

A woman with glasses and a man with glasses and a beard are looking at a whiteboard covered in colorful sticky notes. The woman is pointing at a note. The man is resting his chin on his hand, looking thoughtful.

5 Essential Workflows for Time-Poor Marketers

contents.

Introduction.....	2
<i>Part I: What's in a workflow?</i>	
Why Workflows? Why Now?	4
What is a Marketing Workflow?	5
4 Stages of a Marketing Workflow	6
<i>Part II: 5 Essential Marketing Team Workflows</i>	
#1 Brand	8
#2 Digital (Agile)	9
#3 Content	10
#4 Email.....	11
#5 PR	12
<i>Part III: Streamline Your Workflows</i>	
Streamline Your Workflows in 6 Simple steps	14
How Simple Can Help	15
Appendix of Templates	16
Conclusion	17
Contact Us	17

● Introduction

Digital marketing has injected immediacy and dynamism into marketing that just wasn't there a decade ago. But the development of new technologies that rapidly turn into customer touch points is placing marketing teams under great pressure.

Marketers must create much more content than they ever needed to when they managed just five or six channels to market. And although output has increased by a factor of 10, marketing workflows simply have not kept pace.

All modern marketing teams must develop efficient marketing processes that utilise the latest tools to help them maximise output, maintain quality, meet compliance requirements and maximise results.

Effective marketing workflows balance clarity of process with the need for speed, without compromising on quality or brand compliance.

To help marketing teams come to grips with these new requirements, Simple has developed five essential workflows to help busy marketing teams work more effectively. You'll also find templates to help you implement more effective marketing workflows. We hope you find them useful!

Lara Sinclair
Head of Content, Simple

Part 1

What's in a
Workflow ?

Why Workflows? Why Now?

Marketers are used to diving in and getting work done without giving their work processes much thought. But the changing demands on modern marketing teams can easily lead teams to be overwhelmed if they don't work efficiently.

There are three key trends affecting marketing team workflows -- and the industry at large -- at the moment:

- Most marketing teams are using more channels to market than they ever have before;
- Teams must produce more content than ever before to 'feed' these channels;
- Marketing teams are using more tools than ever before to manage all these processes.

That leaves most marketing teams with three choices to cope with the increased workload:

- Work longer hours
- Lower standards
- Work more efficiently.



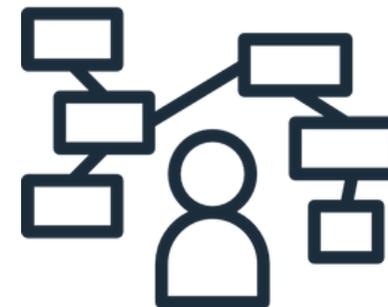
Today's marketing team needs to run like a well-oiled machine that can pump out brand advertising, digital messaging, content marketing and other forms of messaging without missing a beat.

Leaving aside the first two options, documenting, analysing and streamlining your marketing team workflows can be a very effective way to help your team work more efficiently.

Efficient workflows can streamline marketing work by 30%-45%. And when technology is used to automate those workflows, output can increase by as much as 10 times the starting volume.

Workflows that may have been developed when marketing teams managed five or six main channels to market are no longer effective.

Today's marketing team needs to run like a well-oiled machine that can pump out brand advertising, digital messaging, content marketing and other forms of messaging without missing a beat.



What is a Marketing Workflow?

A marketing workflow is much more than a pretty flowchart. It defines the work to be done and the timeframe in which it should be completed.

A marketing workflow is a sequence of interdependent tasks or actions that together define a repeatable marketing process.

Marketing workflows can be created for any part of the broader marketing team to define a process involving different actions, personnel, teams or departments. When a process must be repeated many times, efficient workflows can save time, money and resources, allowing teams to get more work to market, faster.

Marketing workflows can be automated using modern cloud-based technology, such as a marketing resource management platform. Automated workflows define tasks, initiate actions and request approvals based on the completion of previous tasks in the workflow, and can also be used to trigger entirely separate downstream workflows.

For example, a budget allocation request workflow, once approved, might trigger a brand campaign workflow with a request for brief. Once the brief and resulting concept has been approved, it could then generate workflows for the creation of marketing materials for each marketing channel required.



Benefits of Marketing Workflows

The main benefits of documenting and streamlining your marketing workflows are to save time, achieve clarity of purpose and clarity of process, use resources efficiently and improve the overall brand experience – ultimately making your marketing work simpler, faster and more effective.

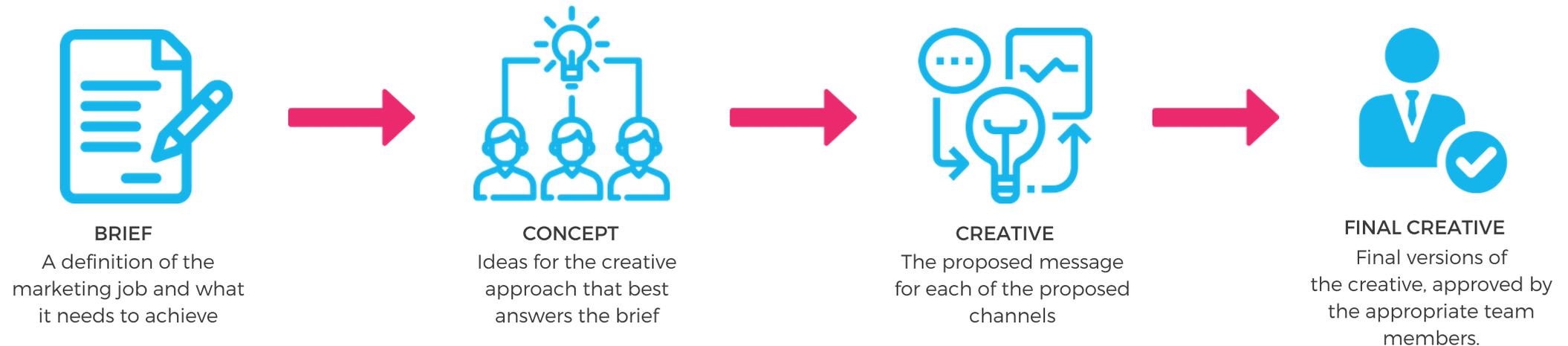
Marketing workflows reduce duplicated and wasted work, address longstanding bottlenecks, remove the need to chase people by email, and build in the necessary steps to ensure all your briefing, branding, compliance and approval requirements are met up front.

They clarify the required process so it can be followed by numerous team members, and prevent confusion by stopping people from getting distracted by unnecessary tasks.

All of this results in increased productivity, greater transparency, shorter go-to-market times and improved accountability.

Four Stages of a Marketing Workflow

Most marketing and content creation workflows comprise four main stages.



Increasingly, regulatory requirements mean marketing risk management and compliance must be built into marketing workflows: otherwise it's a matter of ensuring the work is approved by team members with the required experience to foresee any likely issues that might emerge.

There should also be a results or reflection stage to record how well the campaign performed.

Some workflows are set-and-forget: for example, if you're publishing a blog a day, the process must be easily repeatable. For others, you may need to test and evaluate your workflow based on how it's performing, and tweak it as you go.

Essentially, marketing workflows should balance clarity of process and the need to achieve brand consistency and regulatory compliance with the need for speed. Workflows that are too detailed, or contain too many sign-off stages or approvers, can be counterproductive: not only are they onerous to follow, but they end up wasting time by creating bottlenecks.

"When I'm advising teams on how to create their marketing workflows, I encourage them to focus on tasks that require meaty action, rather than 'busywork,'" Simple implementation consultant Mark Horton says.

We've created five essential workflows to help streamline some common marketing activities and templates to help you implement them.

Part 2

5 Essential Marketing Team Workflows

1. Brand Campaign Workflow

Most brand campaign workflows that involve briefing either internal or external creative teams go through the following steps:



Download

Download our FREE brand campaign workflow template here or see our appendix of templates on page 16.

Brief

The brand marketer writes the creative brief (or marketing brief) and submits this for approval to the designated marketing leader.

In the case of some agency-client relationships, the creative agency will interpret and present the brief back to the marketer for acceptance as a reverse brief -- otherwise known as the agency proposal,

"Some marketing teams that are really good at briefing will eliminate the reverse brief step," Simple's Mark Horton says. "Not all marketing teams are comfortable doing that."

Concept

When the agency has settled on a concept or concepts that answer the brief, they are submitted to the marketer for approval. If briefed correctly, the expectation is that one round of concepts will elicit a direction that is accepted by the brand team; if not, the agency goes back to the drawing board to make amendments or to start over.

Creative

When the concept has been approved, the agency or creative team creates the finished marketing work for each channel. They are submitted to the brand marketer or marketing leader for approval and feedback. Very efficient workflows allow for two feedback rounds at this stage of the process, though sometimes more are required.

Final Creative

When the marketing team is happy with the creative, it may be sent to legal, risk or compliance if necessary.

Then the final version is packaged and distributed to the required brand team, to the internal digital asset manager and to the distribution channels, such as media.

Results

The post-implementation review is conducted, and results recorded so that learnings can be maximised for future marketing campaigns.

2. Digital (Agile) Campaign Workflow

Many enterprise marketing departments have a digital team with a more agile marketing workflow than a traditional brand marketing team.

Each digital marketing team must choose the agile marketing process that best suits them. This is an example of an agile marketing workflow developed for a self-sufficient digital team working in sprints.

Agile Brief

An agile marketing brief with a user story, measurable goals and other required information is completed by the stakeholder or team member requesting the work.

Prioritisation

At the team's Scrum meeting to kick off the sprint, the team's backlog, or to-do list, is prioritised, or 'groomed', to move the most important jobs to the top.

The length of time and resources each task will take is estimated and complex jobs broken down into smaller tasks to be completed within the sprint. The team commits to the tasks to be completed in that sprint.

Concept development to 'Done'

The self-sufficient digital team creates the concept, and reports their progress to the team and external stakeholders in regular standup meetings. Problems are raised and resolved by the team if possible or escalated to the marketing leader if required. The team decides when the first acceptable version of the creative has been reached (defined as 'Done') and the agreed stakeholder or approver signs off on the work. The initial version of the work is launched.

Iteration

The team tracks results and discusses how the campaign might be improved. Changes are implemented and results tracked. The iteration process may be repeated more than once during the sprint. This happens concurrently with the development and creation of other work.

Retrospective and Showcase

At the conclusion of the sprint, the digital team meets to discuss the output and processes. Improvements are noted for future sprints. At a regular set time, work and results are presented to the organisation.

Download

Download our FREE digital (agile) campaign workflow template here or see our appendix of templates on page 16.

3. Content Marketing Campaign Workflow

The ever-present challenge for most content marketing teams is to create highly engaging content at scale.

This content marketing campaign workflow was designed for an in-house team working from an existing strategy.

Content theme and plan

The content marketing team identifies a content topic. The content marketer confirms it fits the product, keyword strategy and overarching marketing objectives. Keyword volumes and social shares are examined and the angle the brand will take to maximise search volumes, social shares, acquisition and conversion is determined.

The idea is interrogated to ensure the campaign includes a variety of content that meets requirements, such as:

- Channel type - eBooks, blogs, infographics, video, webinars, and so on
- Funnel stage - Top, middle and bottom of funnel, and
- Purpose - Acquisition, shares, cornerstone SEO content, and so on.

The working headlines and summaries are written. It is then approved by the content or marketing leader.

Content creation and publication

For each piece, the content is written or commissioned, headlines are written and optimised, then copy is sub-edited and optimised for search engines.

The header image and other graphics are created or commissioned and added to the final draft, and the draft is proof-read.

Social messages are written, approvals obtained from the content or marketing leader, and the content is published or scheduled.

Influencer outreach or other content promotion is conducted; the content is incorporated into marketing automation programs.

Results

Results are monitored and the campaign is tweaked to maximise outcomes based on the best-performing content.

Download

Download our FREE content marketing workflow template here or see our appendix of templates on page 16.

4. Email Campaign Workflow Template

Ad man David Ogilvy called direct response his “first love” and “secret weapon” and said no one should be allowed to create general advertising until they had served their apprenticeship in direct response.

Email marketing campaigns rarely begin with a brief, though they may be initiated by a request from the sales team or other department.

Download

Download our FREE email marketing workflow template here or see our appendix of templates on page 16.

Concept

The purpose of the email campaign is confirmed, the target audience identified, and the email database segmented if necessary. The key message or content is confirmed, along with the call to action, and any follow-up actions, such as nurture emails based on the response to the first email.

Goals and key metrics are defined, including: unsubscribe and open rates, click-through rates, and conversion rates, among others. Approvals are obtained from the relevant marketing leader.

Email creation and testing

The header, footer, layout, images and any other assets are designed. The subject line and email copy are written and sub-edited.

Teams may wish to conduct A-B testing using a different subject line or offer: if so, the above process is repeated for the ‘B’ test.

The email/s are tested on a variety of browsers and devices, along with the links, and the links behind images. The first test email/s are proof-read, amended and tested again. Then they are scheduled.

This process is repeated for any follow-up emails. Approval should be obtained from the required marketing leader or stakeholder as required.

Report

The results are measured and reported on, with feedback provided to the marketing team based on results.

“While stats are great, make sure you’re reporting on more than just vanity metrics,” Simple’s chief marketing officer Sara Gonzalez says. “Rather than just focusing on email open rates and bounce rates, take a deeper look into conversion rates, click to open ratios and be sure to measure across more than just one email.”

5. Public Relations Campaign Workflow

In public relations campaigns, the brand is reliant on media outlets and influencers for distribution, as well as to interpret how the brand is presented.

But a clear understanding of individual outlets' perspectives can have a big impact on how these issues are represented.



Download

Download our FREE PR campaign workflow template here or see our appendix of templates on page 16.

Brief

The PR operative confirms the message and desired outcomes for the brand or organisation. They should leverage their understanding of the target audience and media coverage to date to identify any related messages or 'stories' that will be of interest in the market that relate to the primary corporate message.

Creative approaches, stunts or other elements that might help the message get picked up by the media can be considered. Any other issues that may arise and need to be managed should be anticipated, and a message prepared to address these. The approach is approved by the marketing leader, corporate communications leader or relevant executive.

Tactics

The objectives are translated into messages of interest to the desired media outlets and influencers, and story angles and exclusives for each are confirmed. The message for general release is confirmed. Corporate spokespeople are trained on the messages to be conveyed, impressions to be avoided, and time is booked to ensure they are available to speak to the media if required.

The material is prepared including writing the press release with quotes from the relevant spokespeople, background or product information and supporting corporate, photographic, audio or video materials. These are approved by the marketing leader, corporate communications leader or relevant executive.

Pitch

The ideas are pitched to the selected media outlets and influencers, and followed up as needed. Additional material or interviews are organised if required. The response is monitored in media, online and on social channels.

Results

Coverage and commentary is monitored and responded to if required. The results are recorded in terms of pick-up, reach, positive and negative sentiment, share of voice over time, sales and website traffic. Recommendations are recorded for future PR initiatives.

Part 3

Streamline Your Workflows

Streamline Your Workflows in 6 Simple Steps

Take the first steps towards improving your marketing process by documenting and streamlining your own marketing workflows.



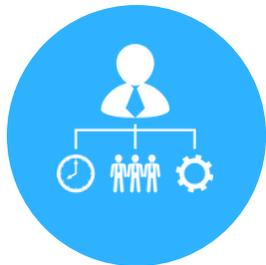
1. Document

Jot down your process on a series of sticky notes. Be comprehensive.



4. Define

Give each Sticky a clear definition of done with timelines.



2. Assign

Add your doers and approvers at each stage of the process. Ask why each approver is there. Only include the essential approvers.



5. Test

Try it out, track your progress, and add in stickies to fill any gaps.



3. Consolidate

Toss out the 'busy work' steps and consolidate the work into stages followed by handovers to a different team or requiring approvals where possible. The only sticky notes left should be the important points!



6. Publish

Enshrine it as best practice by publishing it to your team, or add it to your marketing resource management system or workflow management tool.

How Simple Can Help

Simple can help your team overhaul your marketing workflows, reducing marketing complexity and improving effectiveness. Here are 6 of the key benefits of using our intelligent marketing platform:

1. Visibility

Documented, centralised workflows ensure your marketing process and deadlines are clear. The progress of marketing activities can be tracked easily and approver matrices mapped to your workflows so you can see what needs to be done at a glance, saving countless hours and improving team cohesion.

2. Efficiency

Simple's workflow consultants and marketing platform can help you identify and implement best practice, automating your marketing workflows to ensure they are as fast and effective as possible. Beginning with an intelligent briefing process that ensures all the necessary information and insights are supplied up-front, and then moving each process through approval and compliance gates, Simple makes it easy to ensure your work is brand-consistent and complies with all regulatory requirements.

3. Collaboration

Simple's cloud-based marketing platform enables easy collaboration across teams, geographic locations and time zones. It ensures feedback is retained and logged in the same centralised platform in which marketing work and approvals are captured, ensuring everyone is always looking at the most current version of the work.

4. Agility

Simple can accommodate traditional and agile marketing workflows, including calendar, backlog and kanban board features. There is also an integrated results dashboard to enable your marketing team to launch, iterate and improve campaigns, boosting your responsiveness and allowing you to create more effective marketing.

5. Marketing team intelligence

Analyse and identify the bottlenecks slowing down your marketing workflows and take steps to improve them. Simple provides marketing team analytics that can help teams identify opportunities for improvement in briefing and approvals, as well as track output and results, allowing marketers to fine-tune and optimise both process and performance.

6. Integration

Simple's marketing platform co-ordinates and integrates different technology point solutions, team data and campaign measurement data into your individual marketing workflows and your overall marketing process. This enables Simple to function as the nerve centre of the marketing technology ecosystem.

Appendix of Templates



Brand Campaign
Workflow Template



Digital (Agile)
Campaign Workflow
Template



Content Marketing
Workflow Template



Email Campaign
Workflow Template



Public Relations
Campaign Workflow
Template

● Conclusion

Marketing teams today must commission and manage the creation of content spanning an ever-increasing number of customer touch points.

Despite this, most marketing team workflows have not kept pace with the resulting massive increase in the volume of work marketers must produce.

The use of old tools such as email and ad hoc, undocumented workflows create confusion and bottlenecks, slowing teams down.

Modern technology -- such as the marketing workflow automation capability within Simple's end-to-end Marketing Resource Management system -- gives time back to marketing teams by documenting, streamlining and automating marketing workflows.

It facilitates rapid collaboration between team members, teams, geographic locations and across time zones, and provides data on marketing team activities.

All of this enables marketing teams to do more with less, reducing complexity, increasing speed and volume of output, and ultimately helping all your teams create more effective marketing.

Watch

Turns Out, Your Workflow Matters

Read

5 Best Practices for Managing Marketing Approvals

Learn

How Sportsbet Uses Simple to Streamline its Marketing Workflows

Want to see Simple in action?

Book a demo to see how Simple can help your team streamline, manage and automate your marketing workflows so you can reduce complexity and create more effective marketing.