Adobe
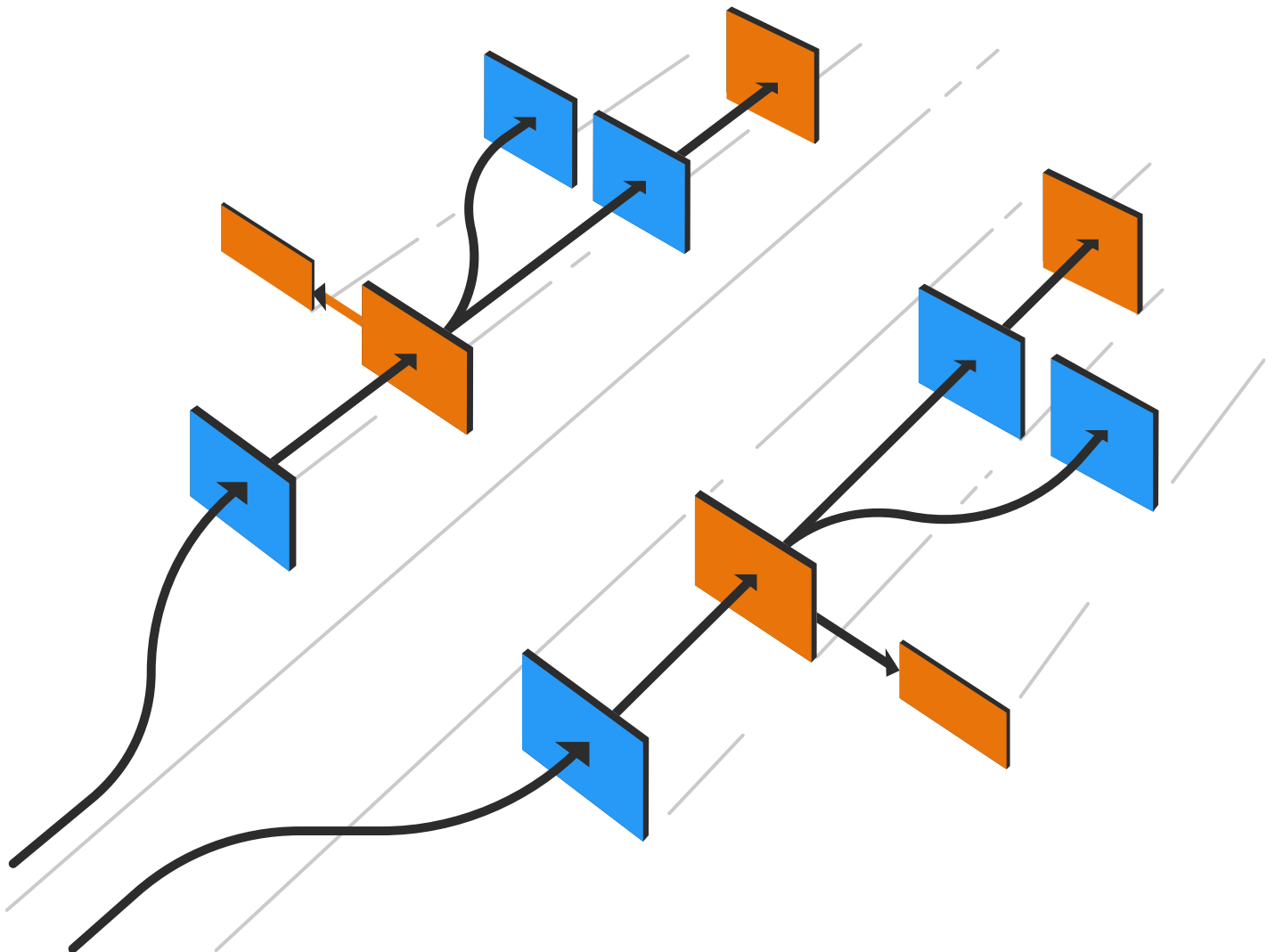
Marketer's guide to managing digital processes.

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 agrees that something has to be done about the chaos. Sixty percent of workers are either completely overwhelmed or barely meeting their deadlines, and only 15 percent of creative leaders say they are extremely satisfied with their current situation. And it's all because of work chaos.

This guide details 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:

- 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

> " There's a better way to do it. Find it.
>
> **Thomas Edison**

Meet deadlines and boost morale.

A smooth and steady workflow supports the creative flow, and your bottom line. Without it, your team can suffer from the following productivity zappers:

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 whomever 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?

Source: 2018 IHCIR

74% Yes

16% No

10% No, we use paper tickets and other manual methods
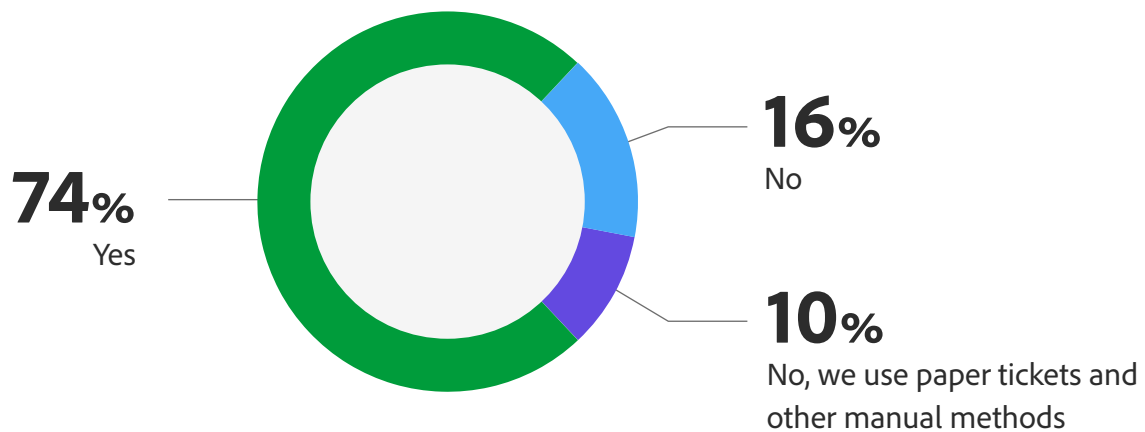
Low transparency

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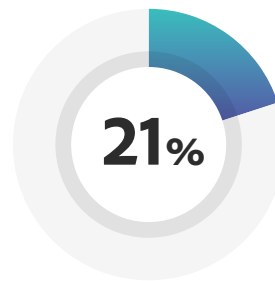
It's not a pretty picture, but most teams accept the state of chaos as "just the way it is." It doesn't have to be that way.

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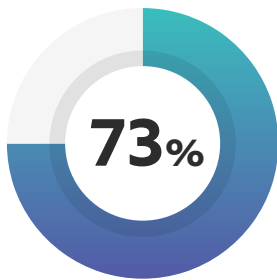
73% of creatives work more than 41 hours per week.

8000+

30% of creative teams of 50+ worked on over 8000 projects.

21%

1000-3000

In 2018, creative teams of 30+ worked on between 1000–3000 projects.

21% of those work more than 46 hours per week.

Stage 1: Define.

The Define stage is the first stage of the workflow—where work initiates. For most, work requests arrive in a number of ways—emails, instant messages, sticky notes, hallway conversations, meetings, or office drive-bys. Not only is it almost impossible to track these requests, but it's also 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.
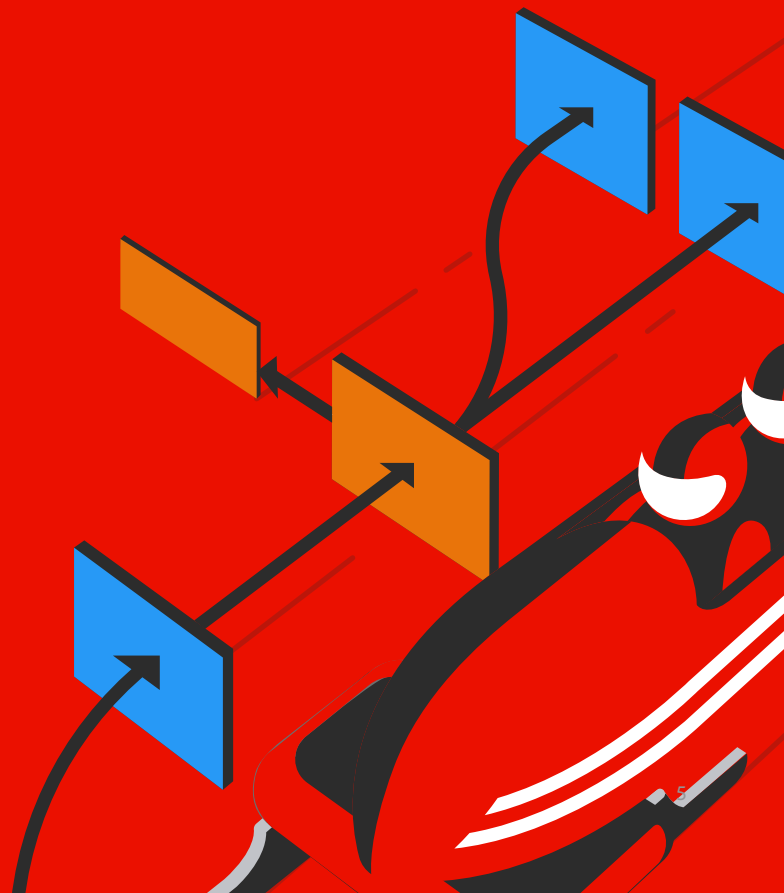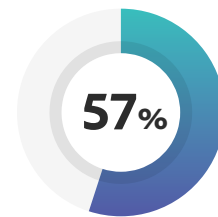
Improve intake processes.

Rather than laboring through work requests that turn 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:
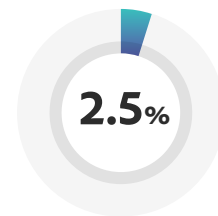
Centralize request management.

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 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.
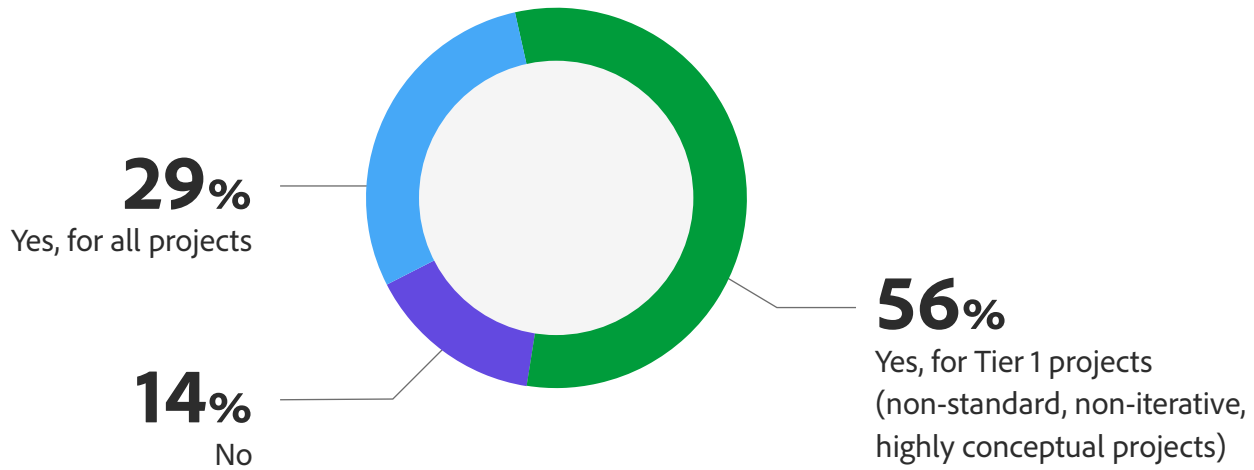
Develop mandatory, standard creative briefs for all the common types of work your team does (web design, banner ads, product design, etc.). The brief should provide enough detail about your team's work requests to understand how long the work will take, what it will cost, who needs to be involved, what 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 receive, define, and track all work in a cohesive and visible manner. Follow these steps and 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.

57%

57% of workers say conflicting priorities is the most common source of departmental conflict.

2.5%

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

Question: Does your team use creative briefs?

29% Yes, for all projects

14% No

56% Yes, for Tier 1 projects (non-standard, non-iterative, highly conceptual projects)

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? When starting every digital project from scratch and without standardized processes, teams often waste countless hours trying to understand and coordinate the work. Spreadsheets, emails, and phone calls create silos because they limit access to information, and not everyone who should be gets included in these communications. 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.
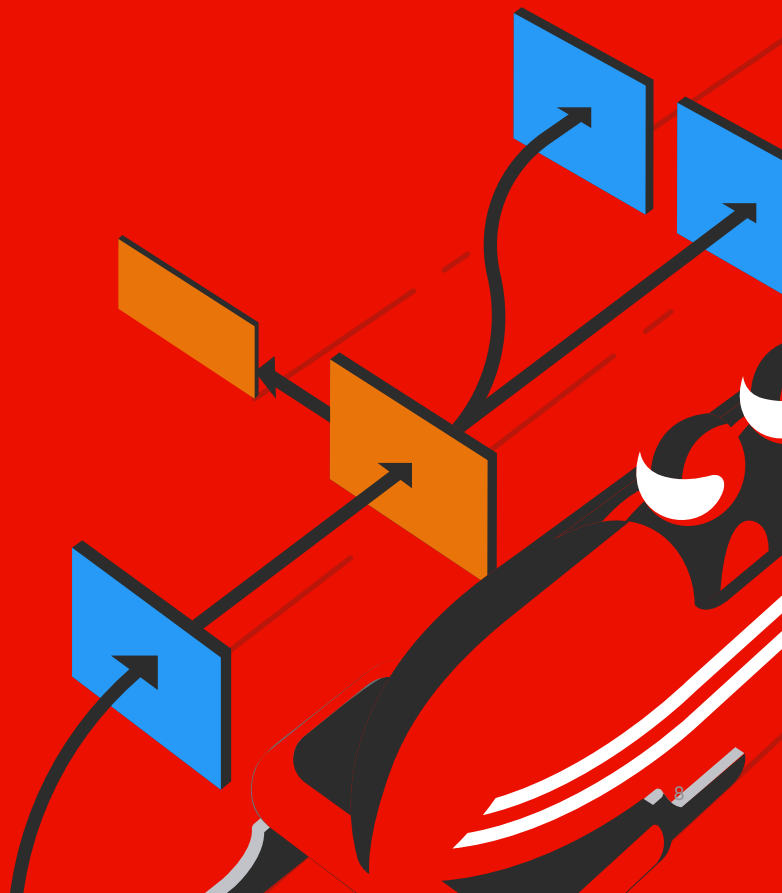
Automate the planning process.

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

1. Prioritize all requests.

Now that all your requests are centralized, getting an overview of all requested work isn't just possible; it's easy. Project managers or owners 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 the highest priority projects. Under this system, team members 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. Even if eBook designs look different, the steps to complete each one remain unchanged. 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 help with assigning the work to multiple job roles. Milestones or a global approval process also help track progress.

3. Define skills.

Templates 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 the project along to next. By coordinating these steps at the start, you avoid delays down the road and deadlines stay on track.

5. Conduct a scope analysis.

Scope includes identifying the specific work to be done, outcomes, budget, and timeline. To ensure the scope is well defined and achievable, look at any defined constraints for the project and figure out what work is needed. Revisit budget, time frame, and other requirements. If any of these aspects of scope feel difficult to meet, now is the time to go back and talk with your client to redefine the scope.

6. Conceptualize results.

Once you identify your primary goals, it's time to define what success looks like. Use a scorecard to see how the project aligns with the defined goals. Scorecards can also be useful for prioritizing work and determining how well a project syncs 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 of 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. 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, 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 the person responsible for its completion. A documented schedule keeps everyone on task 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	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**	

Stage 3: Assign.

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, 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 more 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. Worst of all, there are often last-minute priority shifts, errors, and confusion—leading to project delays, high turnover, hindered productivity, and unhappy clients.
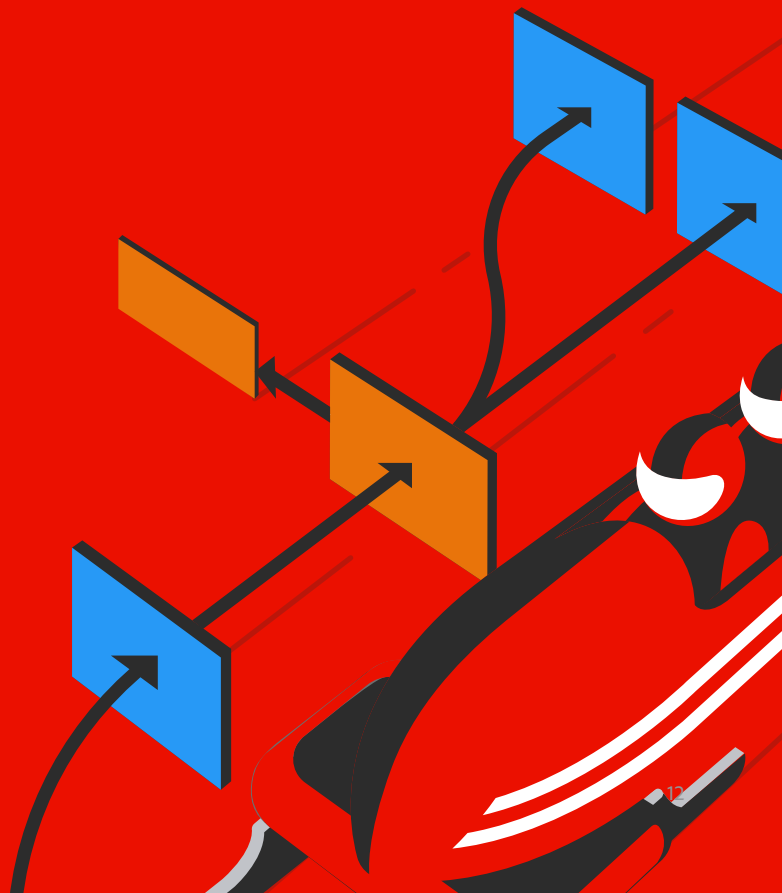
Assign resources for digital work.

It's 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 develop a centralized view into work requests, define the skills needed, and estimate resources as outlined in the first two stages, you gain visibility of each person on your team. This type of visibility lets you commit resources in a holistic manner and 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 overall duration of the project as defined during the planning stage. If a resource or team cannot commit to the planned schedule, discuss the restraints, redefine the estimates, and make adjustments as necessary to the schedule or budget.

Assigning work through a centralized, transparent process improves resource management, utilization rates, and team morale. Studies show that the more organizational support employees receive around their work and decisions, the less job burnout they experience. When work is assigned in a balanced way, team members 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 due to employees 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 help maximize 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 a 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 underutilizing them.

Determind your team's available hours.

Step 1: Have each team member determine their total number of "lights on" hours for the week.

	Meeting hours	Vacation hours	Holiday hours	Email hours	Other	Total hours
			"Lights on" hours per day			
Monday	1			2		3
Tuesday	2			2		4
Wednesday	2			2		4
Thursday	1			2		3
Friday	1			2		3
				Total "lights on" hours for week:		17

Step 2: Find the total available hours, per person, for the week.

Total hours/week	40
- Total "lights on" hours/week	-17
Total available hours:	**23**

Step 3: Find the percent of availability, per person, for the week.

Total available hours x 100	23 x 100
Available hours total (A) /total hours per week	= 2300 /40
Percent of availability:	**= 57.5%**

Step 4: Repeat the 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	57.5%	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 75–80 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 trends and try to keep the workload balanced. Even if your team or department doesn't charge billable hours, track how much time each person spends on project work versus administrative tasks to help keep a pulse on the team's productivity and efficiency.

56%
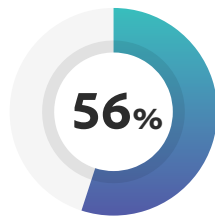
56% of workers believe their skills are underutilized or wish their job presented a greater challenge.

44%
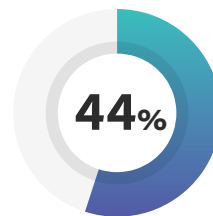
44% of all marketers are facing burnout.

Stage 4: Execute.

Executing the work is the fun part—the creative part. It's also the part where team members want and need to spend the majority of their time. However, the constant interruptions, meetings, unorganized emails that never seem to have the right document versions, and rework from constantly shifting client directions can make it hard to do the actual work. Deadlines come and go, and your team ends up working late, because it's the only time they can actually get work done.
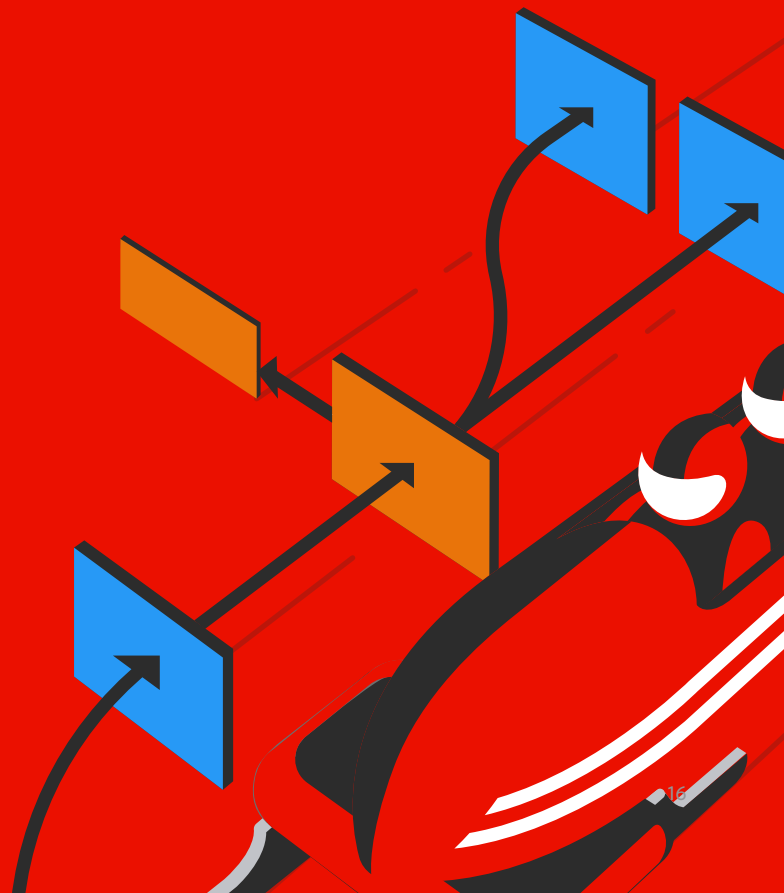
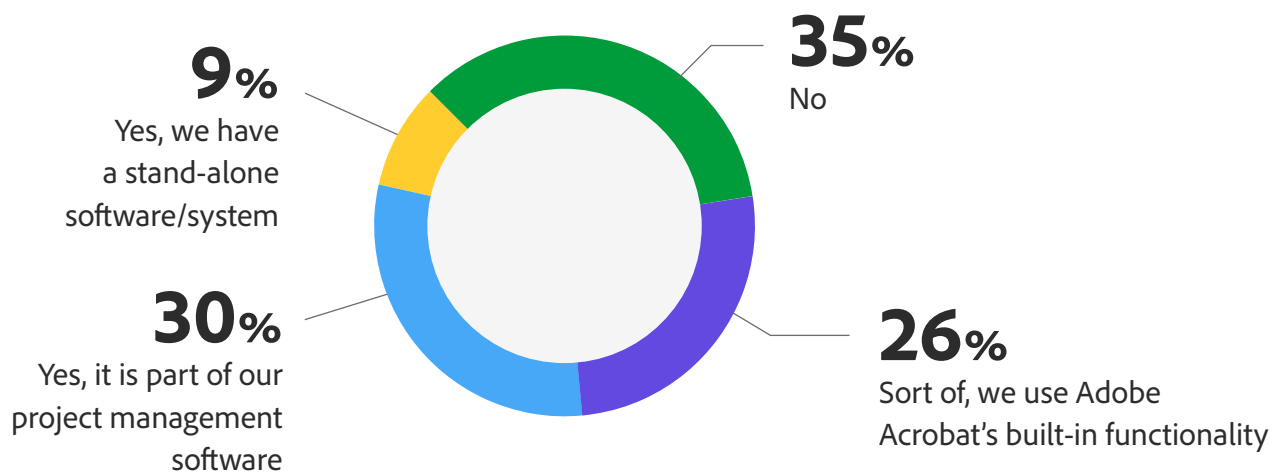# Execute on digital work with speed and efficiency.

By streamlining your work execution processes, you eliminate time-consuming administrative tasks, communicate in the context of the work, and decrease time-to-market. You find that your team finally has time to focus on creativity and innovation. Here are the goals you 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 over the latest version, 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 up the revision process. A digital proofing solution can get 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 proofing software to collaborate with clients and collect/track feedback?

Source: 2018 IHCIR

9%
Yes, we have a stand-alone software/system

30%
Yes, it is part of our project management software

35%
No

26%
Sort of, we use Adobe Acrobat's built-in functionality

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 visibility and ability to manage all creative projects through the entire natural lifecycle of work. By managing the work lifecycle 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 in status meetings or by updating spreadsheets. Collaborating in context increases productivity because you 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 high-value, high-reward creative work.
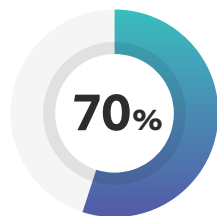
70%   70% of creatives say they need more "creative time," and more than 60% report having "great ideas" but neither the time nor support to execute, according to Getty's Images.
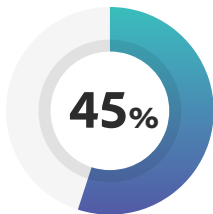
45%   On average, workers use only 45% of their time on their primary job duties.
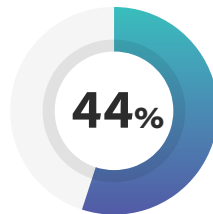
44%   44% of creative services teams are currently not tracking time.

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 its 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.
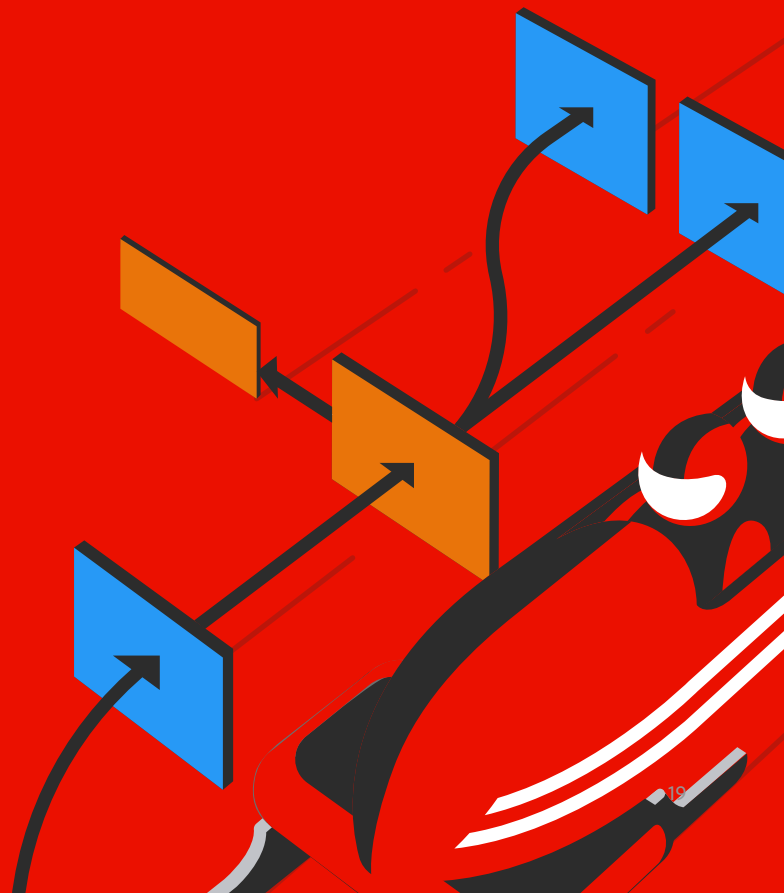
Deliver great work with digital asset management.

Delivery of great work should be cause for celebration, and it can be with the right digital work management processes. With better processes, you streamline final approvals, publish assets on time, and maintain visibility into the entire process to measure success and recognize team members' contributions to 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 help you set up approval paths for final reviews, and they 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.

63%
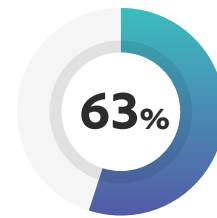
63% of creative teams report using email to share files between locations.

2. Invest in digital asset management (DAM).

Having a DAM system in place can greatly improve your team's productivity. A DAM not only provides a central storage location for all digital assets and content types, but it also 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.

70%
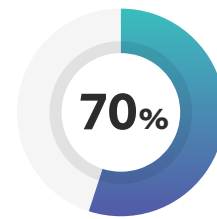
70% of marketers agree that the use of so many tools has made work more complicated.

3. 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?

Source: 2018 IHCIR

25% Yes, we use a system for our team/division

32% Yes, we use an enterprise-wide system

42% No
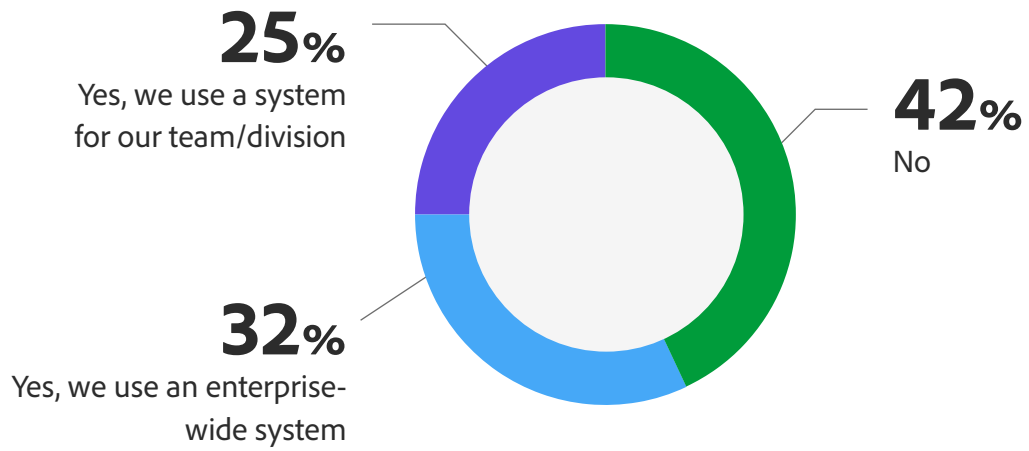
Stage 6: Measure.

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 aspect 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's critical to your team's overall success. Tracking metrics helps you see potential growth opportunities, improve productivity and quality, and justify your value to the organization.

The benefits of work management.

Managing myriad 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, marketing operations, 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 always knows 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 also prevent delays and decrease time to market.

Make better-informed decisions.

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

Reclaim time for innovation and creativity.

When you 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.

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.
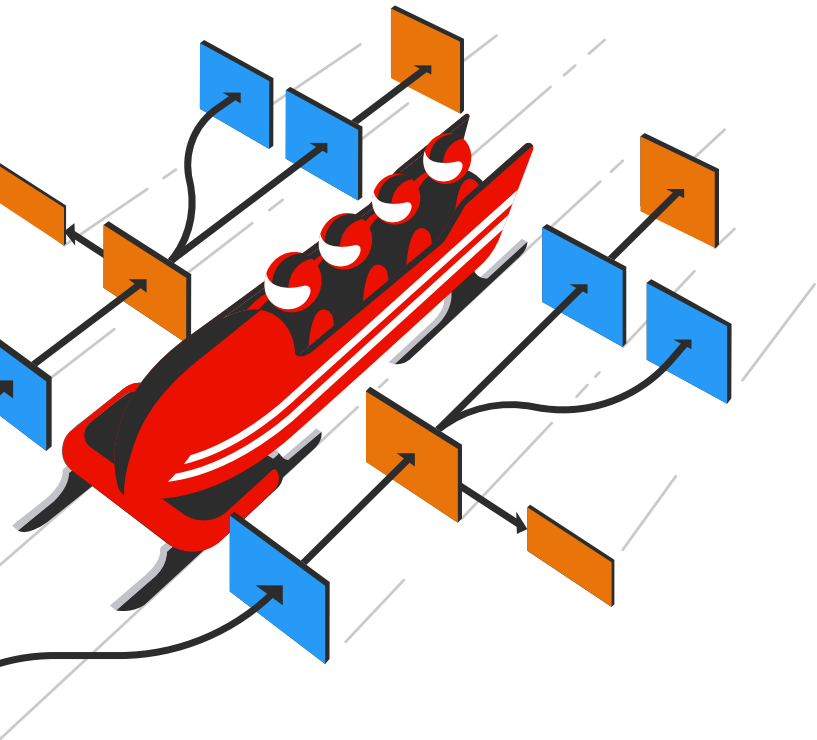
Collaborative work management.

Adobe Workfront enables work management by connecting strategy to delivery; integrating people, data, processes, and technology across the organization; and managing the entire lifecycle of work from start to finish to optimize digital work and enable measurable outcomes. Workfront helps companies run more efficiently by centralizing work in a single application so cross-functional teams can connect, collaborate, and execute the right work—from anywhere.

Together, Adobe and Workfront provide marketing teams with a single system to support planning, collaboration, and governance that unlocks organizational productivity. Now, marketers can create and deliver the best customer experiences, while efficiently and seamlessly managing the workflows that bring these experiences to life.

Get details

Sources

"2017 In-House Creative Industry Report," The BOSS Group and Cella Consulting, LLC., May 2017.

"2018 In-House Creative Industry Report," The BOSS Group and Cella Consulting, LLC., 2018.

"U.S. State of Work Report," Workfront, 2018–2019.

 Hardy-Vallee, Benoit, "The Cost of Bad Project Management," Business Journal. February 7, 2012.

"Get Smart About Marketing Burnout," LivePath, accessed April 8, 2015.

"Free the Creative," Fortune Magazine, Oct. 17, 2013.

"State of Work Report," Workfront, 2014–2015.

"The Digital Work Crisis Survey," Workfront and MarTech Today, 2019.

Adobe