



EBOOK

Planning Marketing Projects for Success: 3 Strategies to Help You Succeed

Contents

Introduction..... 3

Problem #1: There Is No Plan for Tracking Progress..... 4

Problem #2: Planning Happens in Broad Sweeps, Not Detailed Steps 6

Problem #3: Stakeholders Do Not Adequately Contribute to Project Planning..... 8

Works Cited 11

Introduction

Your team is launching a new email campaign. As usual, you make a plan, assign your team various tasks, and communicate what needs to happen. Unfortunately, like 52 percent of marketing teams that say they frequently miss deadlines, you quickly find your campaign is behind schedule.¹

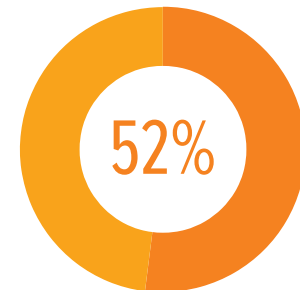
First, you have to rework the landing page because it doesn't fit with the campaign theme. Then, the email copy is too long for the email template because there was a lack of coordination between the design team and copywriting. Finally, everything is ready to go—except you are waiting for final approval from the CMO who's at a conference for the next two days.

Why is this scenario so familiar? And why does it keep happening? It's not because of a lack of effort—85 percent of marketers rate themselves as among the most productive in their office.² Most likely, despite your plans, you still have critical planning gaps in your workflow processes.

How can you keep work on track? Here are three common project planning issues and how you can resolve them.

"In preparing for battle I have always found that plans are useless, but planning is indispensable."

Dwight D. Eisenhower



52% of marketing teams say they frequently miss deadlines.³

① Problem #1: There Is No Plan for Tracking Progress

As part of the workflow process, stakeholders request work and you assign it to various team members according to their skills. But for most marketing teams, assigning work is like sending balloons into the air—work is quickly out of sight. You can't see where work is in its journey, when it's handed off to another team member, or who is working on what. In fact, almost a third (31 percent) of marketing teams say knowing what everyone else is working on is a major challenge.⁴

This lack of visibility jeopardizes projects. When stakeholders, project managers, and team members don't have access to the right level of information at the right time it can cause significant delays or impact critical decisions.



31% of marketing teams say knowing what everyone else is working on is a major challenge.⁵

Solution: Get Visibility into Your Team and Their Work

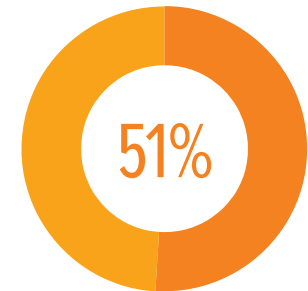
When you don't know who is working on what or where work is in the pipeline, it's easy to keep adding to the team's workload or setting unrealistic deadlines. Your team becomes overwhelmed, stressed to the max, and unable to meet deadlines. In one survey, over half of all marketers said juggling all of their work and trying to fit it into a 40-hour workweek made them dread their job.⁶

With visibility into your team's workload, you can see how far along the work is, what else is on your team's plate, and how those priorities compete. With this information, you can do a better job of planning achievable timelines.

Here are four simple ways to improve visibility:

- 1. Create a visual representation of the work** – Use a storyboard to visually track work so you can see the status in a glance. Whether you use a whiteboard or a digital storyboard, you can track the progress of work through columns that describe the different tasks required to move a project from start to finish.
- 2. Hold daily stand-up meetings** – These short 5- to 10-minute daily meetings allow the entire team to check in with each other. They allow teams to discuss urgent issues, change priorities, or to get a brief update on the status of the work.
- 3. Plan for all the work your team needs to do** – How much time does your team spend on daily activities like checking email or addressing ad-hoc projects that routinely come up? What other project-related work are they already doing and when is it due? Only when you can see every team member's full workload can you plan realistic project timelines.
- 4. Provide stakeholders with real-time status updates** – Whether you use an online spreadsheet or a cloud-based tool, give stakeholders the ability to access project updates and plans. You'll not only build trust, but allow them to be partners in the process.

When everyone—managers, team members, and stakeholders—has visibility, it is much easier to plan appropriately. It also helps avoid unrealistic deadlines (or overworking your team) while keeping your stakeholders happy and involved.

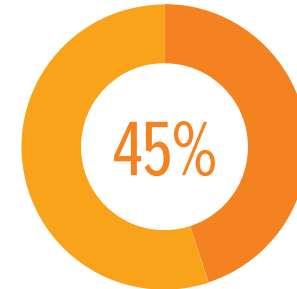


51% of marketers say juggling all of their work to get it done in a 40-hour workweek made them dread their job.⁷

② Problem #2: Planning Happens in Broad Sweeps, Not Detailed Steps

Abraham Lincoln once said, “Give me six hours to chop down a tree and I will spend the first four sharpening the axe.” Detailed planning is critical to fast execution. But often it seems faster not to document every detail. After all, you and your team are seasoned professionals—you know what needs to be done. And you’ve completed the same types of projects dozens, if not hundreds of times before.

In reality, with so many tasks to juggle and constant interruptions (the average marketer gets interrupted every three minutes or nearly 20 times per hour⁸), even seasoned professionals can forget a critical step. With 45 percent of marketers saying they lack standard processes for workflows,⁹ it’s not all that surprising that many marketing teams also struggle with rework, miscommunication, and delays. Standardizing and detailing workflow processes during the planning stage could alleviate a lot of these issues.



45% of marketers say they lack standard processes for workflow.¹⁰



The average marketer gets interrupted every 3 minutes—nearly 20 times per hour.¹¹

Solution: Use Templates to Plan Every Step

Using templates for each type of project and for repetitive processes, such as approvals, allows you to define and track all steps throughout the process. To create your templates, you can use Word, Google Docs, or a dedicated project management tool, but it is important that each template outline the following:

- Who is responsible for the work and at what stage?
- How long should each task take to complete?
- How will your team communicate internally?
- When and how will you communicate project updates to stakeholders?
- Where will you save, store, and deliver project files to key stakeholders?

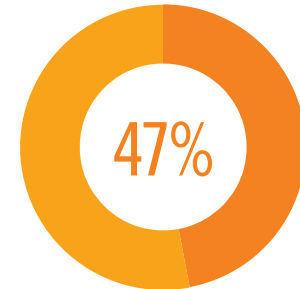
Taking the time to plan each step is worth it. Organizations that rely on common work practices and routines instead of templates typically see a failure rate that ranges from 10 to 30 errors per 100 opportunities.¹² Templates, on the other hand, reduce rework by ensuring steps are not missed or done out of order. They streamline the approval process by making dependencies clear upfront so everyone understands how delays on their end impact the project downstream.

Organizations that rely on common work practices and routines instead of templates typically see a failure rate that ranges from 10 to 30 errors per 100 opportunities.¹³

③ Problem #3: Stakeholders Do Not Adequately Contribute to Project Planning

Often, poor planning starts right at the beginning of the entire work lifecycle. For example, the sales team calls and asks your team to create a tradeshow banner. You get a few details on the phone and then you assign the work.

However, 47 percent of failed projects broke down due to poor planning and requirements management.¹⁴ Without more specific guidelines from stakeholders, confusion abounds. What does the sales team want to achieve with the banner? Who is the target audience? What are the key messages they are trying to convey? Your team may create a great banner, but it might not meet the sales team's objectives. Then it's back to the drawing board with your team working late nights and weekends to redo the entire banner or, even worse, the stakeholder kills the whole project and outsources the work.



47% of failed projects broke down due to poor planning and requirements management.¹⁵

“When people work on the same project but have different notions for what the goals are, what their roles are, and how or why to help each other when things go wrong, it creates the friction that makes projects fail.”

—Scott Berkun, best-selling author

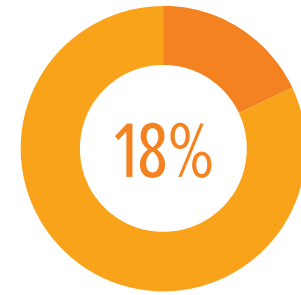
Solution: Make Marketing Briefs a Must

Most marketing teams currently do not follow the planning best practice of using a marketing brief. However, without one, the entire workflow begins in chaos, with no one having a clear understanding of the goals and objectives of the work they are creating. In fact, 18 percent of marketers say more accountability from stakeholders would improve their productivity.¹⁶ Clear guidelines prevent confusion and rework.

To ensure your team has a consistent and clear understanding of the work requested, develop standard marketing briefs for all the common types of work your team does (web design, banner ads, billboard ads, digital asset design, product launches, etc.). The brief should provide clear details about:

- When work is due
- What it will cost
- Who needs to be involved
- What the deliverable is
- What the outcome should be
- Who will approve the final project

By making a brief a mandatory part of the process, your team will be able to better meet stakeholder expectations, stay within scope, and get projects done on time.



18% of marketers say more accountability from stakeholders would improve their productivity.¹⁷

“Being able to collect the right information, making sure the right people have access to it, can analyze it and make recommendations based on insights—this is where marketing needs to lead, invest, engage.”

*Denis Cochet, Senior Vice President,
Sales & Marketing, Alstom Power*

Streamline Your Planning Efforts with Workfront

Planning is critical to project success, but it does not have to be hard. Embracing a more holistic Marketing Work Management approach like Workfront will help you easily:

- Gain real-time visibility into the status of work and resource capacity
- Standardize and automate processes for improved productivity
- Build credibility and improve stakeholder satisfaction

workfront.com/marketing



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