

Collaborative Work Management for Marketing Teams:

A BUYER'S GUIDE

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So, You're Interested in Collaborative Work Management

Marketers are under more pressure than ever before. From running strategic lead gen campaigns to creating engaging content to raising awareness on social media, the list goes on.

Requests are many and resources too few. Tight deadlines and tighter budgets stretch your team paper-thin.

Communication is haphazard, status updates go missing, and feedback loops never end. Juggling projects across email and spreadsheets is stressful and inefficient.

The right project management tool means better planning and processes, easy collaboration, and greater visibility into your team's work. The problem: There are hundreds of tools designed to help improve task management and productivity. Each promises to be better than the next, and they all look decent on paper.

The prospect of weeding through these solutions to find the right work management tool for your marketing team is enough to make you throw in the towel. You don't have time to waste! That's why we've compiled this buyer's guide.

It provides seven key questions to help you quickly and effectively evaluate today's top collaborative work management solutions. You'll find a feature and capability checklist at the end of the guide so you can confidently choose the perfect fit for your team.

Question #1

Will it help my team jumpstart projects quickly and effectively?

The initial stages of a task set the tone for the rest of the project. When projects get off the ground efficiently, your team can move swiftly toward completion. Having the right tools and systems in place to help your team hit the ground running is paramount.



Request forms are meant to be the first step in the collaborative process. But if your form is too detailed, requesters find ways around it, muddling your process and scattering requests across email and chat. If your brief is too general, requests will be vague, forcing team members to go back-and-forth with requesters to fill in the blanks.

Missing information is the leading cause of stress at work for 52% of respondents in a [2015 survey](#) of nearly **1,500** business professionals.

A good collaborative work management system adds structure to the intake process. It simplifies briefs for requesters, while ensuring your team receives the relevant details they need to be successful.

“To make sure we get all the information we need without asking unnecessary questions, my team uses [Dynamic Request Forms](#),” says David Mekerishvili, design team lead at Wrike. “The questions change based on the information the requester provides as they fill out the brief. For example, if the requester is a marketer and the project is a web page, they will get different questions than if the requester is a sales rep asking for a presentation.”

Related Capabilities to Look For

- Dynamic Request Forms
- Automated project creation
- Automated project assignment

Website Team Request

Use this form to submit request to the website team.

Request title: *

Update Price Page

Define urgency of the request: *

High

Provide details (field to type): *

Please, update description of the plan we provide for

Submit

Question #2

Does it make it easier to manage my team's time and resources?

Landing pages. Email campaigns. Social media. Content. Marketing teams are pulled in many different directions each day. Juggling competing deadlines and balancing workload across team members is a major challenge for marketing managers and directors.

Resource allocation and time management are never checked off your to-do list. Project goals and requirements inevitably change, requiring management to take stock of remaining resources, shuffle priorities, and effectively communicate these updates to their team. Good luck managing all that in a spreadsheet!

People are your most important resource. [Resource management](#) solutions help managers visualize workloads so they can accurately forecast commitments and plan work around their team's availability. At a glance, tap into your team's workload and instantly notify them when schedules or priorities shift. Choose a solution with a robust workload view that shows you who has reached full capacity, and who can take on additional tasks.

Track projects in a timeline or calendar view to visualize which initiatives are in flight and coming down the pike. This helps your team more effectively prioritize, assign, and schedule tasks. You'll also learn how long it takes to produce specific types of projects, and which team members work faster than others. You can then use this information when budgeting time, allocating resources, and committing to deadlines in the future.

Finally, a Gantt chart view should allow you to add or reschedule projects in a couple clicks. Dragging and dropping projects or tasks on the timeline changes their due dates, and shifts the corresponding deadlines of any dependent tasks or subtasks. Assignees are instantly notified of these updates.

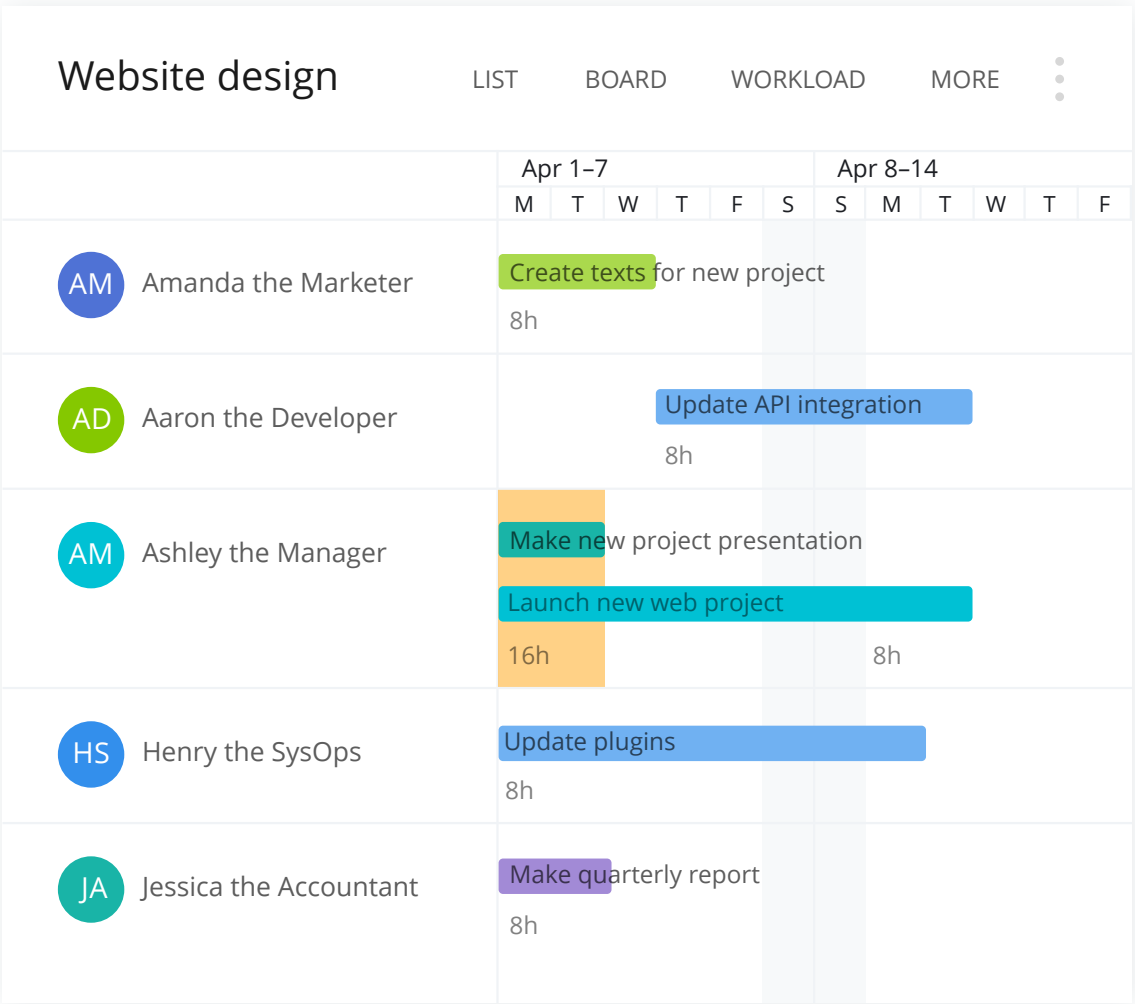
“

One of the things I love about Wrike is its transparency, and how it can visualize task dependencies and capacity planning. That was also something that was very challenging to articulate before. We also have bi-coastal status meetings that we run through a video conference, screen sharing Wrike to review the statuses of all our projects and create the agenda for the meeting. We have two of those meetings a week, which makes it really easy for people to be like.

— Denise Teti, Director of Marketing + Sales Promotion, Speedo USA

Related Capabilities to Look For

- Easy task scheduling and assignment
- Gantt chart and calendar work views
- Workload views
- Drag and drop project/task rescheduling
- Automatic scheduling notifications
- Resource allocation tools



Question #3

Will it free my team from busy work and give us more time to be strategic?

Workers spent 41% of their time on average doing desk work like preparing reports, answering emails, and keeping their team on task, according to a [2013 report published in the Harvard Business Review](#).



Leading collaborative work management solutions centralize conversations from across email, spreadsheets, and other messy mediums into a single shared workspace, saving you the trouble of combining notes and action items from disparate sources.

All communication is kept in the context of specific projects, tasks, or files so you can avoid lengthy recap emails. Collaborators are notified of comments and @mentions in real-time, streamlining handoffs and shortening feedback loops.

Choosing a solution that integrates with popular tools like Slack and Gmail is also important, particularly for marketing teams working with external collaborators. The work management solution ultimately serves as the team's single source of truth, but information can also be accessed and entered using these existing tools. Their ability to "talk to one another" effectively centralizes communication while still allowing contributors to work however they're most comfortable.

[Templates](#) are another important time management feature. Saving common initiatives as templates within your work management platform enables you to simply clone them each time you start a new project. Rather than start each project from scratch, key components like dependencies, task duration, assignees, and reports are copied over. Knowing exactly what a project entails makes scheduling and execution less stressful for everyone involved.

Related Capabilities to Look For

- Centralized communication
- Project templates
- Live comments and @mentions with notifications
- Integrations with popular chat/email clients

Content for New Integration

☐ In progress

NC

Nick

JW

Jess

+

by Mike on Dec 26

New Integration: It's official

Our new integration has been a secret for a while, and now it's time for it to hit the big time. So, today we **Amanda** by to announce that now everyone can bring the power of it.

But we're not stopping there. Today our partner is launching a new feature, which allows users to interact with apps in a popup window inside it. And, we're also excited to announce **Aaron** we're one of the first to take advantage of this new feature.

AM

Amanda the Marketer
@Jess @Nick @Aaron fyi

👍

1

Question #4

How closely will I be able to track my team's progress?

When managing a few people or projects, it's easy to keep all the information in your head. Project details are practically absorbed through osmosis as you attend team meetings and overhear office conversation. But as marketing teams grow, maintaining visibility becomes difficult.

Gone are the days of shouting across desks for status updates. The explosion of projects and a growing remote workforce have made regular face-to-face meetings a thing of the past. Verbal updates are imprecise and easily forgotten, and tracking progress via email is a recipe for inbox avalanches, confusing threads, and forgotten ccs.

The last thing you want to do is micromanage or bog down your team with frequent check-ins. With the right collaborative work management tool, you won't have to. Instead, you'll be able to see work as it's being done. You'll even receive automatic, real-time notifications when high-stakes projects move forward—or fall behind. This level of visibility allows you to anticipate problems and take action before they happen.

According to operations expert and Wrike Strategic Customer Success Manager Roberto Wantland, one of the most effective project management tools for visibility is dashboards. "One of the first things I do to help my clients is set up a shared dashboard that shows the status of all active project tasks and when they are due," he explains. "This helps managers assess progress and identify any red flags in a single glance, and works to keep contributors on pace."

Related Capabilities to Look For

- Real-time status updates
- Custom, shareable dashboards
- Robust search and filtering

“

Dashboards and reporting have eliminated a lot of the constant ‘what’s the status’ emails and meetings. People are now able to just check their dashboard and know what the health is, and then utilize their time more efficiently.

— Hoon Kim, Creative Production Manager, Airbnb

Marketing scrum board

Upcoming

TODAY (4)

- AK Collect customer testimoni...
New
- MG Launch campaign on Twitt...
New
- KF Update ebook library
New
- DH Update logos on our site
New

Current sprint

TODAY (2)

- KL Add the “build a cus... Oct 05
In design
- AS Fix the counter Oct 05
Ready for launch

LATER (4)

- DH Localize new ebook Oct 04
Drafting
- AS Email blast for the... Oct 06
In design
- KF Survey for customers Oct 06
Ready for launch
- KT Collect ideas for new... Oct 07
Drafting

Question #5

Will it streamline collaboration, feedback, and approvals?

Quality of work and likelihood of success increase when great minds work together. But as projects become more complex and more teams and stakeholders get involved, collaboration quickly goes from inspiring to burdensome. Work is duplicated or slips through the cracks entirely. Feedback is conflicting and given at the wrong moments. Files and emails go missing, meetings eat into productivity, and handoffs feel like acts of faith.

Keeping track of revisions and approvals can be challenging for marketing teams. Sending files as email attachments leads to duplicate or conflicting changes across multiple documents. Other team members are left with the time-consuming job of consolidating feedback and chasing down final approvals. Version control chaos ensues.

Using an asset management tool like Google Docs or Dropbox is a step in the right direction. But organizing files, making sure your team has access, and pulling contractors in for review is tricky.

63% of [high-performing marketing teams](#) are excellent at collaborating with other departments — that's 17.1x more likely than underperforming teams.

The best collaborative work management solutions bring all files and feedback together in one place. Documents are tied to their associated projects or tasks, so everyone knows where to find them, and collaborators receive alerts in real-time with every new comment or @mention, streamlining communication. Files can even be uploaded directly from Google Docs, Box, and other integrated asset management tools. Even better, [DAM](#) (Digital Asset Management) integrations keep everything on brand by organizing and sharing approved brand assets across the organization.

Proofing tools take the guesswork out of the revision process. The ability to visually markup documents minimizes ambiguous feedback. Participants see each other's changes and can work through conflicting edits in real-time. Managing revisions for a single file, in a single place creates a clear edit and approval trail. The latest files are displayed front and center to mitigate version control issues, while previous versions remain accessible for easy reference.

Related Capabilities to Look For

- Contextual communication
- External sharing and access control
- Ability to attach files to specific projects or tasks
- DAM integrations
- Proofing
- Approvals
- Version tracking

ride_on_art.png
1 of 13

AD

KL

AD

EW

KL

Aaron 9 mins ago

@Kelli, I think you forgot the full brand it is Piazzo Scooters

REPLY

Kelli 7 mins ago

In reading the creative brief, it seemed as if this campaign is for the clothing and the scooters - that is why I just went with the top brand

Aaron 5 mins ago

Let me check with @Edward. Ed, what is the proper branding for this?

Edward 5 mins ago

@Aaron I check with a client. It should have the word "Scooter" @Kelly FYI

KL

Reply

5

5

VERSIONS

COMMENTS

Question #6

Is it flexible enough to meet my team's diverse needs and requirements?

You've heard the phrase "you can't fit a square peg in a round hole." If you've ever worked in a project management solution that wasn't the right fit for your team, you know it's true. Each company, team, and individual has their own processes, so selecting a flexible collaborative work management system is essential for adoption.

This is especially true for marketers because so many processes, sub-groups, and collaborators exist within a single team. You'll want the ability to create custom project workflows, status updates, and folder structures based on each group's unique projects and processes. If your processes are particularly complex, consider a project management tool that offers onboarding services and dedicated account managers.

Not everyone organizes their work in lists. Some prefer timelines, while others relate better to tables. Whatever collaborative work management platform you choose should be versatile enough for team members to manage work in the way that makes them most comfortable.

Nearly [65% of marketers](#) admit working in silos negatively affects the campaigns they're working on. Integrations with the tools your team already uses, like Slack, Gmail, and Adobe Photoshop also organize projects and communication without disrupting existing workflows. They help centralize information and allow people to work in the tools they know and love while keeping all project details in one place.

Finally, with nearly half of Americans working remotely, finding a project management solution that can be used on the go is key. Untether your marketing team from their desks and empower them to work whenever and wherever inspiration strikes.

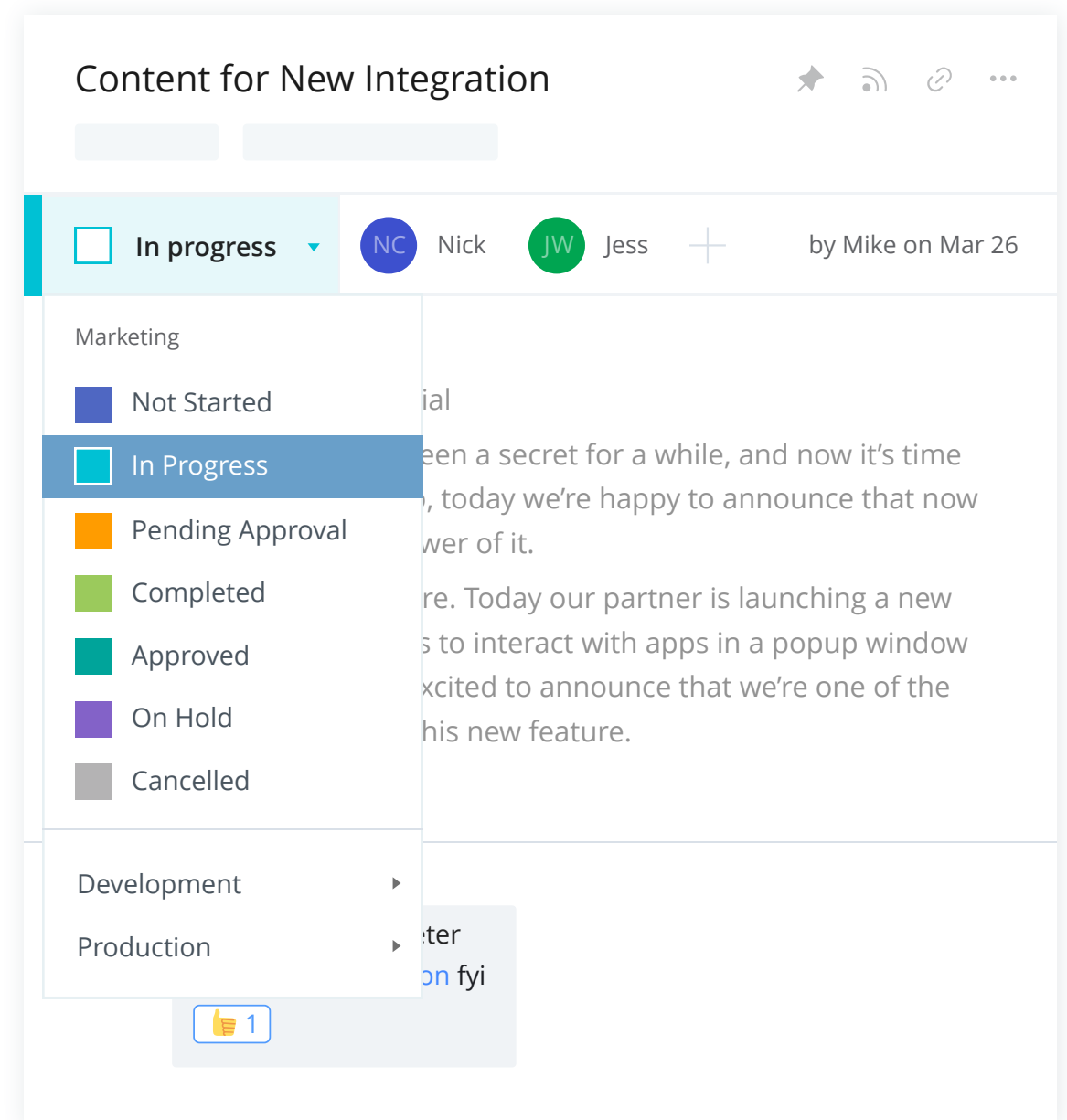
“

Wrike makes it possible for each person on the team to work the way they want. I want to see a time log, a workload list, and Gantt charts. But I want people who want just a task list to feel comfortable too—without having to use eight different tools.

— *Chelsea Scholz, Marketing Manager of Brand Promotion, Unbounce*

Related Capabilities to Look For

- Custom workflows and statuses
- Multiple work views
- Flexible folder structure
- Integrations with leading marketing tools
- Adobe Creative Cloud Extension
- Robust mobile application
- Implementation consulting and services



Question #7

How will it help me measure performance and make smarter decisions?

Marketers' timelines are shrinking and pressure to perform is mounting. Not every task can be a top priority.

Where do you focus your team's attention? How do you maximize efficiencies and make the most impact?



Collaborative work management solutions with real-time, custom reports allow marketing leaders to measure output and make more informed decisions. How many projects is your team working on at any given time? Which projects consume the most time, and how do they perform? Integrating your work management platform with business intelligence tools further enables companies to tie specific tasks and projects directly to business outcomes.

“

With Wrike, I am able to track and monitor all of my projects in one place. If asked about one of my projects, I can instantly go into Wrike and give them an update within 30 seconds.

— *Lisa Matthews, Project Manager, [Hootsuite](#)*

If you're using a workspace that captures all the metadata around projects and processes, you should be able to run a report for projects with missed deadlines or unmet objectives. Did they involve a particular asset type or work request? Are projects getting stuck in the same process step? Are certain team members always involved?

Answering these questions allows you to spot and address any bottlenecks negatively impacting performance. You'll be better prepared to make the case for additional headcount. Identifying issues related to specific team members also presents the opportunity for valuable coaching around skills like time management, organization, and communication.

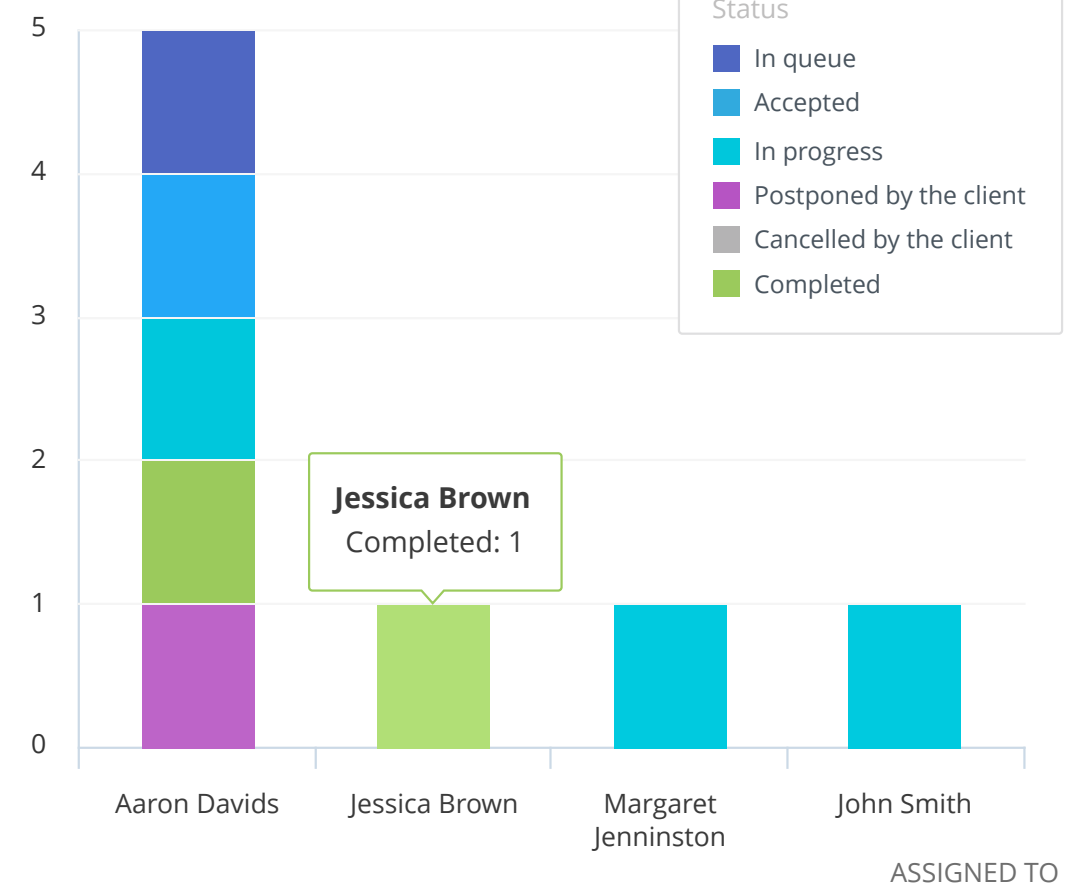
Related Capabilities to Look For

- Custom reporting & analytics
- Metadata capture
- Data export
- BI integrations

Cleaning team weekly report

Data on 11/02/2017 20:03 

TASK COUNT



Your Collaborative Work Management Checklist

Use this checklist to compare collaborative work management providers.

If you're unable to check most of the boxes for a solution, eliminate it from your list.

The solutions that check the most boxes are your top contenders!

Progress Tracking

- ☐ Real-time status updates
- ☐ Custom, shareable dashboards
- ☐ Robust search and filtering
- ☐ Reporting and analytics

Request Forms and Project Briefs

- ☐ Dynamic Request Forms
- ☐ Embeddable request forms
- ☐ Automated project creation
- ☐ Automated project assignment

Collaboration & Approvals

- ☐ Integrations with popular chat/email clients
- ☐ Ability to attach files to specific projects or tasks
- ☐ DAM integrations
- ☐ Proofing
- ☐ Approvals
- ☐ Version tracking

Streamline Tasks

- ☐ Centralized communication
- ☐ Project Templates
- ☐ Integrations with other communication tools
- ☐ Contextual communication
- ☐ Reporting and analytics

Time and Resource Management

- ☐ Easy task scheduling and assignment
- ☐ Gantt chart and calendar work views
- ☐ Workflow view
- ☐ Drag and drop project/task rescheduling
- ☐ Automatic scheduling notifications
- ☐ Project templates
- ☐ Resource allocation tools

Work Flexibility

- ☐ Custom workflows
- ☐ Custom statuses
- ☐ Integrations with leading tools
- ☐ Multiple work views
- ☐ Adobe Creative Cloud Extension
- ☐ Robust mobile application

Performance Analysis and Workload Insights

- ☐ Custom reporting & analytics
- ☐ Metadata capture
- ☐ Data export

Other

- ☐ 24/7 tech support
- ☐ Implementation services
- ☐ Dedicated account management

Ready, Set, Evaluate

With thousands of project management tools on the market, finding the best one for your marketing team is no small feat. You've taken a smart shortcut by reading this guide to learn more about the most important features. Now use these seven questions and our accompanying checklist to narrow down the playing field and find your perfect fit.

Wrike could be the right tool for your marketing team! Sign up for a free 14-day trial of our award-winning collaborative work management platform to jumpstart starting projects, streamline collaboration, make smarter decisions, and so much more today.

Get started *for free*