creative content

Worker finally gets to work

Resource Manager tracks team skills

Customer Feedback loop

Production Manager tracks all requests

Deliverable deployed or delivered

Deliverables in “special” folder for finished work

Final version sent to customer

Negotiate via email & finalize SOW in a doc

PM adds new project to task list

Resource Manager tracks team skills
Tackling the phases of project management

Intake
- Request
- Respond
- SOW

Plan
- Project
- Resource
- Assign

Execute
- Work
- Review
- Approve

Fulfill
- Store
- Deliver
- Deploy

#MarketersRule
Intake

The process of receiving a work request, along with its supporting documentation.
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
Requests from 501-1,000 Coworkers

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
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
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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
Implementing Your Intake Process

1. Request
2. Reiterate & Hold Firm
3. Request
4. Reiterate & Hold Firm
5. Request
Tips for Request Forms
#1 Apply the Goldilocks Principle

Not too long, not too short…just the necessary information.
#2 Simplify By Using Multiple Forms

Different deliverables may require different forms. Be realistic.
#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.
Problem: Making Accurate Work Estimates

IT'S ALMOST TOO EASY
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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2. Make improvements as you go
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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

#MarketersRule
Execute
Agile: A Different Way to Work
The traditional approach to a website redesign project follows a very linear, step by step process.
Agile Workflow
The Backlog
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The Sprint
## Dances with Wolves

**Solutions Marketing Agile Team**

### Iterations

#### Backlog

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<th>Iteration Name</th>
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#### Goal

The goal is to:

- **New Story**
  - Add tags to general marketing assets in Boulder Logic
  - Add tags to agency assets in Boulder Logic
  - Update: Add YA to agency case study snapshot

- **Plan Iteration**
  - Review and Approve
  - [Why WF companion piece] Write new content (based on Joe's clarification)
  - [Why WF companion piece] Update ticket with new screenshots

### Assigned To

- Shaowati Cates
- Robert Oscanyan
- Natalie Ward

### Team

- Dances with Wolves

### Assignment

- Requested
- Working
- Working on

### Last Update

- 5/27/16
- 5/26/16
### Dances with Wolves

#### Solutions Marketing Agile Team

#### Iterations

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<thead>
<tr>
<th>Name</th>
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<th>Total Points</th>
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The Visual Storyboard
### Fall Campaign In-Store Banner Ads

#### Project Status
- **Current**

#### Planned Hours Complete
- **140.42**

#### Average Hours Per Day
- **4.01**

#### Estimated Completion
- **Jul 20, 2016**

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<td>In Progress</td>
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<td>0%</td>
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<tr>
<td>Messaging - final</td>
<td>Complete</td>
<td>0.85 / 1</td>
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<td>New Adobe Integrations webpage</td>
<td>Complete</td>
<td>26.60 / 32</td>
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<td>Messaging - edits</td>
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<td>4 / 4</td>
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**Add Subtask**
Continually Measure & Evaluate
Agile for Your Team

Where do we begin? We’re Agile…ish Team Agile We got this!
Where do we begin?

We’re Agile…ish

Team Agile

We got this!

Get Started:

• Agile perspective
• Pick a timeframe
• Feedback
Get Started:

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

Where do we begin? Team Agile We got this! We’re Agile…ish
Get Started:

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

• Use Agile for bigger efforts
• Commit to dates past one sprint
• Adopt and scale Agile
• Document processes
Review & approvals
What is the surefire method for getting people to approve content?

- Set a meeting with the approver (48%)
- Put a print-out in their hands (21%)
- Wait for them outside the restroom (6%)
- Send daily reminders (5%)
- Lie about an impending vacation to get them to finish “before you go” (4%)
- It’s not a problem—my approvers are always on time (16%)
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?
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

Understanding the Digital Asset Lifecycle:
- Ingest
- Secure
- Store
- Transform
- Versioning

- Regulate
- Search
- Preview
- Publish/share
Q&A

• Visit workfront.com/demo to learn more about Workfront for marketing teams.


• Questions? Email info@workfront.com.