

A SMARTSHEET REPORT:

Build a Shared Services Program that Empowers Your Creatives



The heat is on. Even before the arrival of our 24/7 always-on digital landscape, managing the creative processes of marketing was complicated and time-consuming. Increasing demands, dwindling resources, byzantine approval processes, and moving goalposts for final deliverables all make creatives' jobs more challenging.

But marketing organizations face a new imperative: According to a [recent McKinsey study](#), 83% of global CEOs now believe marketing can be a major driver of revenue growth.¹ This expectation brings new pressure to bear on marketing shared services programs to find new efficiency in their delivery models, in order to free up resources for high-value projects that can contribute to top-line revenue growth. To do this requires a vastly more effective approach to the marketing services delivery model.

Even in the best of times, the subjective nature of creative work and hard-to-define goals makes marketing project management a challenge. Today's creative work teams face a fast-changing landscape that complicates the situation even more, making it increasingly stressful and demanding because of factors including:

Greater competition. Rapid-fire digital content is the order of the day. The customers' attention span has dwindled to a mere eight seconds, which means that marketing creative has to capture and [sustain interest almost instantaneously](#).² These pressures intensify when enterprises also have to deliver volume at speed to compete: Consumers watch almost [five billion YouTube videos every day](#)³ and more than [four million Facebook posts get "liked" every minute](#).⁴ Amid so much noise, creatives need more than ever to ensure their marketing message stands out and captures attention.

Increased complexity. High-impact marketing today depends on a seamless omnichannel experience. Enterprises must ensure that consumers soak in consistent branding, both in-person and across a multitude of digital channels, including website, blog, social channels, advertising, and more. Further, the bar is being raised on brand experiences: [58% of millennials](#) say they expect to be able to interact with brands no matter the channel they use.⁵ And nearly [three out of four consumers](#) want to be able to track orders using whichever channel they can access.⁶ Given the ever-widening portfolio of available digital channels, creatives must make their message work across a variety of devices (smartphones, tablets, desktops) and social media avenues. This often means creating multiple versions of the same creative, or multiple content streams per channel.



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1. McKinsey & Company, 2019. *Marketing's Moment is Now: The C-suite Partnership to Deliver On Growth*.

2. New York Times, 2016. *The Eight-Second Attention Span*.

3. MerchDope, September 29, 2019. *37 Mind Blowing YouTube Facts, Figures and Statistics – 2019*.

4. DOMO, 2015. *Data Never Sleeps 3.0*.

5. SDL, July 14, 2014. *SDL Study Reveals Channels Are Irrelevant to Consumers*.

6. BRP Consulting, 2018. *2018 Customer Experience/Unified Commerce Survey*.

Supercharged customer expectations. The omnichannel experience is more than just a branding exercise. When they do it well, companies can realize a significant increase in revenue by analyzing customer data to deliver targeted, [personalized content](#).⁷ Close to half of all consumers and nearly 60% of millennials are willing to share data about personal preferences so they can be fed a more [personalized digital experience](#).⁸ While data analysts slice and dice such consumer preferences and decide how to match the marketing to the consumer, the onus of crafting and delivering that personalized messaging — a spa experience for honeymooning couples vs. conference facilities for a corporate customer — falls to marketing creatives.

Borderless teams. Increasingly, shared services teams are coping with pressure to scale by collaborating with external agencies and freelancers. Other teams will outsource because of a lack of adequate internal talent — especially the case when a tight U.S. labor market makes finding the right skilled employee challenging. Add to that a growing mobile workforce within their own organization; by 2022, nearly half (42.5%) of the workforce will be remote at least some of the time, communicating and collaborating with work teams [through digital means](#).⁹ Building effective remote collaboration into marketing shared services processes is an imperative.

Siloed technology. Chat and email. Task apps, ticketing, and storage solutions. Creatives field requests for work, updates, and approvals through a variety of disconnected channels. Back in 2012, [McKinsey](#) forecast that messaging platforms like Slack would increase productivity dramatically and break down silos.¹⁰ Whether or not that has actually happened remains open for debate. In many cases, having too many disparate “productivity” tools might be hurting, instead of boosting, productivity; [McKinsey](#) reports that workers now spend as much as 19% of their working hours searching for information.¹¹ Creatives make and share important decisions via email and audio and web conferencing, in physical meeting rooms, and by swapping comments in documents, spreadsheets, and proofing apps. But unless a dedicated professional consistently documents and shares what was said when and where, there is often no single source of truth to keep creatives and program managers all on the same page.

7. Boston Consulting Group, 2017. *Profiting from Personalization*.

8. Deloitte, September 14, 2016. *Deloitte study: Digital influence redefines the customer experience*.

9. StrategyAnalytics, November 9, 2016. *The Global Mobile Workforce is Set to Increase to 1.87 Billion People in 2022, Accounting for 42.5% of the Global Workforce*.

10, 11. McKinsey & Company, July, 2012. *The social economy: Unlocking value and productivity through social technologies*.

The New Imperative for Shared Services Programs: Collaborative Work Management

Into the complex and often frustrating pressure cooker that is marketing shared services comes a new breed of technology that is driving remarkable organization-wide change. Called “collaborative work management” (CWM), these cloud-based applications redefine collaborative work by empowering overworked and swamped teams to work in a new way. Pioneered 15 years ago by Smartsheet, the field now hosts light- and heavy-weight solutions that offer varying degrees of functionality, management, and control.

Here’s a look at the most pressing pain points marketing shared services organizations face today, and how CWM applications deliver effective solutions:

Pain Point: Communication and Collaboration

Siloed technologies. Geographically dispersed teammates, working in different companies and in different time zones. Communications lost in the shuffle of “Reply All” email threads. Just one of these factors is enough to complicate communication; together, they can spell the doom of effective, on-time delivery.

A design request relayed via email suddenly accelerates to critical status during an in-person meeting, but the external stakeholders (or even most of the internal ones) are chugging along, blissfully unaware of the change in deadline and resource allocation. A change in messaging prompts a re-work of a graphics package, but no one thinks to tell the copywriter.

Time is lost as creatives follow the breadcrumbs of communication — where did I read that message last? — from a variety of channels, instead of leaning on a central source of information. Collaboration is a challenge, as creatives bounce between multiple purpose-built tools to submit, proof, approve, track, and report on their work.

The Solution: Centralize

Centralizing all information, from requests and requirements to resource allocation and approvals, creates a single source of truth that can redefine how marketing shared services teams work. With real-time access to project status via portals and dashboards, and up-to-the-minute updates on changing requirements, creative teams shed administrative baggage and free up time (and head space) for improved delivery. And with a clear-eyed view into dependencies and requirements, collaboration becomes seamless.



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Using a CWM platform may not eliminate meetings altogether, but it can shave off hours spent updating each other about status and resource allocation by making the information readily available to anyone, anytime. A CWM platform also makes tracking and reporting on work easy, so business leaders get an accurate view of team productivity – and how it’s contributing to the bottom line.

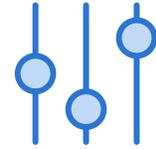
Pain Point: Approvals

Too often, internal stakeholders don’t agree on what they want – but they know what they *don’t* want. This invariably leads to scope creep and too many churn cycles as not everyone can agree on what “done” looks like. The subjective nature of the creative process worsens the situation, as what looks like a stellar campaign to one stakeholder receives a lukewarm reception from the rest. [Forrester research](#) reported in 2018 that “unanticipated tasks” were on the rise at 70% of organizations surveyed. Likewise, nearly half (47%) the survey respondents viewed unstructured work (including unanticipated tasks that are required to complete projects) as the top challenge in project management.¹²

Outsourcing to agencies, the gig economy, and the rise of digital nomads have made the sign-off process more challenging and time-consuming. Very often, no single person has complete authority to sign off on the project. As creatives attempt to navigate multiple points of view, the design process itself is slowing down. A [2018 Forrester survey](#) commissioned by Smartsheet showed that an average of 38% of projects fail to meet their deadlines.¹³ Manual approvals processes eat time better spent iterating on creative.

The Solution: Standardize

A collaborative work management tool enables standardization of the entire creative marketing cycle, from conceptualization and ideation to final delivery. CWM tools make room for exacting design briefs that encapsulate vision directives and brand guidelines in one central platform. Since all stakeholders have access to this platform, they can agree on final outcomes and sign off on the briefs before the project even starts. This holds stakeholders’ feet to the fire in case of sudden changes of vision or scope, and keeps the campaign on track.



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12, 13. Forrester, October, 2018. [Deliver On Top Business Objectives With Collaborative Work Management.](#)

A CWM tool can help teams track whose sign-off is necessary on tasks, what the proofing cycle looks like, and accepted interpretations of the brand style guide. The platform can house all related fonts and style documents. By standardizing every aspect of the creative process, a CWM tool improves productivity instead of leaving creatives to reinvent the wheel for every new project on their plates. A CWM tool also encourages marketing managers to outline which metrics to measure so they can evaluate the success of their campaign. Such details help creatives focus more quickly on what to change (and keep) for the next ideation and design cycle.

The best-in-breed CWM platforms offer automated workflow capabilities that vastly streamline the approvals process. Requests and notifications are triggered automatically, so you can keep work moving, 24/7, no matter how far-flung your team.

Pain Point: Clutter

Housekeeping is a major chore if you have to clean eight different rooms with varying degrees of clutter. A similar situation holds true for project management: Creatives don't want to check email, then dig around a file-sharing service for the style guide documents, mail each other relevant font files using a dropshare kit, update project status on a whiteboard and then pen down delivery dates on an Excel sheet. Every new place where information has to be entered is time spent away from the creative process and hurts productivity.

Creatives don't suffer from a lack of tools to help them attend to various parts of the creative process. If anything, there are too many tools that clutter up the administrative tasks that need to be done. The problem is that these tools only grant partial functionality and so the project ends up in silos: documentation in one place, approvals in another tool, and delivery tracking through yet another. Worse, each tool speaks a different language and features a different interface, which creatives must learn before they can actually be productive.

The Solution: Simplify and automate

A certain amount of documentation is inevitable for effective project management — but the right CWM platform corrals all those requirements and attachments in one place. A powerful collaborative work management platform will eliminate the reliance on a piecemeal approach and simplify the creative process by speaking one easily understood language, accessible in one central location. It doesn't always have to mean getting rid of all your tools, just casting off the unnecessary ones.



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Pain Point: Resource management

Sometimes managers simply assign a task to the nearest creative at hand, either because they can't easily see the load distribution or they don't have the time to assess resources. This leads to an inequity of work distribution, with one creative pulling more than their fair share. Workloads that exceed in-house availability trigger email cycles and delay, as project managers query agencies and freelancers about their availability.

The Solution: Allocate

An effective CWM platform ensures all relevant stakeholders can get a comprehensive view of all projects in flight — in real time. Such levels of transparency help ensure equitable allocation of resources, as project managers can see resources along with project status and timelines.

Project managers can also easily outline responsibilities and see their resource spend and utilization rates to track billable hours. They can then work on allocating resources more efficiently. Collaborative work management tools help managers gather real-time data on what's working (or not) and identify where the bottlenecks are before they can create any lasting damage to already-tight timelines.



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The Pain Point: Scale

In the past, preserving brand identity was relatively easy; creatives only had to worry about landing consistent, effective messages across newspaper, television, and billboards. The explosion of new digital outlets and social media platforms, each with their own technical requirements for optimum content delivery, means creatives now have to ensure consistent brand identity and messaging across a complex sea of channels. Such a scaleup of work frustrates creatives, who might have to test every new campaign on at least five different web browsers, on mobile platforms, and more.

The rise in personalized messaging fed through digital analytics also adds to the pressure to relay one message a variety of ways and then test those through multiple platforms.

Justifiably, creatives often view the administrative tasks related to project management — status updates, documentation updates, the approval process and proofing — as time sucks that distract from the “real” job at hand. While that might indeed be the case, accountability is a key part of tight project management. Companies that undervalue the importance of project management run the risk of failure and significant revenue loss as a result. Such opposing needs between the administrative tasks related to project management and creatives’ desires to work on “work” presents a challenge to marketing teams.

The Solution: Automate

Artificial intelligence and natural language processing (NLP) are already aiding creatives in the design process by helping them search for and cull media assets faster, and by automating routine tasks such as cropping and alt-tagging to translate one message across multiple screens.

That same underlying philosophy can dramatically decrease the grunt work associated with project management tasks. For example, when a designer finishes a task and files it in place in their CWM tool, it can automatically generate an alert to a supervisor who needs to approve it.

Equally important, because stakeholders might be anywhere, the right CWM tool will allow access on-the-go; critical, since 66% of information workers use a smartphone for work, with nearly 25% of them doing so for at least [half the workday](#).¹⁴ In such a case, as soon as the supervisor receives the alert on her mobile phone, she can review the document and sign off electronically so the work cascades onto the next step.

Updates to tasks can be pre-programmed to auto-fill on project sheets as per an easily configured automated workflow. No need for status update emails or a Slack message sent to everyone on the channel. The same applies to recurring reminders. Such automation speaks to the necessity of standardization – the more standardized the process, the greater the ability to streamline necessary but time-consuming tasks. In a [2017 Smartsheet report](#), 59% of workers estimated they would save at least six hours a week if their routine tasks were automated.¹⁵ With the right CWM tool automating many of the chores related to project management, creatives are free to focus on what they love to do best. And marketing managers see an increase in productivity because of faster turnarounds.



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The platform you need

The value of CWM technology to marketing shared services organizations cannot be overstated. A [2017 survey](#) of 1,100 companies conducted by the Institute for Corporate Productivity found a direct correlation between collaborative work and improved performance.¹⁶ In addition to a five-fold increase in performance, projects also registered lower costs, increased productivity, and a compressed turnaround time.

14. Forrester, October, 2018. [Deliver On Top Business Objectives With Collaborative Work Management](#).

15. Smartsheet, June, 2017. [Automation in the Workplace 2017](#).

16. Raconteur, December 15, 2017. [How collaboration powers productivity](#).

In today's high-velocity digital landscape, enterprises are leading with customer experience as a way of standing out amid all the noise. As a result, creatives are under more pressure than ever to deliver high-impact marketing ideas that make a lasting impression and foster brand loyalty. When "eyeballs" and "clicks" and a whole host of complex indicators are the metrics that determine ROI, companies need to ensure that their marketing messages stay on track. Project managers and the C-suite need to make every conscious effort to make creatives' jobs easier, so they retain and optimize valuable talent. More than half the companies surveyed for a [2018 Forrester report](#) said that the improved planning that CWM delivers will lead to greater employee satisfaction.¹⁷

The Smartsheet platform provides a centralized source of truth where all stakeholders can collaborate effectively, in context, and in real-time. It completely redefines marketing shared services processes by providing collaboration, transparency, and efficiency, getting everybody working on the same page. And Smartsheet makes creatives happy by keeping them focused on the work they want to do.

The global collaborative applications market is already valued at [\\$3.5 billion](#).¹⁸ There's a reason that IDC forecasts it will grow at an impressive [rate of 70%](#) in just the next three years.¹⁹ In a globalized workplace, collaborative work management is the future of all work — *especially* creative work. With a CWM solution in place, marketing shared services organizations can realize unprecedented productivity, and drive new value to the brand — and to the bottom line.

About Smartsheet

Smartsheet (NYSE: SMAR) is a recognized leader in collaborative work management, trusted by more than 90% of the Fortune 100. It empowers marketing organizations to plan, manage, track, automate, and report on work, driving accountability by maintaining consistency across channels, saving time with centralized resources, and increasing speed to market. With proven, pre-built solutions, marketing teams can create better campaigns, plan extraordinary events, and provide best-in-class shared services to their organizations. Learn more at smartsheet.com/marketing.



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17. Forrester, October 24, 2018. [The Forrester Wave™: Collaborative Work Management Tools For The Enterprise, Q4 2018](#).

18, 19. IDC, August, 2018. [Worldwide Collaborative Applications Forecast, 2018–2022: The Collaboration Imperative Arrives](#).

