Project & Process Management

in Marketing Teams & Agencies

A benchmarking report by Screendragon

Introduction & Methodology

Screendragon is process & project management software for high performance marketing and agency teams. Our software and professional services teams work with many global brands, such as Kimberly Clark, P&G, Kellogg's and many leading agencies, such as McCann, Leo Burnett and Maxus.

At Screendragon we often hear negative feedback, both from non-marketers in brands and also client feedback on the agencies that they work with or come into contact with.

This feedback suggests agencies do not have enough rigour when it comes to project management and internal processes. While other departments within the enterprise brands seem to look down on marketing teams as creative, yet lacking skills and tools often employed in other departments to manage projects cost effectively and efficiently.

We also know from our own implementation that many organisations; both agency and client side have project management capabilities and tools that need to catch up with the digital age. Many still seem to rely on outdated and outmoded methodologies.

Methods of working are often old-fashioned and unstructured, which is constraining marketing teams and agencies even as the range of online channels available to them has exploded to an unprecedented level.

In order to prove or disprove this, Screendragon carried out online research. We commissioned a questionnaire, which was distributed among brands and agencies, ranging from mid-sized to global players, to which 220 client and agency side marketers and creative's responded.

We asked questions to deliver insight into how those people and teams work, to what extent they employ the digital tools now available to them and where they might be in need of more effective working practices.

Executive Summary

The research revealed a marketing/agency environment where, despite the profusion of digital channels and specialist software solutions, working practices remain old-fashioned and outmoded. Projects are still usually managed on spreadsheets and emails and very few use dedicated project management tools.

The result is duplicated work, incorrect versions of creative being published and few businesses with a central repository of their organisational knowledge and processes.
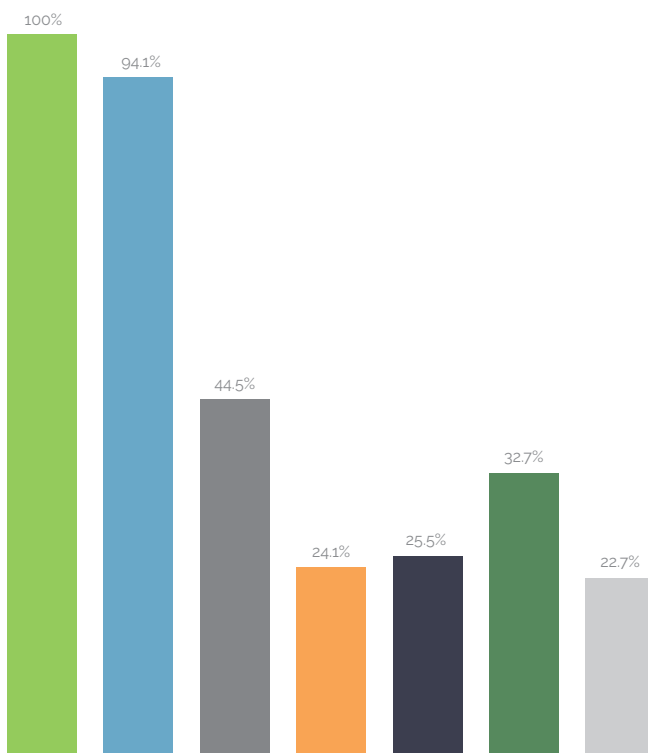
- Email and Microsoft Excel are the two main software systems used by marketing teams and agencies to manage projects. Less than half (44%) use dedicated project management tools

- Eight out of ten respondents (79%) think it would save them both time and frustration if they were able to go to just one place to get their work done

- A third of managers (33%) admit that they lack standardised processes

- Only around a quarter believe they have a firm grip on the status of their projects

- More than a third of those surveyed (34%) feel that work requests are not handled well in their organisation

- More than half (56%) of respondents don't track operational performance

- One in six (17%) admit that unnecessary duplication of work happens frequently

- Only one in six organisations (17%) have a dedicated software system to manage feedback and version control for creative approvals

- 40% of organisations admit that they've inadvertently published an incorrect piece of creative

- Almost three-quarters of organisations (72%) don't have one place, such as a dedicated online environment, where they and their partners can collaborate

- 30% of those surveyed say their organisation doesn't have an on-boarding process set up.

- Around one in five organisations (19%) believe that they would save more than a day for both existing managers and new staff members if they had their organisational know-how and processes organised in one place

- Eight out of ten believe agile working methods can be applied to some or all of their operations.
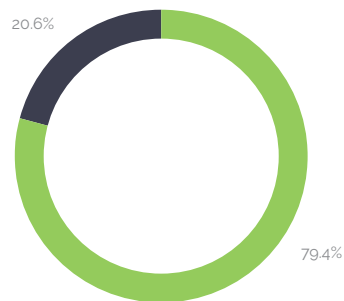
Productivity

Email and Microsoft Excel remain the two main software systems used by marketing teams and agencies to manage projects, employed by 100% and 94% respectively. Less than half (44%) use dedicated project management tools and only a third (33%) employ digital asset management.

Add that to the fact that a quarter of those surveyed (24%) employ online proofing, and it seems project productivity is still broadly reliant on old-school software that has been around for decades.

100%

94.1%

44.5%

24.1%

25.5%

32.7%

22.7%

How many separate software products do you use to get your work done?
(*tick all that apply*)

- ● Email
- ● Excel
- ● Project Management Tool
- ● Online Proofing
- ● Approval Tool
- ● Digital Asset Management
- ● Resource Planner

Project productivity is still broadly reliant on old-school software that has been around for decades.
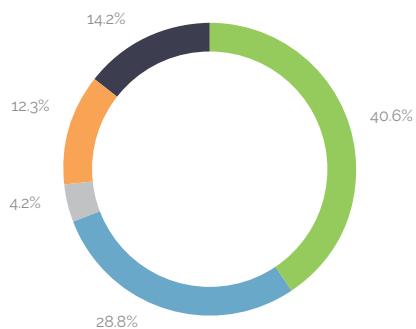
20.6%

79.4%

Do you think it would save you time and frustration if you were able to go to one place to get your work done?
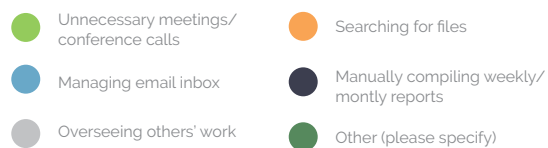
- 🟢 Yes
- ⬛ No

The fact that email is so widespread means it's also no real surprise that managing inboxes is the second biggest productivity killer for managers, behind only the time drain of unnecessary meetings and conference calls.

And yet, there's a demand for a better way of working. Eight out of ten respondents (79%) think it would save them both time and frustration if they were able to go to just one place to get their work done. These findings suggest it's time more businesses freed their marketing teams from the endless parade of meetings, calls and emails and looked for digital productivity solutions more in keeping with the 21st century.
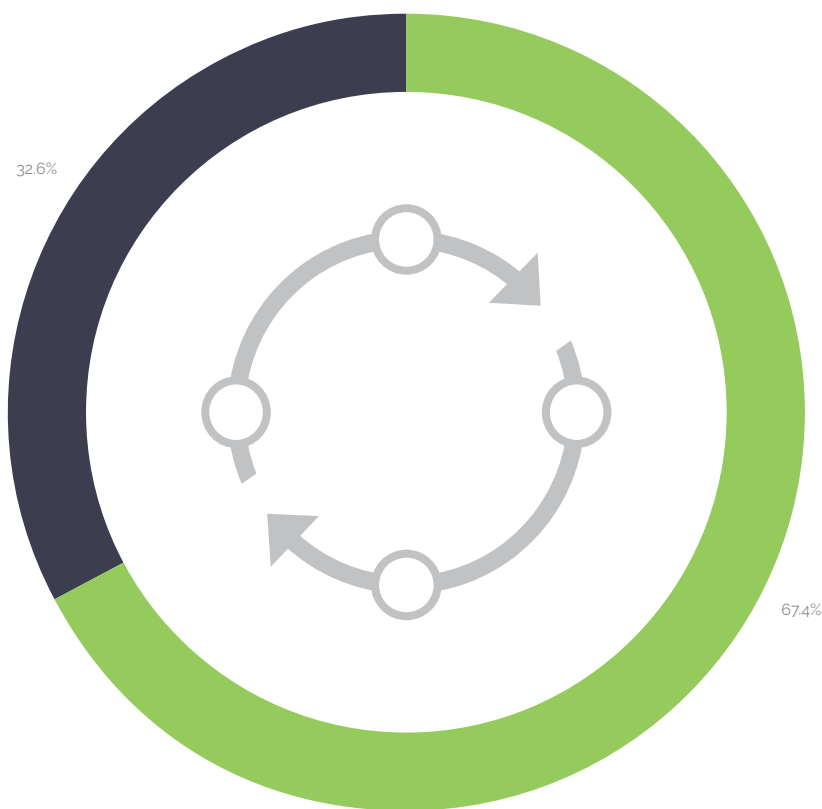
14.2%

12.3%

4.2%

40.6%

28.8%

What do you consider to be the top productivity killer in your daily work?

- 🟢 Unnecessary meetings/ conference calls
- 🔵 Managing email inbox
- ⚪ Overseeing others' work
- 🟠 Searching for files
- ⬛ Manually compiling weekly/ montly reports
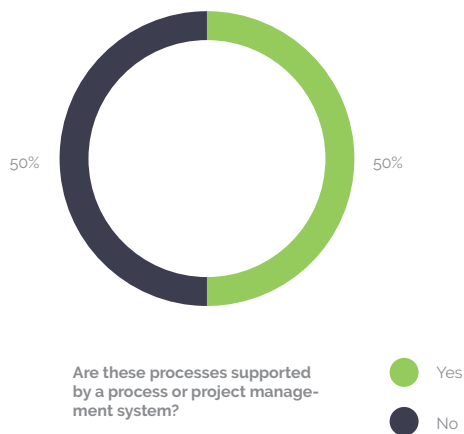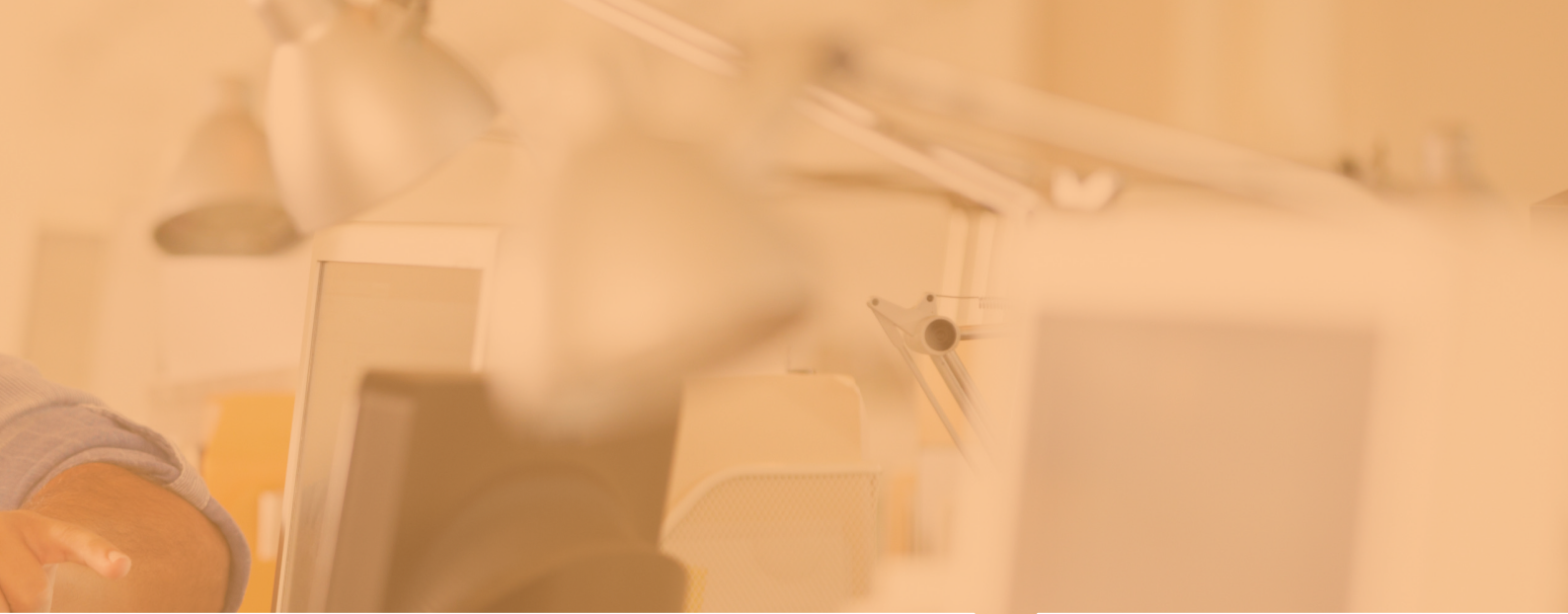- 🟢 Other (please specify)

Processes

The processes behind marketing projects, in particular, are in need of a serious shakeup. A third of managers (33%) admit that they lack standardised processes and only half (50%) have the support of a project and process management system.

32.6%

67.4%

Do you have standardized processes for your marketing projects?

● Yes

● No

50%

50%

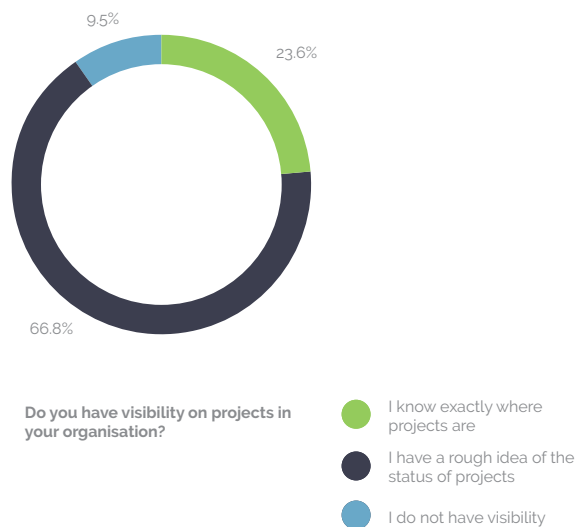**Are these processes supported by a process or project management system?**

🟢 Yes

⚫ No

The result of poor processes is, unsurprisingly, people without any clear visibility on how their work is actually going. Only around a quarter believe they have a firm grip on the status of their projects and two-thirds (67%) have to make do with a 'rough idea'.

Even more worrying, one respondent in ten apparently has no visibility at all. That suggests that there are a large number of potentially business-critical marketing projects currently being undertaken with no real accountability and control.

9.5%

23.6%

66.8%

Do you have visibility on projects in your organisation?

🟢 I know exactly where projects are

⚫ I have a rough idea of the status of projects

🔵 I do not have visibility

7

Managing Progress

Given that effective and accurate work request control is an essential part of process management, it's a concern that more than a third of those surveyed (34%) feel that work requests are not handled well in their organisation. More than half (54%) go on to admit that those work requests aren't captured digitally and routed for approval and feedback.
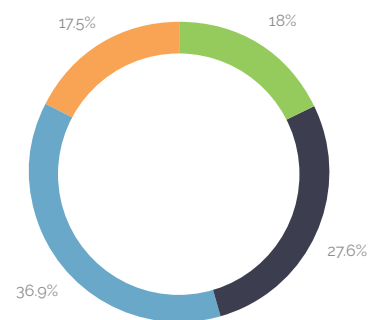
In fact, it seems a large proportion of process monitoring isn't handled digitally at all: almost four out of ten agency and marketing managers do it through meetings, with most of the rest relying on the old standbys of email (28%) and Excel (18%). Only around one in six use a dedicated portfolio dashboard.
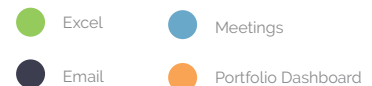

33.9%
66.1%
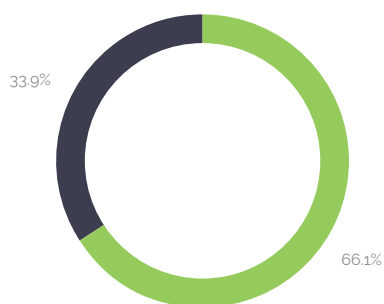
Are work requests managed well in your organisation?
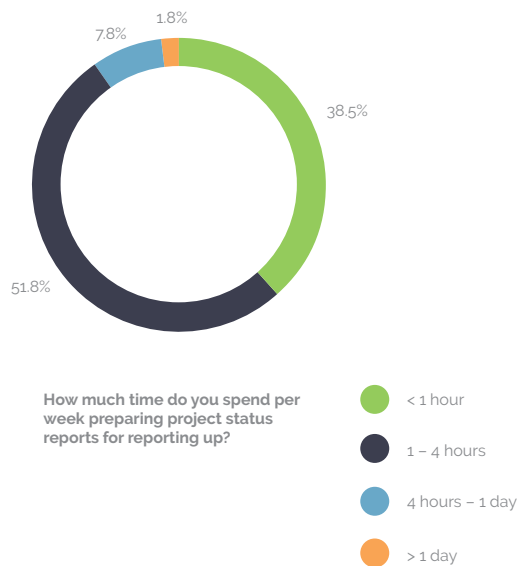
- Yes
- No

53.9%
46.1%

Are they captured digitally and routed for approval and feedback?

- Yes
- No

17.5%
18%
27.6%
36.9%

How do you monitor project progress?

- Excel
- Email
- Meetings
- Portfolio Dashboard

It seems a large proportion of process monitoring isn't handled digitally at all.

How much time do you spend per week preparing project status reports for reporting up?

- 🟢 < 1 hour
- ⬛ 1 – 4 hours
- 🔵 4 hours – 1 day
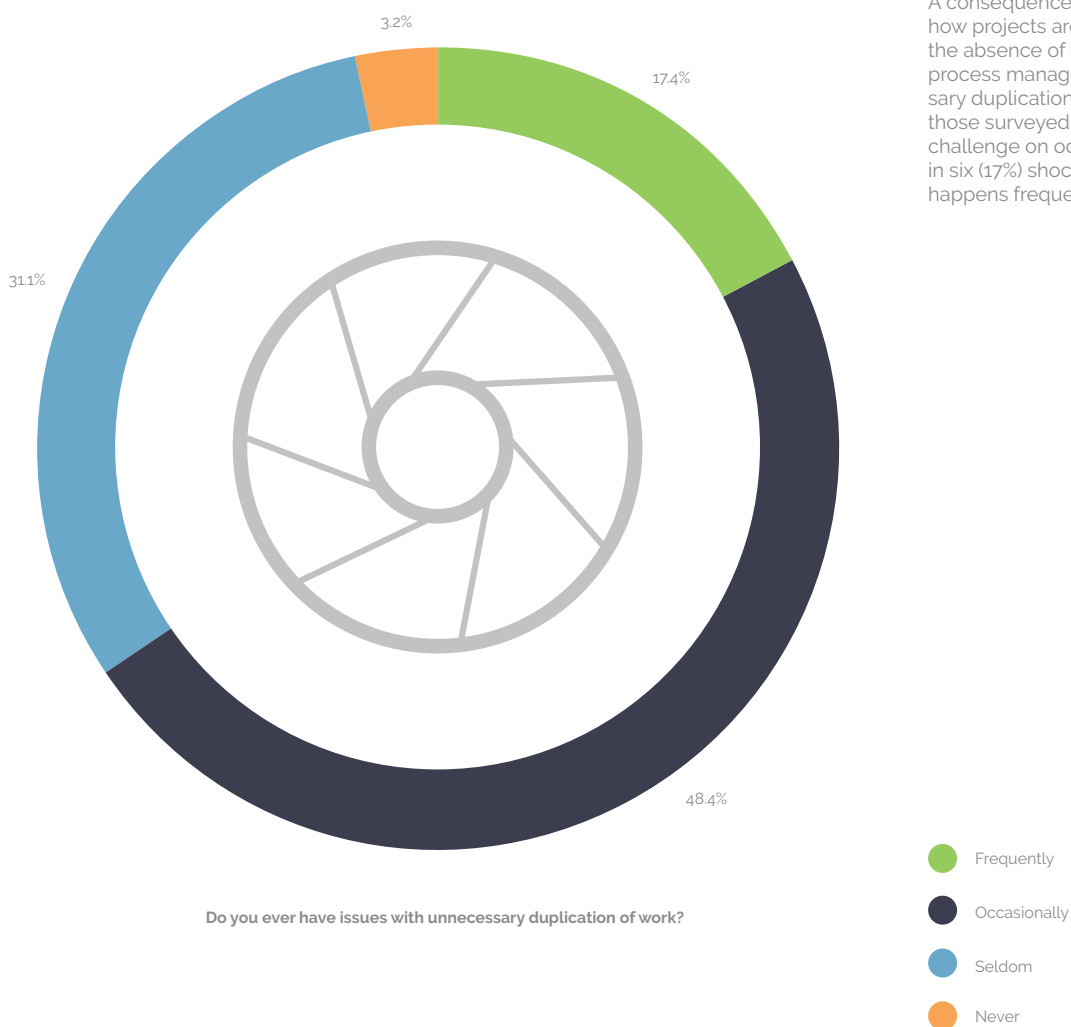- 🟠 > 1 day

1.8%
7.8%
38.5%
51.8%

The lack of digital process management capability leads to more time being spent creating and distributing status reports, with more than half of those surveyed spending 1-4 hours a week on reporting (and one in ten taking even longer).
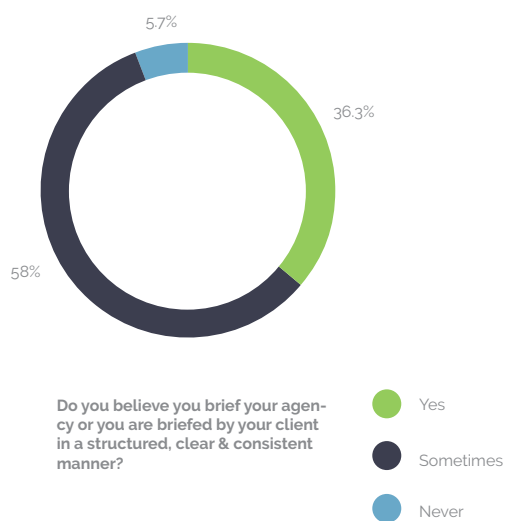
It also leads to less ability to track operational performance and analyse how long projects are taking as against how long they should be taking. As a result more than half (56%) of respondents don't track operational performance, even though many of them would like to do so.

It seems that a large number of marketing and agency projects could be taking too long to complete and those supposedly in control don't know how, why or when.


Do you track operational performance (i.e. estimated project completion versus actual completion)?

- 🟢 Yes
- ⬛ No
- 🔵 No, but I'd like to

26.5%
44.3%
29.2%

Clarity and Compliance

3.2%

17.4%

31.1%

48.4%

Do you ever have issues with unnecessary duplication of work?

A consequence of the lack clarity in how projects are progressing and the absence of a centralised digital process management is the unnecessary duplication of work. Almost half of those surveyed come up against this challenge on occasion and around one in six (17%) shockingly confess that it happens frequently.

- Frequently
- Occasionally
- Seldom
- Never

5.7%

36.3%

58%

Do you believe you brief your agency or you are briefed by your client in a structured, clear & consistent manner?
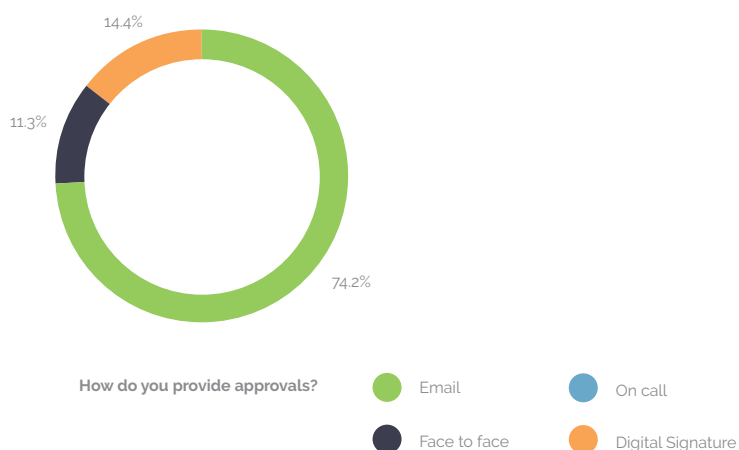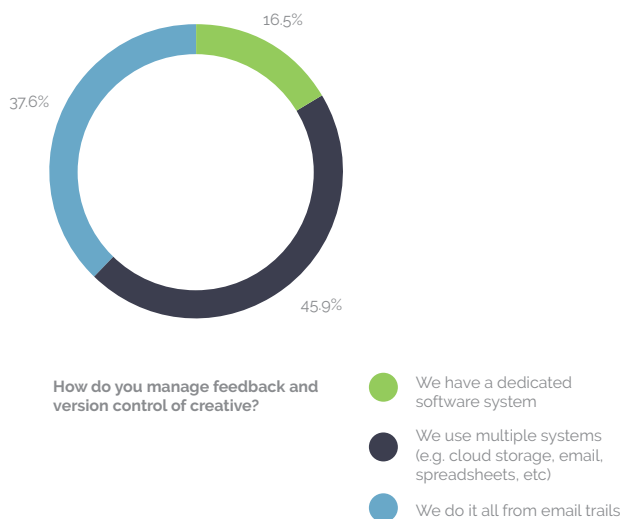
● Yes

● Sometimes

● Never

Not enough clarity and consistency can also negatively impact how organisations work with their agency partners. Only a third or so (36%) believe they always brief agencies or are briefed by clients in a structured, clear and consistent manner. Most think it only happens some of the time and around 6% think it never happens at all.

Compliance, on the other hand, remains an important part of how many brands and agencies work and nine out of ten of respondents said as much.

10.3%

89.7%

Is compliance important for you and your brand?

● Yes

● No

V
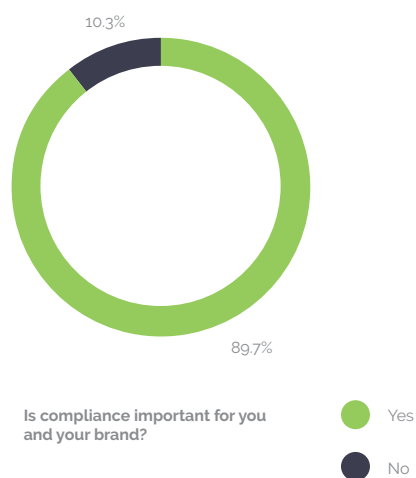
The Creative Approval Process

16.5%

37.6%

45.9%

How do you manage feedback and version control of creative?

- ● We have a dedicated software system
- ● We use multiple systems (e.g. cloud storage, email, spreadsheets, etc)
- ● We do it all from email trails

14.4%

11.3%

74.2%

How do you provide approvals?

- ● Email
- ● On call
- ● Face to face
- ● Digital Signature

Managing the approval process is one of the most important elements of any marketing project, especially as most have multiple stakeholders whose sign-off is needed at various stages as well as milestones they need to meet in a timely fashion.

When it comes to creative approvals, however, only one in six organisations (17%) have a dedicated software system to manage feedback and version control. The rest apparently rely either on multiple separate systems such as spreadsheets and cloud storage or on email trails. Again, this is hardly the vision of digital efficiency that most businesses would want to portray for themselves.
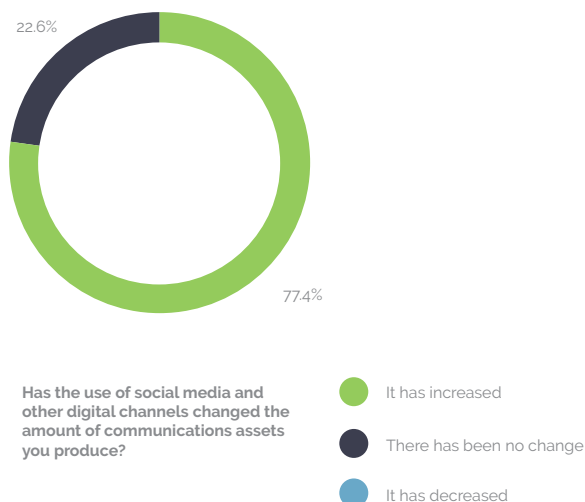
Email is also the main channel for providing approvals (thereby offering written proof), with some instead using digital signatures for an additional level of security. Unfortunately, the fact that one in nine marketing managers and agencies (11%) choose to rely solely on face to face approvals with no written or digital confirmation is much less comforting for the worst case scenario if something goes wrong.

40% of organisations admit that they've inadvertently published an incorrect piece of creative.

40.4%

59.6%

Has an incorrect version of creative work ever been inadvertently published?
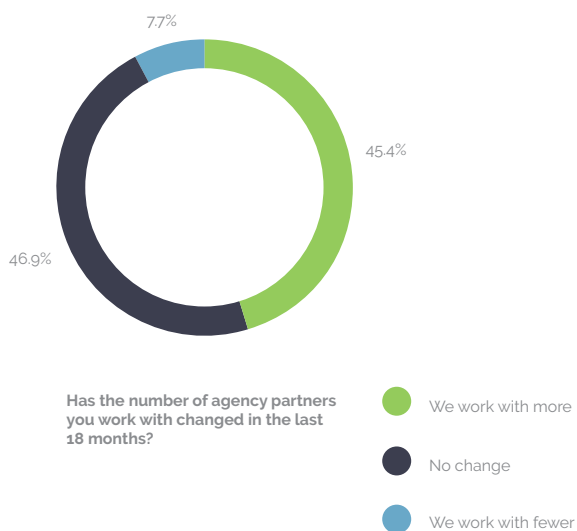
● Yes

● No
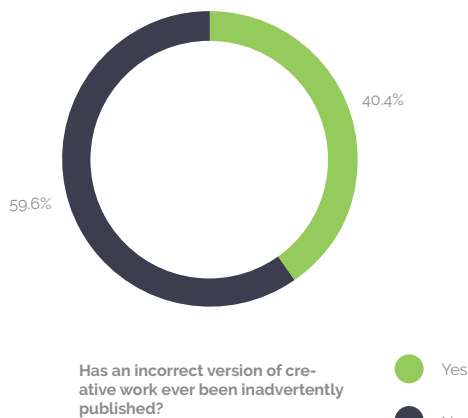
And, of course, things do sometimes go awry. In fact, 40% of organisations admit that they've inadvertently published an incorrect piece of creative. The lack of an effective digital version control and approvals process is undoubtedly one of the key factors that can lead to exactly this sort of (frankly avoidable) error.

It also doesn't help that the dangers of using incorrect versions of creative have been hugely exacerbated by the recent explosion in digital channels. Social platforms and the like have led to more than three-quarters (77%) of organisations producing a greater number of communications assets than ever – which means even more creative executions that might not be what was intended.

22.6%

77.4%

Has the use of social media and other digital channels changed the amount of communications assets you produce?

● It has increased

● There has been no change

● It has decreased

Working with Partners

7.7%

45.4%

46.9%

Has the number of agency partners you work with changed in the last 18 months?

🟢 We work with more

⚫ No change

🔵 We work with fewer

Another factor impacting the need for better methods of project and process management is the increasing reliance on agencies and business partners among organisations. Almost half (45%) have seen the number of agency part-ners they work with go up over the past 18 months and a mere 8% have seen the number decrease.

However, the growing requirement for agency partners has not always led to more investment in creating effective ways of working together. Almost three-quarters of organisations (72%) don't have one place, such as a dedicated online environment, where they and their partners can collaborate to ensure their work is properly aligned and integrated.

28.4%

71.6%

Do your partners have one place to collaborate together to create aligned, integrated work?

🟢 Yes

⚫ No
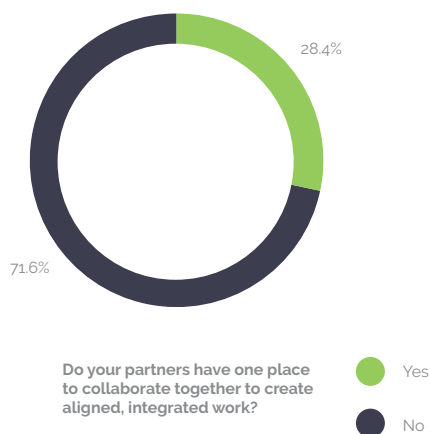
Effective On-Boarding

Better working with agency or client partners may be an important part of the equation, but even more vital is the ability to create better working within organisations themselves. This is where on-boarding matters most, as new recruits and arrivals need access to the right information and resources from day one.

With that being the case, it's an unpleasant surprise that 30% of those surveyed say their organisation doesn't have an on-boarding process set up. In addition, a quarter (25%) apparently don't offer a central repository of assets, processes and campaigns to which new recruits can refer.

Even where such resources do exist, it seems they're more likely to be in the form of traditional internal systems such as clouds or intranets rather than specialist software designed with the on-boarding process in mind.

But the need is clearly there. Around one in five organisations (19%) believe that they would save more than a day for both existing managers and new staff members if they had their organisational know-how and processes organised in one place. Even more would save hours of their time if they had access to such a resource.
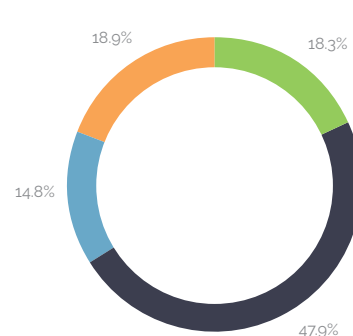
30.2%

69.8%

13.4%

25%

61.6%

18.9%

18.3%

14.8%

47.9%
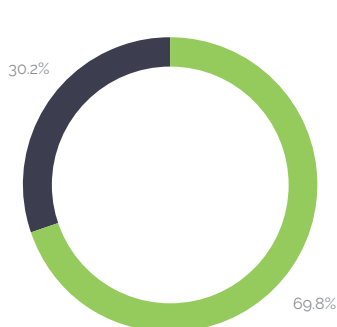
Do you have a process for on-boarding new staff?

● Yes

● No
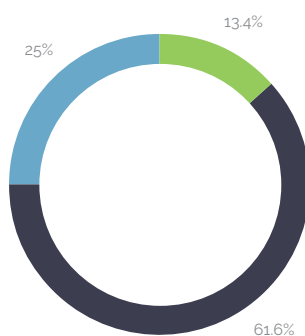
Is there a central repository of assets, processes and campaigns that new recruits can refer to?
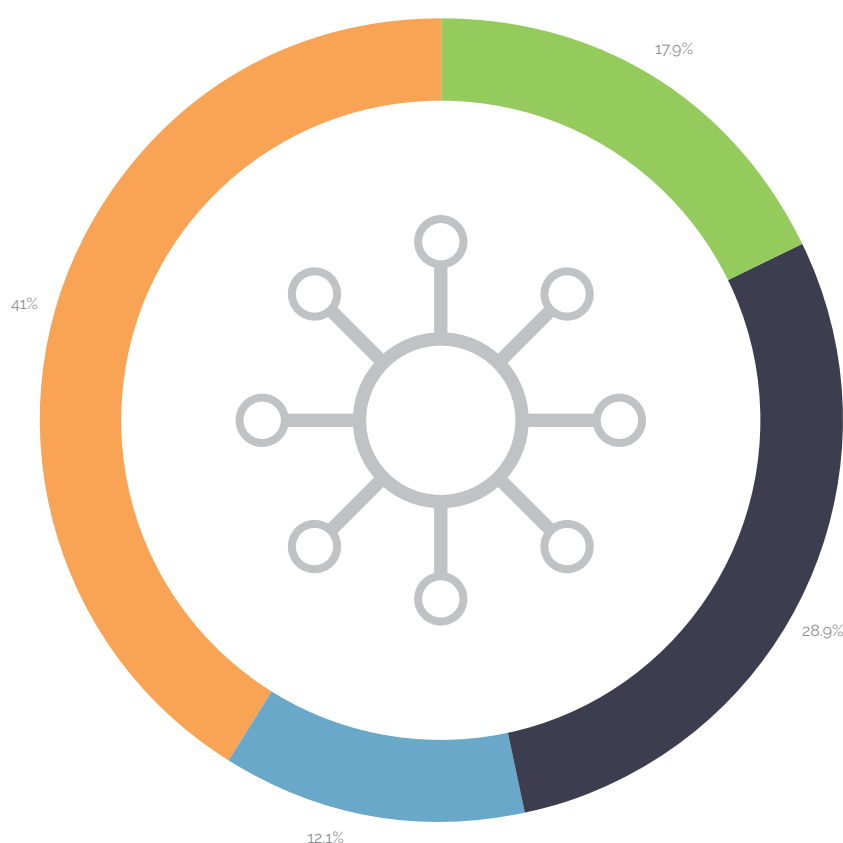
● Yes, we use specialist software

● Yes, we use standard internal systems (e.g. intranet, SharePoint, cloud storage)

● No

How much time do you think it would save you and the new staff member on-boarding if you had organisational know-how and processes organised in one place?

● < 1 hour

● 1 – 4 hours

● 4 hours – 1 day

● > 1 day

Agile Working

The term 'agile working' (and more spe-
cifically, 'agile marketing') has become
increasingly commonplace in the busi-
ness world in recent years.

Organisations are keen to transform their
working processes around where, when
and how people work. As the old Martini
advertising strapline would suggest,
agile organisations think in terms of
'any time, any place, anywhere' - not
just flexible hours and hot-desking, but
working without traditional boundaries to
complete tasks.

17.9%

28.9%

41%

12.1%

Are you aware of the term Agile Marketing?

🟩 Yes, we implement it

⬛ Yes, I have heard of it
and I'm interested in it

🟦 Yes, I have heard of it but
I am not interested in it

🟧 No

# Agile organisations think in terms of 'any time, any place, anywhere'.
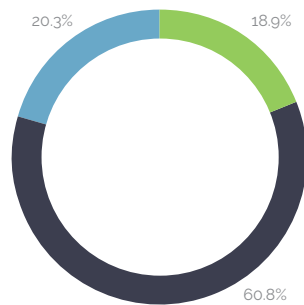
How well can agile working methods be applied to your operations?

- They can be applied across all operations
- They can be applied in some areas
- Not at all

Most of those we surveyed have heard of agile marketing, with around one in five already implementing it and another third or so (29%) interested in what it can offer. Furthermore, eight out of ten believe agile working methods can be applied to some or all of their operations.

Scrum is the most commonly used form of agile working method across those surveyed, although the wide range of responses shows that no one methodology is capturing a majority of the market share at this time. A number of agile working packages exist and each apparently has its devotees and its naysayers.

What this suggests is that agencies and marketing teams interested in agile working need expert guidance on which package is right for them. There is clearly no one-size-fits-all solution.
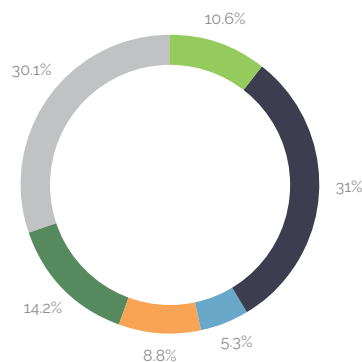
Which agile working methods do you use/have you used?

- DSDM (Dynamic Systems Development Method)
- Scrum
- XP (Extreme Programming)
- Waterfall
- Prototyping
- Other (please specify)

Conclusion

The picture painted by this research is one of marketing teams and agencies using out of date working practices to manage their projects and processes.

Where their specialist project management counterparts have eagerly adopted agile methodologies and dedicated software tools, it seems marketing teams continue to rely on email trails, spreadsheets and corporate intranets to share knowledge and control how their work is progressing.

Even with the explosion in social media and digital channels, and the related massive growth in demand for marketing materials and content, many marketing projects remain mired in confusion, poor practice and paperwork.

Those agencies and marketing managers willing to adopt more sophisticated methods of working, however, are much better placed to handle the challenges and opportunities of the constantly changing digital world that touches every element of our working and personal lives.