GUIDE

The Complete Guide to Request Management

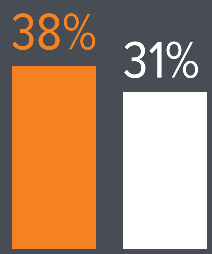
How to Gather and Define Work with Marketing Work Management

Introduction

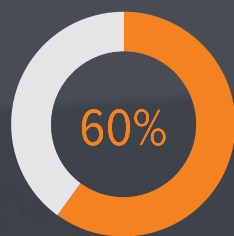
Managing client requests is a painful, chaotic process. Your creative team gets numerous requests every day for a variety of different services. These random requests come from every department—HR wants a new employee flyer, marketing needs a web banner designed, sales wants you to create some cool graphics for a presentation. And they come at you in every way possible: phone calls, emails, taps on the shoulder, or scribbled on a sticky note.

As the requests pile up, your team quickly falls into reactive mode, working on projects for the person who makes the most noise. Meanwhile, clients complain that your team is unresponsive, takes too long to fulfill their requests, and they don't see a lot of value to the organization from your services. Clients start to outsource their "important" work leaving your team with the grunt work. Requests get lost or forgotten because there's no real system to track them. There are frequent shifts in business priorities and last-minute fire drills in effort to meet changing demands. To top it off, every fire drill creates a domino effect on subsequent deadlines for other requests. Constant rework is the name of the game because expectations are not defined and managed properly from the start.

Fortunately, the situation is not as hopeless as it seems.



GAINING RESPECT FROM INTERNAL CLIENTS (38%) AND VALUE RECOGNITION (31%) ARE TWO OF THE TOP FIVE CHALLENGES FOR IN-HOUSE CREATIVE TEAMS.[1]



60% OF CREATIVE WORKERS ARE EITHER COMPLETELY OVERWHELMED OR BARELY MEETING THEIR DEADLINES.[2]

Organize the Chaos with Marketing Work Management

Marketing Work Management (MWM) is a fundamental change in the way creative services teams approach, organize, and track work requests. MWM focuses on providing the right amount of structure to balance creativity and productivity. It incorporates the smartest practices in the industry while eliminating common inefficiencies creative teams struggle with, such as:

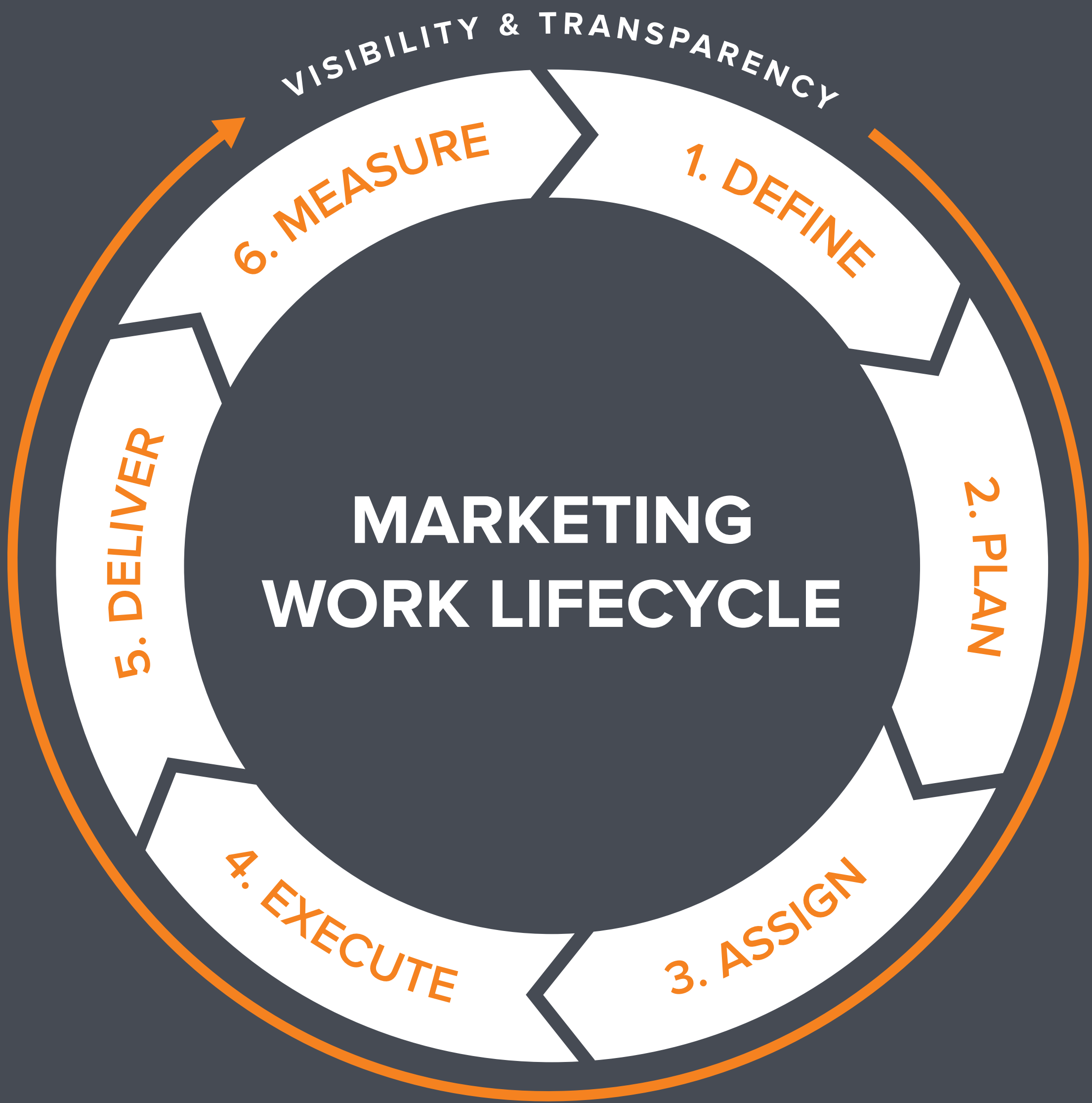
- Using too many tools to organize work
- Lacking a standardized set of processes for work requests and project planning
- Relying on daily or weekly status meetings
- Utilizing email as a collaboration tool
- Spending too much time on administrative tasks instead of creative work

These types of productivity barriers are at the core of why many creative teams struggle with work request chaos, burnout, missed deadlines, and a lack of perceived value. But, when creative teams apply the MWM approach to work, they can expect to experience greater productivity, more transparency and trust, increased visibility, and more time to focus on the high-value creative work.

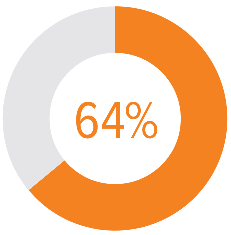
In this guide, you will learn how to effectively use the MWM approach to better manage the work request process. Implemented correctly, the MWM approach results in reduced chaos, fewer fire drills, less rework, and a higher perception of value.

The Marketing Work Life Cycle

To begin, it's important to understand the big picture. Defining work, which includes managing requests, is only the first stage in a much larger workflow. 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.



DEFINE IS THE FIRST STAGE OF THE MARKETING WORK LIFECYCLE AND THE FOCUS OF THIS GUIDE. IN THE DEFINE STAGE, THE WORK IS REQUESTED, GATHERED, AND UNDERSTOOD SO THE TEAM CAN COMPLETE THE WORK ON TIME AND FULFILL DESIRED OUTCOMES.



64% OF WORKERS SAY THERE IS OFTEN CONFUSION AT THEIR COMPANY ABOUT WHO IS DOING WHAT.[3]

ONLY 2.5% OF COMPANIES SUCCESSFULLY COMPLETE 100% OF THEIR PROJECTS.[4]

How to Define Work with Marketing Work Management

As the first stage of the marketing workflow, “Define” is where work originates for creative teams. Having some process or organization from the start is imperative, but many marketing and creative services teams lack standardized processes for this stage. The result is that their workflow begins and ends chaotically. The lack of clear processes leads to frustration, poor productivity, overburdened resources, unidentifiable priorities, fire drills, delays, and more.

In the MWM methodology, process standardization must start at the beginning of the work lifecycle—with the way the team receives requests. If the beginning is organized, maintaining an organized workflow throughout the life of the project is much easier. Rather than receiving work requests in a number of ways to a number of people at any given time, the MWM method captures and defines all work requests in a unified manner from the start of the work process.

In the Define stage, six steps are critical to the MWM approach:

STEP 1	**Centralize request management**
STEP 2	**Use creative briefs**
STEP 3	**Review requests**
STEP 4	**Define requirements and gather expectations**
STEP 5	**Share ideas**
STEP 6	**Visualize outcomes**

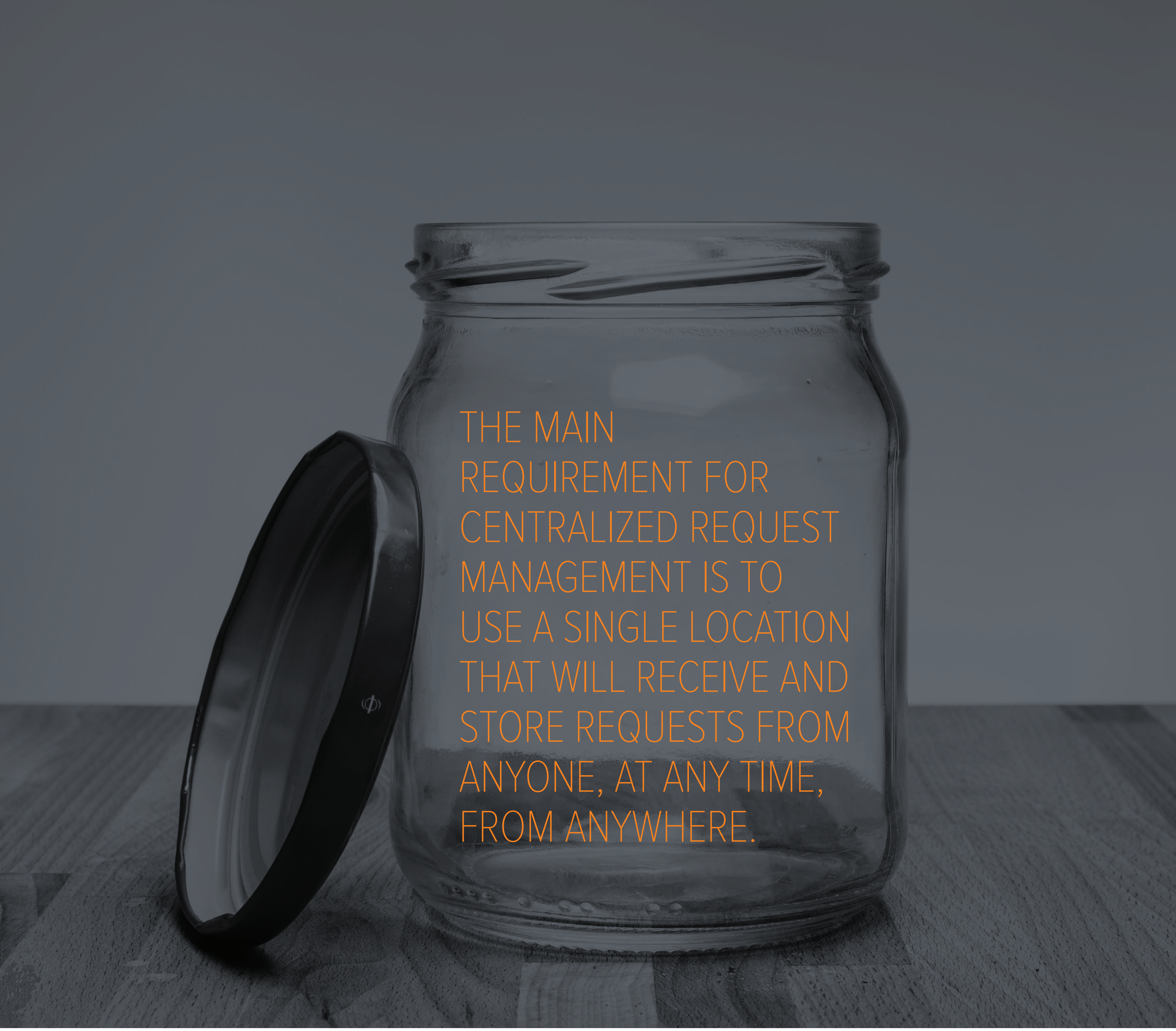
The following pages will show you how to apply these steps.

STEP 1: CENTRALIZE REQUEST MANAGEMENT

In a centralized request management system, you receive, track, and follow work from start to finish from one location. Centralization creates visibility into the request process. With a centralized request management process in place, clients submit all work requests (big, small, and ad hoc) to a central location using an integrated work-request tool. A designated traffic manager then reviews requests and moves them through the system.

Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
1	Designate a central accessible location for all requests	It's important that all requests are sent to one location for viewing, assigning, and tracking instead of coming in via emails, phone calls, sticky notes, or a tap on the shoulder. You can do this several ways—with an online form, an email alias like creativerequests@yourcompany.com, or ideally, with a cloud-based work management solution. The main requirement is to use a single location that will receive and store requests from anyone, at any time, from anywhere.
2	Designate a traffic manager	A traffic manager is someone who is responsible for scheduling all jobs and moving them through the work lifecycle. A designated traffic manager is a crucial component of keeping the work flowing smoothly. The traffic manager reviews each submitted job and tracks it throughout its lifecycle. The traffic manager also manages the workflow and task dependencies. At smaller organizations, a traffic manager may also be the creative director, project manager, production manager, or an account manager if the team is structured like an agency. Whether your organization has the resources for a designated traffic manager or it's part of a person's larger role on the team, what's crucial is that there is one person designated to manage requests end to end.
3	Develop a system for request submission	Now decide how you want to receive requests. Do you want everyone to email the traffic manager, submit an online form that populates an Excel file, or use a cloud-based request management or work management tool? Assess your work environment and decide which is best for you and your clients. Then, communicate and consistently enforce this new process.
4	Know what to include in each type of request	Your team gets a variety of requests, but they also get a lot of requests for the same types of work. Use templates to develop the appropriate request forms for each type of work you're frequently asked to do. For example, some requests may only require the requestor's contact information, a brief summary of the project, and a complete-by date. Others may require more details such as documents or art attachments, a list of key stakeholders on the project, a budget for printing costs, etc.
5	Develop a protocol for what happens once a request is received	Different requests have different levels of complexity. You can immediately hand off small, quick projects that require the work of only one individual with little to no intake. Large, complex projects require more upfront evaluation of the project's objectives, resources, and schedule. Have your designated traffic manager assess all incoming requests and queue them according to the type of request and the procedures you've developed for managing them.



The Benefits

The biggest benefit of centralizing your request management is visibility. With request management centralized, you have a comprehensive view into the work you need to do, who is doing it, and where it is in the pipeline. This visibility gives you the ability to see all of the existing requests for your team and provides a holistic picture that allows you to plan and prioritize accordingly. In addition, centralization streamlines the request process to make sure no requests slip through the cracks and saves time with managing, receiving, assigning, and tracking requests.

STEP 2: USE CREATIVE BRIEFS

A creative brief is a document that outlines the work requested, the goals, the schedule, the budget, and the objectives of the project. Prior to initiating the work, the client and the creative services team develop the brief through meetings, interviews, and discussions.

Unfortunately, most creative teams do not currently follow this best practice. In fact, only 23 percent of in-house creative teams use creative briefs for all projects; 17 percent say they never use them; and 60 percent say they use them only on Tier 1 projects.[5] Without a creative brief, the entire workflow begins in chaos.

To standardize the request process and ensure your team has a clear and consistent understanding of the work requested, the MWM approach requires standard creative briefs for all the common types of work your team does (web design, banner ads, billboard ads, digital asset design, etc.). The brief should provide enough detail about the work requested for your team to understand how long the work will take, what it will cost, who is involved, what the deliverable is, and what the expected outcome will look like. Make creative briefs a mandatory part of the request process. Let clients know that without a completed brief, a request cannot go into the work queue for completion.

Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
①	How to design your creative brief	Some projects may require more detailed planning than others, so don't try to use one detailed creative brief template for all your work. This is where electronic creative briefs in marketing work management tools come in handy; if it's a quality tool, you can customize the design to cover only the information necessary for that specific type of project. Effective creative briefs rely on good questions. If you can ask the right questions, it will make your life easier. Make sure to clarify the who, what, where, when, and how of the deliverable.
②	Options for what to include in your creative brief	**1. Project context** **Background/Challenge** To create a great product or asset, your team needs some context for the assigned project. They need to know the "why" of the project. What's the need? What's the pain? What's the opportunity or challenge? Your team may not need to know every nitty-gritty historical detail of the project, so don't waste time trying to pin down unimportant details; only require information that's necessary for your team to do great work. **Target Audience/Market** How will you know how to target your deliverables unless you know who's going to see, handle, watch, or read what you're creating? Make sure you know the "who" of the project before beginning. Don't just simply write "potential customers." What about these potential customers? How old are they? Where are they from? What's their average salary? What are their interests? This type of information can make the difference between a successful campaign and a huge waste of time and money.

		2. Desired deliverable(s) **Description/Summary** Clients often have a picture in their head of what they want, but it can require a little digging to get them to describe their vision. It's your job to give them the opportunity to tell you what they actually want your team to do and to lay out all the details so you feel confident you understand. **Key Messages** Boil down the deliverable or campaign to a few key messages. What are they? What does this project most need to convey or evoke from the audience? Some agencies call this the "big idea." **Brand/Campaign Details** This section is especially important for external agencies that may have to learn a whole new brand with every project, but even in-house teams should cover the details of "how" to execute the work. Make sure to clarify all the details, such as the tone, color, font, size, logo specs, and any other guidelines related to the project.
③	When to use a creative brief	As a best practice, advice found in Cella's 2014 In-house Creative Services Report is sound:[6] *"All Tier 1 projects (highly creative, conceptual projects) should include a creative brief. Requiring a creative brief for non-Tier 1 projects may require too much effort on the part of your team and/or your clients. An abbreviated brief for your Tier 2 projects and simply an intake form for your Tier 3 projects are best practices."* Since creative briefs are called "briefs" for a reason, and since not all creative projects look alike, creative briefs don't always come in "one-size-fits-all" packages. Use the three creative project tiers outlined in the Cella report as your guide when determining how detailed a creative brief should be: **Tier 1: Non-standard, non-iterative, highly conceptual work** This work is the most prone to ambiguity, which means creative briefs are a must. Otherwise, team members may either stress out from not knowing where to start or risk going in a completely wrong direction. Think about a full advertising campaign; you'll want a lot of direction from the client before you set your team loose. **Tier 2: Previous work executed across deliverables** Since Tier 2 deals with already defined and completed work, it doesn't need quite the detail that a Tier 1 creative brief calls for. Your team still runs a high risk, however, if they don't use one. For example, a Tier 2 project could be a website landing page for an internal client. Chances are you've already created dozens of these so you already have a general feel for what the expectations are, but it's always good to make sure you have all the information you need before you start. **Tier 3: Edits, revisions, templated work** Tier 3 requires the briefest brief of all, but even though it's simple, you still want a project description to refer to. Plus, if you let the little things through with sticky notes and hallway conversations rather than requiring some form of a creative brief, you'll quickly become like a fast food joint that delivers fast and cheap to anyone who comes to the drive-through. An alternative to developing your own briefs is to use a marketing work management system with customizable, built-in creative briefs where, during initial request, the client is required to provide certain information for the team. Even in this scenario, as a best practice, it's still recommended that you take the time to meet with the client and ensure that everyone is on the same page before production begins.

④	Who should fill out the creative brief	This is often disputed territory. Is it the client? Is it the creative director? The account manager? The designer or writer assigned to the project? The answer is, it depends. If you're operating as an in-house agency, the best practice is to have the representative from client services or the assigned account manager meet with the client to go through the creative brief. It may make sense for your agency to include the creative director in this process as well to make sure everyone has a sound understanding of the project requirements. If you're an in-house creative services team, you need to determine what process works best for your team's unique workflow. Perhaps it makes the most sense for the creative director to meet with the internal client to fill out the brief. Maybe your team has traffic managers or production managers that would better fill that role. At the end of the day, the thing you want to avoid is sending a document to the client to fill out on their own as it can lead to a number of problems: • Client takes too long to fill it out • Client gets frustrated and doesn't fill it out at all • Client only fills out some of the information • Your team reads the brief and doesn't understand what the client means

The Benefits

A creative brief is the map that you use throughout the work to ensure that you get to your final destination—delivering quality work that meets your client's expectations. With no map, it's likely your team will get lost along the way. The result? The client requests rework when you misunderstood expectations or you encounter frequent work delays while you manually look for information that a creative brief incorporates right at the start. With a creative brief as your compass, however, you can be more productive, better plan and utilize your resources, avoid rework, and deliver an overall better product and experience for your client. Subsequently, you'll also save time and money because you had good communication upfront.

AS A BEST PRACTICE, TAKE TIME TO MEET WITH THE CLIENT TO GO THROUGH THE CREATIVE BRIEF.

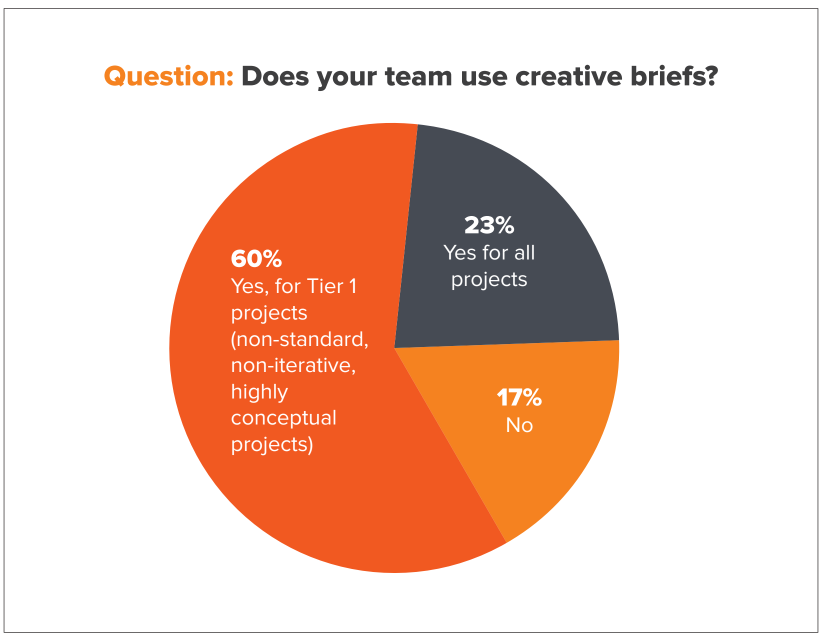
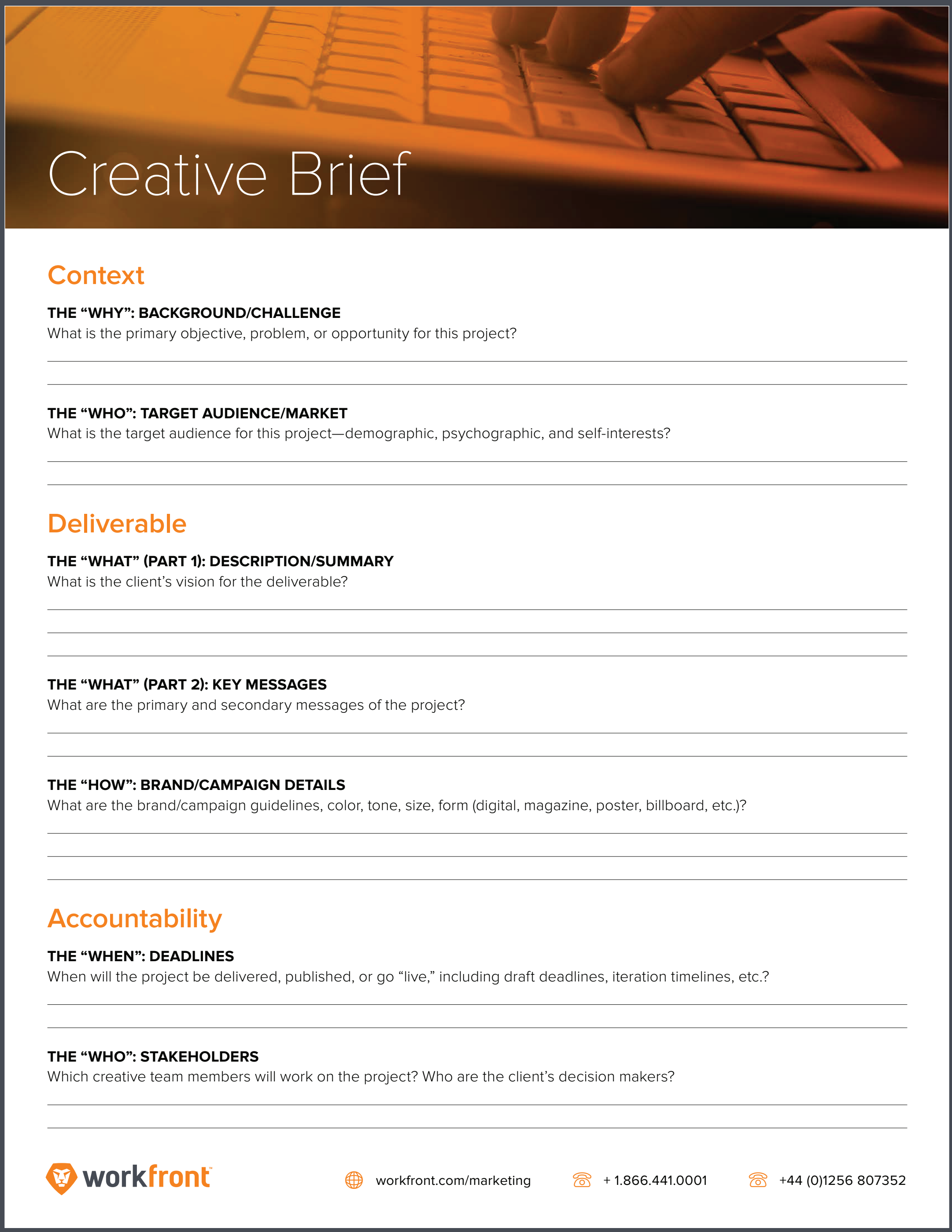


Figure 1: From the 2015 IHCSIR

EFFECTIVE CREATIVE BRIEFS RELY ON GOOD QUESTIONS. MAKE SURE TO CLARIFY THE WHO, WHAT, WHERE, WHEN, AND HOW OF THE DELIVERABLE.



Creative Brief

Context

THE "WHY": BACKGROUND/CHALLENGE
What is the primary objective, problem, or opportunity for this project?

THE "WHO": TARGET AUDIENCE/MARKET
What is the target audience for this project—demographic, psychographic, and self-interests?

Deliverable

THE "WHAT" (PART 1): DESCRIPTION/SUMMARY
What is the client's vision for the deliverable?

THE "WHAT" (PART 2): KEY MESSAGES
What are the primary and secondary messages of the project?

THE "HOW": BRAND/CAMPAIGN DETAILS
What are the brand/campaign guidelines, color, tone, size, form (digital, magazine, poster, billboard, etc.)?

Accountability

THE "WHEN": DEADLINES
When will the project be delivered, published, or go "live," including draft deadlines, iteration timelines, etc.?

THE "WHO": STAKEHOLDERS
Which creative team members will work on the project? Who are the client's decision makers?

workfront workfront.com/marketing + 1.866.441.0001 +44 (0)1256 807352

Figure 2: Creative Brief Sample

STEP 3: REVIEW THE REQUEST

In this step, you review what the work is and how this work fits into the bigger picture. Review the request to bring your team into the process, get their input, and ensure that they understand the creative brief.

Here are the steps you should follow:

Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
①	Brief your team on the project	Now that you have all the details of the project gathered in the creative brief, it's time to bring your team together to review the details. This meeting gives the team an opportunity to look at what is being asked, what the deliverables are, what the timeline is, etc. Give them the opportunity to ask questions and push back on areas where they have concerns. This is an internal meeting without the client so discussion and questioning is encouraged as a way to ultimately achieve consensus and better outcomes.
②	Hold a kickoff call	Next, you'll want to bring your client and the team together for a kickoff call or meeting. In this meeting, both parties can ask questions about the project and set expectations. Let the client ask specific team members about their approach, similar projects done previously, or any other questions they may have. Likewise, this meeting provides an opportunity to get a better sense of the client—their personality and style preferences that may inform the work.
③	Clarify where necessary	Even with a detailed creative brief, there are likely areas that certain team members won't understand or will need clarity on. Now is the time to ask those questions and add additional details to the creative brief to make sure everyone is on the same page.

A KICKOFF MEETING PROVIDES AN OPPORTUNITY TO GET A BETTER SENSE OF THE CLIENT—THEIR PERSONALITY AND STYLE PREFERENCES THAT MAY INFORM THE WORK.

The Benefits

Good communication practices are established at the start of the project, when you take the time to review everything as a team. This extra effort eliminates confusion, rework, and delays down the road and helps set clearer expectations for everyone—your team and your clients. The review process also improves the client experience. Clients feel that you've taken the time to really understand their strategic goals and are in alignment with their expectations.

STEP 4: DEFINE THE REQUIREMENTS AND GATHER EXPECTATIONS

To define requirements, you need to specify the features or attributes of the project deliverables. Analyze clients' needs, wants, and wishes so you can best understand the requirements and expectations of the project. Whether it's the size of the ad, a color scheme, or something more arbitrary such as making the design "pop," make sure you understand exactly what your client expects. Otherwise, you are likely to miss the mark and disappoint.

It is also important to involve all key stakeholders and participants in the requirements-gathering process to build consensus and ensure expectations are clearly understood by all. This step is an important part of the MWM method and is crucial for ensuring client satisfaction and avoiding communication mishaps.

Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
1	Understand the project objectives and goals	Refer back to the creative brief of the project to get a clear understanding of the business needs and the intended outcomes. If you don't see a way to meet an objective or goal, then get clarity or manage the expectations with the client so it's clear to everyone what you can or cannot deliver.
2	Break the project into sub-phases	Identify the work processes that must occur to complete the project. Break the overall project into milestones. For example, to complete a webinar campaign, your team may need to create a banner ad, a landing page, and an HTML email template. You have now broken the project down into three sub-phases.
3	Break sub-phases into tasks	Now, take your sub-phases and break them down further into tasks. For example, to create a landing page requires a writer to write the copy, a graphic designer to design the page, and a web designer to build a contact form. By defining the tasks and the job roles necessary to complete this phase of the project, it's easier to prioritize the work, identify dependencies, and assign the work to the appropriate team members.
4	Prioritize the requirements	Identify the requirements to meet real client needs. Some classifications include: need, want, dream, must-have, desired, and like. For example, a client may want a dozen different designs to choose from, but must have at least three (a much more feasible number).
5	Evaluate your resources	Through the process of breaking the project into sub-phases and tasks, you identify the tasks and the job roles for the project. Now, evaluate your team members, their current workloads, the time they need to do "lights on" work (i.e., daily administrative tasks like check email, attend meetings, etc.), and their skill sets. If you find that your team either lacks the necessary skills or simply doesn't have the bandwidth for certain aspects of the work, you can plan from the start to outsource certain pieces of the project.
6	Develop a budget	Build out a budget based on the tasks you've described and the resources you need. Using previously tracked data about how long specific tasks take will help you make accurate budget estimates.
7	Define the scope	Clarify what the deliverables are, how many iterations of revisions are included, and how the asset will be delivered (i.e., digital, print, etc.).

8	Develop a schedule	Develop a schedule that accounts for every task and is achievable without overburdening resources. Communicate all deadlines to clients, and make it clear what the timeline is for their feedback and that delays on their end may result in overall project delays.
9	Hold reviews of requirements with key stakeholders	For a more accurate understanding of the project and higher customer satisfaction, review the requirements with the client to verify expectations.

The Benefits

This step can seem tedious and is often skipped, but it's the best way to ensure all stakeholders are on the same page about the scope and details of the project. When requirements aren't defined upfront, it's easy for stakeholders to offer contrary feedback halfway through that may delay or derail a project. Defining the requirements at the start ensures a more productive work environment. There is less rework, which saves time and money on the project, increases resource utilization, and ensures that the work you are doing aligns with the client's strategic goals.

IF YOU DON'T SEE A WAY TO MEET AN OBJECTIVE OR GOAL, THEN GET CLARITY OR MANAGE THE EXPECTATIONS WITH THE CLIENT SO IT'S CLEAR TO EVERYONE WHAT YOU CAN OR CANNOT DELIVER.

STEP 5: SHARE IDEAS

If you want to drive home the value your team offers clients, you need to share with them what you know. Be proactive and provide them with useful ideas that improve outcomes. Based on your expertise, you may suggest different approaches to the client. Perhaps they want to use a pale color scheme for a web ad, but you know that using dark colors like red and black is eye-catching and more likely to get clicks. When these discussions happen in this phase, there is less rework, expectations align, and the quality and value of the work is elevated.

Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
①	Be proactive	Lack of value-added strategic thinking is one of the top five causes of pain and friction in client relationships.[7] Be a value creator by seeking out new sources of information and insight. Think about new ways your client can capitalize on opportunities or address problems. Identify threats to your client's results and share ideas about how to combat them.
②	Build proof your ideas work	It's not enough to just share your ideas; you need to build credibility around them if you want your client to get on board. Show results from other clients with similar problems. Or show how your ideas are helping others produce results. How will this help generate more revenue? What will they gain? Be as specific as possible about the benefits of the client accepting your idea.
③	Ask permission	You need to understand the personalities you are dealing with and be sensitive to their preferences. Always ask permission to share ideas. If the client declines, unless it is truly critical to meeting expectations, don't push further.
④	Effectively deal with client resistance to good ideas	Sometimes you know that what your client is asking you to do will not achieve the desired results or is not in line with industry best practices. Despite attempts to share ideas you believe will elicit better results, they won't listen. If you've already tried building proof and you believe strongly they need to consider your idea, seek stakeholder input. If other stakeholders agree, then you need to work delicately as a team to convince the client to accept the solution.
⑤	Remember the client is always right	At the end of the day, if a client isn't interested in your ideas and wants to do things their way, then you have to accept this. But it is important, as you'll see in the next step, to visualize the outcome with them so that success is defined in a way that lets you both look good.

LACK OF VALUE-ADDED STRATEGIC THINKING IS ONE OF THE TOP FIVE CAUSES OF PAIN AND FRICTION IN CLIENT RELATIONSHIPS.[7]

The Benefits

When you share ideas with your clients, you build trust and respect. Clients stop seeing you as an automaton doing the work and more as an individual—a strategic partner—with real knowledge that can help them meet their goals and objectives. Subsequently, the value of your entire creative services team increases for your clients and the organization as a whole. Your good ideas receive recognition from clients and other stakeholders, and the overall client experience is improved through your additional insights.

STEP 6: VISUALIZE THE OUTCOME

To visualize the outcome, you must understand from the beginning what the goals of the project are and what results equate with success. With your client, develop a view of what success looks like. Is it simply having a design the client likes or is it how many clicks a web banner receives? When the outcome is clear to you and your client, you are more likely to meet expectations, satisfy your client, and see measurable results of your work.

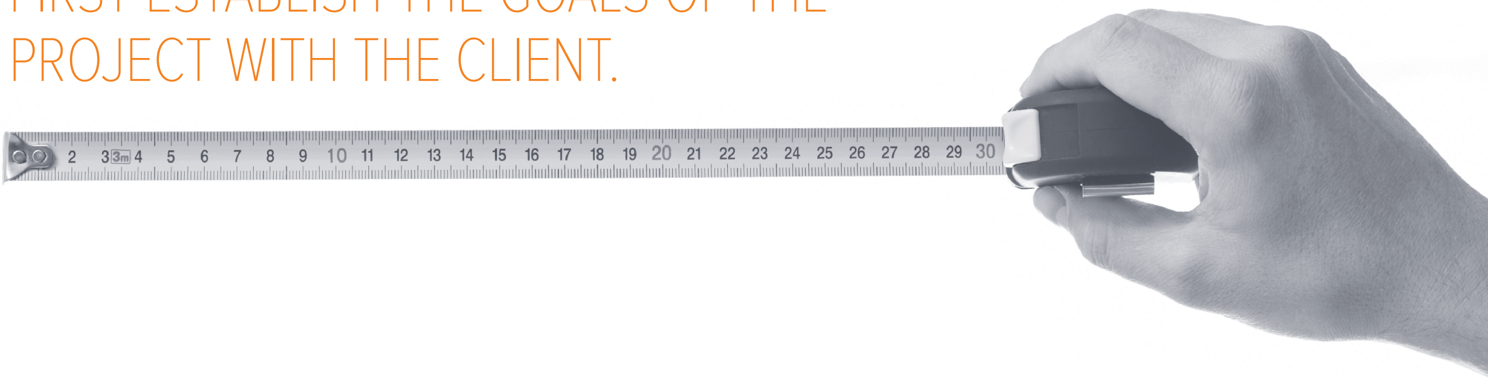
Recommended actions and strategies

	WHAT TO DO	HOW TO DO IT
①	Establish a baseline	To measure success, you need to first establish the goals of the project with the client. Then, determine what key performance indicators (KPIs), if applicable, you will use to measure whether you meet those goals. These indicators should be quantifiable measurements such as page views, clicks, event attendees, etc. Once the goals and KPIs are established, look at historical data to set a baseline. Perhaps the last video you produced received 1,500 views and 225 shares—these numbers are your baseline. From here, you and the client should set a benchmark for this project. For example, a five percent increase in downloads may be a good benchmark for this project.
②	Deal with unrealistic benchmarks	Sometimes your client wants to establish a benchmark you know you simply cannot meet. It's important to set expectations at the start of the project so there isn't dissatisfaction at the end. If the benchmarks simply aren't within the realm of what you think you can deliver, don't agree to them. Explain why you don't think they're achievable and then offer an alternative benchmark that you can meet. An honest and open discussion about what's achievable is in everyone's best interest.
③	Clarify mutual expectations	Clients may come to a project with expectations that certain aspects be handled a certain way. For example, a client expresses concern that three illustrations (your standard number) are not enough. When you dig deeper, the client reveals that on the last project none of the designs met her satisfaction, but she felt forced to pick one because so much time went into developing the concepts to completion. The additional information provides a better understanding of your client's concerns and expectations. It allows you to accommodate those concerns by working with her more closely in the initial concept stage than you normally would to ensure that there are several designs she likes before you take the time to fully sketch them out.
④	Ask questions to understand what it is they value	Sometimes a client may say they want a certain result, but when you inquire further you learn that they really have a different goal in mind. For example, a client says the number of clicks is important, but on further investigation you discover what they really value are the leads they believe those clicks will generate. So probe deep enough to make sure you understand what it is they really value and want to achieve. They may be correct in how to best get there, but seeing their true goal may allow you to provide alternative avenues for success.
⑤	Listen with the intent to understand	Listening—true listening—is a skill. Often people are only half-listening and focusing more on what they want to say next. But if you want to deliver the best product with the best outcomes for your client, you need to really listen to what they are saying. Ask smart questions rather than tell someone what you know. Even if you are certain you "know" what they are saying, don't cut them off. It's important to make your client feel heard.

The Benefits

It's much easier to deliver a product your client loves and that meets their goals when you know what those goals are and you've discussed together how to best achieve them. Visualizing outcomes is an important part of continuing to develop a relationship of trust and mutual respect. Establishing outcomes also ensures a more productive work environment that will save you time and money in the long run. By communicating upfront about expectations and outcomes there will be fewer redo requests and better strategic alignment with the client's goals.

TO MEASURE SUCCESS, YOU NEED TO FIRST ESTABLISH THE GOALS OF THE PROJECT WITH THE CLIENT.



Conclusion

In the Define stage, MWM sets up standard processes to ensure all work is received, defined, and tracked in a cohesive and visible manner. Request management is streamlined from the start to avoid chaos down the road. By following the steps outlined in this guide, you'll gain control of your request management process. This control improves team productivity, eliminates common confusions and delays, builds trust, and provides a way to identify and work on the most strategic work first. Most importantly, the Define stage creates a solid foundation upon which the rest of the work management process can continue to build.

Centralize your request management process with Workfront

Workfront is a cloud-based Marketing Work Management (MWM) solution that helps in-house creative teams control the chaos of random work requests.

- Improve team productivity
- Build credibility and client satisfaction
- Increase visibility into your team's work
- Focus more time on creativity

workfront.com/marketing

Endnotes

1. The BOSS Group, Cella Consulting, LLC and InSource, *2015 In-House Creative Services Industry Report*, 2015.

2. "Workfront Survey: Workers Overwhelmed by Deadlines Blame Lack of Focus and Constant Interruptions." Workfront. November 14, 2013. http:// www.workfront.com/press-releases/ workfront-survey-workers-overwhelmeddeadlines-blame-lack-focus-constantinterruptions.

3. "Workfront Survey: Workers Overwhelmed by Deadlines Blame Lack of Focus and Constant Interruptions."

4. Hardy-Vallee, Benoit. "The Cost of Bad Project Management." Business Journal. February 7, 2012. http://www.gallup.com/businessjournal/152429/cost-bad-project-management.aspx.

5. "2015 In-house Creative Services Industry Report."

6. The BOSS Group, Cella Consulting, LLC and InSource, *2014 In-House Creative Services Industry Report*, April 2014.

7. Gass, Michael. "Study: The Top Five Frictions in Client and Ad Agency Relationships." Fuel Lines. Jan. 31, 2012. http://www.fuelingnewbusiness.com/2012/01/31/study-the-top-five-causes-of-friction-in-client-and-ad-agency-relationships/.