



GUIDE

The Complete Guide to Planning Creative Projects

How to efficiently plan creative work with Marketing Work Management

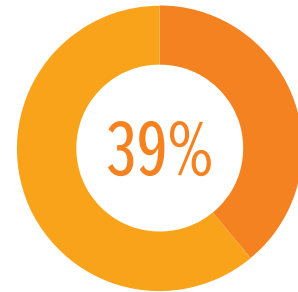
Introduction

Roald Amundsen, a Norwegian polar explorer, said, “Adventure is just bad planning.” As a creative team, you may not be heading to the South Pole any time soon, but poor planning can still lead to misadventures like fire drills, missed deadlines, rework, poor communication, and constantly changing priorities. In some cases, poor planning can even cause complete project failure.

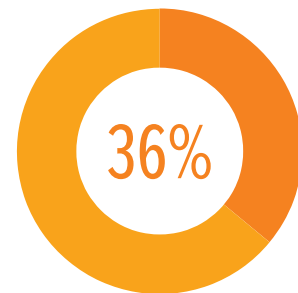
Without good planning (or with no planning in some cases), team members don’t understand the workflow and they waste time “reinventing the wheel” on steps they simply repeat from project to project. What’s more, the planning that does occur happens in silos. When it’s time to execute, no one knows who is working on what, who is waiting on what, or when things will get done. The result is chaos at best and at worse, complete failure.

But over-planning can be just as big of a problem as poor planning. In this scenario, creative teams find themselves spending too much time navigating emails, sitting in planning meetings, and updating spreadsheets. Almost 40 percent of marketers report spending three or more hours in email per day (18 percent of those say they’re in email all day!).¹ And 36 percent of marketers blame interruptions; 24 percent blame unproductive meetings; and 14 percent blame manual tasks like updating spreadsheets for reducing their productivity.² Ultimately, time spent on planning activities takes time out of execution, so it’s important to find the right balance.

In this guide, you will learn how to effectively use the Marketing Work Management (MWM) approach to better manage the planning process. Implemented correctly, the MWM approach results in better planning procedures with reduced chaos, fewer fire drills, less rework, and more time to execute the work.



39% of respondents believe poor planning is a major cause of project failure.³

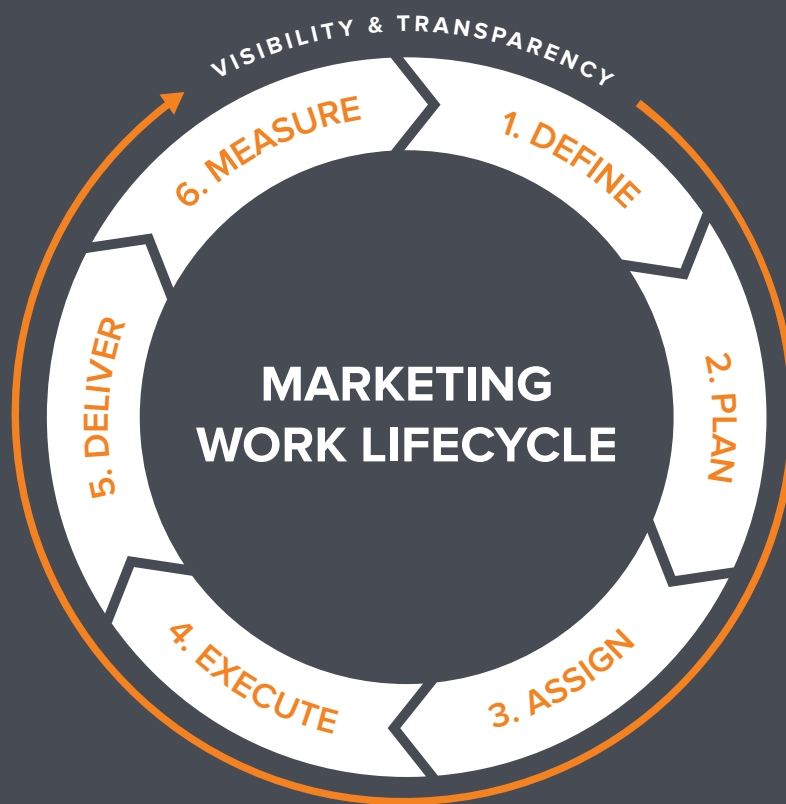


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The marketing work lifecycle

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 increase productivity and balance the need for processes with time for creativity.

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.



Planning is the second stage of the MWM work lifecycle and the focus of this guide. In the Plan stage, the work is prioritized, defined, and conceptualized so the team can complete the work on time and fulfill desired outcomes.

Eight steps to planning work with Marketing Work Management

“Failing to plan is planning to fail.”

In the MWM methodology, proper planning is critical to the rest of the work lifecycle. If the work is adequately planned, maintaining an organized workflow throughout the life of the project is much easier. Rather than too little or too much planning, the MWM method approaches planning in a balanced, holistic manner that eliminates unnecessary administrative tasks like extra meetings or email, while ensuring that the work is ready to be assigned, executed, and delivered as expected.

In the Plan stage, eight steps are critical to the MWM approach:

- Step 1 – Prioritize all requests
- Step 2 – Structure the work
- Step 3 – Estimate dates and set milestones
- Step 4 – Define skills and coordinate the effort
- Step 5 – Conduct a scope analysis
- Step 6 – Estimate the budget and resources
- Step 7 – Conceptualize results
- Step 8 – Get stakeholder buy-in

Here’s how to apply these steps.

1 Prioritize all requests

In new research findings from Business Improvements Architects, only 32 percent of respondents said they had a process for prioritizing projects.⁵ Additionally, 68 percent of organizations said they had no systematic approach in place to prioritize projects or link them to corporate and strategic goals.⁶ Yet, without a plan in place to prioritize projects, it's likely that the highest value work is not the work getting done. Instead, clients who scream the loudest or have the most pressing deadline will take precedence over projects with higher strategic value to the business.

To ensure projects are prioritized according to corporate and strategic goals, use a scorecard or other ranking system. To do this you'll need to:

1. **Appoint a backlog manager.** When your team has a standardized process in place for work prioritization, it's important to have one designated person on the team who is responsible for managing your backlog of requests. This could be the creative director, if you're a small team, one of the senior designers or writers, or it could be a traffic manager, project manager, production manager, or even resource manager role. Choose the person who will be best for your unique team. That person will be the gatekeeper for the team's incoming requests as well as existing/pending requests. It will be their responsibility to assign priority to requests based upon the standards your team has previously agreed upon. If you're running an Agile team, this person will be responsible for determining which projects to assign to each sprint.

Having a designated request gatekeeper and priority manager will help protect the rest of the team from spending time trying to funnel requests or determine priorities. It will also allow for internal clients to know exactly who to talk to about their requests and project statuses.

2. **Set priorities.** Develop criteria against which to prioritize all projects. Organize a subcommittee that includes both senior management and team members to work out what the criteria should be. Senior management buy-in is crucial for dealing with unhappy clients who think their work should always be first.

An easy way to identify critical criteria is to start with the five W's: "Who, What, When, Where, and Why."

- **Who:** Look at the importance of who is requesting the work. The higher up the chain of command the requester is, the higher the importance the request may have, even if it's not a high-priority deliverable. For example, an urgent request from a vice president of sales or the CEO may score higher than a similarly urgent request from a marketing manager even if the marketing manager is requesting a deliverable of more strategic value.
- **What:** Evaluate what the project deliverable is. Decide if certain deliverables are more valuable to the strategic business goals than others. Are lead conversion requests such as designing a landing page more or less valuable than a branding request? What about requests for internal use versus external use?
- **When:** See what the requested deadline is—immediately, same day, next day, next week, no hurry, etc.
- **Where:** Assess where the deliverable will live once it is completed. Is it for online use, for an event, or for internal circulation? Do any of these venues take precedence over others in terms of their strategic value?
- **Why:** Look at the objective of the project and its value to the business as a whole. Is the purpose to build the company's reputation? Is it for internal team building? Or is it for sales conversion? Decide which objectives are most important to the overall goals of the company.



68% of organizations said they had no systematic approach in place to prioritize projects or link them to corporate and strategic goals.⁷

- 3. Assign points.** Once your team has agreed upon the attributes you need to score, the subcommittee will need to decide on the number of points each attribute is worth. Make sure to address situations like what to do when a low-priority or low-point request comes in, but it's from someone important like the CEO. How do you work in requests that may not seem like a high priority but are important anyway?

One way to experiment with your point system is to score previous projects, look at the results, and make adjustments until you feel your scoring system accurately reflects your priorities. Then, try it on new projects coming in the door. It will take some trial and error to get the point value right, but just continue to monitor and make changes as necessary. Be prepared to have hard conversations with requesters when their requests are not top priority, but remind them the system has senior management support and ensures the most strategic work gets done first.

In the example on the next page (Figure A), projects are scored and prioritized according to a point system. In this system, more significant factors receive higher points and vice versa. For example, executives are allotted a higher number of points than other requesters; more immediate deadlines are also scored higher than those a few days or weeks away. Deliverables such as videos and flyers are scored higher than SlideShare designs due to the fact that they require outside coordination with printers, videographers, and scriptwriters. Choose or create a scoring system that works to your team's specific workflow and needs.

	1	2	3	4	5	6
	IMPORTANCE TO THE BUSINESS	AUDIENCES	EFFORT REQUIRED (TEAM LABOR HOURS)	EXPECTED DURATION (BUSINESS DAYS)	DEADLINE (WORKDAYS* UNTIL DUE)	SCHEDULE NEEDED
WEIGHTING / POINTS	30%	25%	15%	10%	10%	10%
100	A	A	75-100+	25+	1-5	Emergency
75	B	B	50-75	19-25	5-10	Behind Normal Schedule
30	C	C	25-50	11-18	10-20	Normal Schedule
10	D	D	0-25	5-10	20+	Ahead of Normal Schedule

SCORING FACTOR COLUMN IN MATRIX	SCORING FACTOR DESCRIPTION	SCORING FACTOR VALUE (SELECT CELL FOR DROP DOWN)	CALCULATED SCORE FOR EACH FACTOR
1	Importance to the Business	C	30
2	Audience	A	100
3	Effort Required	50-75	75
4	Expected Duration	5-10	10
5	Deadline	5-10	75
6	Schedule Need	Normal Schedule	30
Total project score			56.75


Figure A: Prioritization Scorecard Example – Scorecard credit to Ann Buice, as featured in Cella’s IHCSR 2015⁸

*Calculate the number of working days between the two dates.

Net Workdays	Dates
Today	6/20/2014
Due Date	6/25/2014
Working Days	4

Benefits

The entire organization benefits from a proper work prioritization system. You don’t need unnecessary meetings or emails to figure out who should work on what and when. Work is queued according to its appropriate level of strategic value. And best of all, team members no longer have to cave to the person who screams the loudest because they have management support for the prioritization system.



Businesses without templates that simply use common work practices typically see a failure rate that ranges from 10 to 30 errors per hundred opportunities.⁹

2 Structure the work

Structure the work by breaking projects into smaller, defined tasks during the planning phase. If this step is skipped, you may not understand the true scope of work, which can lead to overburdened resources, fire drills, and missed deadlines.

To effectively structure your work, follow these four steps:

1. **Identify the overall goals of the project.** As part of this process, it's important to know what the desired outcome is as well as all of the tasks and subtasks that are required to achieve it.
2. **Consider each major deliverable or objective.** These are the parent tasks necessary to deliver the goals identified in step one. They represent the next hierarchical level in the work's structure.
3. **Break down the work into even smaller chunks.** Identify all the subtasks necessary to deliver the parent tasks. Continue to break down tasks until tasks are small enough to be assigned to an individual or can be completed within a small, defined amount of time.
4. **Template the work.** The simple reality is that you need to create standardized systems, processes, and methods or else you will eventually face mistakes, missed steps, and rework. It's also important to include approvals in your templates so you can plan and track your time accordingly and avoid approval delays. Businesses without templates that simply use common work practices typically see a failure rate that ranges from 10 to 30 errors per hundred opportunities.¹⁰ To template your work, you need to:
 - **Decide where templates are most effective.** Is the work repeatable? Meaning, does your team do work like this often? Can you define a standard workflow? If the answer to these questions is yes, then it's likely there is a good opportunity to streamline the work with a template.
 - **Create a template that includes all phases of work.** For example, if you are creating a video, you will want to include all the phases: 1) content creation, 2) storyboarding, 3) visual creation, 4) editing, 5) finishing touches such as voice over, music, etc., 6) production, and (7) approval.

- **Designate dependencies.** In the previous example, video creation depends on finalizing the storyboarding process. By acknowledging these dependencies before the work begins, you avoid doing the work out of order and having to do it again.
- **Plan the duration.** How many days or weeks will the project take? How many hours within the duration will it take? Plug dates and hours into the template.

Phase 1: Define	Assigned Team Members	Dependencies	Timeline/Duration	Planned Hrs	Due Date
Brainstorm ideas/concepts		None	2 days	3	Sept. 2
Write script outline		Complete brainstorming	1 week	25	Sept. 10
Approve script outline		Complete draft of concept	3 days	2	Sept. 13
Phase 2: Write Content	Assigned Team Members	Dependencies	Timeline/Duration	Planned Hrs	Due Date
Write script drafts		Need concept draft	2 days	4	Sept. 16
Approve final script		Script finalized	4 days	4	Oct. 4
Phase 3: Storyboard	Assigned Team Members	Dependencies	Timeline/Duration	Planned Hrs	Due Date
Storyboard script					
Approve final storyboard					
Phase 4: Production	Assigned Team Members	Dependencies	Timeline/Duration	Planned Hrs	Due Date
Rehearse voiceover		Need final script	1 week	20	Oct. 11
Record voiceover		Finish rehearsals	1 week	10	Oct. 18
Approve voiceover		All recording completed	3 days	4	Oct. 23
Draw illustrations					
Apply animations					
Phase 5: Final Editing	Assigned Team Members	Dependencies	Timeline/Duration	Planned Hrs	Due Date
Edit transitions and visuals		Recording finished	2 weeks	40	Nov. 7
Add music		None	3 days	10	Nov. 10
Final approval		All editing and music finalized	2 days	2	Nov. 13

Figure B: Example project template for animated video project

Benefits

Breaking down the structure of the work in the Plan stage assists with accurate project organization. By having a detailed view of the components of the work, assigning work is simpler and allows for a more precise estimation of costs, risk, and time. Additionally, templates streamline the workflow process and increase productivity. Templates reduce rework by ensuring steps aren't missed or done out of order. They can streamline the approval process by making dependencies clear upfront and putting pressure on everyone to complete their tasks on time, so others can too. Templates can also improve resource planning, making it possible to quickly see how many resource hours a project will require.



51% of project managers identified meeting milestones as one of the main criteria for a project's success.¹¹

3 Estimate dates and set milestones

To effectively structure the work and template it out, you need to estimate dates and set milestones. Begin by establishing a project start and end date with your client. To keep the work on track throughout the project, especially for complex projects, it's important to set milestones as well. They will help you break up the work into smaller, more manageable chunks.

Here's what you need to do:

1. **Set your dates.** When is the start date? When is the final version due? When making estimates, work backward from a final deadline. Ensure that the project is achievable within the timeframe your client desires or rework the timeline with them to find a reasonable timeline that works for everyone.
2. **Set milestones.** Milestones are used as a way to mark specific points in a project's development. They do not impact the duration of the project, but mark anchor points such as a project start and end date, a need for an external review, or the completion of a phase of work. Unlike parent tasks that define the work that needs to be done, milestones allow you to track and mark the achievement of completing one or more parent tasks over a certain length of time. Once you've set milestones, incorporate them into your scheduling, calendar, and other tracking tools so you can remember when they are due and hold your team accountable to completing them on time.
3. **Include client tasks and delivery dates.** Your team is not the only one accountable for keeping deadlines on track. Make sure your clients are aware of their role in the project and what deadlines they are responsible for keeping if they want the project to meet its milestones and final deadlines. For example, make sure the client has a set start and complete date for each approval throughout the project.
4. **Define the number of iterations.** Most creative projects have a certain number of approvals they go through, but too often the number of iterations can get out of hand. Three iterations is a best practice standard and should be enough rounds to address any concerns or requested changes. Whatever the number of iterations you set for the project, make sure it's spelled out to the client and that you've agreed upon when each iteration is due to the client and due back to you with their feedback. If a client insists on more iterations than

originally agreed upon, have a plan in place to address the issue—whether it’s an automatic readjustment of the deadline because of the delay or a change order to readjust the timeline or the budget.


5. **Develop a schedule template.** Create a template to share with clients that shows each task, when it’s due, and who is responsible for its completion. Provide your client with a filled out schedule at the start of each project. A documented schedule keeps everyone accountable and lets the client know what is expected and required at each step in the process. Web-based, sharable calendar solutions and/or client portals are excellent tools for this step of the workflow.

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 C: Sample of a basic schedule template

Benefits

Deadlines and milestones are necessary to keep projects on schedule and on budget. They also help break large projects into more manageable chunks and reduce overhead created by additional time spent on activities like extra planning meetings or emails. Deadlines make it easier to keep your team’s momentum moving forward.



34% of in-house creative teams identified their group's greatest challenge as finding the right skill sets.¹²

4 Define skills and coordinate the effort

As part of the Plan stage, you need to know what skills the project requires and map out the transitions between phases (i.e., concept, design, and production) so execution is as seamless as possible. Yet, with 34 percent of in-house creative teams identifying their group's greatest challenge as finding the right skill sets¹³ and another 84 percent of respondents in a different survey indicating that there is a skills gap in their organization right now,¹⁴ it's likely your team will not always have the skills in-house necessary to complete the work.

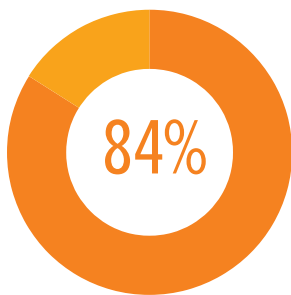
To prevent delays or poor results due to a lack of skills or lack of coordination, it's important to plan ahead.

1. **Map out in advance your team's skills.** If you haven't already done so, create a comprehensive list of skills each team member possesses. This way, during either the initial request stage or in the planning stage, you'll know right away whether your team has all the skills needed or if you will need external resources for help.
2. **Address skill gaps in advance.** The advantage of mapping your team's skills in advance is it allows you to strategically begin to identify the gaps. For skills you frequently or occasionally need but don't have on your team (or if you don't have enough resources with a specific skill), you can start looking for reliable contractors who can fill those gaps. Keep their information on file. This way you'll avoid a last-minute scramble to "find someone." Also, when you do hire new employees, give consideration to what skills they have that your team needs.
3. **Define the skills for each work request.** When a new project comes into the queue, as part of the planning stage, you'll need to ask:
 - What skills does the project need?
 - Who on the team has these skills?
 - Who would be best to work on this project?
 - Do they have the bandwidth to do so?
 - Do you have the outside resources to fill skill gaps? If yes, who?
 - If not, how will you address this issue?

4. **Coordinate the effort.** If you have already structured and templated the work as suggested in the previous step, it will be simple to coordinate what needs to get done, when it needs to get done, and which tasks have dependencies. Where tasks require a team, think about who will be on the team and any conflicts that may prohibit the team from working together effectively (time constraints, personality issues, etc.).

Benefits

When you define the skills needed in the planning phase, you avoid scrambling later to fill skill gaps that weren't identified or overburdening resources. Taking the time to coordinate the work in the planning phase means there is less likelihood of delays later down the road due to resources waiting on others. What's more, you can select the resource who best fits with the client's vision for their project as well as who has the most bandwidth to do the job.



84% of respondents indicate that there is a skills gap in their organization right now.¹⁵

5 Conduct a scope analysis

Scope relates to the time, budget, and quality of the work required. Conducting a scope analysis will ensure that you and your client understand the scope of work requested, including who is responsible for managing the scope throughout the project, how much time is needed for each phase of the project, what the quality expectations are, and what the budget for the project is.

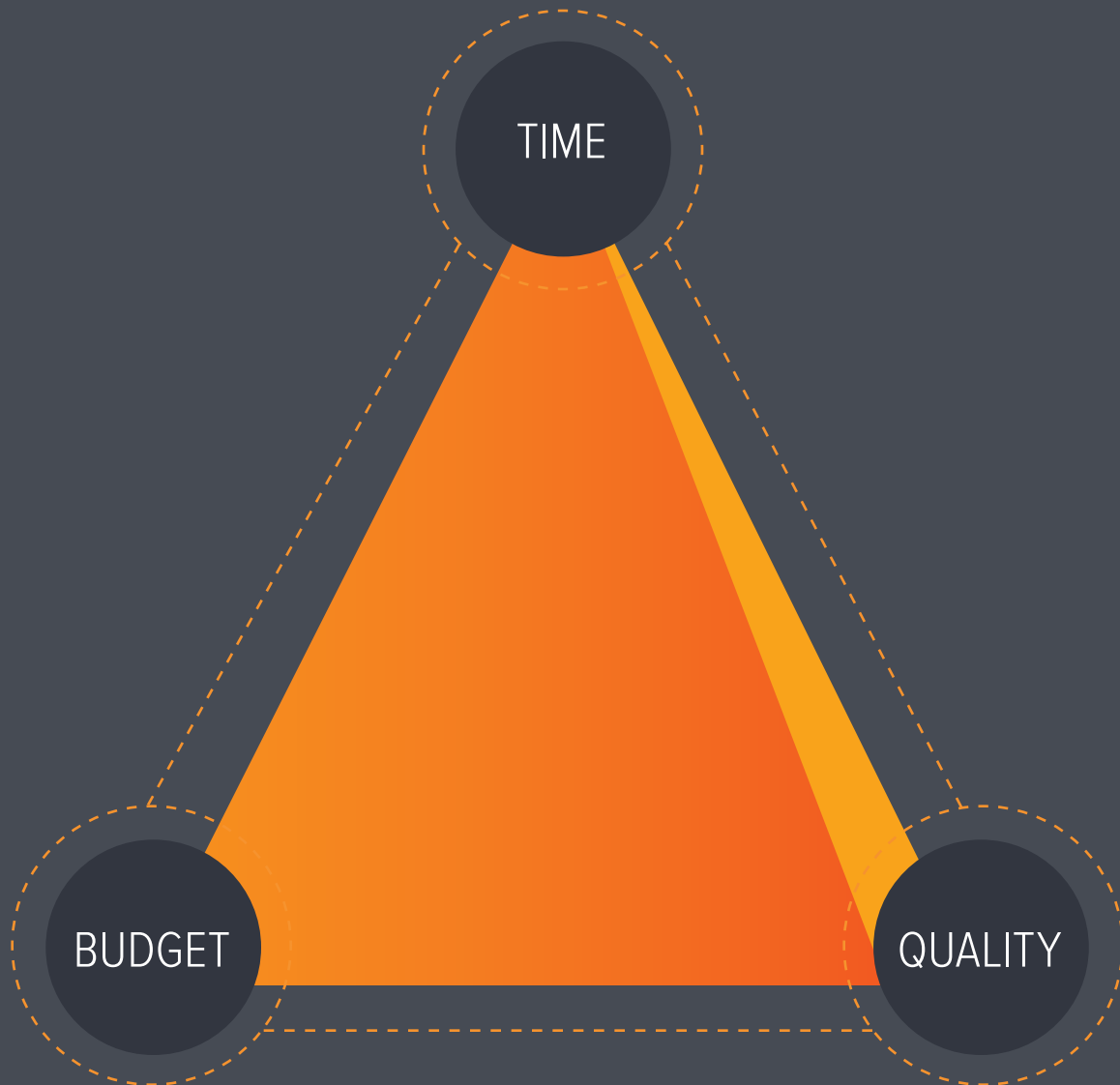
To conduct a comprehensive scope analysis, you need to:


1. **Specify the work requirements.** What are the functions and features required for the website, video, ad banner, etc.? Are there specific requirements that must be built into the design or does it need to follow a specific set of branding guidelines? This is also a great time to define and agree upon how many rounds of review will be designated for the project. Make sure that you have as much detail as possible to ensure there is a clear view of the work you are being asked to do.
2. **Identify limitations.** Often it is as crucial to document what is not within scope as what is; otherwise people may execute on certain things that were not budgeted for or included in the project timeline. For example, if you're asked to develop a brochure for an upcoming tradeshow, you need to be clear in advance if the project requires only design because the client will provide the copy.
3. **Address the potential for scope creep.** Creative projects are notorious for scope creep, where small requests for additional work can quickly spiral beyond what the original budget and time limitations of the project allow. It's a problem for every creative team. Low-performing organizations experience scope creep 53 percent of the time, but even high-performing organizations experience it 39 percent of the time.¹⁶ To avoid scope creep, make sure you've drawn your boundaries by making the details of the scope as clear and concrete as possible.
4. **Have a change control process.** Inevitably, there will be projects where the scope needs to change. In addition to having your client sign off on the project's initial scope, make them aware that changes to the project scope, including additional rounds of revisions, will require a change order or some other identified process to address the change in scope and any consequences, such as higher costs or time, that may result from the change.

Benefits

Confirming the scope of the project with the client in the planning stages greatly reduces unwanted surprises. It helps prioritize and reduce ad hoc work requests or scope creep, saving time and money. A good scope analysis also facilitates productive communications with stakeholders and serves as a tool to manage client expectations, workload balancing, and team morale.

The three parameters of project scope





20% of overtime is attributed to insufficient staffing of marketing and creative services teams.¹⁷

6 Estimate the budget and resources

With 20 percent of overtime attributed to insufficient staffing of marketing and creative services teams, taking the time to estimate the budget and resources requirements in the planning stage will help ensure you get a better understanding of how to maximize the resources you have.¹⁸

To accurately estimate your project's budget and resources, you need to know how many billable hours are required and any associated costs.

1. **Track your team's time.** Less than half of in-house creative teams currently track their time,¹⁹ but without this information, it's difficult to make accurate estimates about how long each task will take or how many resource hours you need. Once you've tracked time over a few projects, you will begin to develop more solid estimates based on the average time specific tasks or projects took your team in the past. As a bonus, time tracking will also help you understand the average speed of each of your team members for each type of project. This is valuable insight that will help you make better resource allocation decisions in the future—especially when you have important rush requests to fulfill.
2. **Create a worksheet so you know the numbers.** Using your project template, a spreadsheet, or a budgeting and estimating tool, estimate the number of resource hours and the cost of those hours for each task or project (depending on the size and importance). The worksheet can provide estimated totals for certain types of standard work and then be adjusted as needed.
3. **Use estimates to evaluate your options.** Estimates can be used to compare the return on investment of outsourcing versus using an in-house resource. They can also help with scope analysis by ensuring that the budget allows for quality execution of the scope of the work

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	\$80	\$440
• Task A3	Tom	7	\$65	\$455
Activity B				
• Task B1	Jane	3	\$80	\$240
• Task B2	Phil	2	\$75	\$150
Total Project Cost				\$1485

Figure D: Sample resource and budget estimate template

Benefits

With resource and cost estimates planned in advance, you will have a better understanding of the budget and whether it's feasible to accomplish what the client wants done when they want it done. It will also help with stakeholder buy-in. When stakeholders can see that you'll need 65 hours of designer time in one week, they will be more open to hiring outside resources or increasing the budget to get the project completed.

38% of executives say that measuring quantitative and qualitative project outcomes is more important than it was almost a decade ago.²⁰

7 Conceptualize the results

Once you've identified your primary goals and objectives for a project, you can start to define what success looks like. Similar to using a scorecard to prioritize work, a scorecard that measures expected outcomes will help you score and track specific success metrics. Define what metrics you'll score your team and the success of the project on in the planning stage so you are working toward those goals throughout the project.

Useful scoring metrics might include:

1. **Client satisfaction ratings.** Create a feedback form or other system to measure client satisfaction and use this information to evaluate how well your team did and what areas you need to improve. Right now, 53 percent of creative service teams say they never survey their clients for feedback.²¹ But it's something every team needs to do to stay competitive with outside agencies and improve the quality of their work and their clients' experience.
2. **Planned vs. actual budgets.** It's important to look at how your team does at meeting the project's original agreed upon budget. If you went over, you'll want to understand why. What could you have done differently to improve your results? And if you stayed on target or came in under budget, you can also examine what processes helped you achieve a good result and how you can continue to duplicate those processes across other projects.
3. **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 project, 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 how many billable hours this specific project should take. See if you can hit your target.
4. **Project milestones.** Major milestones mark the transition of a project from one phase to another. On large projects, creating milestones is a good way to see if your team is staying on track and if the project is still within its scope. Milestones also provide an opportunity to evaluate other project aspects, such as client satisfaction or billable hours, throughout the project rather than only at the end.

5. Delivery dates. Late projects often come with budget overruns and unhappy clients. Tracking your team's on-time delivery rates (the percentage of projects delivered on time each quarter, half, or year) will provide a good indication of how all your processes are working and whether adjustments need to be made.

Benefits

By deciding in advance what makes a project successful, you'll be more likely to meet your goals. Gathering data from one project will help you in future projects as you can apply what you've learned going forward. As a result, client satisfaction rates should rise and missed delivery dates should decrease. You will also be able to collect information about what is causing bottlenecks and better plan future projects. Finally, defining goals at the start of a project improves team accountability as well as allows each member of your team to see their individual work in proper context. They'll better understand the importance of their work and the meaning of their contribution.

8 Get stakeholder buy-in

One of the main reasons projects fail is a lack of stakeholder involvement or buy-in.²² Yet, 31 percent of creative services teams say that getting executive support and buy-in is their biggest challenge.²³ Involving stakeholders in the planning stage of the project can increase buy-in, enables the team to use stakeholder knowledge from the onset, and can help identify unknown opportunities or obstacles.

Here's what you need to do:

- 1. Identify stakeholders.** Start by identifying the people and departments affected by both the project and the outcome. For example, a brochure may involve the marketing team that requested its development and the sales team that will distribute the brochure. Once you have identified the key stakeholders, establish a hierarchy of stakeholder importance. Some stakeholders will have more influence, so getting their buy-in is more crucial to the success of the project.
- 2. Build a business case.** Particularly for large or expensive projects, a business case helps explain the need for the project and the return on investment the project should deliver. When everyone clearly understands these two components, it's easier to secure stakeholder buy-in. A proper business case should include the following:
 - **Project goals.** Clearly state the objective of the project and why it's of strategic value to the business.
 - **Expenses.** Include a budget that lists out the total costs (see Step 6).
 - **Resource estimates.** Estimate what resources (i.e. skills and who has those skills) will be involved in the project as well as the number of hours that will be required. The cost of the resources should already be covered in the budget (see Step 6).
 - **Risks.** Identify risks to the project such as approval delays, budget overruns, etc.
 - **Estimated ROI.** Determine the benefits of the project and put a number on the value as best you can. Soft benefits are good, but the ability to measure hard returns such as click ratios or increases in website traffic will likely garner more stakeholder support.
 - **Scorecard.** Stakeholders want to know how you're going to measure success. So develop a scorecard that identifies key measurements of success (see Step 7). Be prepared to review these at the end of the project with stakeholders.

Benefits

By getting buy-in early in the work lifecycle, you are able to ensure project support financially, resource-wise, and management-wise throughout the project. Your stakeholders will also be more confident in the project because they will know the goals of the project, the strategic value, the projected ROI, and how to measure success. Finally, having stakeholder buy-in on your projects will help build your team's credibility and perceived value to the business.

Conclusion

In the Plan stage, the MWM approach maps out all of the areas that require forethought in order to speed the execution and delivery of a project as well as guarantee its success. If thinking about implementing all these “planning processes” overwhelms you, just remember: most of the planning activities listed in this guide only need to be done in depth once. From there, you’ll be able to create benchmarks or standardized processes for the planning stage of your projects. Then, in the future, the majority of the planning phase for all similar projects moving forward will move more smoothly and quickly. Good planning can eliminate a great deal of inefficiency in the work lifecycle. It will help your team avoid wasting time due to administrative planning work, unnecessary meetings, rework, fire drills, missed deadlines, and more, because you will already have defined project planning processes. Additionally, good planning happens in conjunction with all those involved on the project (clients, stakeholders, and team members), which breaks down silos. Good planning also addresses time, budget, and other project limitations so, when the work is ready for execution, there are no unwanted surprises and the appropriate resources and processes are in place for a smooth-sailing project.

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Your team's time is precious. Creatives should never have to spend more time in planning and administrative work than is necessary. With Workfront Marketing Work Management, you can define your workflow processes, streamline project planning, and keep your team focused on doing what they do best—creating. Workfront helps creative teams across the globe:

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- Focus more time on creativity

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