



Adobe Workfront



WORK MANAGEMENT FOR MARKETERS

# Strategic planning.



## Overview.

Through our experience with the best brands in the world, we've found that the most successful organizations—and the most successful marketing leaders—treat work like a tier one asset. They understand that work impacts every aspect of the organization and is a primary driver of the digital experience. To help marketing leaders manage this critical work, we've identified seven distinct stages in the marketing work lifecycle and what work needs to happen in each stage. The more efficiently marketers can navigate the work in these stages, the more effective they can be overall.

In this guide, we explore the first two stages of work: *Strategy and Intake*, then *Budget and Plan*. We provide you with insights into how to better manage the work in these stages to ensure you're prioritizing the work that matters most. If you'd like to learn more about the other stages of the marketing work lifecycle or the benefits of managing work as a tier one asset, you can read our full guide, [\*The Complete Guide to Work Management for Marketers\*](#).

# Strategic planning.

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 strategic goals. Often, the squeaky wheels win out, while more important work gets delayed.

To make smart and accurate decisions from the very beginning of your marketing workflow, you need a work management application that can:

- Give you visibility into all work by streamlining and standardizing the intake process
- Show you exactly how all work is laddering into a goal to ensure all work is the right work
- Facilitate the strategic planning process by using data to make critical decisions quickly so you can prioritize and plan



## Standardize the intake of work.

Most marketing departments get work requests through a variety of scattershot channels—email, Slack, phone calls, chats, and so forth. It's incredibly hard to track the requests and prioritize them—unless you centralize work requests in one place and require the use of a standardized form to collect the information you need. When you understand what the request is, what resources you'll need to complete it, 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.

The marketing division at Esri, a GIS mapping software company, had work requests coming from all over the organization in all manner of channels, making it tough to prioritize and track. In fact, to get all work requests into one place, it consolidated 74 request systems into a single work management application.

By centralizing work requests in Workfront, Esri finally had a centralized location for managing the intake process, which improved visibility into all work requests. Because its employees could stick with the tools they were already comfortable with, like Outlook, to submit their requests to Workfront, Esri avoided the change management battle that's common when introducing a new tool.

“ We increased Workfront user adoption through the native integration with Outlook. Our staff can submit requests with the responsive fields and reply to notifications as if they were in Workfront. They became comfortable with Workfront by using it in the tool they were comfortable with.

**Brian Sapp**

Organization Adoption Lead, Esri

## Align work to strategic goals.

Once you have all your work requests in one location, you can prioritize the work that is driving toward [strategic goals](#)—whether that's improving the mobile experience or bringing new products and capabilities to market. By [aligning and prioritizing work to strategic goals](#) and initiatives, you're ensuring your team's work matters, and you can prove its impact. You also gain the ability to say no to work requests that aren't strategic and won't bring value to the business.

## Make smart, data-driven decisions.

Ever-changing plans are one of the most challenging aspects of marketing work. When this happens and you find that your entire campaign messaging strategy needs to shift—or that you need to move up the timeline of a product launch—a work management application lets you [run multiple scenarios](#) to determine what the timeline will look like if more or less of your team pitches in to help rewrite the messaging or develop a new launch campaign. And you can see how that would impact the timeline of other projects already in progress.

A big part of planning work is understanding the capacity of your people to take on new work. Using a work management application to compare different scenarios, you get better insight into where your resource gaps lie. This not only helps you plan better by identifying where and when you need resources, but also gives you the data to back up any budget requests for more resources.

Having this type of scenario planning data has helped Sage, an enterprise software company, make better planning decisions. It's helped the company stay agile and adapt quickly to reprioritize projects across all 16 teams in its marketing department. Being able to show marketing's ROI and decision-making process to leadership has also earned marketing a seat at the leadership table.

“ Before we couldn't plan capacity. With Workfront, we can see request types' volumes, so we're able to ask the right questions: 'Do we have enough internal resources to deliver what people are asking of us? How much are we spending? Do we have the right agencies on board?' And because Workfront allows us to see what we are delivering internally vs. outsourcing, we're able to find data-driven answers to those types of questions before making decisions.

**Amy Potts**

Global Sr. Manager for Sage's Creative Operations

## Always get the right work done.

When work requests come to your department, you need to be able to quickly assess whether it's the right work, how urgent it is, and whether you have the resources and budget to get the work done when it needs to be done. Workfront makes this easy to do by allowing you to:

- Standardize the intake process so you have complete visibility into all work requests
- Prioritize that work against strategic goals
- Use scenario planning to determine how to best proceed when trying to balance budget, resources, and timelines

Having these capabilities empowers your teams to say no to the work they shouldn't be doing and yes to the work that matters most. This not only allows your teams to do work of value, but also to prove their value to the organization.



**Learn how to move from strategy and planning to *Digital Content Creation*, where we show you how you can create and approve creative work faster.**

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## Sources

"Esri Customer Story," Adobe Workfront customer story for Esri, Feb. 19, 2021.

"Execute with Agility and Advance Digital Transformation," Adobe Workfront customer story for Sage, Feb. 19, 2021.



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