

Moneytree Adopts Wrike and Speeds Up Marketing Projects by 75% from Start to Final Approval



Founded in 1983, Moneytree is a retail financial services provider with more than 80 branches in Washington, California, Colorado, Idaho, Nevada, and British Columbia. The Moneytree team differentiates itself by offering exceptional customer service.

The Challenge

The marketing team at Moneytree is responsible for all aspects of marketing advertising, and communications, both internal and external. From new product launch campaigns to blog content for the company intranet, this team is responsible for a lot of moving pieces at any given time. Before Wrike, the team used a combination of email, spreadsheets, and in-person meetings to assign work, track progress, and facilitate revisions and approvals. This approach presented several challenges, including manual tracking of statuses and approvals, long lead times for collateral development, and limited visibility across all projects for members of senior management.

New to her role as Director of Marketing for Moneytree, Cynarah A. saw an opportunity to improve the visibility and efficiency of marketing workflow. She empowered Alex B., Marketing Project Manager, to research project management software solutions for the team to try before they ultimately selected Wrike.

“Wrike is so flexible and robust and has just about every feature under the sun. You don’t sacrifice anything. We would have had to work our processes around the other tools. But we could see Wrike would work with our existing processes,” says Alex.

SUCCESS STORY FACTS

3x

Scaled to 3x the team size with ease

7 days to 24 hours

Reduced length of approval process

75%

Increased project speed from start to finish

156

Hours saved for the Project Manager with proofing features

The Solution

Successfully Incorporating Wrike

Deployment started when Wrike helped to build out what one of their marketing processes would look like in the new tool. Then regular team meetings occurred to look at each of them.

“Onboarding Wrike forced us to interrogate our existing processes,” says Alex, “and we believe they work better for us now. That has made onboarding new people much easier. We are faster and more nimble than before.”

The team also includes a web development team who were comfortable using another tool and initially reluctant to buy into Wrike. That has changed with time, consistent encouragement, and the ability to see how easy it was to learn Wrike. “I notice they’re now adding projects and tasks to Wrike themselves in order to keep track,” shares Denise R., VP of Marketing & Training. “The digital team not only adopted Wrike, but they’re seeing how beneficial it is for their own workflow and accountability.”

As the team’s Wrike champion at Moneytree, Alex has set the expectation that all marketing project work is now done through Wrike. She implemented retraining, kicking back anything project related that comes through via email. Her motto? “If it’s not in Wrike, it doesn’t exist.” She sets 1:1 quarterly check-ins with each team member to learn about pain points or to share newly discovered Wrike capabilities.

A Single Source of Truth

Working across teams and across geography can be a challenge. But after implementing Wrike, the Moneytree marketing team has a single source of truth for information and communication, making it easier for everyone to stay in the loop, move projects from start to approval to completion, and also onboard new team members quickly and efficiently.

Cynarah says, “We have lots of projects going at once and a single campaign could have printed pieces, web banners, digital components, and more. It’s nice to see where a project may be stuck and why. Wrike makes things so much easier for us to manage. We live and breathe it every day. We now have one single source of truth.”

CASE SUMMARY

Headquarters

Seattle, Washington

Industry

Financial Services

Number of Employees

501 - 1,000

of Users

60 seats

Departments using Wrike

Marketing,
Training,
Product Development,
IT,
Compliance

Top Challenges

Lack of visibility,
Inefficient tracking
and approvals,
Need single source of truth,
and Project management

When Moneytree onboarded Wrike, the marketing team was smaller, and as they grew, the volume of projects grew too. “We couldn’t have kept our arms around everything or kept our quick turnaround time without Wrike,” explains Denise. The marketing team also drove home the benefits of using Wrike for project management and collaboration. As a result, other departments at Moneytree opted to start adopting Wrike.

“It’s been really powerful to be able to expand it beyond our team and collaborate with other departments who are now using Wrike,” says Cynarah.

Work-from-Home Accountability & Collaboration

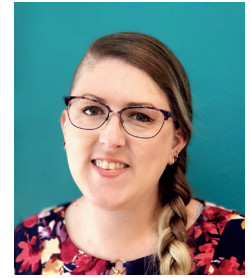
Wrike helps the Moneytree marketing team stay engaged and collaborate even while they’re working remotely. Increased visibility helps everyone see where they fit into the larger team structure, and how their work contributes to achieving organizational goals.

As the department’s director, Cynarah was tasked with leading her department with the transition to work from home at the start of the COVID-19 pandemic. She explains, “With Wrike in place we were able to look and see how we could best transition projects, move work easily among users, and manage changes in response.” The team had to be even more on top of projects. Wrike made it easy to quickly pull a report and make decisions based on real-time information.

In addition to increased visibility, productivity, and efficiency for projects, Moneytree also started using team chat threads in Wrike as a fun way to keep morale up. When they’re together in person, the marketing team is extremely bonded and social. During this time apart, team members pose fun questions like “What shows are you binge watching?” or “What are you seeing outside today?” and post word games and other fun challenges to keep the team connected.

Insights & Increased Visibility with Reports

The Moneytree marketing team leans heavily on reports, which help them save time, gain and share big-picture visibility, and manage expectations. Reports in Wrike are easy to pull, interactive, and a great resource for senior management who may be interested in a deeper dive.



“Wrike is so flexible and robust and has just about every feature under the sun. You don’t sacrifice anything. We would have had to work our processes around the other tools. But we could see Wrike would work with our existing processes.”

**Alex, Project Manager,
Moneytree**

As the project manager, Alex can gain insight into the performance of all projects and team members with a simple click. She can see what's bogging down a project, what's past due, and what's up next. Each Monday, the creative team uses an active task by assignee report to review task lists and look for potential roadblocks. "This report is a clean, simple, easy way to see all of the work and set priorities for the week," says Alex. The report saves her 1.5 hours per week by not having to update a spreadsheet or chase down team member statuses one by one.



Centralized Feedback & Faster Approvals

Before Wrike, Moneytree relied on email for sharing proofs, revisions, and approval reviews. It was difficult sending one PDF (a comp of marketing materials) out for review to multiple people for feedback. Keeping track of all the different feedback and changes was more of a manual, time-consuming process. There wasn't an efficient way to have a single conversation without a lot more emails or more meetings.

According to Alex, the approval process for Moneytree marketing projects has multiple steps and stakeholders. Without a tool to help streamline and automate this workflow, it's more challenging to shepherd a project through from inception to production.

The benefits of having proofing and approval functionality within Wrike are keeping everything centralized, maintaining an audit trail, and greater efficiency for everyone. When Moneytree was evaluating possible project management tools, the Wrike proofing features were a huge selling point.

Alex recounts, "That was one of the shining jewels of Wrike that was why we chose Wrike in the end. The ability to leave direct comments, have a conversation and document it all in one place was really big for us."

With Wrike, Moneytree cut the average number of days for project approval down from seven to four, and they can often turn approvals around within 24 hours if something is a high priority. Having the feedback all in one place allows approvers to have richer discussions, which leads to better work and leaves a trail to reference for future projects. It also frees up the project manager from having to micromanage the approval process, which saves her three hours every week (or 156 hours over the course of a year).

"The archive is so helpful when it comes to revisions," says Denise. "It really helps people see the rationale for why something was changed."

"It's been really powerful to be able to expand it beyond our team and collaborate with other departments who are now using Wrike."

**Cynarah, Director
of Marketing, Moneytree**

Results

Wrike's flexibility and robust suite of tools helped the marketing team at Moneytree improve the visibility, transparency, and efficiency of their workflow. Projects are moving through the pipeline much faster now than before — **75% faster from start to final approval.**

"The tool is interactive and we see everything in real time," says Denise. "We're all working collaboratively together instead of alone waiting for emails. With our compliance team using Wrike, I can also now see when projects are in the final step of the approval process before moving into production. I have visibility on all projects and don't need to bother anyone else for updates."



The tool is interactive and we see everything in real time. We're all working collaboratively together instead of alone waiting for emails. I have visibility on all projects."

Denise, VP of Marketing & Training, Moneytree

Find out how Wrike can help your business.

Visit www.wrike.com

