



The Modern Marketer's Guide to Efficiently Managing Digital Work Processes

A faster, better way to bring ideas and creative work to market



Introduction	3
Why your team needs to manage digital work more efficiently	4
Managing ideas, content, and creative work	6
The Digital Work Lifecycle	8
Stage 1: Define	Ç
Stage 2: Plan	12
Stage 3: Assign	16
Stage 4: Execute	2
Stage 5: Deliver	24
Stage 6: Measure	28
Conclusion	3
Works cited	33

# Introduction

For the typical marketing team's digital work process, chaos is the norm. Constant work requests, interruptions, overflowing email inboxes, shifting stakeholder expectations, and long hours are often the rule rather than the exception. This chaos leads to delays, late delivery, and missed opportunities.

Those whose work relies on creativity and innovation often shudder at the thought of workflows, processes, or structure. But everyone can agree that something has to be done about the chaos. Work chaos is why nearly 60 percent of workers are either completely overwhelmed or barely meeting their deadlines and why only 15 percent of creative leaders say they are extremely satisfied with their current situation.<sup>2</sup>

"There's a better way to do it. Find it."

-Thomas Edison

In this guide, you'll learn about proven methods and strategies to help your team manage digital work processes with greater speed and efficiency—without compromising creativity. In fact, with the right processes in place throughout each phase of your team's workflow, you'll be able to:

- Decrease time-to-market
- Increase on-time delivery
- Ensure consistent, high-quality work
- Reclaim time for innovation and creativity
- · Improve efficiency and predictability
- Gain visibility into your entire workflow



# Why your team needs to manage digital work more efficiently

# Request mayhem

Your marketing team likely receives a large volume of requests. They get these requests in a variety of ways—emails, phone calls, hallway requests, and more—to a variety of team members. Not to mention the constant emergency requests and ad hoc requests to juggle.

# **Priority Confusion**

This leads to total work breakdown. Each member of the team starts working on different things—often for whoever is begging the most or yelling the loudest—and they lose track of which projects are the most important.

Question: Does your team use project management software?



1000-3999

In 2016, creative teams of 30+ worked on between 1000-3999 projects.<sup>3</sup>

+0008

17% of creative teams of 50+ worked on over 8000 projects.<sup>3</sup>



# Low Transparency

Meanwhile the creative director is left frantically trying to track projects and requests on spreadsheets and through emails, phone calls, instant messages, and meetings. But getting clear updates is a challenge and the data lives in too many places.

### Missed deadlines

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 or weekends becomes mandatory to meet deadlines.

# Dwindling morale

Amidst the long hours, meetings, and high stress in an unorganized environment, team morale plummets and burnout skyrockets.

It's not a pretty picture, but most teams accept the state of chaos as "just the way it is." And it doesn't have to be that way.



73% of creatives work more than 41 hours per week.



21% of those work more than 46 hours per week.<sup>4</sup>

# Managing ideas, content, and creative work



Key aspects of effectively managing digital work processes that will help you bring content and creative work to market faster and more efficiently include: Less than half (44%) of creative teams have all workflow processes documented.<sup>5</sup>

# The ability to capture and prioritize ideas

Prioritizing requests allows you to input tasks and projects from as early as the idea stage if that's what your current processes require. Simplify demand management, and easily assign projects based on factors predetermined by management—meaning your team knows what to work on first and what the next steps are.

# Workflow templates

Templates allow your team to quickly and easily set up consistent workflows so that no steps are missed. When creating a workflow template, it should include the required tasks for each type of project, the order of completion, who should complete them, and how much time it will take to complete each task. The templates will save time so your team can complete quality digital projects faster than before and take back their creative innovation time.

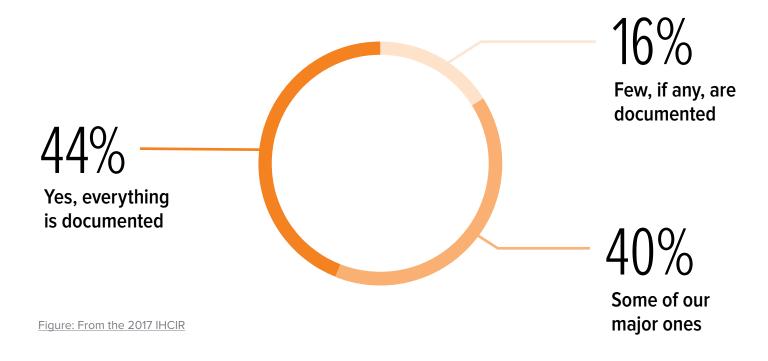
# Digital review and approval

By eliminating time-consuming and disconnected review methods like email and hard copy, everyone has real-time visibility of feedback and the status of digital projects. Work doesn't get lost or forgotten, and your team doesn't waste time on rework caused by confusing or conflicting feedback.

# Real-time collaboration in context

Teams that are able to collaborate in real time—and within the actual work—are able to understand comments and communication in context. This clarity saves time, prevents wasteful rework, and results in higher-quality work.

### Question: Are your workflow processes documented?





# The Digital Work Lifecycle

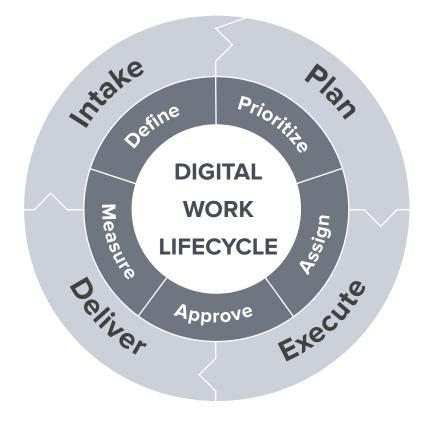
These same key aspects of managing work are reflected throughout the digital work lifecycle. This idea represents the typical flow of marketing work—from the initial work

request to measuring outcomes and all the stages in between. It generally follows four stages: intake, plan, execute, deliver.

To successfully complete the work that needs to be done, each stage must embrace the key principles mentioned previously:

- Ability to capture and prioritize ideas
- Workflow templates
- Digital review and approval
- Real-time collaboration in context

The following pages show a deeper dive into managing digital work processes and how following best practices affects each stage of the work lifecycle.





## **STAGE 1:**

# Define

The Define stage is the first stage of the workflow—where work is initiated. 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 completely 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, overburdened resources, unidentifiable priorities, fire drills, and delays.



# How to improve intake processes

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

# 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 start.

### Use built-in creative briefs

Most creative teams are not currently following this best practice. In fact, only 27 percent of in-house creative teams use creative briefs for all projects, 15 percent say they never use them, and 58 percent say they use them only on tier-one projects.

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 digital work they are creating.



of workers say there is often confusion at their company about who is doing what.<sup>7</sup>

2.5%

Only 2.5% of companies successfully complete 100% of their projects.8

Develop mandatory, standard creative briefs for all the common types of work your team does (web design, banner ads, product 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. Let clients know that without a completed creative brief a work request cannot go into the work queue for completion.

By setting up standard processes, you will ensure you receive, define, and track all work 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 digital work first.

### Question: Does your team use creative briefs?



Figure: From the 2017 IHCIR



### **STAGE 2:**

# Plan

The planning phase can be one of the most (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? By starting every digital project from scratch and without standardized processes, teams often waste countless hours trying to understand and coordinate the workflow, scheduling numerous meetings or sending a flurry of emails to define the scope, hash out the requirements, and get stakeholder buy-in, and project managers track details on complicated spreadsheets or sort them out in phone calls and emails. All of this is often a drain on productivity. The problem is that spreadsheets, emails, and phone calls create silos because they limit access to information, and not everyone who should be gets included in these communications. So in the end, your team creates a plan, but it's not well-coordinated or communicated, leading to trouble and delays further down the work lifecycle.



# How to automate the planning process

Planning doesn't have to be tedious. With the right solutions in place, planning can be a collaborative and painless process. Streamlined, transparent processes eliminate excessive emails, cumbersome spreadsheets, project silos, and unnecessary meetings. For effective planning, follow these strategies:.

# 1. Prioritize all requests

Now that all your requests are centralized in one location, getting an overview of all requested work isn't just possible; it's easy. Project managers or owners can weigh work requests against each other and prioritize them 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 priorities. Under this system, team members can also prioritize their own work, rather than completing projects based on who begs the most.

# 2. Standardize repeatable work

While no two projects are the same, the workflows often can be. All ebook designs will look different, but the steps to completing each one are the same. 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 help track progress.

### 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 (e.g., 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 are due, 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, now is the time to go back and talk with your client and redefine the scope.

36% of marketers blame interruptions, 24% of marketers blame unproductive meetings, and 14% blame manual tasks like updating spreadsheets for reducing their productivity.<sup>10</sup>



53% of in-house creative teams never survey their clients.<sup>11</sup>

### 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 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 billed hours for a project relates directly to its profitability and is a useful measure for your team's value to the organization. Even if your team doesn't bill by the hour, you can still track the number of hours you spend on each project that would be billable. 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.
- 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.

### 7. Estimate dates and set milestones

When making estimates, work backward from a final deadline. Also, be sure to include stakeholder tasks and delivery dates. For example, how many days will they have to approve each version? Get your stakeholders 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.

The more you can standardize and automate the planning process via templates and standard workflows, the more time you save your team and the more coordinated they will be. With the time they save, they can be more productive and focus more of their efforts on creativity, innovation, and quality.

### **Sample Project Schedule**

Project	Status	Due	Driver
Banner Ad	Draft of copy for ad	<u>2/3</u>	Mary
	Copy approved	<u>2/9</u>	Client
	First draft ad design	2/9-2/12	Tom
	Review first draft	<u>2/13-2/18</u>	Client
	Second draft ad design	2/19-2/23	Tom
	Review second draft	2/24-2/26	Client
	Make final changes	<u>2/27-3/2</u>	Tom
	Approve Ad	3/3	Client
	Project Complete	3/3	

# STAGE 3: Assign Maybe you manage a large team that execute

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 digital work is constant and often overwhelming. Right now, assigning work is time-consuming since you don't know who is working on what or what's currently in each team member's queue. Because of this, you end up assigning work through meetings, emails, or phone calls so you can ask them if they have the bandwidth to take on work. You 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.

# Four steps to assigning resources for digital work

It is important that the creative director, traffic manager, and/or production manager have visibility into everyone's workload and availability. Here's how to effectively assign resources and manage capacity and utilization rates:

### 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 over 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 underutilizing resources.

Ask all teams and individuals to commit to the project deadlines, estimated hours, and the overall duration of the project as 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 through a centralized, transparent process 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. When work is assigned in a balanced way, team members avoid burnout and have a higher level of engagement with the work they are doing. In addition, the enhanced visibility 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.

# 2. Take a hybrid approach to resource management

Using some Agile management tactics, such as defining how much time to spend on different types of work, can be beneficial for maximizing utilization rates. For example, you can set team-wide goals, such as 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-utilizing them.



Only 56% of workers believe their skills are underutilized or wish their job presented a greater challenge.<sup>13</sup>



44% of all marketers are facing burnout.<sup>14</sup>

### How to determine your team's available hours

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	
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	23
X 100	x 100
AVAILABLE HOURS TOTAL (A)	= 2300
/ TOTAL HOURS PER WEEK	/ 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.

# 3. Assign tasks to teams or job roles

Assigning tasks at different organizational levels makes it easier to manage and balance your resources. 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.

# 4. Know your utilization rates

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. 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.



Implementing a social approach to project communication can reduce the time employees spend searching for content by 35% and improve overall productivity by 20-25%.





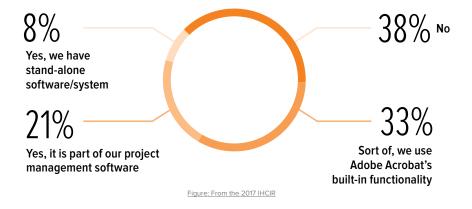
# How to execute on digital work with speed and efficiency

By streamlining your work execution processes, you can eliminate time-consuming administrative tasks, communicate in the context of the work, and decrease time-to-market. You will find that your team finally has time to focus on creativity and innovation. Here are the goals you can achieve by effectively managing your digital work processes:

# 1. Streamline reviews and approvals with digital proofing

Proofing often 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 prior feedback 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.

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



### 2. Consolidate tools

When team members bounce back and forth between multiple tools multiple times per day, it interrupts the natural flow of work and can cause frustration, delays, confusion, and duplicated efforts. Creative teams need the ability and visibility to manage all creative projects through the entire natural lifecycle of work. By managing the entire lifecycle of work in one place with one tool, marketers and creatives gain control of their digital work processes and avoid constant interruption and tool switching.

### 3. Collaborate in context

Communicating about work through disconnected tools—like email and chat—means you have to refer back to the project being discussed and try to figure out what exactly is being referenced. It also means everyone else misses out on the conversation, so you then need to communicate information through status meetings or by updating spreadsheets. By collaborating in the context of work, you cut down on that administrative work and are able to focus on the right work. You increase productivity and are better able to balance process and creativity. Through efficient management of digital work processes, teams can free themselves from time-consuming administrative tasks and spend more time on innovation and high-value, high-reward creative work.



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, according to a Getty's Images.<sup>17</sup>



On average, workers use only 45% of their time on their primary job duties.<sup>18</sup>



37% of creative services teams are currently not tracking time.<sup>19</sup>

# **STAGE 5:**

# Deliver

This stage represents the final push to achieve what you said you would. However, 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 great work. This chaotic approach can easily lead to burnout, missed deadlines, and low team morale.



# Four steps to asset delivery with digital asset management

Delivery of great work should be cause for celebration, and it can be with the right digital work management processes. With better processes, you can streamline final approvals, the publish assets on time, and maintain visibility into the entire process to measure success and recognize team members' contributions to creating an exceptional design or asset. Here's how to deliver digital work effectively and efficiently:

# 1. Final approval from all stakeholders

Use a standardized approval process to capture feedback and communication. Digital proofing solutions can help you set up approval paths for final reviews, and they can help everyone—from senior managers and executives to editors and designers—understand their roles and be accountable. It's then much easier to get approvals on time and publish assets 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.

# 3. Acknowledge and recognize great work

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.

Recognition is integral to managing modern 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 and have a 23.4 percent lower turnover rate than companies without strategic recognition programs. In the Delivery stage, there should be a focus on recognizing team and individual accomplishments and undergoing a thorough evaluation of current processes. By encouraging team and client feedback, you can continually refine processes that will improve your team's productivity, costs of service, and organizational value.

18%

18% of creatives say they've never received praise or recognition for work<sup>23</sup>, yet when asked what motivates them most, over half of creatives (54%) ranked doing great work.<sup>24</sup>

14%

In organizations where individual employees or teams are recognized, the entity's average score for employee results was approximately 14% higher than in organizations in which recognition does not occur.<sup>25</sup>

# 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, then take corrective action so the next project meets expectations.

Question: Does your team use a digital asset management system?

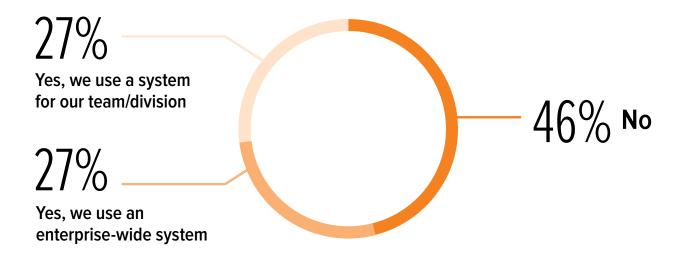


Figure: From the 2017 IHCIR



59% of creative teams report using email to share files between locations.<sup>26</sup>



Over half (51%) of marketers use between 6 and 15 tools to manage their work.<sup>27</sup>



### **STAGE 6:**

# Measure

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.

Start by setting standard key performance indicators (KPIs) and benchmarks so you know where you stand currently, the progress you are making, and where you want to be. Another important part of successful measurement is the ability to generate reports and provide dashboard updates to executives and key stakeholders. Some KPIs you may want to measure are on-time delivery rate, client satisfaction ratings, billable hours, and total output. Collecting data may not be what creatives love doing, but it is critical to your team's overall success. By tracking metrics, you will see potential growth opportunities, improve productivity and quality, and justify your value to the organization.



# The Benefits of Enterprise Work Management

Managing a myriad of digital design and creative projects requires defined processes that allow for and anticipate everything that can arise. Using efficient centralized digital work management processes throughout the entire lifecycle of work results in real-time visibility for teams, managers, and executives. With the right digital work processes in place, creative services teams, in-house agencies, marketing departments, new product development teams, and other teams that manage digital work are able to:

# Ensure consistent, high-quality work

With standardized digital work processes, your team will always know the steps to follow to achieve consistent results. Standardization also ensures team members know what's expected, and each project is held to the same standards.

# Increase speed to market

Templates, streamlined processes, and collaborative reviews and approvals save time because you prevent miscommunication and avoid reinventing the wheel with each new project. With real-time collaboration and communication that stays in the context of work, you'll also prevent delays and decrease time to market.



# Make better-informed decisions

Simplified resource management provides you with the visibility to maximize utilization rates. When you can see how much time resources have to devote to strategic work, you avoid underutilizing or overburdening them. And when you can assign tasks by team or job roles, it's easier to manage and balance your resources.

# Reclaim time for innovation and creativity

When you are able to track data in real time, create customized reports, and access a dashboard reporting feature, you eliminate a lot of manual work. That frees up time for innovation and higher value creative work.



# Conclusion

The successful management of digital work processes depends on team and management buy-in and a commitment to implementing the strategies outlined in this guide. It requires investment to develop and standardize those processes, but the rewards are even greater. When you order the chaos and eliminate time-consuming tasks and processes, you allow marketing and creative teams to develop a foundation for success.





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