

Lead Express Achieves Workflow Balance With Wrike

One of the most sought-after B2B agencies in Australia, Lead Express is a lead generation company with a difference. The full-service growth agency focuses on generating qualified B2B leads for businesses by building professional digital, social, email, and phone campaigns that appeal to target markets as well as by providing incredible client support.

The Challenge

Lead Express needed a better way to manage workflows and workloads so the agency could deliver impactful results to clients faster. As the company underwent rapid growth, this was especially true for cross-functional projects involving multiple teams and complex, moving parts.

Teams were initially working through spreadsheets and email communications, and collaboration was stifled due to issues with version control, holistic project views, and solutions that were unable to scale alongside company growth.

“We were heavily reliant on inefficient tools,” reflects James Cashmore, CEO and Head of Strategy at Lead Express. “We were like a lot of businesses: just using spreadsheets or emails.”

“We needed something that could scale with the business and our different teams,” recalls Emily Trussler, Head of Digital at Lead Express. “Something that could adapt to each department and how they work and their different workflows as well.”



SUCCESS STORY FACTS

80%

fewer spreadsheets to manage projects

70%

less time allocating workloads and resources

50

more efficient with a clear, centralized solution

The Solution

After assessing other tools, including the Atlassian platform and Clarizen, Lead Express selected Wrike's powerful work management software to help centralize work, balance workloads, and expand the business – integrating essential tools like standardized templates, Blueprint functions, automated workflows, and resource trackers.

“We undertook trials with quite a lot of different platforms, but Wrike was very user friendly and very easy for me to set up templates and projects to test,” explains Trussler. “Everyone was really receptive to Wrike because it was so much easier to use and acted as a single source of truth as well.”

“It was an exhaustive review of other systems, but Wrike stands out,” adds Cashmore.

A single system for all departments

Lead Express was focused on finding one work management solution that could empower every team to work how they want. The agency discovered that Wrike's versatility enabled all its departments to set up the custom views or workflows they needed to do their best work.

“What I found with Wrike is you can use it in a number of different ways. You can have a Kanban, list, Gantt, or table set up. Different parts of different departments use those different set ups. We needed a platform suited for all our different services, offerings, and teams. And Wrike was the only system we found to be a good fit for all of it,” says Trussler.

“The more systems, the more costs,” states Cashmore. “It's not ideal to have heaps of different systems that people have to learn and that you have to pay for. If you can get it down to one system and establish a great relationship with that partner, then that's a utopia. And that's what we've found in Wrike.”

Better resource management

With every team now working in one centralized solution, Lead Express can access powerful reports on capacity, workload, and effort to help the agency improve its resource management.

CASE SUMMARY

Customer

Lead Express

Global Headquarters

Scoresby, Victoria, Australia

Industry

B2B Lead Generation

Top Challenges

Multiple teams with unique workflows, Disjointed communication tools, Lack of visibility into team capacity

Why Wrike

A single, easy-to-use work management tool for all departments

Departments Using Wrike

All departments

Feature Highlights

- User-friendly interface
- Powerful reporting & capacity management
- Custom views for different teams

Integrations

Outlook, Sharepoint, Wrike API to BI tool, Salesforce,

Website

leadgeneration.com.au

“We run reports for effort allocation versus time spent on tasks and projects,” explains Trussler. “We can use workload charts to schedule or pre-allocate effort for the duration of a campaign. And some people use the timer within each Wrike task to help them track their time.”

Wrike gives Lead Express more visibility, so managers can better balance workloads and support their staff. “It’s definitely helped us manage the workload of our data team because we’re able to see how many projects they have assigned to them at any one time and how many tasks they have to do within a period of days. Then the manager can easily see how many team members are actually needed to complete that number of tasks. Wrike has helped us realize the amount of work and the number of team members truly needed for certain projects,” says Trussler.

Enabling digital transformation

Faced with new challenges posed by the pandemic, remote work, and their digital transformation, Lead Express found Wrike to be essential in enabling them to both deliver new, entirely digital experiences, as well as transition their own workflows into a remote environment.

“If I think of the campaigns that have really stood out to me in the past year, I think it’s been the shift from in-person events to the number of online events we run now,” notes Trussler. “And when we first started working from home...that was quite easy for us because we had systems in place like Wrike – everyone was very clear on their workloads, the projects they were running, and [Wrike] made it quite seamless to manage a team remotely.

Streamlined project intake

As an agency, Lead Express fields a lot of requests from external clients. The organization needed a work management tool that could streamline incoming requests and automate the project creation process.

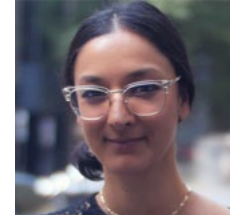
“When a client submits a request form, that duplicates a blueprint which includes all the tasks and requirements for a standard campaign. Essentially, any kind of project we would work on, we’ve got a Blueprint for it,” says Trussler.



“I consider Wrike a large reason why we’ve been able to scale and grow as quickly as we have over the last five years.”

James Cashmore,
CEO & Head of Strategy,
Lead Express

To organize all work across teams, Lead Express has created unique Spaces and folders for clients. “We have our Pilot Space in Wrike and then move them into the Ongoing Space if they become an ongoing client. There are different folders within each Space so we can see all the projects and campaigns that we’ve run for them,” explains Trussler.



The Conclusion

Over the last five years, Wrike’s powerful work management solution has helped Lead Express consolidate work, enable digital transformation, and scale their business. Initially deployed just for the design department, Wrike now enables collaboration across multiple global teams at Lead Express – unifying and streamlining processes for the entire organization.

“All our departments use Wrike in all different ways and with all different workflows.”

Emily Trussler,
Head of Digital,
Lead Express

“We’ve come so far, and we’re excited to continually evolve and refine our processes and blueprints,” adds Trussler. “We look forward to testing even more capabilities and features in Wrike.”

James Cashmore is undoubtedly impressed with how much Wrike has simplified work for the organization. “I want my staff and customers to be happy. The easier my staff can work, the less concern there is,” Cashmore concludes. “I would attribute Wrike to a large reason why we have been able to scale and grow as quickly as we have. The staff has a lot of confidence in the system, so we’ve been able to focus on other parts of the business that generate revenue. From the CEO’s perspective, that’s the biggest benefit of Wrike.”

Find out how Wrike can help your business

Visit www.wrike.com

Free Trial

