

Use Case Presentation

HOW WE ASSISTS
MARKETING TEAMS
DO THEIR BEST WORK WITH A
PROJECT MANAGEMENT (PM) TOOL

Use Case: Marketing Teams

GOALS AND CHALLENGES: WHY A PM SOLUTION IS NEEDED

- Management of project workflow deadlines and ensure better quality work and delivery time, bringing structure to project procedures
- Having visibility to as much work information in one place - using PM tool as a space where all team members can complete tasks and track project progress
- Accountability, visibility and streamlining processes - reduce time overruns (bottlenecks) on projects resulting in timely completion of tasks and projects
- Review of files i.e. PDF, Pictures, or Videos - where there is visibility & accountability for what is being reviewed, who is responsible for the review(s), and when the review is due



Creative Briefs and Email campaigns

PROCESS STEPS AND CAPABILITIES



CREATIVE BRIEFS

Usually initiated by a request form. This can either be a duplicate of an already existing project template (in PM tool) or a newly created task - used to decide whether the brief will be approved, or rejected.



EMAIL CAMPAIGNS

Usually a monthly recurring process which could last between a week to a month. These campaigns are also usually planned out in advance due to their monthly occurrence - so having a project template with timelines is helpful for visibility to upcoming workload.

Creative Briefs and Email campaigns

KEY POINTS

- Request forms are important to help funnel requests to a central space, instead of emails or meetings, and they help capture the minimum amount of information needed to deliver on the respective brief or campaign
- Marketing project templates allow for clients to outline the action items needed to deliver on different project types, including the subject matter experts on each task, as well as lead times on each task
- The Proofing & Approvals feature allows for seeing a digital footprint of who is reviewing documents, what reviews have been made, and the deadline for when the approval is needed

Measure of Success

- Implement / automate project management as much as possible, and bring structure to project procedures
- Management of project workflow deadlines and ensure better quality work and delivery time
- Handle project management logistics, and track tasks - solving these issues saves time. Increased visibility and accountability. Reduce time spent tracking project logistics. Track feedback, approvals, and assets

Marketing Teams

SAMPLE CUSTOMERS

SAMPLE #1

- Resources for onboarding the team
- High level detail implementation of PM tool
- Great use of PM to implement the current processes

SAMPLE #2

- Built project templates with timelines & dependencies, and dynamic request forms
- Built folder structure based on project types as well as Marketing creative, Social media, and Product development teams

SAMPLE #3

- Project templates
- Dynamically redirect Request Forms to appropriate question page(s)
- Folder structure accounting for different project types, and subject matter experts within the Marketing team (i.e. Content, Creative, Design) thus allowing for great use of the tagging feature