A Guide to Happy Creatives and Healthy Bottom Lines

Finding the "Agency Holy Grail" using Marketing Work Management

workfront™

UNRIVALED SATISFACTION COMES FROM CREATING AWARD-WINNING CAMPAIGNS WITH THE PERFECT BLEND OF ART AND INNOVATION. That "creative itch" is, no doubt, the reason you chose to make your marketing agency your life's work. But too often, agency life becomes a living nightmare that sucks every creative whim or thought from your soul.

While you chase the brass ring of creative awards and accolades, the reality is that you endure an unending struggle to achieve and maintain healthy profit margins with clients hammering you on price and speed of delivery. You face cutthroat competition from new and established agencies relentlessly nipping at your heels. And you live under the constant threat of client defection. In fact, Don Draper of *Mad Men* fame got it right—both then and now— when he memorably said that the day an agency wins a client is the day it starts to lose that client. In fact, with so many impossible demands, the only opportunity for creativity seems to be inventing new ways to keep your creative team happy under the strain of brutal customer demands and unforgiving deadlines.

> "Companies lose between $200 – $300 billion a year due to absenteeism, tardiness, burnout, decreased productivity, increased employee turnover, and medical insurance costs resulting from employee work-related stress"
>
> - "Time Management Statistics," National Safety Council, Priority Magazine, accessed June 2014

In a futile attempt to deal with these challenges, agencies often resort to counterproductive measures. They hire more resources, taking a greater toll on profit margins. They hold more status meeting to keep projects on track and moving forward, but end up stealing precious time from their creatives. Ironically, this pressure on creative teams to do more with less ultimately sacrifices the quality of their work—and the agency's reputation along with it.

But of course, your best creatives won't be willing to sacrifice quality. As their workload piles higher and higher, they'll work overtime, weekends, and whenever else they have a spare waking (or even non-waking) moment. Theirs becomes a desperate quest to find the time needed to fully tap into their creative juices and produce the next amazingly fresh, market-changing creative campaign that will wow your clients and keep them cutting checks.

Unfortunately, putting your best creatives through that relentless pace leads to burnout and perhaps even defection to an agency that holds the promise of less demanding hours, a positive work environment, and the opportunity to spend more time actually being creative. Such an agency would be the Holy Grail for creatives and agency executives alike. To find that Holy Grail, you might have already realized you need to leave behind the time-sucking inefficiencies of antiquated manual processes and disjointed point products— such as spreadsheets and other office productivity tools—you use to manage your work.

Maybe you've considered a move to traditional Project and Portfolio Management (PPM)—or even so-called project management for marketing offerings—to manage your creative work processes. While these solutions promise a change from the status quo, they fall considerably short of enabling you to reclaim the time and efficiencies needed to retain your best talent, outdistance the competition, hit your profit margin targets, and attract and keep the clients you want. Achieving all of that requires a highly collaborative work management solution that caters specifically to your needs as a marketing agency.

56%
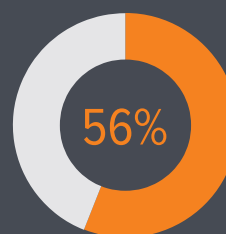
"56 OF MARKETERS SAY UNPRODUCTIVE MEETINGS IS ONE OF THEIR TOP FOUR WORK INEFFICIENCIES."

– WORKFRONT MARKETING PROFESSIONALS SURVEY DATA

But how do you really decide what's the best fit for your agency? You have to understand your options. To give you that understanding, this paper provides quick insight into the differences, strengths, and weaknesses of your choices, including the following:

- Settling for the status quo

- Banking on project management for marketing

- Making do with "marketing lightweights"

- Investing in Marketing Work Management

KEY DELIVERABLES IN THE AGENCY QUEST FOR THE HOLY GRAIL

Finding the Holy Grail of marketing agencies requires a solution that helps you reclaim time. This will free you from the mind-numbing and time-wasting activities that keep you from focusing on what really matters. Such a solution will successfully deliver work management essentials that enable you to:

- **MANAGE ALL YOUR WORK IN ONE PLACE**. Having a single solution that manages your entire work lifecycle in one place eliminates wasted time gathering information from disjointed tools, manually creating reports, and trying to keep everyone in the loop. Your solution needs to seamlessly give all stakeholders visibility into work progress and status from a single source of truth. It needs to be able to provide your clients and agency leadership with concrete data and real-time insights into what your teams are doing and the value they deliver. It also needs to help ensure those teams can focus on the right work, at the right time, and with access to the information they need to create high-quality deliverables.

- **AUTOMATE WORK PROCESSES**. In the agency world, the term "process" often gets interpreted as "fake work" or "bureaucracy." That's typically because business processes are often the primary culprit in limiting time for creative work. Even though processes are a necessity in keeping projects on track and within scope, you need a solution that uses process to give your team *more* time to be creative, not less.

  Your agency solution should automate common processes so your teams don't have to start from scratch every time they launch a new project or campaign. It should help you build team consensus and make clear to every team member who is responsible for what, when each step in the process should take place, and what the expectations are for all aspects of the project. Ultimately, your solution should let you worry less about logistics and more about generating top-notch creative and deliverables.

- **UNIFY COLLABORATION**. Daily status meetings, long email chains, phone calls, and isolated instant messages don't promote effective collaboration. Agreed-upon decisions, action items, and essential information often get forgotten, scattered, buried, and lost among all these disconnected forms of communication. You need to invest in a solution that unifies all your collaboration in one platform, creating a single source of truth for decisions, requests, updates, assignments, plans, roadblocks, feedback, actions, results, and other critical communications associated with your agency's work.

- **SIMPLIFY AND ENHANCE WORK MANAGEMENT**. The ideal Marketing Work Management solution should give you a flexible, efficient environment that maps to your culture and processes—and grows along with you. It needs to be easy to adopt, implement, and use without requiring a lot of training. It should give you just the right amount of structure to take the chaos out of agency work, while giving you the freedom, flexibility, and time to be as creative as you desire.

RISING ABOVE THE STATUS QUO

You've risen above the days of being a hungry startup. You've assembled a great team of creatives. You've engaged a number of quality clients. Perhaps you've even won a few awards. Now you have to get serious about staying ahead of the competition, winning and retaining clients, and keeping your talent happy. That can't happen if you continue to rely on your old, disconnected, antiquated model of managing agency work. Managing projects with spreadsheets, tracking hours with timesheets, and sharing digital assets via Dropbox or an internal file share system might have been okay when you were first starting out, but it's no longer enough.

Maybe you think you're covered because you've collected a few point solutions along the way. You might have a task management tool or a single-user project management offering. Perhaps you picked up an issue tracking or DevOps product your web developers raved about. You might even have a tool here or there that caters specifically to managing the agency's clients or finances. But when you rely on disconnected tools, you end up with disconnected teams and processes. It's like using duct tape to assemble a bike and hoping it will provide a stable foundation for your ride.

The truth is these disconnected tools don't work well together. They create the opposite experience of what you want from a work management solution. Instead of being able to manage all of your work in one place, it's scattered everywhere, with different members of the team using their tools of choice to manage their daily grind. This creates information silos where no single person has a comprehensive view of all the work. As a result, no one knows what anyone else is doing, making it impossible for teams to be as agile, productive, or responsive as they need to be. It also means that team leaders and members have little insight into dependencies and project status, forcing the need for time-consuming weekly—or even daily—meetings.

The result is that you spend more time wrestling information out of these tools than they're worth.

Worse yet, you're left with no standardized way to track requests, prioritize work, or keep others up to date. And if your project-related communications are similarly spread out among multiple tools, you're likely sacrificing critical clarity regarding what was agreed to, who's doing what, and who's got the ball.

Adding to the problems with the disconnected point products that have become the status quo for startups is the fact that they haven't been designed to address many of the unique needs of agencies. They leave out functional capabilities critical to agency work—such as Digital Asset Management (DAM) and proofing. They also lack the means to scale with agency growth. And their difficult-to-use interfaces hinder users from managing the dynamic projects and numerous moving parts of agency work.

Evolving into a world-class, creatively renowned agency requires that you leave behind the disconnected management tools you used to keep your head above water as a startup. To swim with the big agency fish, you need to rise above the status quo. But you also need to be careful that you don't make the mistake of moving to a new solution that pretends to cater to your needs as a marketing agency, and instead provides limited capabilities and relies on outdated processes and technologies. Such solutions fall far short of allowing you to reclaim the lost time needed to stay ahead of the competition, be more profitable, and give your people the creative time they want and need.

WHAT ABOUT PROJECT MANAGEMENT FOR MARKETING?

Traditional project management solutions have been around for a long time, helping organizations facilitate the various activities and processes involved in executing projects. Over the past few years, a handful of project management vendors have started positioning their offerings as project management for marketing by adding a few features and tools for marketing organizations and agencies. While these solutions may have

helped some agencies tighten up processes and move work through the funnel, most of them are still drowning in work, waiting for approvals stuck in the Twilight Zone, and struggling to effectively manage client requests and expectations.

The reasons these marketing project management solutions fail to address agency needs vary from offering to offering, but most simply don't help agencies manage ad hoc client requests or streamline approvals to keep deliverables tracking to schedule. They have little or no request management capabilities, and most completely ignore the need for project approvals. Some provide no means of prioritizing projects based on their importance or strategic nature, while others' idea of prioritization is to let users simply drag to the top whatever items they think might be most important, regardless of organizational goals.

Of course, each individual offering has its weaknesses. Some don't support the latest trends in executing work, like Agile methodologies that emphasize bite-sized deliverables and frequent review and iteration over monolithic, linear projects. Others push a simplistic, one-size-fits-all paradigm that can't handle complex projects and evolving workflows. A few structure their user interfaces in a way that makes sense for other departments, but not creative teams and their unique workflows. Some provide no customization to their solutions, while others offer customization only with a hefty price tag. Most lack innovation and creativity, simply trying to copy what other vendors do—or claim to—in addressing agency needs. These vendors' lack of strategy and vision leaves them playing catch-up as they try to cobble together lower-class versions of the features and capabilities that true Marketing Work Management provides.

A major drawback of project management for marketing solutions is their inability to scale. They might be able to handle basic project management, such as creating projects, assigning tasks, and recording time. However, since their offerings tend to cater to the demands of small or medium businesses, they can't handle the complexity inherent to marketing work in agencies that have successfully grown past the startup phase.

Part of this lack of scalability is due to the fact that many project management for marketing solutions provide little functionality of their own. Instead, they require you to turn to a host of other solutions for things like project scheduling, issue tracking, collaboration, reporting, and more. This leaves customers on their own to source critical components and then try to patch them together. And this, of course, consumes valuable time and still leaves you with a disconnected solution in the end.

The biggest failing of all these solutions is that they lack the ability to natively deliver on some of the most important capabilities needed for agency work—namely, online proofing and managing digital assets. Some provide no digital asset management capabilities at all. And most of the vendors who offer online proofing do so by integrating with ProofHQ, a Workfront product. If so many project management for marketing vendors turn to Workfront to address the needs of their agency customers, there are efficiencies to be gained by eliminating the middleman and going straight to the source.

WHAT ABOUT MARKETING LIGHTWEIGHTS?

Another class of solutions you might have heard about targets marketing teams and agencies by offering some aspects of traditional project management with a smattering of additional features that cater specifically to marketing needs. On the surface, these might sound like the perfect solution for agencies looking to leave behind spreadsheets and other disconnected point products. But while they seem to be on the right track, the truth is they also fail to make the grade.

Developed by small vendors for small agencies, these products tend to be limited in scalability and actual capabilities, making them more "marketing lightweights" than real solutions. Due to these vendors' limited development resources, their attempts to address all the needs of marketing agencies result in a jack-of-all-trades, master-of-none paradigm. The most promising of these offerings might encapsulate project management, client management, financial management, file sharing, and online proofing features, but each

with hit-or-miss functionality. Most offerings have a more modest set of features, all of which are too limiting for all but the smallest creative agencies.

Another characteristic of these marketing lightweights is that they tend to be two to five years—or more—behind the technology curve. For example, while most of these do offer native digital asset management and online proofing, they tend to be simplistic in nature, difficult to use, or reliant on slow performing, outdated technology. In terms of project management, instead of employing new and innovative methodologies like Agile, they only support traditional Waterfall processes that aren't designed for the dynamic, ever-changing needs of agency work.

Perhaps the biggest setback for these lightweight marketing solutions is that none of them can handle the complexities of large or dynamic campaigns. Most often, this is due to limited feature capabilities, difficult-to-use interfaces, and antiquated processes and technology. Other factors might include a lack of adequate project prioritization or request management capabilities. In some instances, it's simply because the offering is only designed to handle work directly associated with an individual user rather than the agency at large. Regardless of the issue, marketing lightweights are not the answer for an agency on the rise.

WORKFRONT: THE HOLY GRAIL OF MARKETING WORK MANAGEMENT

Your marketing agency can't afford to be limited by incomplete functionality, lack of scalability, overly simplistic features, challenging user interfaces, or outdated technologies and processes. As you seek to leave behind the spreadsheets, disconnected tools, and manual processes of your start-up days, you need a complete Marketing Work Management solution that enables your creative team to reclaim productive time and reach your goals as a world-class marketing agency.

As the leader in Marketing Work Management, Workfront gives you an easy-to- use, cloud-based collaborative environment that expertly manages and gives you clear visibility into all your agency work. It delivers a host of integrated capabilities

that your team can rely on to get work done together faster, more easily, and more dynamically, yet in-control fashion. It enables you to automate and standardize your processes so you can easily assess, prioritize, and assign agency work, while providing your people the freedom to work the way that suits them best—and grow with them as processes and maturity models evolve.

> "Workfront gives us everything we need in one place."
>
> - Molly Privratsky, Director of Email Operations, Trendline Interactive

STAY AHEAD OF THE COMPETITION

Workfront empowers you to edge out your competition by giving more time to your creatives so they can produce more high-quality work that wins clients and awards. It lets you easily create natural workflows that eliminate endless status meetings, reduce busy work, and enable your team to spend more time being creative. In short, Workfront deals with the day-to-day processes of the business so your people don't have to.

> "Workfront gives us, as an independent and fast-growing firm, a competitive advantage over other agencies."
>
> - Max Cheprasov, Covario VP, PMO & Operations

Additionally, by enabling you to communicate and track all your work in one place, you can keep your creative work moving forward without having to rely on time-sucking meetings, a deluge of emails, or desk-to-desk status collection. You eliminate time wasted searching through spreadsheets, emails, or other external systems to get the information needed to move a project forward. Best of all, your team members get to spend even more time being creative and producing great work.

> "In less than eight months our delivery rate has increased to 99.9 percent."
>
> - Alli Emerson, Senior Vice President and Director of Operations at MRM/McCann

HIT PROFITABILITY TARGETS

Since Workfront provides you with visibility into your entire creative workflow, it gives you accurate insights into the time demands and true costs of different types of projects, which enhances your ability to create more accurate bids. It improves your ability to plan, allocate, and maximize resources for your projects. That visibility also enables you to make sure your creatives stay focused on the most strategic work and maximize billable time.

Additionally, the real-time updates and approvals Workfront provides help foster client trust in your creative expertise, lessening their tendency to micro-manage status and versions, while reducing costly and unnecessary rework. Furthermore, the solution's ability to provide a single source of truth for all collaboration—including among your teams and with your clients—enables you to eliminate scope creep, avoid doing more than the price of the contract, prevent finger pointing, and keep clients honest. In the end, you make more money and have more time to enjoy the satisfaction of work well done.

> "Workfront has helped improve the client relationship in terms of profitability and on-time delivery."
>
> - Max Cheprasov, Covario VP, PMO & Operations

RETAIN TOP TALENT

Retaining top talent is all about keeping your people happy. Being able to offer a healthy work-life balance, along with the time and creative license to produce great work, are essential to that happiness. Workfront makes it easy to offer both by facilitating the creative time your teams want during the work week—and the time off they deserve on evenings and weekends.

The visibility into your team's work makes it easier to recognize and reward your top performers, as well as monitor who needs more work versus less. You can also more accurately map compensation to actual work and performance levels. Being able to better recognize your top performers makes it easier to reward them with the opportunity to work with top clients and high-profile campaigns.

> "With Workfront, we could see which individuals more efficiently handled a high volume of requests and which individuals were better suited to work on more complex campaigns requiring more time."
>
> - Alli Emerson, Senior Vice President and Director of Operations at MRM/McCann

> "We've slimmed core processes from 70 to 45 steps while making our approval process more formal."
>
> - Molly Privratsky, Director of Email Operations, Trendline Interactive

A COMPLETE MARKETING WORK MANAGEMENT SOLUTION

The native addition of online proofing and digital asset management (DAM) to Workfront Marketing Work Management gives your agency a complete solution for managing all of your marketing work. ProofHQ, Workfront's leading online proofing solution, allows your people to easily review and provide fast feedback on proofs from anywhere at any time, whether they're on a Mac, PC, tablet, or smartphone. Its support of more than 150 files types (including video) makes it easy to share and proof files in one seamless environment, deliver more content for more channels in less time, and maintain better quality, client satisfaction, and results.

Additionally, Workfront DAM (Digital Asset Management) helps you manage the entire lifecycle of digital assets from beginning to end. Not only can you manage the creation and production of marketing assets with Workfront, but you can seamlessly curate, store, and distribute your finalized assets in Workfront DAM. With Workfront DAM, you can more effectively manage and control digital assets, maintain brand integrity, and distribute and fulfill marketing assets—all within the context of the work, itself.

By providing a complete Marketing Work Management solution, Workfront takes the chaos out of marketing and agency work. Its comprehensive set of integrated capabilities and holistic collaboration environment does away with disconnected tools, miscommunication, manual processes, time-wasting meetings, and the hectic chaos that can derail even the most promising marketing agencies. With Workfront, you can:

- Manage all your marketing work in one place

- Automate work processes

- Unify collaboration

- Reduce time-wasting meetings and manual processes

- Enable your people to produce great work

To learn how Workfront Marketing Work Management can aid your quest to find the Holy Grail of marketing agencies, contact Workfront at 1.866.441.0001 or +44 1256 807352.

Conquer Work Chaos with Workfront

Manage the end-to-end work lifecycle with an Enterprise Work Management solution like Workfront. Your team will devour the work chaos practices of the past and enjoy:

- an easy-to-use, adoptable platform

- collaboration in the context of work

- real-time visibility into all types of work

- multi-methodology capabilities

- customized reports and dashboards

workfront.com