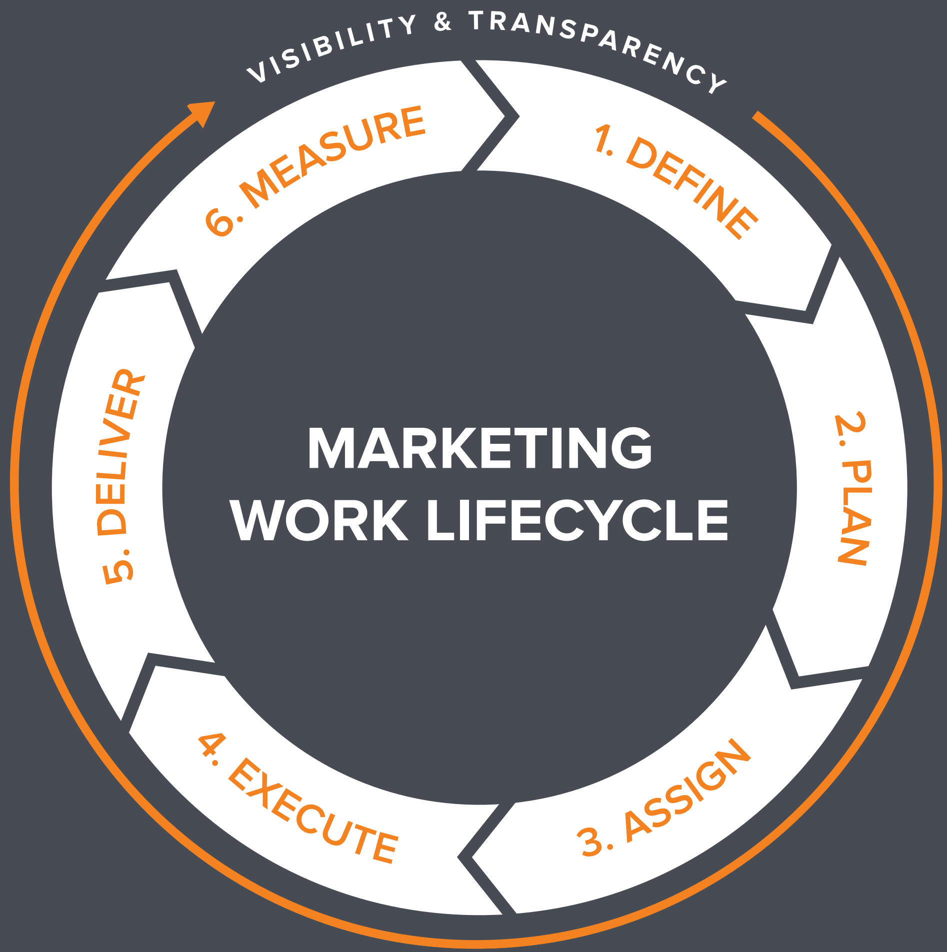


GUIDE

The Complete Guide to Marketing Work Management

A Better Way for Aprimo Users

workfront™

Contents

"THERE'S A BETTER WAY TO DO IT. FIND IT."

– THOMAS EDISON

Introduction

Welcome to the Complete Guide to Marketing Work Management (MWM)—a proven methodology for managing marketing and creative work that can help you escape a bad relationship with legacy solutions like Aprimo. For the typical creative services team or in-house agency using Aprimo, chaos is the norm. Despite an extensive feature set, the software is hard to learn, cumbersome to use, and it doesn't adapt well to changing client expectations—leading to plenty of backdoor work requests, interruptions, and overflowing email inboxes. Work chaos is why nearly 60 percent of creative workers are either completely overwhelmed or barely meeting their deadlines[1] and why only 14 percent of creative leaders say they are extremely satisfied with their current situation.[2]

BUT THERE'S A BETTER WAY TO GET WORK DONE—THE MARKETING WORK MANAGEMENT APPROACH.

In this guide, you'll learn more about the MWM methodology—why you need it, what it is, how it differs from traditional approaches to work management, and what strategies you can implement throughout every phase of your team's workflow to improve visibility and gain more time to focus on creative work. When you manage work the MWM way, you'll be able to:

- Balance your workloads so they aren't unbearable
- Justify your value to both clients and executives
- Prioritize work according to strategic value
- Gain better data and insights
- Optimize your resources
- Improve team communication and collaboration
- Accelerate the approval process
- Define and achieve successful outcomes
- Gain visibility into your entire workflow

Why Your Team Needs Marketing Work Management

1000 – 3999 projects

IN 2014, CREATIVE TEAMS OF 30+ WORKED ON BETWEEN 1000 – 3999 PROJECTS.

8000+ projects

24% OF CREATIVE TEAMS OF 50+ WORKED ON OVER 8000 PROJECTS.[3]

41+

88% OF CREATIVES WORK MORE THAN 41 HOURS PER WEEK.

46+

22% OF THOSE WORK MORE THAN 46 HOURS PER WEEK.[4]

A typical creative team receives a large volume of requests, from ad banner designs to large branding campaigns. And they get these requests in a variety of different ways—emails, phone calls, hallway requests, and more—to a variety of different team members. On top of the chaotic way requests are coming in, there are constant emergency requests and ad hoc requests to juggle. This leads to total work mayhem—though not always recognized as such. Each member of the creative team starts working on different things (often for whoever is begging the most or yelling the loudest), while the creative director or production manager is left frantically trying to track projects and requests on spreadsheets and through emails, phone calls, instant messages, and meetings. As a result, all the time the creative team is spending in meetings and on the phone, means less time to get the actual work done. And it's a downward spiral from there—the quality of the work dwindles, and working late hours and weekends becomes mandatory to meet deadlines.

As if that's not bad enough, due to a lack of standardized processes, rework, bottlenecks, and long approval wait times occur frequently. Despite the whole team working late nights and weekends, deadlines get missed, clients are ticked off, and executives wonder what the team is doing and if it's worth keeping around. Team morale is low and burnout is high.

It's not a pretty picture, but it's the one that most creative teams accept as "just the way it is." But it doesn't have to be.

Question: Does your team use project management software?

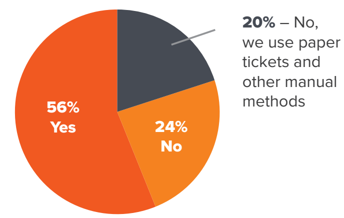


Figure 1: From the 2015 IHCSIR

Currently, 44 percent of creative teams don't use any project tracking software, and half of those are using paper tickets or other manual methods.[5]

Tracking the details is often seen as a "waste of time" that takes away from the creative process and is resisted by many creatives. Done correctly, however, tracking the workflow can add more time to be creative and make it easier to justify the value of an in-house creative team or agency to executives and clients.

The MWM approach to managing marketing and creative work makes creative teams' lives and jobs more manageable. MWM increases visibility by centralizing the planning, communication, and execution of work. When followed, its processes add efficiencies to the workflow that help balance the workload and add more time for creative work. MWM also provides clear measurements of your team's success, encourages team and individual recognition, and helps increase corporate management's confidence in the value of investing in your services.

What Is Marketing Work Management?

MWM is a methodology for managing all marketing and creative work seamlessly through its entire workflow with increased efficiency. It helps marketing departments and creative teams discover how to balance process and creativity, increase productivity, and focus on the right work—the most valuable work—while also providing marketers with freedom from administrative tasks so they can spend more time being creative.

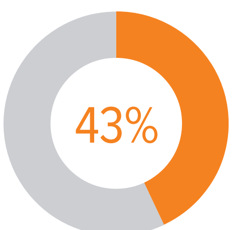
Really, MWM is a fundamental change in the way marketing and creative teams approach, organize, and track work. It incorporates the smartest practices in the industry while eliminating common inefficiencies creative teams struggle with, such as:

- Relying on daily or weekly status meetings
- Utilizing email as a collaboration tool
- Updating spreadsheets and reports manually
- Spending more time on administrative tasks than creative work
- Lacking a standardized set of processes for work requests and project planning
- Using too many tools to organize work

These types of productivity barriers are at the core of why many creative teams struggle with chaos, burnout, missed deadlines, and a lack of perceived value. In applying the MWM approach to work, marketing teams can expect to experience greater productivity, more transparency and trust, increased visibility, and more time to focus on the high-value, high-reward creative work.

Four Keys to the Marketing Work Management Approach

There are four key principles that are central and paramount to successfully adopting the MWM methodology:



LESS THAN HALF, (43%) OF CREATIVE TEAMS HAVE ALL WORKFLOW PROCESSES DOCUMENTED.[6]

1 Standardizing Processes

The key to saving time and increasing efficiency is to implement set processes for the types of work creative teams do frequently. Creative services teams do a lot of "repeatable" work—or a lot of the same types of work—such as billboard ads, print or web ad design, campaigns, and digital assets like e-books and infographics. Instead of reinventing the wheel with every new project, each process can and should be standardized by capturing the workflow in a project template, using creative briefs, and detailing the common flow of approvals. By standardizing these kinds of repeatable workflows, creative teams are able to be more efficient with the time they have and consequently spend more time on the creative process.

2 Managing the Entire Lifecycle of Work in One Place

Creative teams need the ability to manage all creative projects through the entire natural lifecycle of work—from initial request to on-time delivery—seamlessly. Currently, many creative services teams use 10 or more tools to manage their work. As team members bounce back and forth between multiple tools multiple times per day, the natural flow of work is interrupted and can cause frustration, delays, confusion, and duplicated efforts. With an MWM solution in place or by consolidating and integrating team tools to connect and centralize the workflow, seamless management of all creative work is possible.

Question: Are your workflow processes documented?

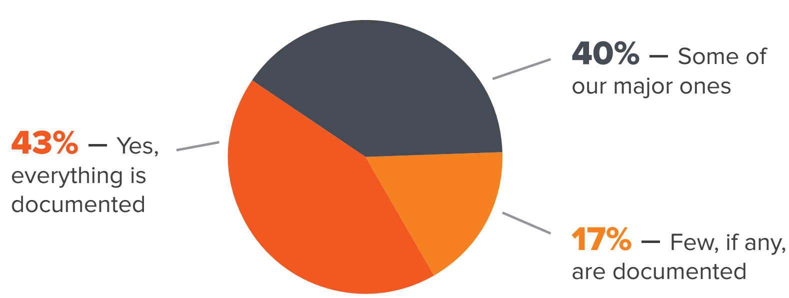


Figure 2: From the 2015 IHCSIR

3 Collaborating in Context

For MWM to be successful, all work communication must occur in a documentable place, happen in the context of the work, and be visible to all relevant parties. When communication about creative work is only captured in email back-and-forths, weekly meetings, instant messages, or phone calls, staying updated on feedback or changes becomes not just a hassle, but a giant time suck. Communicating in the context of work makes updates and discussions about work a quick, collaborative effort that's easy to find and track.

4 Unifying Tools

While MWM is *not* about purchasing one tool to rule them all, it is about eliminating as many excess tools or point solutions as possible and linking (or integrating) the necessary tools so all processes and information work nicely together.

Individually, these four principles play a critical role in reducing the chaos of a creative services team's work. Collectively, they form a powerful approach to work management that relies on and creates visibility.

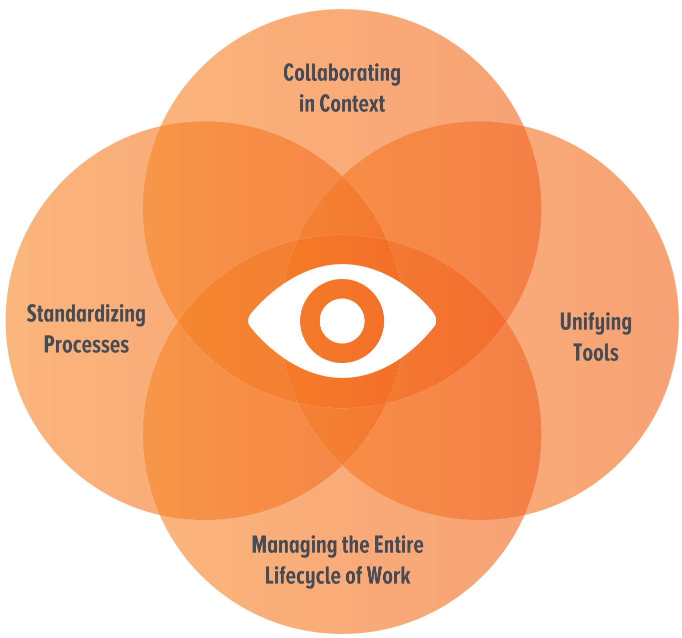


Figure 3: The Four Keys to Creating Work Visibility

It's important to understand that MWM is about doing work differently. It requires a willingness to change the way you and your team approach, organize, and track work. Furthermore, success with this approach requires specific changes be made in the way each stage of the marketing work lifecycle is handled. The MWM approach and the strategies outlined in this guide are based on industry best practices and years of experience working with creative services teams from all around the world.

The Marketing Work Lifecycle

The marketing work lifecycle represents the typical flow of marketing or creative services work—from the initial work request to measuring outcomes and all the stages in between. In the MWM model, the marketing work lifecycle follows six stages: define, plan, assign, execute, deliver, and measure.

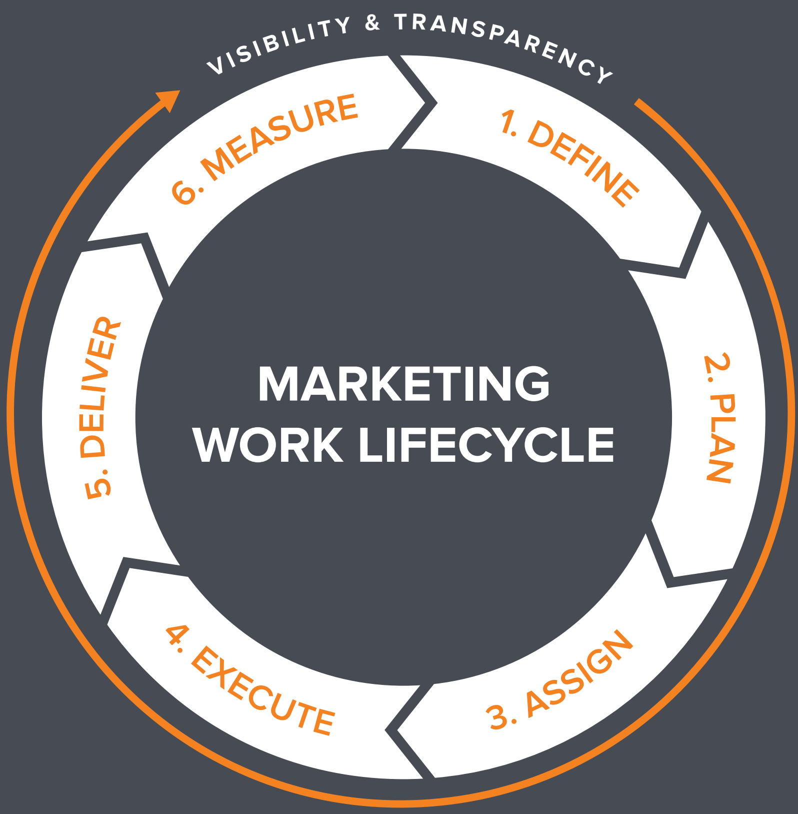


Figure 4: The Marketing Work Lifecycle

To achieve success with the MWM approach, each stage must embrace the four key principles mentioned previously:

- Eliminate major inefficiencies through standardized processes
- Facilitate collaboration within the context of the workflow
- Manage all work in one place
- Unify your team's tools and processes

The following pages show a deeper dive into the MWM approach, how it affects each stage of the work lifecycle, and how its principles are applied to each stage.

Stage 1: Define

The Define stage is the first stage of the workflow—where work is initiated. Having some process or organization from the start is imperative, but many marketing and creative services teams lack these processes and the workflow is initiated in chaos. For most, work requests arrive in a number of ways—emails, instant messages, sticky notes, hallway conversations, meetings, or office drive-bys. These requests can come to multiple different team members too: John gets stopped in the hall and is asked to work on an infographic while Jill receives an email asking if she can "quickly" design a banner ad for an upcoming webinar. Not only is it almost impossible to track these requests, it's even harder to identify who is working on what, how much work they have in their queue, and what work should get done in what order. It all leads to frustration, poor productivity, over-burdened resources, unidentifiable priorities, fire drills, and delays.

6 STEPS TO DEFINING WORK WITH MARKETING WORK MANAGEMENT

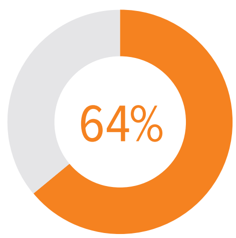
Rather than work requests turning up in a number of ways to a number of people at any given time, the MWM method seeks to capture and define all work requests in a unified manner. Here's how to define work with MWM:

1 Centralize request management

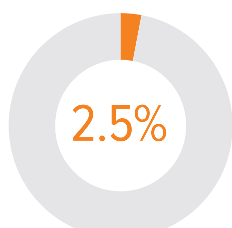
To create visibility into the request process, one person must receive all requests in one place. Whether it's an email address such as requests@yourcompany.com, a Google Form that auto-populates a spreadsheet, or an integrated work-request tool, require your team and clients to submit all work requests (big, small, and ad hoc) to a central location in a standardized manner. Designate a gatekeeper or consider hiring or creating a traffic manager role to handle the incoming requests. No matter how it's structured, it's critical to stick to the process—one place, one person, no exceptions. This way, you can keep work organized from the very start.

2 Use creative briefs

Most creative teams are not currently following this best practice. In fact, only 23 percent of in-house creative teams use creative briefs for all projects, 17 percent say they never use them, and 60 percent say they use them only on tier-one projects.[9] But using a creative brief is critical. Without one, the entire workflow begins in chaos with no one having a clear understanding of the goals and objectives of the work they are creating.



64% OF WORKERS SAY THERE IS OFTEN CONFUSION AT THEIR COMPANY ABOUT WHO IS DOING WHAT.[7]



ONLY 2.5% OF COMPANIES SUCCESSFULLY COMPLETE 100% OF THEIR PROJECTS.[8]

To further standardize the request process and ensure your team has a consistent and clear understanding of the work being requested, develop standard creative briefs for *all* the common types of work your team does (web design, banner ads, billboard ads, digital asset design, etc.). The brief should provide enough detail about the work being requested for your team to understand how long the work will take, what it will cost, who needs to be involved, what the deliverable is, and what the outcome should be. Make including a creative brief a mandatory part of the process. Let clients know that until a creative brief is completed, a work request cannot go into the work queue for completion.

Question: Does your team use creative briefs?

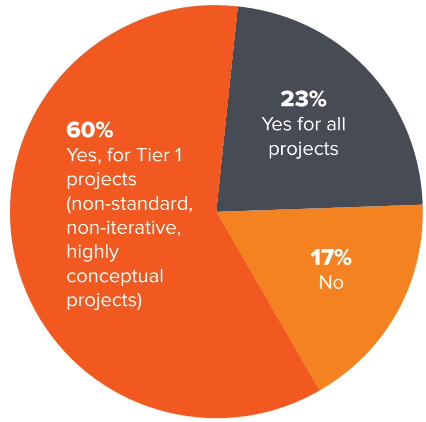


Figure 5: From the 2015 IHCSIR

3 Review the request

Complete creative briefs in cooperation with the client. Because you've already established that the brief is a requirement to executing any work, they should be willing to participate in the process. Do not leave this task to the client alone, however, or it's likely to leave you with an unclear understanding of what they want to achieve. Whether it's an internal account manager, production manager, or someone else assigned to the project, it's important to sit down with the client so the brief gets completed in a manner that ensures both parties have realistic expectations, are clear about the work requested, and agree on defined outcomes.

4 Define the requirements and gather expectations

Clearly outline the requirements in the brief. Whether it's the size of the ad, a color scheme, or something more arbitrary such as making the design "pop," make sure you understand exactly what your client expects. Because if it doesn't end up looking like what they had in mind, clients are likely to be disappointed.

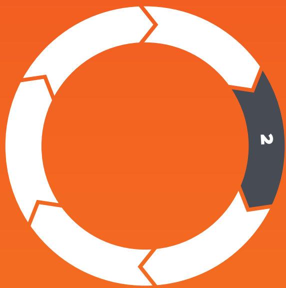
5 Share ideas

Providing suggestions and sharing knowledge with your client can improve the work and the outcomes. Perhaps your client wants to use a pale color scheme for a web ad, but you know that using dark colors like red and black is eye-catching and more likely to get clicks (the desired outcome). When you share this kind of knowledge, the client sees you and your team as experts in your field—you know the design or advertising best practices—and it makes it more likely they'll agree to a design that has the highest potential to meet their desired outcome. Sharing ideas also builds trust and will result in the client seeking your direction more in the future.

6 Visualize the outcome

In partnering with your internal clients, develop an understanding of what success looks like. Is it simply having a design the client likes or is it how many clicks a web banner receives? When there is a measurable definition of success, your team is more likely to meet expectations and satisfy your client. And even if your client doesn't end up loving the work, if it performs well and meets the agreed definition of success, you still look good.

In the Defining stage, MWM sets up standard processes to ensure all work is received, defined, and tracked in a cohesive and visible manner. By following the steps outlined above, you'll improve team productivity, eliminate common confusion or delays, build trust, and be able to identify and work on the most strategic work first.

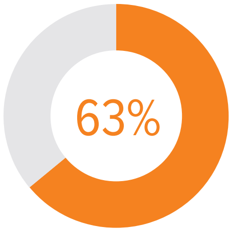


Stage 2: Plan

The planning phase can be one of, if not the most, unnecessarily time-consuming parts of the creative workflow. What needs to be done? Who will do it? When will they do it? How much will it cost? And so on. By starting every project from scratch and without standardized processes, creative teams often get bogged down and waste countless hours trying to understand and coordinate the workflow. Creative teams end up scheduling numerous meetings or sending a flurry of emails to define the scope, hash out the requirements, and get stakeholder buy-in. But it's often a drain on productivity. The details get tracked on complicated spreadsheets or sorted out in phone calls and emails. Silos are created because spreadsheet access is limited to one or two people, and not everyone who should be gets included on a certain phone call or email. So in the end, your team creates a plan, but it's not well-coordinated or communicated, which means there will likely be trouble and delays further down the work lifecycle path.

9 STEPS TO PLANNING PROJECTS WITH MARKETING WORK MANAGEMENT

Planning doesn't have to be tedious. The MWM approach makes planning a collaborative and painless process. Rather than sending excessive emails or updating cumbersome spreadsheets no one else has access to, MWM knocks down silos and eliminates excessive meetings and emails as well as time-consuming administrative tasks like updating spreadsheets. For effective planning, follow these MWM strategies:



63% OF MARKETERS REPORT SPENDING 3 OR MORE HOURS IN EMAIL PER DAY (18% OF THOSE SAY THEY'RE IN EMAIL ALL DAY!).[10]

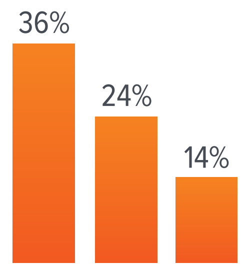
1 Prioritize all requests

With all requests centralized in one location, getting an overview of all requested work isn't just possible; it's easy. Work requests can then be weighed against each other and prioritized in alignment with the company's strategic initiatives and goals. Use a scorecard, a tiered system, deadlines, or requestor importance to help determine what projects are the highest priority. Under this system, team members can also prioritize their work accordingly, rather than completing projects based on who begs the most.

2 Structure the work

While no two projects are the same, the workflows often are (or can be). All e-book designs will look different, but the steps for designing each one are the same (i.e., develop content, draft a design, send for approval, etc.). Create and apply project templates to all work requests for repeatable work (or types of work your team does regularly) to structure the work and streamline the process.

Best practices for building templates include developing a complete task list, assigning job roles to tasks, and estimating the duration and planned hours of each task. To further improve your templates, create parent tasks for larger pieces of work and subtasks to break the work into smaller parts or to help with assigning the work to multiple job roles. Milestones or a global approval process can also be included to help track progress.



36 PERCENT OF MARKETERS BLAME INTERRUPTIONS, 24 PERCENT BLAME UNPRODUCTIVE MEETINGS, AND 14 PERCENT BLAME MANUAL TASKS LIKE UPDATING SPREADSHEETS FOR REDUCING THEIR PRODUCTIVITY.[11]

3 Define skills

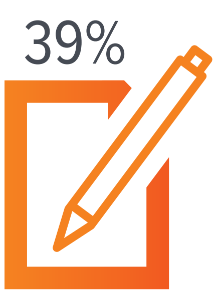
Templates should define the skills needed for each task. For example, you may need a writer, an illustrator, and a graphic designer for a certain digital asset. Then, assess whether you have those skills in-house or need to outsource. Knowing what skills you need, and when in the process you need them, also helps with the next step—coordinating the effort.

4 Coordinate the effort

As part of the planning phase, you need to ensure that the transitions between different phases (i.e., concept, design, and production) will be as seamless as possible. It's important that everyone involved has a comprehensive view of the workflow, knows when things need to get done, what tasks they need to do, who will be waiting on them to finish their parts, and who they pass their part on to next. By coordinating these steps at the start, you'll avoid delays later down the road and deadlines will stay on track.

5 Conduct a scope analysis

Scope includes identifying the specific work to be done, outcomes, budget, and timeline of the project. To ensure the scope is well defined and achievable, look at any defined constraints for the project and figure out what work is required. Revisit budget, time frame, and other constraints. If any of these aspects of the scope feel difficult to meet—maybe the project will take longer than the client has suggested—now is the time to go back and talk with your client and redefine the scope.



ONE SURVEY REVEALS THAT 39 PERCENT OF RESPONDENTS BELIEVE POOR PLANNING IS A MAJOR CAUSE OF PROJECT FAILURE.[12]

6 Conceptualize results

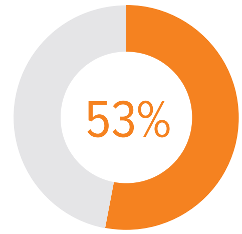
Once you identify your primary goals, you can start to define what success looks like. Use a scorecard to help you see how the project aligns with the defined goals. Scorecards can also be useful in prioritizing work and determining how well a project aligns with overall business objectives. Useful scoring metrics include:

- **Client satisfaction ratings** – Create a feedback form, quarterly survey, or other system to measure client satisfaction and use this information to evaluate how well your team did and where you can improve.

- **Billable hours** – The number of hours the client is billed for the work relates directly to the profitability of a specific project and is a useful measure for your team's value to the organization. Even if your team doesn't bill by the hour (or at all), you can still track the number of hours that you spend on each project that would be billable (i.e. non-administrative hours). Then, translate these hours into a "billable hour" to show executives the monetary value of the work your team provides.

- **Project milestones** – Major milestones mark the transition of a project from one phase to another. On large projects, creating milestones can be a good way to see if your team is staying on track and if the project is still within its scope. It also provides an opportunity to evaluate other aspects such as client satisfaction or billable hours so that improvements can be made mid-project when needed.

- **Delivery dates** – Late projects often come with budget overruns and unhappy clients. Tracking your team's on-time delivery rates will show whether your processes are working.



53% OF IN-HOUSE CREATIVE TEAMS NEVER SURVEY THEIR CLIENTS.[13]

7 Estimate the budget and resources

As part of the planning process, it's imperative to assess how many resources you'll need, the billable hours required, and any other associated costs for each work request so you can calculate the total cost. To streamline this process, create a worksheet with default rates built into it. The worksheet can provide estimated totals for certain types of standard work and then be adjusted as needed. Then you can use these estimates to evaluate and compare with available resources in your organization as well as to help with scope analysis, risk assessment, and stakeholder buy-in.

WORK BREAKDOWN - TASK	WHO/JOB ROLE	ESTIMATED TIME	BILLABLE HOURLY RATE	DEFAULT COST
Objective A				
Activity A				
- Task A1	Tom	3 hours	$65	$200
- Task A2	Mary	5.5 hours	$80	$440
- Task A3	Tom	7 hours	$65	$455
Activity B				
- Task B1	Jane	3 hours	$80	$240
- Task B2	Paul	2 hours	$75	$150
Total Project Cost				**$1,485**

Figure 6: Sample Resource and Budget Estimate Template

8 Estimate dates and set milestones

When is the start date? When is the final version due? What are the milestones? When are subtasks due? How many iterations are agreed on and when are iterations due? When making estimates, work backward from a final deadline. Also, be sure to include client tasks and delivery dates. For example, how many days will they have to approve each version? Get the client to acknowledge they also have accountability for keeping the project on track and that delays on their part may cause delays in the overall project. Develop a schedule template to share with clients that shows each task, when it's due, and who is responsible for its completion. A documented schedule keeps everyone accountable and lets the client know what is expected at each step.

PROJECT	STATUS	DUE	DRIVER
Banner Ad	Draft of copy for ad	2/3	Mary
	Copy approved	2/9	Client
	First draft ad design	2/9-2/12	Tom
	Review first draft	2/13-2/18	Client
	Second draft ad design	2/19-2/23	Tom
	Review second draft	2/24-2/26	Client
	Make final changes	2/27-3/2	Tom
	Approve Ad	3/3	Client
	Project Complete	**3/3**	

Figure 7: Sample Resource and Timeline Template

9 Get stakeholder buy-in

Sometimes it's necessary to build a business case for a large or expensive project. Stakeholders need to understand how a specific project will promote the strategic goals of the organization, the cost of the project, and the return on investment (ROI). When building a business case, include project goals, expenses, resource estimates, risks, estimated ROI, and a scorecard that lets stakeholders understand what metrics the project is to be measured against. With all the other planning steps completed, compiling the business case should be a matter of pulling together the data you already have and presenting it in a clear and organized manner to your stakeholders. Once you receive buy-in, it's time to move on to the next stage.

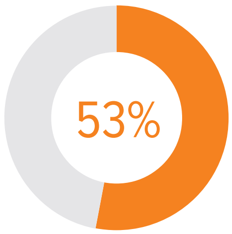
In the Planning stage, MWM introduces standardized processes that can significantly reduce the time creative teams typically spend on planning. With templates that clearly define what needs to get done and when, you'll spend less time on coordinating efforts such as status meetings or sending email. You'll have a clear vision of costs, time, and budget, which means less chance of scope creep. Building the business case and getting stakeholder buy-in will be easier and less time-consuming as well. And because you've coordinated the effort in advance, you're less likely to run into bottlenecks farther down the road. Finally, planning the MWM way offers visibility into all facets of planning—from budget and resource hours to risk assessment. With MWM, the goal is to break down silos and eliminate guessing so you and the rest of your team know exactly what's going on with your work.

Stage 3: Assign

Maybe you manage a large team that executes thousands of projects a year. Or perhaps your team is smaller, with hundreds of projects a year. Either way, the amount of work is constant and often overwhelming. Right now, assigning the work that needs to be done is time-consuming. Since you don't know who is working on what or what's currently in each team member's queue, you assign work through meetings, emails, or phone calls, and keep track of those assignments in an impressively detailed spreadsheet. Maybe you even print out work lists for each member of the team every day. This process eats up your time and your team's time. But, as you've probably found out the hard way, if you don't ask them first whether they can take on more work, you're likely to push some resources to the breaking point, while others may be twiddling their thumbs. Even so, there are often last-minute priority shifts, errors, and confusion—leading to project delays, high turnover, hindered productivity, and unhappy clients.

5 STEPS TO ASSIGNING RESOURCES WITH MARKETING WORK MANAGEMENT

The MWM approach allows the creative director, traffic manager, and/or production manager visibility into everyone's workload and availability. Through the MWM processes outlined in this section, creative managers can assign resources and manage capacity and utilization rates in a balanced way. Here's how to assign resources with MWM:



ONLY 53% OF CREATIVE LEADERS INDICATED THEIR TEAM WAS APPROPRIATELY STAFFED WHEN CONSIDERING FULL-TIME AND CONTINGENT STAFF.[14]

1 Commit resources

Once you have developed a centralized view into work requests, defined the skills needed, and estimated resources as outlined in the first two stages, you now have visibility into both demand and capacity for each of the individuals on your team. This type of visibility lets you commit resources in a holistic manner that results in accurate capacity planning and better balanced workloads—neither overburdening nor under-utilizing resources.

2 Take a hybrid approach to resource management

Using some Agile management tactics, such as defining how much time will be spent on what types of work, can be very beneficial for maximizing utilization rates. For example, you can set team-wide goals, such as

HOW TO DETERMINE YOUR TEAM'S AVAILABLE HOURS FOR A SPRINT

Step 1

Have each team member determine their total number of "lights on" hours for the week

NUMBER OF "LIGHTS ON' HOURS PER DAY						
"LIGHTS ON" ACTIVITIES	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	
MEETING HOURS	1	2	2	1	1	
MEETING HOURS						
VACATION HOURS						
HOLIDAY HOURS						
EMAIL HOURS	2	2	2	2	2	
OTHER						TOTAL "LIGHTS ON" HOURS FOR WEEK:
TOTAL HOURS:	3	4	4	3	3	17

Step 2

Find the total available hours, per person, for the week

TOTAL HOURS/WEEK - TOTAL "LIGHTS ON" HOURS/WEEK	40 – 17
= TOTAL AVAILABLE HOURS	23

Step 3

Find the percent of availability, per person, for the week

TOTAL AVAILABLE HOURS X 100	23 x 100
AVAILABLE HOURS TOTAL (A) / TOTAL HOURS PER WEEK	= 2300 / 40
= PERCENT OF AVAILABILITY	= 57.5%

Step 4

Repeat process for each week in the sprint

Step 5

Gather numbers from entire team for the week

TEAM MEMBER	AVAILABILITY	DAYS OFF	AVAILABLE HOURS
JOHNNY	57.50%	0	23
FREDDY	60%	0	24
ASHLEY	55%	0	22
SHAINA	65%	0	26
JUAN	60%	0	24
TOTAL AVAILABLE TEAM HOURS FOR THE WEEK:			119

Step 6

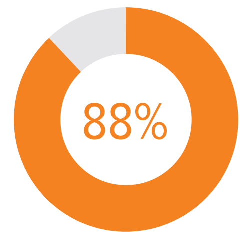
If your Sprint is multiple weeks, do steps 1-5 for each week of the Sprint and add totals accordingly

Figure 8: Determining "Lights On" work and total available hours per sprint

spending 80 percent of your time on strategic, prioritized projects and 20 percent on "lights on" tasks like meetings and managing email. Based on these percentages, calculate the hours allotted for each type of work in each day. In a scenario with an 80/20 split of a regular 40-hour work week, team members should spend no more than 1.6 hours per day on "lights on" work and 6.4 hours a day on strategic work. This makes it easier to understand how much time resources have to devote to strategic work and helps eliminate over- or under-burdening them.

3 Assign tasks to teams or job roles

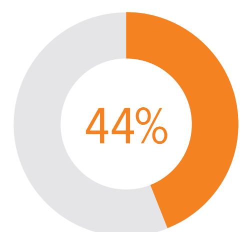
Assigning tasks at different organizational levels makes it easier to manage and balance your resources. You can start by assigning the team milestone tasks, such as the first draft of a website redesign. Then, go to the next level of detail and assign job roles, such as a content writer or graphic designer. From there, a traffic or resource manager can look at team members' availability, taking into account already assigned strategic work and "lights on" work as discussed above, and assign each task according to a resource's skill and current availability for strategic work.



88% OF SPREADSHEETS HAVE ERRORS.[15]

4 Know your utilization rates

Utilization rates are the percentages of time individuals spend doing billable work. Develop an optimal utilization rate for your team that takes into account time they need to spend on non-billable work, such as checking email or attending trainings. A 75 to 80 percent rate may be appropriate, but look at your team's unique situation and/or research industry utilization benchmarks. Then, assess how each individual resource is trending and try to keep the workload balanced. Utilization rates help you determine how well the team is operating and where improvements can be made. Even if your team or department doesn't charge billable hours, you should track how much time each individual is spending on project work versus administrative tasks to help keep a pulse on the team's productivity and efficiency.



44% OF ALL MARKETERS ARE FACING BURNOUT.[16]

5 Get commitments from resources

Ask all teams and individuals to commit to the project deadlines, estimated hours, and the overall duration of the project that were defined during the planning stage. If a resource or team cannot commit to the planned schedule, discuss together what the restraints are, redefine the estimates, and make adjustments as necessary to the schedule or budget.

Assigning work the MWM way will improve resource management, utilization rates, and team morale. Studies show that the more organizational support that employees receive around their work and decisions, the less job burnout they experience.[17] When work is assigned in a balanced way, burnout is avoided and team members have a higher level of engagement with the work they are doing. In addition, the enhanced visibility you gain into your resources and their workloads saves management time and reduces the chance of delays down the road from resources having too much on their plate and not enough time to do it.

Stage 4: Execute

Executing the work is supposed to be the fun part—the creative part. It's also the part where creatives want—and need—to spend the majority of their time. Except constant interruptions, meetings, digging through emails for the right version of the copy, and rework from constantly shifting client directions make it hard to find time to do the actual work. Deadlines come and go and your team ends up burning the midnight oil because it's the only time they can actually get work done.

6 STEPS TO CREATIVE EXECUTION WITH MARKETING WORK MANAGEMENT

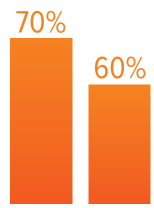
When you follow the MWM approach, you will streamline your processes so they are no longer a burden, eliminate time-consuming administrative tasks and meetings, reduce last-minute rework, and communicate in the context of the work. By improving your work execution processes you will find that your team finally has time to be truly creative and can get the valuable and enjoyable creative work done during their day, not late at night or over the weekend. Here's how to execute work using the MWM model:

1 Track progress

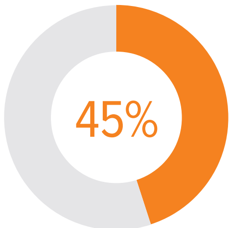
Create a central location, using a cloud-based tool or an integrated MWM tool, where all team members can update their progress at anytime, from anywhere. Then, all the work the creative team does (including ad hoc assignments) gets managed in one place, from conception to completion. Managers can see project progress, and team members with task dependencies can see how the work is trending. Arbitrary verbal updates or emails like, "about 80 percent done," are eliminated since everyone can see at a glance, in real time, how the work is trending. Tracking progress also means issues can be reported in a central location, allowing managers to quickly flag problems and address them before the schedule is blown.

2 Communicate in context

Report issues, communicate actions, and collaborate all within the context of the work. This is a crucial step to execution. Whenever possible, avoid using email or holding meetings, as these approaches create information silos and don't allow the communication to be seen in the context of the work by all team members. A social approach, similar to that of Facebook, is a good way to keep communication and collaboration contextual. And research shows that implementing a social approach to project communication can reduce the time employees spend searching for content by 35 percent and improve overall productivity by 20 to 25 percent.[20]



70% OF CREATIVES SAY THEY NEED MORE "CREATIVE TIME," AND MORE THAN 60% REPORT HAVING "GREAT IDEAS," BUT NEITHER THE TIME NOR SUPPORT TO EXECUTE.[18]



ON AVERAGE, WORKERS USE ONLY 45% OF THEIR TIME ON THEIR PRIMARY JOB DUTIES.[19]

Question: Does your team use soft proofing software to collaborate with clients and collect/track feedback?

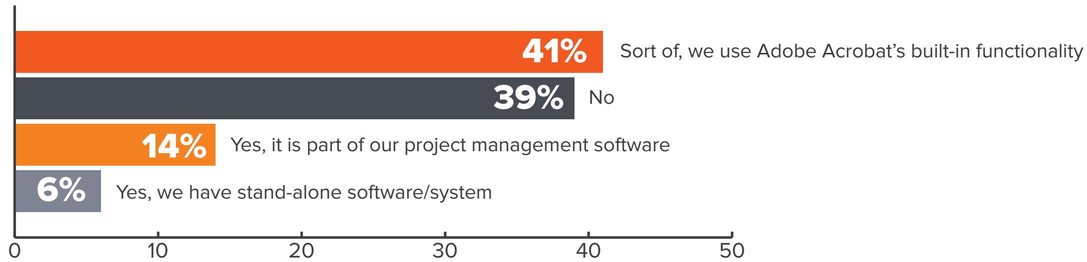
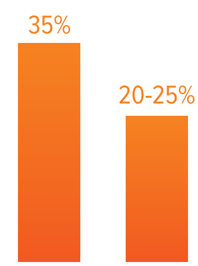


Figure 9: From the 2015 IHCSIR

3 Standardize the approval process

Approvals are often the biggest headache in the execution phase. To avoid having work hung up waiting for approvals, create approval templates, and automate the process when possible. Templates should map out when in the process the asset needs to be reviewed and by whom. Then, make sure the reviewers are available when you need them. If someone is planning on being on vacation, for example, advance planning gives you time to create a backup plan or adjust the schedule beforehand rather than missing a deadline. Automating the approval process through templates or through an MWM tool will save even more time. Instead of alerting the people involved, gathering documents from several different locations, and contacting approvers for updates, your team can spend that time on creative work.



IMPLEMENTING A SOCIAL APPROACH TO PROJECT COMMUNICATION CAN REDUCE THE TIME EMPLOYEES SPEND SEARCHING FOR CONTENT BY 35 PERCENT AND IMPROVE OVERALL PRODUCTIVITY BY 20 TO 25 PERCENT.[20]

4 Use digital proofing

Proofing has its own set of headaches: job jackets that get lost, paper piled on desks, confusion about which version is the latest, and other issues with poor documentation or accountability. Digital proofing, however, gets rid of the confusing paper trail and allows you to streamline feedback processes by collecting everyone's comments in one place. Digital proofing allows others to see what else has been said in a central location and can minimize duplicate or contradictory comments—speeding the revision process. A digital proofing solution can speed assets to market 56 percent faster, require 59 percent less time managing proofs, and provide a 29 percent reduction in number of revisions.[21]

5 Track time

Tracking time may feel like one of those dreaded administrative tasks that creatives hate to do, but it's an essential part of developing visibility into all your processes. Even if your team doesn't bill clients, it's important to know how much time standard tasks take. Consistently and accurately tracking time will help:

- **Provide accurate estimates** – The data you collect will allow you to give clients accurate estimates about when the work will be completed, increasing your credibility with executives and clients.

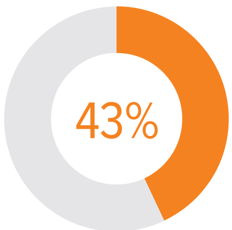
- **Improve on-time delivery rates** – Good historical data on actual time spent makes it much easier to create accurate schedules, which will improve on-time delivery rates.

- **Eliminate scope creep** – It's much easier to keep scope creep under control when you are monitoring your time and budget and already know how long certain tasks should take.

- **Improve resource utilization** – Time tracking provides a good understanding of how many hours it takes to complete a project or task. Resources can then be appropriately assigned to those tasks without overloading or under-utilizing their time.

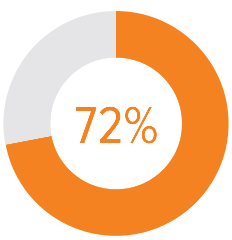
- **Improve processes** – Seeing where your team spent their time will help to identify problematic processes and allow you to make changes accordingly for greater efficiency and productivity.

- **Reporting** – Time tracking allows you to provide concrete metrics to management or executives about what your team is working on, the time it takes to do it, and even how much ROI projects are creating for the business.



43% OF CREATIVE SERVICES TEAMS ARE CURRENTLY NOT TRACKING TIME.[22]

In addition to team-wide benefits, tracking time can help individuals show their value. Being able to show managers what you've been working on and how long you spent doing it—especially if you're able to be more efficient than the average team member, can help you promote your value to the organization. Make sure your team understands the value they get by tracking their time so that no one skips this step. Capture time through a centralized system so that historical and actual data can be used to improve future estimates.

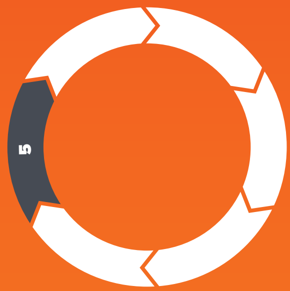


CLIENT BEHAVIORS ARE A CHALLENGE FOR 72 PERCENT OF CREATIVE SERVICES TEAMS BECAUSE THERE IS NO IMPLICATION FOR MISUSE OR ABUSE.[23]

6 Have a change-order system in place

Client behaviors are a challenge for 72 percent of creative services teams because there is no implication for misuse or abuse.[23] It's important, therefore, for creative teams and in-house agencies to develop standards that create client accountability. First, define how many hours standard tasks should take (e.g., perhaps all banner ads should take eight hours to create). Then, when the client requests changes that require more than the allotted time or scope, you can create a change-order to increase the monetary charge, to charge additional time, or to send the job back into the work queue to be reprioritized against other work. Having these types of consequences in place will help with difficult in-house clients whose constant revisions and scope changes can make a two-day project take three weeks. Clients may not alter their behavior because they had to wait longer for completion, but at least you'll still meet on-time delivery rates for all your projects without having to work overtime.

Using the MWM methodology throughout your workflow means you'll save time on many of the administrative processes, from defining, planning, and assigning work to accelerating the approval process and eliminating rework through poor communication and feedback. Instead of always scrambling to get work done, your team will have more time to be creative and execute work you're truly proud of (and more of it). These improved processes will boost morale, lead to better outcomes, ensure more strategic work, and increase your team's perceived value to the organization.



Stage 5: Deliver

This stage represents the final push to achieve what you said you would. However, it often ends up being a stressful, chaotic period where you are begging for final approval from stakeholders and chewing your fingernails in worry that you might miss your final deadline. Without a good system in place, your team works in reactive mode—scrambling to get work out the door. And once the project receives final approval—on time or not—it's a rush to publish it and move on to the next work request in the queue. There's no time to assess how the project went or whether your team achieved the objective, and team members are rarely recognized or praised for their great work. This chaotic approach can easily lead to burnout, missed deadlines, and low team morale.

4 STEPS TO ASSET DELIVERY WITH MARKETING WORK MANAGEMENT

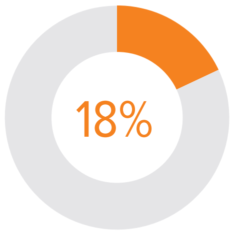
Delivery of great creative work should be cause for celebration, and with the MWM approach, it is. Final approvals get streamlined, the asset is published on time, and you have visibility into the entire process to assess success and recognize team members' contributions to creating an exceptional design or asset. Here's how to deliver work with MWM:

1 Final approval from all stakeholders

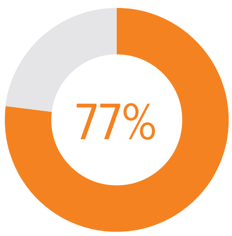
With a standardized approval process in place, a digital proofing tool to capture feedback, and communication facilitated through the context of work, getting final approval from stakeholders is no longer difficult. From senior managers and executives to editors and designers, all understand their role and are accountable, making it much easier to get approvals on time and publish the asset(s) as expected.

2 Invest in Digital Asset Management (DAM)

Having a DAM system in place can greatly improve your team's productivity. A DAM system not only provides a central storage location for all digital assets and content types, but it eliminates version control issues, keeps assets organized and easy to find (no more trying to remember whether a certain asset is on your Google Drive, company drive, or Dropbox), and makes it easy to share assets with clients and executives.



18% OF CREATIVES SAY THEY'VE NEVER RECEIVED PRAISE OR RECOGNITION FOR WORK,[24] AND WHEN ASKED WHAT MOTIVATES THEM MOST, OVER HALF OF CREATIVES (54%) RANKED DOING GREAT WORK.[25]



77% OF CREATIVE TEAMS USE EMAIL AS THE PRIMARY WAY TO SHARE FILES BETWEEN LOCATIONS.[26]

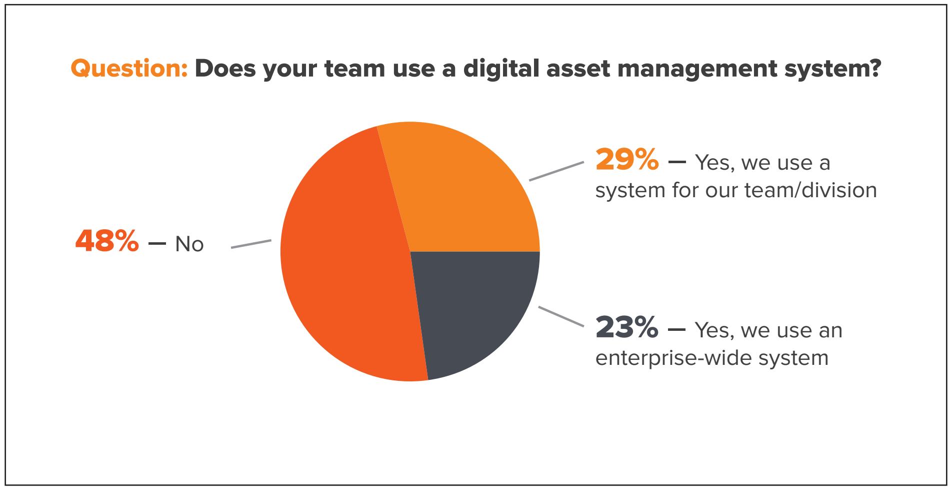


Figure 10: From the 2015 IHCSIR

3 Acknowledge and recognize great work

With the MWM approach, it's important to showcase work accomplishments and reward high performance to keep and attract top talent. Recognition helps reduce attrition rates, keeps team members engaged in their work, and encourages creativity and high performance. In fact, in organizations where individual employees or teams are recognized, the entity's average score for employee results was approximately 14 percent higher than in organizations in which recognition does not occur.[27]

IN ORGANIZATIONS WHERE INDIVIDUAL EMPLOYEES OR TEAMS ARE RECOGNIZED, THE ENTITY'S AVERAGE SCORE FOR EMPLOYEE RESULTS WAS APPROXIMATELY 14 PERCENT HIGHER THAN IN ORGANIZATIONS IN WHICH RECOGNITION DOES NOT OCCUR.[27]

4 Evaluate the process

Before moving on to the next project, take a moment to evaluate the process of the project you just completed. Did you meet your definition of "done"? Was the deliverable on time, on budget, and on message? If the answer to any of these questions is no, then it's time to reevaluate your processes and see where the issues are, and then take corrective action so the next project meets expectations.

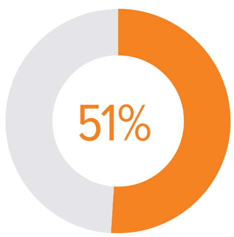
Recognition is an integral part of the MWM approach to managing creative teams because its impact is so significant. In fact, organizations with the most sophisticated recognition practices are 12 times more likely to have strong business outcomes[28] and have a 23.4 percent lower turnover rate than companies without strategic recognition programs.[29] In the MWM Delivery stage, there is a focus on recognizing team and individual accomplishments and undergoing a thorough evaluation of current processes. MWM encourages team and client feedback in order to continually refine processes that will improve your team's productivity, costs of service, and organizational value.

Stage 6: Measure

Typically, no one outside the creative services team or marketing department has any idea what your team really does or what value it provides. Without real data to illustrate value, jobs may be on the line. The problem is, you don't have the data, so numbers get fudged or a "positive spin" is put on things without numbers to back it up. Often, marketing organizations use six or more different tools for tracking measurements like on-time delivery, hours, resources, and output, but it's not easy to lasso all these disparate pieces of data into one cohesive story that shows how much the creative services team or marketing organization does and how valuable it is to the business. Instead, team members are stuck worrying about job stability, feeling undervalued, and facing low team morale.

HOW TO APPROACH MEASUREMENT WITH MARKETING WORK MANAGEMENT

Measurement is important for internal team evaluation and process improvement as well as for proving your team's value to the rest of the company, including executives. In fact, 73 percent of CEOs think marketing and creative teams lack business credibility because they can't prove they generate business growth.[31] To eliminate this negative perception, creative teams need metrics that clearly demonstrate their value. Effective measurement starts by setting standard key performance indicators (KPI) and benchmarks so you know where you stand currently, the progress you are making, and where you want to be. For example, if you begin tracking your on-time delivery rate and it's 60 percent, you can set a goal to try to get it to 80 percent. KPIs and benchmarks should involve everyone—team members need to have input, as do high-level executives. When everyone has input, there is an agreement around what constitutes success or value.



OVER HALF (51%) OF MARKETERS USE BETWEEN 6 AND 15 TOOLS TO MANAGE THEIR WORK.[30]

Another important part of successful measurement is the ability to generate reports and provide dashboard updates to executives and key stakeholders. Data speaks louder than words and to prove your value, you need real numbers and real measurements of success. Make sure you have a tool that can track data in real time, that allows you to create customized reports so you can measure what's important to your team and organization, and that provides a dashboard reporting feature so executives and stakeholders can see at a glance where projects stand. A robust tool will also eliminate a lot of manual work and free up time for higher value creative work.

Here are some KPIs you may want to measure and key questions that will help you evaluate your progress:

KPI	KEY QUESTIONS	EVALUATION
On-time delivery rate	What is our delivery rate now? What should our on-time delivery rate be?	Is it increasing? Did we hit our goal? If not, how far off are we, and what can we do to be even better next quarter or next year?
Client satisfaction ratings	What key metrics do we want our clients to evaluate us on? Do we have a system in place for getting their feedback? If yes, what are our current ratings? Where do we want to be a year from now?	Did we get feedback from clients? Did we hit our target rate? If not, where did we score low, and how can we improve in those areas?
Billable hours	What percentage of hours is currently billable? What percentage is optimal for our organization?	Are we meeting our billable hours target this quarter or this year? If not, why not and what can we do to improve?
Total output	What are our total deliverables per quarter or per year? How much more do we think we can increase that number?	Is it increasing? Is there still room for improvement?

Regardless of what you choose to measure, make sure you regularly evaluate progress. Make adjustments to your processes as necessary and continue to try and raise the bar. Just as important, make sure to celebrate success. Recognition is also an important part of this process. Showcase work accomplishments and reward great performance. Your team needs to feel engaged and valued for MWM to work properly for your organization.

Collecting data may not be what creatives love doing, but collecting data in the key areas identified in the MWM Measurement stage is critical to your team's overall success. The more often and accurately you track these metrics, the more your team will be able to see potential growth opportunities, improve productivity and quality, and justify your value to the organization.

Marketing Work Management for the Entire Marketing Department

Though the majority of this guide is aimed at in-house creative services teams and agencies, the MWM methodology also applies to entire marketing departments in two main ways:

1 FUNCTIONAL MARKETING TEAMS ARE CLIENTS OF THE CREATIVE TEAM

In-house creative teams or agencies have internal clients—most of which are made up by the other functional groups within the marketing department, such as digital marketing, programs and events, communications and social media, or product marketing. Work managers on these teams turn to the creative team as a regular resource, requesting banner ads, booth skins, content and layout, videos, memes, landing pages, and more. It's important for the rest of the marketing team to understand these work management best practices as they apply to the work they're requesting.

2 THE ENTIRE MARKETING DEPARTMENT HAS WORK TO MANAGE

Though the various functional teams within marketing departments make regular requests of the creative team, those requests are usually small parts of a greater whole—or, in other words, smaller tasks within larger projects. The rest of the marketing department has projects and work to manage too and the MWM methodology applies to those projects as well. Marketing teams also benefit greatly from creating standardized processes, managing the entire lifecycle of their work in one place, collaborating in the context of work, and consolidating their tools. If the communications team is managing work in spreadsheets while the creative team is using a marketing work management solution and the events team is using a task management system or spreadsheets, the department as a whole will likely function in silos, suffer from scattered data and manual processes, and lack sufficient visibility to be more efficient and productive.

Marketing Work Management Creates Visibility

By managing work throughout its entire lifecycle, collaborating within the context of the work, standardizing processes to eliminate inefficiencies, and unifying tools to increase productivity, the Marketing Work Management approach increases visibility. Using its four guiding principles, executives get the high-level visibility they need to be successful, managers can justify their resources and better prioritize how they are utilized, work is better aligned to corporate strategy, and productivity improves across the board. Team members are more engaged in their work, make better decisions, understand their priorities, and work more efficiently. Less time is spent on administrative tasks and more time gets spent on creative work.

The Benefits of Marketing Work Management

Managing a myriad of design and creative projects requires a clear methodology that allows for and anticipates everything that can arise. Marketing Work Management is an approach to managing the entire lifecycle of work in a unified, structured, and contextual manner. It delivers real-time visibility for teams, managers, and executives throughout every stage of the work lifecycle. MWM provides creative services teams, in-house agencies, and marketing departments with the ability to:

- Increase work outputs in the same amount of time with the same, or fewer, resources
- Use real-time data to assign work, maximize resources, and offload work to meet changing demands
- Optimize the time and financial investment required to do work
- Understand the true cost of work and what it takes to be profitable
- Ensure everyone is focused on the same goals and the right work
- Create the right work environment where employees can cultivate skills, credibility, and job satisfaction
- Showcase work accomplishments and reward high performance to attract and retain top talent
- Deliver on and manage work expectations for internal and external stakeholders or clients
- Automate the process of conforming to external regulations and standard work policies
- Increase visibility into who is doing what, when things will be done, and how things are going
- Gain visibility at each level of the organization

While MWM covers a lot of processes, its advantage is that all of these processes are consolidated, automated, and standardized. Legacy solutions like Aprimo are heavy on process and programming, but with MWM, work flows seamlessly through the work lifecycle; processes cease to be a burden and are often barely noticeable. Instead of manually managing work, creative teams have more time and energy for the creative and engaging work they love.

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- Increase productivity and workflow efficiency
- Improve visibility within your team
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