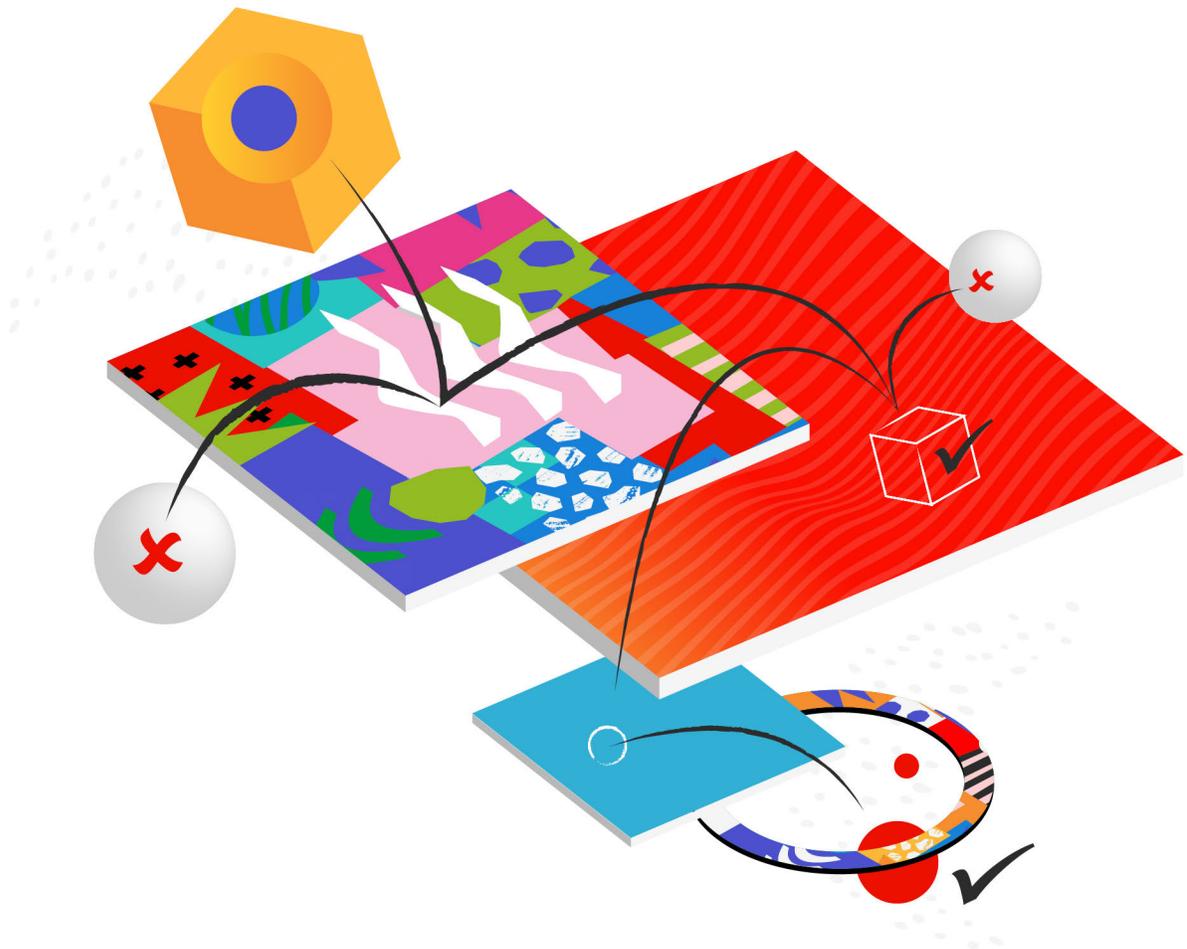# Bringing order to marketing operations processes.

What happens when you think strategically about the way you work.

Introduction

Pop quiz: What assignment should your marketing team tackle first? Should you complete the one marked "Due ASAP," or the one labeled with the red siren emoji in the email subject line? Or should you drop everything and work on the project the CEO personally asked you to take care of when you passed each other in the hallway?

You know that when everything is a priority, nothing gets prioritized—this leads to scattershot, inefficient processes that do little more than keep your head above water.

On any given day, marketing operations teams may be iteratively planning in response to business or market changes, analyzing data, executing campaigns, and tracking budgets and key metrics—anything that contributes to the overall efficiency of marketing efforts in the marketplace. But making the day-to-day operation of your marketing department more efficient can reap benefits as well. According to a *Total Economic Impact* study by Forrester, increasing the productivity of marketing operations within a large enterprise can claw back lost productivity—amounting to over $1.7 million in just two years.

As marketing operations continue to grow, better project workflows are a vital way to add value. To help, here are six ways your team can improve work management processes to increase effectiveness throughout the entire lifecycle of marketing work:

Standardize the work intake process

Develop repeatable processes

Make data-driven resourcing decisions
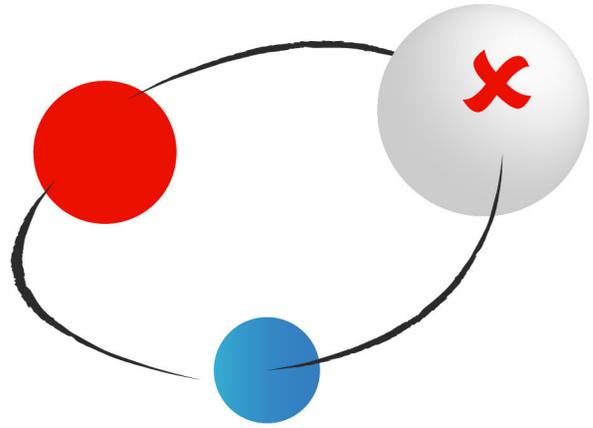
Automate common processes and tasks

Improve communication across departments

Track performance in real time

Juggling ad hoc requests.

Marketing operations teams work on strategic projects, such as technology implementations, process development, and data quality, but they are no strangers to ad hoc requests from other departments throughout the company. They receive frequent requests from sales, finance, and marketing to compile reports, analyze data, troubleshoot software, and more.

Do these challenges sound familiar?

- Requests are easily lost or forgotten because they come in so many forms (email, hallway conversations, texts).

- The work requirements aren't clear.

- No one knows who has the capacity to take on ad hoc requests.

- There is no good system to prioritize ad hoc requests against other strategic work.

You aren't alone. According to an Adobe Workfront survey, 71 percent of global workers would like to have a single destination to understand and manage work, but 69 percent don't have that type of solution in place. Responding to ad hoc requests alongside other day-to-day work is challenging, but a standardized, centralized intake process can save teams the time they need to keep all the plates spinning.

71%
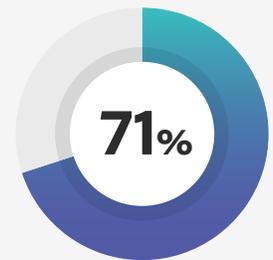
71% of global workers would like to have a single destination to understand and manage work.

Standardize the intake process.

Ad hoc requests may never go away, but standardizing the entire intake process will streamline your entire workflow. Clearly defining the steps of the process, from how requests are received through how they are assigned, makes it easier to properly prioritize what work gets done, and when.

Here are four steps you need to implement to track and assign all requests:

1. **Centralize all requests.**

   No more "quick asks" via chat—make it a rule that all ad hoc requests are submitted in the same manner to the same location. Something as simple as an electronic form sent to a designated email might be the right solution for your team. Or you can use a work management application with a built-in, customizable request form.

2. **Require a comprehensive marketing brief.**

   More important than what is being assigned is why it is being assigned in the first place. When you understand what the request is, what resources you'll need to complete when it needs to be done, and how it aligns with strategic goals, it's easy to evaluate what work your team should say yes to. And how to prioritize it.

3. **Automate the assignment of work.**

   By automating previously manual processes, your marketing team can minimize the time between an inbound request hitting your desk and your team beginning work. Automation can include standardized workflows, like scoring and prioritizing new work requests against strategic goals and assigning work requests to the right resources.

4. **Track your progress.**

   An effective work management tool will allow the traffic manager to easily track strategic as well as ad hoc work. It will also give them insight into each resource's capacity to take on additional work.
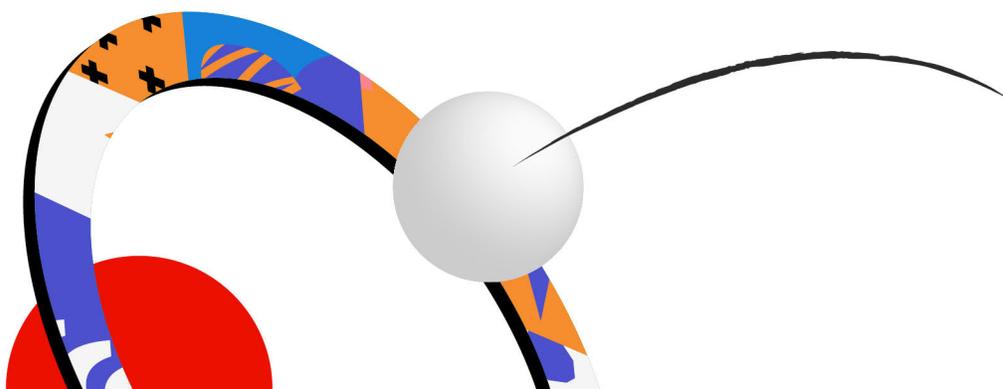
No set way to prioritize work.

With so many requests coming in from so many different directions, it's hard for marketers to constantly keep all their teams' efforts in-line with corporate goals. Often, the squeaky wheels win out while more important work gets delayed.

Marketing operations teams need to stay agile when new high-priority work comes in— but current processes don't facilitate real-time decision-making, especially when trying to weigh priorities across teams and departments. In fact, according to our research 9 out of 10 marketers feel there is a lack of strategic alignment across functional teams, causing delays and inefficiencies in what work gets done. You need a way to align any work that comes into your marketing strategy and use data to strategically plan possible scenarios.

SOLUTION:

Make data-driven resourcing decisions.

If your team wants to truly improve marketing efficiency for the organization, you must be strategic about your own work—ensuring that the highest-priority, most strategic work gets done first.

Here's how to make it happen:

1. **Set your goals and priorities.**

   Before you can effectively prioritize work, you need to define your priorities. Whether you decide to use a scorecard, a tiering system, or deadline to determine the priority of work, agree as a team on what metrics are most important.

2. **Prioritize work assignments against those goals.**

   As requests come in via your chosen standardized intake process, use the above metrics you've defined to prioritize and assign the work. Automation can aid this process by automatically identifying key request types that most align with your priorities and highlighting them for quick assignment.
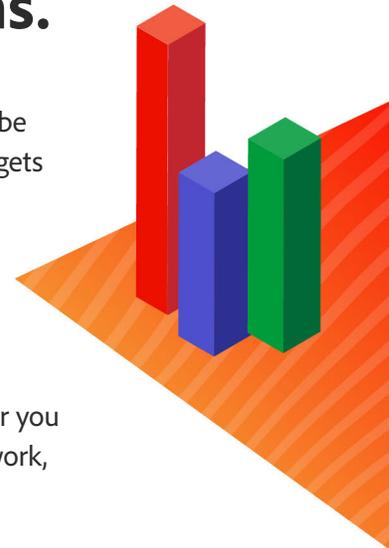
3. **Be strategic with your resources.**

    The best way to switch from being reactive—simply assigning work as it comes in—is a work management application that can help you compare different scenarios to get better insight into where your resource gaps lie before you're caught out. Scenario planning in this way helps you determine how to best proceed when trying to balance budget, resources, and timelines.

4. **Designate a traffic manager.**

    This person is responsible for tracking, prioritizing, and assigning requests to team members. Depending on the size of your team and the number of requests your team receives, this can either be an administrative position or a job function of one of your team members, such as a campaign manager or marketing operations director.

5. **Consider Agile.**

    Agile project management is all about staying flexible to accommodate a rapidly changing environment. Daily stand-up meetings (short 10-15 minute meetings) allow team members to discuss new work requests, including ad hoc requests, and determine the priority of the work.

Following the above empowers your team to focus on the work that's most important—and valuable—to your organization.

“ Being agile and able to adjust processes, systems, and workflows has armored both the company and its customers to stay engaged and inspired.

Jenifer Salzwedel
Senior Director, Marketing Operations and Enablement
Poly

Overcoming communication and collaboration barriers.

Without good communication and collaboration, marketing operations teams cannot create and deliver great experiences at speed and scale. Even for teams that have good communication, there is room for more efficient, accurate, and timely ways to disseminate and act on shifting strategies.

One of the most efficient ways to breaking down these barriers is to keep communication and collaboration centered around the spaces where work is actually being done.

>> I joke that we'd have a meeting before the meeting, and a meeting after the meeting, so a meeting was never just one meeting.

Monique Evans
Workfront System Analyst
Stanley Black & Decker
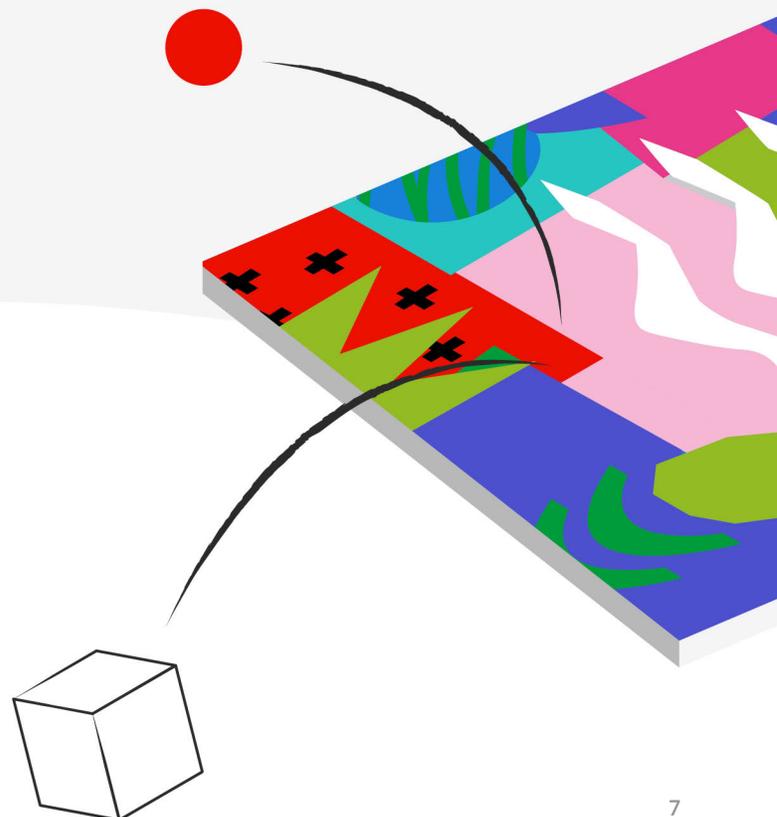
Collaborate in context.

To break down communication silos, increase collaboration across departments, and keep the feedback loop flowing, marketing operations teams need to implement processes that allow for better collaboration and communication within the context of the work being done.

Here are three ways to keep collaboration tied to the work:

1. **Provide complete visibility into all communications.**

   We rely on multiple forms of communication to reach our colleagues. Oftentimes a key piece of information is shared individually, or a stakeholder is left off an email chain. A centralized work management application can integrate with the communication tools you're already using, such as email, ensuring no message gets lost in the shuffle.

2. **Use a digital proofing tool to centralize feedback.**

   Using a digital proofing tool that integrates into existing creative tools helps tie feedback to a specific version of a specific document, without ever needing to leave the application. Now marketing operations teams and clients can collaborate in the same space and see the feedback from each other in real time.

3. **Automate to keep out of the conference room.**

   Eliminate routine and repetitive project management tasks like facilitating review-and-approval workflows through automation, letting stakeholders know when it's time to review, and letting creatives know when it's time to revise—all in real time.

Starting over with each new project.

Marketing operations involves a lot of the same projects and tasks, again and again. Creating reports and marketing automation campaigns and onboarding new technology vendors are all cases where the details may vary, but the steps to accomplish the task remain the same.

To streamline your processes, you need to have repeatable processes stored in templates, as well as a single repository for existing materials that can be reused to increase efficiency and productivity.

Develop repeatable processes.

The key to saving time and increasing efficiency is standardizing the process for the types of work that marketing operations teams do over and over again.

Instead of reinventing the wheel every time they start a new project for a stakeholder, marketing operations teams can and should standardize by:

1. **Capturing workflows in templates.**

    Create and apply templates to all common types of work requests. Templates help structure the work and standardize processes. This includes 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.

2. **Coordinating the effort.**

    Because marketing operations teams work across departments, it's critical to map out each step to ensure that the transitions between different phases 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 and rework by completing tasks out of order—and deadlines will stay on track.

Necessary but time-consuming processes bog down projects.

According to Adobe Workfront's *State of Work* report, employees report only spending 40 percent of each day doing the work they were hired to do. Much of that remaining time is spent organizing and packaging work for handoff to the next stakeholder or department. By automating these rote tasks, projects can get off the ground quicker, reviews can be more efficient, and delivery of work can happen the moment it is approved.

SOLUTION:

Automate common processes to keep work moving.

Through powerful automations, marketing teams can free themselves from manual processes across disconnected tools—so they can spend more of their day on high-value creative and strategic work.

Here are three areas where automation can keep projects from stalling out:

1. **Automate prioritization of new work requests.**

   Automating the scoring of incoming requests against your company goals can take the guesswork out of where to assign resources. Not only does this minimize the time between an inbound request hitting your desk and your team beginning work, it also ensures the most important, high-value work gets completed first. Automation can also aid in estimating the time it will take to complete a given request, using AI that draws on past projects of a similar scope.
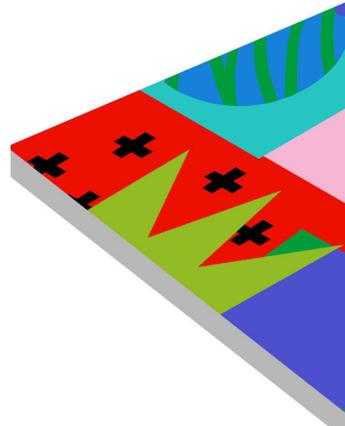
2. **Automate the common flow of approvals.**

   To avoid having work 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 and automatically alert stakeholders when reviews and approvals are needed.
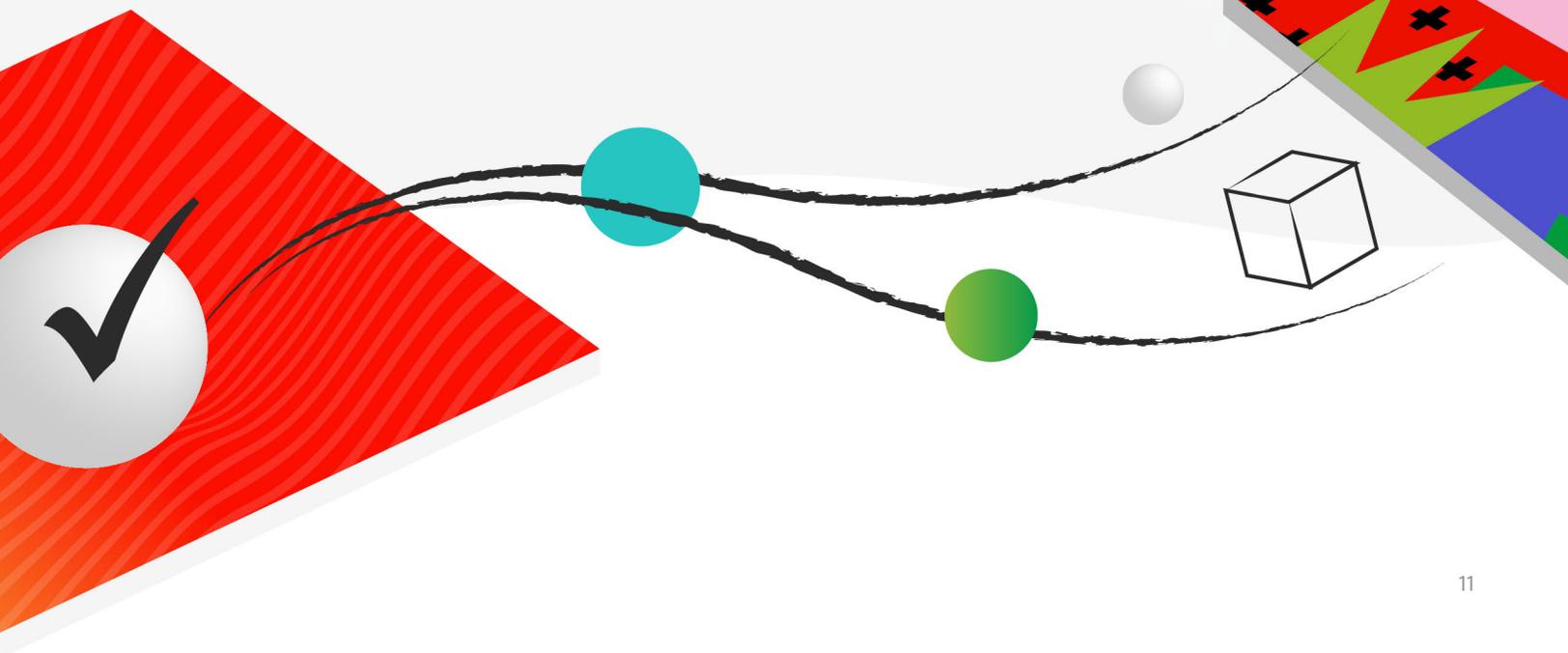
3. **Tool-to-tool automation.**

   As tools become more complex, so do the workflows that connect them all. Automating integrations between tools can streamline the creation, revision, and delivery of work. For example, when a new campaign is approved, you can enter all the information into a work management tool and have it automatically push to your marketing and CRM tools for delivery.

> Making the data flow seamlessly across our tools means that people won't have to learn the individual point solutions. They can just go to Workfront and do everything they need to do there.

Paul Tasker
VP Marketing Operations
Sage

Measuring and optimizing your work.

While marketing operations teams may be busy tracking the ROI on a technology purchase or providing analysis on how a specific campaign performs, they often overlook managing, tracking, and analyzing the overall organizational value marketing provides. The truth is that identifying and tracking internal work metrics like how much time your team spent creating a certain asset, how many resources it takes to create an asset or an entire campaign, and how long it took from start to finish is as important as external metrics like impressions, click-through rates, and time spent on site.

SOLUTION:

Measure performance externally and internally.

With proof that your marketing operations are aligned with your company's strategic goals and are achieving those goals with speed and efficiency, you can easily illustrate your value to the organization. To be able to get a holistic view of your work performance, you need campaign analytics data and targeting data as well as project management data all in one place.

While we all know the importance of tracking performance of your published work when it's live in the marketplace, here are three ways to track and measure marketing effectiveness within your organization:

1. **Take a holistic view of project timelines.**

   Knowing who is spending how much time on what will help you evaluate resource effectiveness, accurately estimate resource costs on projects, and understand where there may be bottlenecks. By collecting and measuring historical data around how long tasks and projects realistically take, you can build achievable timelines that stakeholders can count on.

2. **Compare planned vs. actual budgets.**

   Show how well marketing does at understanding the costs upfront and staying within the budget while delivering results. To track this data, you need to understand the true costs of each project and campaign. Keeping this information in a central location where you can compare historical data, resources used, and unplanned expenses will help optimize future planning.

3. **Give executives real-time visibility into marketing work processes.**

   Use dashboards to give executives real-time visibility into the marketing team's time schedules, budgets, and more. Using a work management system can automate the process and ensure insights are provided in real time.

Propel your marketing operations team to success with Adobe Workfront.

The right tools can help you increase your marketing operations team's value in measurable ways. Embracing a more holistic approach to managing your team's work with a marketing work management solution like Adobe Workfront will help you:
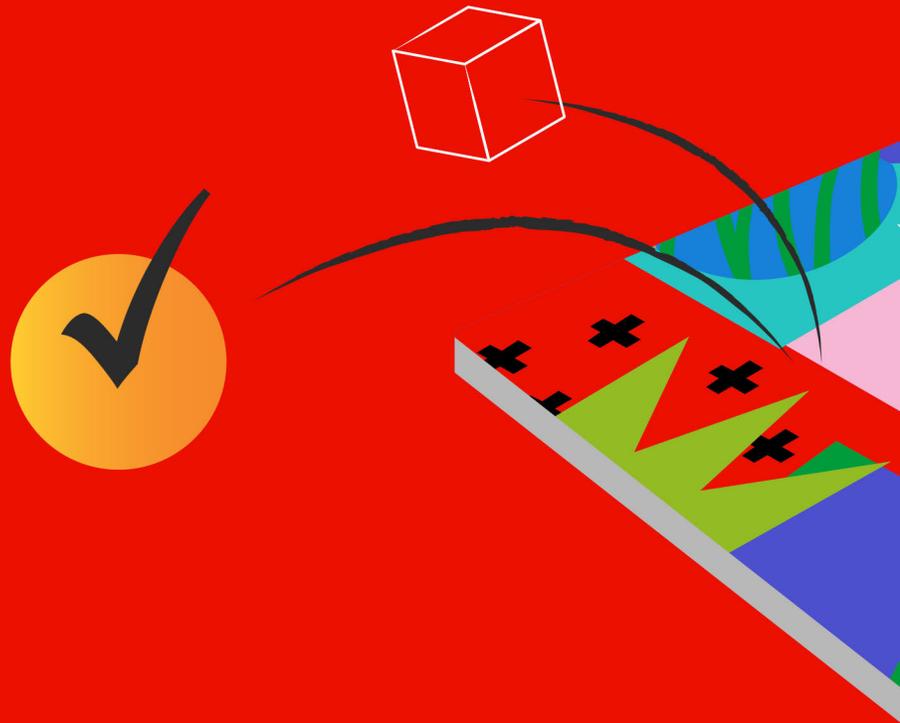
- Work more efficiently while focusing on the most strategic assignments.

- Increase productivity by automating common tasks.

- Improve communication and alignment across departments.

- Increase the value of your marketing team before the work is even published.

See how Adobe Workfront can empower your marketing team to streamline its operations and deliver value to your organization—before you even push "publish" on a single campaign. Learn more with *The Complete Guide to Work Management for Marketers*.

Sources

1   "2020 Global Marketing Report," Workfront, 2020.

2   "2020 State of Work Report," Workfront, 2020.

3   "2021 State of Work Report," Workfront, 2021.

4   "Forrester Reveals How Enterprises Hit 285% ROI with Workfront," Adobe Workfront, August 6, 2020.

5   "How Stanley Black & Decker Banished Busy Work," December 3, 2019.

6   "Execute with Agility and Advance Digital Transformation," Workfront customer story for Sage, accessed on Jun. 10, 2021.