



THE WORKGROUPS DAVINCI GUIDE TO

OPTIMIZED REMOTE MARKETING WORKFLOW



Workgroups DaVinci 

When the COVID-19 pandemic forced many organizations to scramble to work remotely, few could have foreseen the long-term affects the pandemic would have on managing teams from multiple locations. As we begin 2021, while many are back in the workplace, a significant portion of employees are still (and will likely continue) working from home.

According to a recent [Gallup Poll](#), nearly two-thirds of U.S. workers who have been working remotely during the pandemic would like to continue to do so. But how can your team harness the benefits (and safety) of working remotely, while maintaining cohesive and effective project management?

Do you find your marketing team:

- **Fighting scope creep?**
- **Struggling to keep projects and tasks moving forward?**
- **Focusing on the wrong projects?**
- **Allocating too many or too few resources to a particular project?**
- **Needing to get “re-approval” on project deliverables?**

These are challenges that any creative team may face under the best of circumstances, but that are now exacerbated by team members working from home. Here are 7 practical tips, based on experience with our enterprise customers, to help your business manage your remote marketing projects more efficiently.



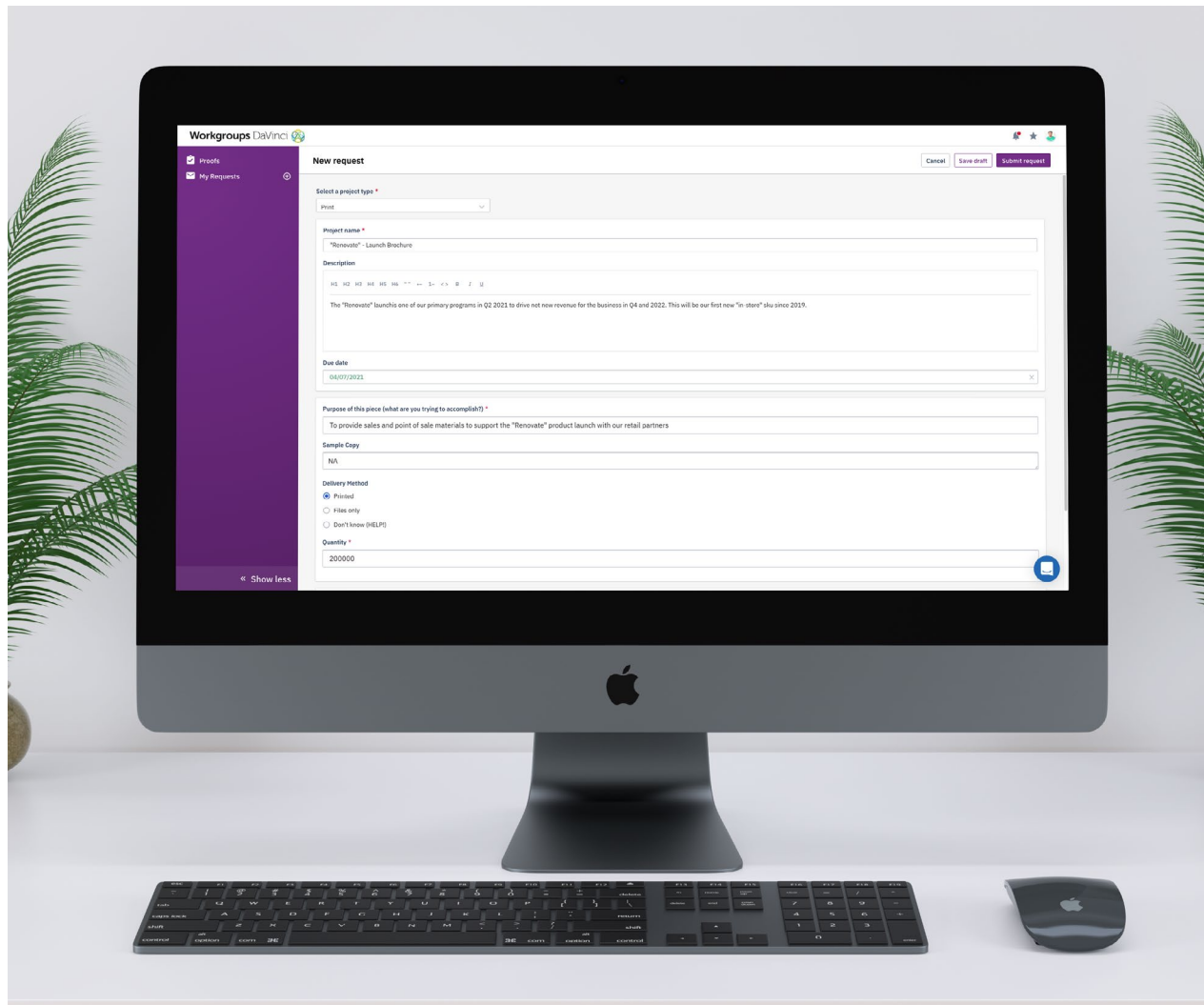
TIP #1

DEFINE YOUR PROJECT SCOPE

Your marketing projects require a step-by-step roadmap to create a clear picture of what is needed from your team. According to a study by PMI, scope creep is a huge concern for project managers, affecting 52% of projects². Stop scope creep by clearly defining each piece of a project from the start.

To define project scope, ask yourself these three questions:

- #1** What is the purpose of this project and how will it be measured?
- #2** What needs to be accomplished, by who and by when? Clearly define what success looks like.
- #3** Are there any hard considerations like budget, file type, or job type that should be considered?



Clearly defining the ins and outs of your project ahead of time (and communicating these expectations) will keep your entire team on the same page from project intake to completion and will result in greater project success. Work closely with key project stakeholders to understand their goals for the project. Our clients do this easily using configurable intake forms and combining them with configurable, repeatable workflows. This makes it easy to gather the information that is critical to the successful execution of your project.

TIP #2

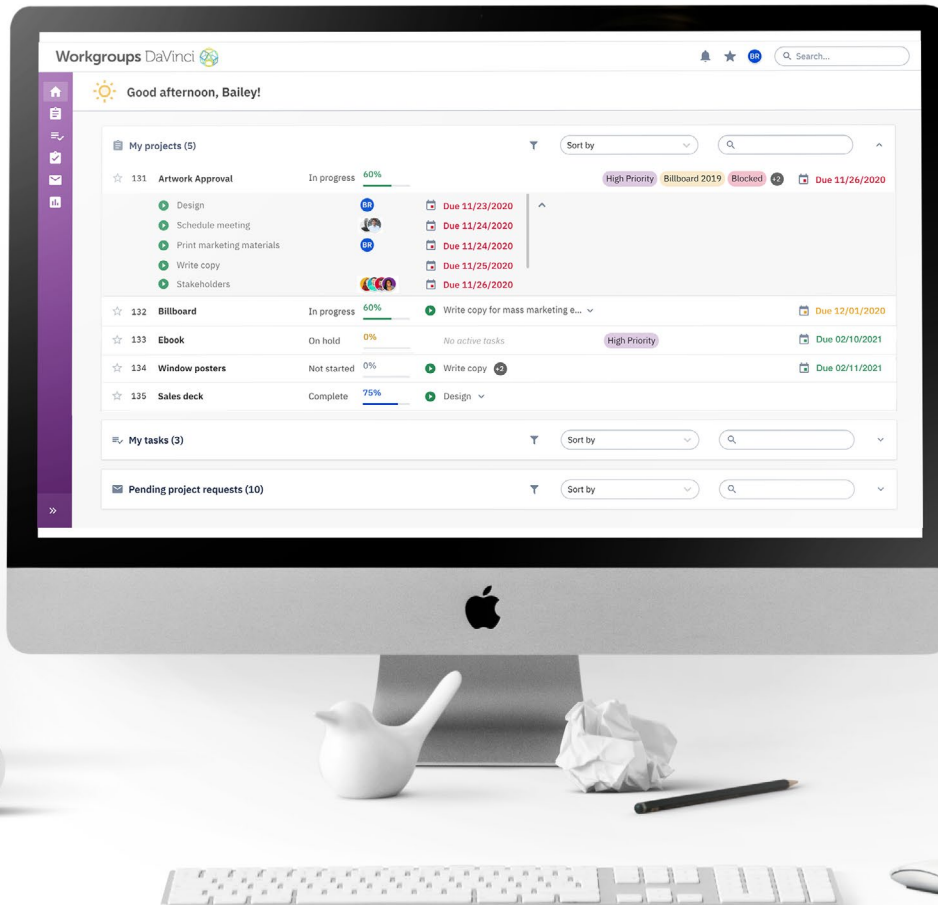
SIMPLIFY AND STANDARDIZE PROCESSES

Once your project scope is defined, look for ways to simplify and streamline your processes. For instance, if your team is consistently working on a certain type of project for a certain client, there are opportunities to create efficiencies throughout the project.

Identify the similarities in your past few campaigns and find areas to streamline. This could look like:

- Adding or subtracting employees from the approval process
- Creating standard processes for digital or print projects
- Realistically planning (forecasting) the number of days a project will take to complete
- Determining what derails projects for your team. For example, are you bringing in key stakeholders too early or late in the project?

A good workflow management tool like Workgroups DaVinci will help you do all of this with an easy-to-use dashboard and reports that allow you to see trends, make accurate projections and identify areas in your process that can be replicated.



TIP #3

IDENTIFY THE 4 WS OF PROJECT FEEDBACK



Actionable feedback gathered and deployed in a timely manner is crucial to successful project completion. A simplified review process ensures your projects get from point A to point B smoothly. Involving the right stakeholders at the right time can help eliminate rounds of ongoing feedback for a faster finished product.

For better feedback, ask yourself if you have covered the 4 Ws of project feedback:

#1 WHO are your reviewers?

#2 WHEN do you get the feedback? Are you bringing the right people in at the right time?

#3 WHERE (HOW) do you get the feedback? Email? Slack or teams? Hard copies?

#4 WHAT feedback do you need? Be specific to keep reviewers on track—tell your reviewers what you need of them.

Consider visualizing your reviewers by laying them out in a Kanban board to determine who needs to review what and when. Reviewers can vary from peers, legal, product team members, executive team members, proof readers, internal stakeholders, clients and vendors. Bringing in a reviewer too early or late can cause unnecessary revisions and re-work, ultimately affecting your budget and timeline.

Where you get the feedback or how you exchange that feedback with your reviewers is also an area ripe for improvement. While email is often used, it is not the most effective way to gather and store feedback particularly in a remote setting. Using a workflow management platform like Workgroups DaVinci provides a central repository for all of your assets, revision rounds and feedback. Use the approval process to your advantage—get timely buy-in and eliminate duplication of work.

TIP #4

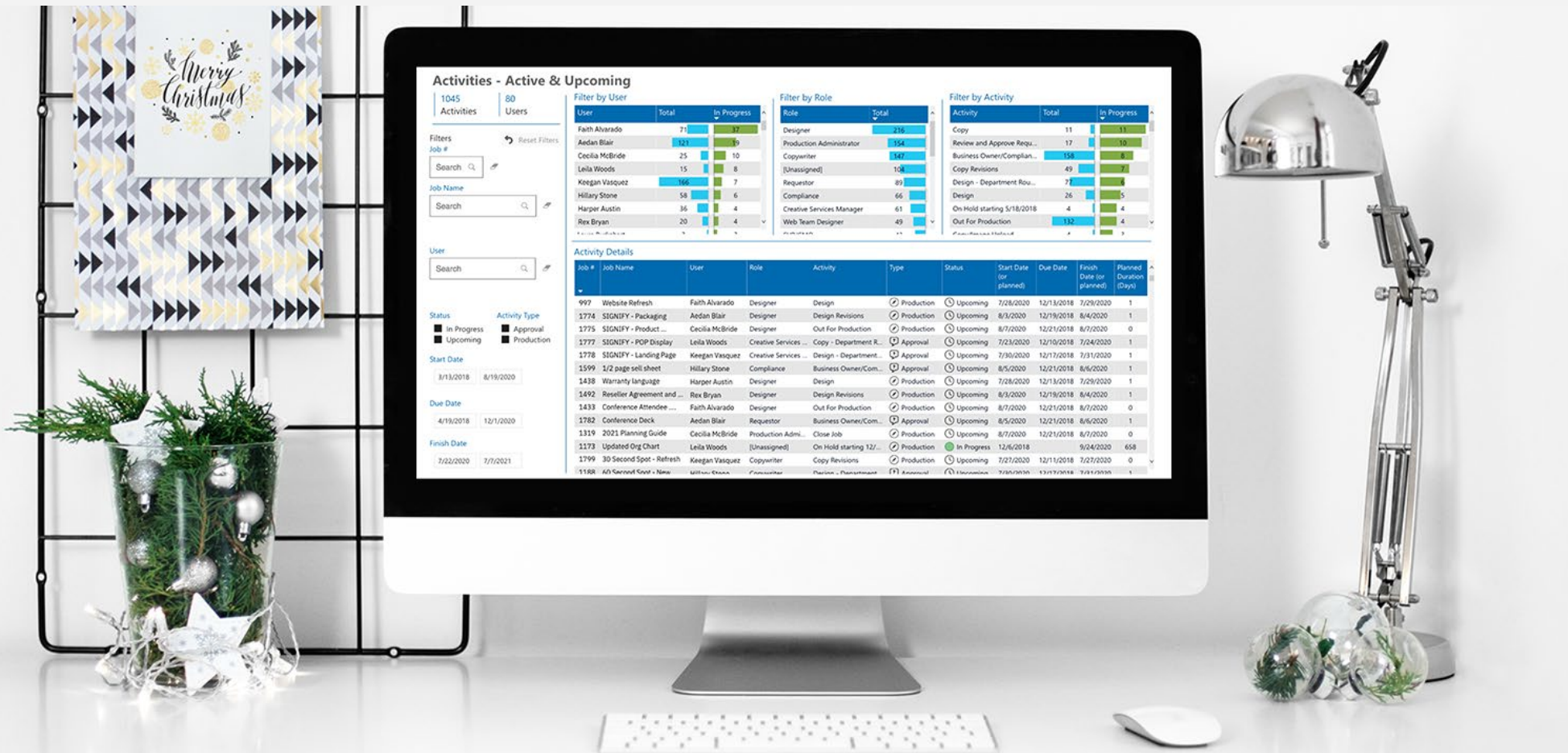
REPORT ON TRENDS AND DETAILS

Understanding the factors that impact the success of your project allows you to create and scale impactful marketing campaigns. Think back to the metrics you defined during project intake. How are you measuring against those metrics to see if you have met your goal?

Tools like Workgroups DaVinci with dashboard access are a great option to review projects at-a-glance. With the right

tool, you can keep tabs on employee workload, job types, number of job completions and more. You can use these reports to identify trends and areas for improvement (including timeline definition and setting realistic budgets).

Create reports for your management team that you can run quickly and easily so that you can devote more of your time to developing award-winning, revenue-driving campaigns.



TIP #5

MANAGE RESOURCES



In a remote environment, managers don't have the advantage of walking to their employee's desk to see whether or not they're busy. Since you can't be on the front lines, managing your team's workload effectively is key to avoiding burnout and enhancing employee engagement.

According to a 2020 Project Management study by Saas List:

73% of employees report feeling burnt out with

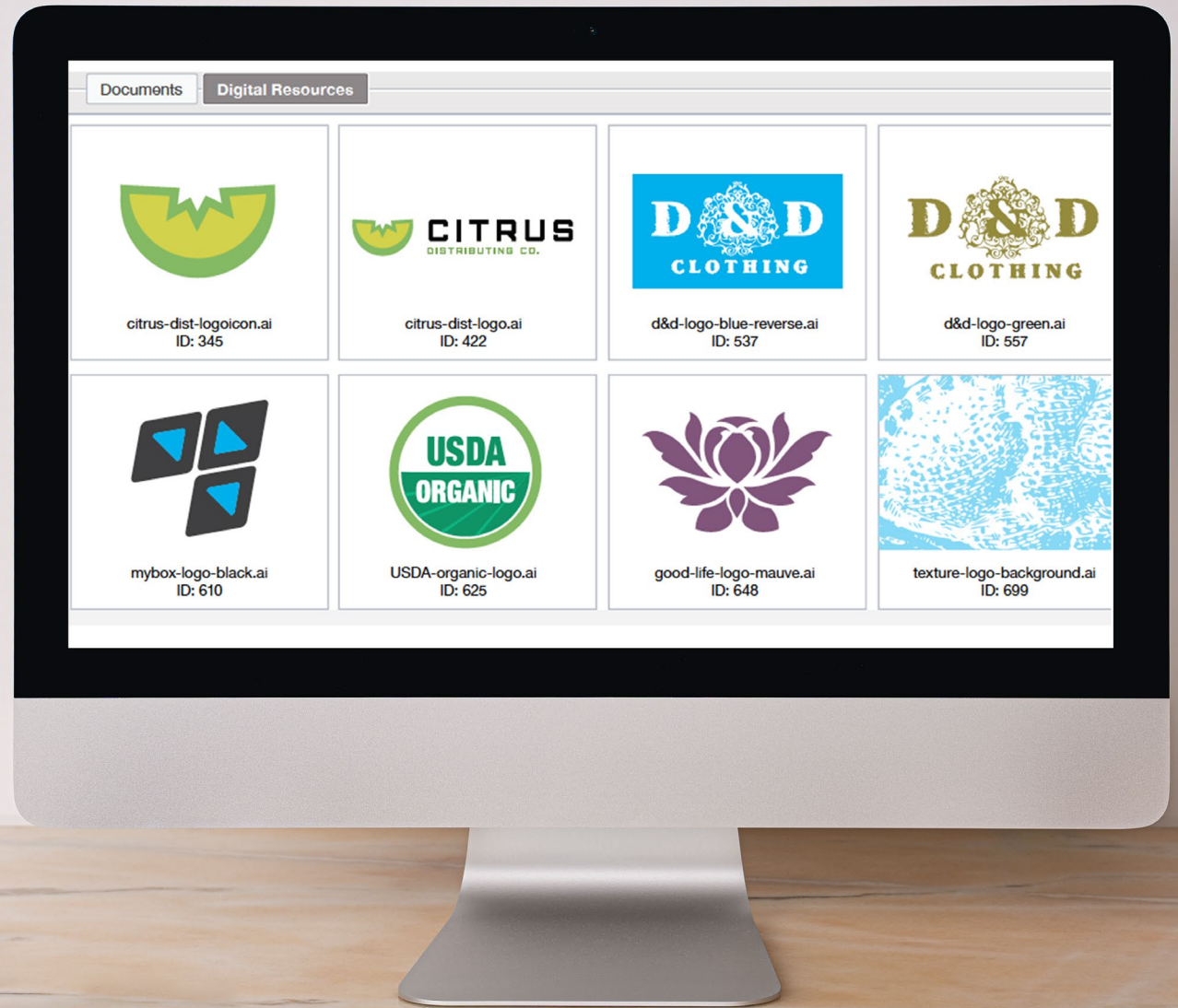
20% reporting unmanageable workload as the number one source of burnout

Putting the right people in the right place is an effective way to manage your employee resources. Once you have your project defined and a simple overview or dashboard of your team's workload, you can distribute work evenly with ease. The same principle applies to equipment as well—manage your project timeline to ensure that you are not double booking your editing bays, cameras or photo booths.

TIP #6

MANAGE ASSETS

Managing your assets is just as important as managing your people. Maybe you work on repeat or seasonal projects that you need to refer to or need somewhere to store final versions of documents. While shared drives get the job done, they are not an ideal system of record when you factor in VPN capabilities or a comprehensive search function using keyword tagging. A central system can keep your completed projects secure, ensures your team is referencing the most recent version of a document and helps you locate client work fast. This single common place for your assets protects your brand consistency and allows you to standardize your collateral and messaging.



TIP #7

AUTOMATE WHEN APPROPRIATE

As a manager, controlling traffic between your team can leave little time for other work. Consider which steps of the process you can automate for their sake and yours. Does your current process allow for real-time notifications when a new project gets assigned or when a reviewer makes a comment? Tackling these small but important steps through automation can help you save time and allows you to focus less on the “traffic control” of your project and more on the quality of the output. As the fall-out of the pandemic will continue to be felt this year, your creative team will likely be asked to do more with less. A solid workflow management tool will help you continue to provide quality output that meets company goals while keeping your team happy and productive.

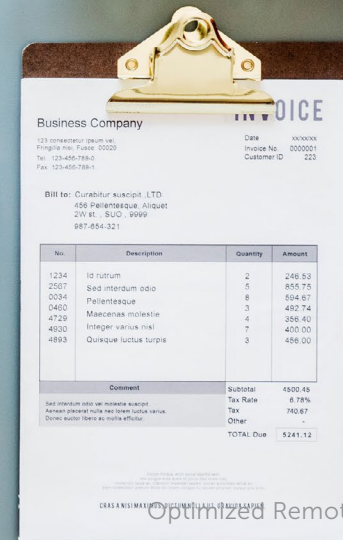
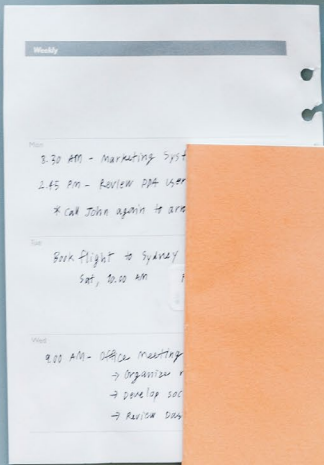
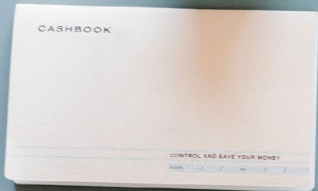


TAKE THIS NEXT STEP

This guide has outlined the basic framework with some concrete ways to improve remote creative project management. For more best practices around marketing workflow management, check out our free live and on-demand webinars. If you are interested in learning how to implement these improvements for your

marketing team, let's connect for a conversation or free demo.

To learn more, check out workgroups.com/enterprise, or call us at (319) 337-8599 or email sales@workgroups.com. Workgroups DaVinci has the tools you need to optimize your remote marketing efforts and deliver better projects fast.



Workgroups DaVinci

TRUSTED BY THE WORLD'S BEST BRANDS

Designed specifically for marketing and creative design teams, Workgroups DaVinci is the only collaborative software to combine project management, online proofing, digital asset management and financial management tools into one simple solution. For over 25 years, we have been making productivity and workflow management solutions trusted by the world's top marketing teams to deliver amazing creative work. Visit our website for more information.



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