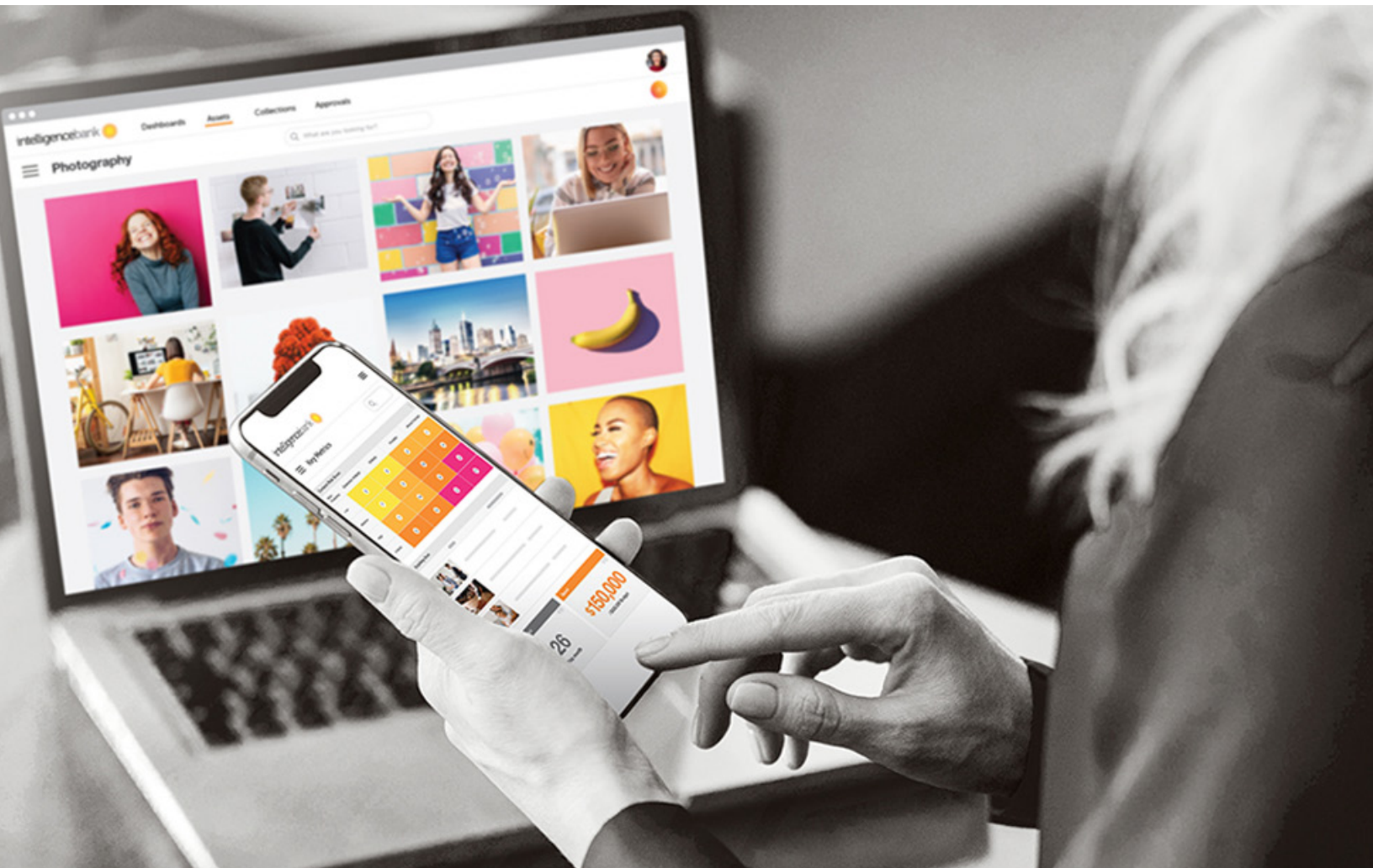# 7 Must-Have Marketing Workflows

Increase marketing efficiency and ensure brand compliance

Successful marketing requires constant and dependable workflows

Everyday marketing teams are producing vast amounts of content across a wide range of channels. From the production of print and video, to social, digital and sales collateral - the list goes on. Add to this a network of agencies and freelancers that help produce this content and thereby as a result the process becomes very complicated. With all these moving parts, it's easy to see how having uncoordinated marketing processes can lead to poor execution or even worse - exposing one's brand to unnecessary risk.

Navigating compliance obstacles

Heightened brand risks, tighter timelines and new compliance requirements demand a greater focus for streamlined operations and improved marketing efficiencies. Brands in highly regulated industries must navigate brand, legal and compliance obstacles before any marketing content sees the light of day.

How do you regain control and make the process more effective?

IntelligenceBank's Marketing Operations Software (also known as MRM) and DAM helps overcome all of these content roadblocks by increasing marketing efficiency and getting approved work out the door faster. The software solution manages digital assets (DAM), automates brand compliance and improves collaboration between teams from one convenient place.

Work faster, reduce risk and maintain brand compliance

As the marketing system of record, our unique workflows help move content through the marketing compliance process so you can get work done faster, maintain an audit trail of approvals, track what's important and stay compliant.

To inspire your team to create great work quickly, here are the top seven marketing operations workflows leading brands use to reduce risk and unleash the power of their content.

"If you're a brand leader who manages a complex environment of many teams, processes and brands, I'd certainly suggest considering a single system to centralize, approve, standardize and manage your brand assets."

ANZ *Paul Siedle*

Australia and New Zealand Banking Group   *Ranked #22 on The Top International Bank list*

1

Ensure everyone is on the same page:
Automate briefs and assign collaborators

As a marketing professional, managing and coordinating all of your campaigns is a big task – all of which starts with the foundations set by each creative brief.

Behind every piece of great content is a comprehensive and coherent brief that has been signed off by the necessary stakeholders involved.

Capture campaign essentials upfront

Automating a creative brief into a workflow ensures that everyone is on the same page and allows you to gather all of the required information for creative production and marketing projects upfront. It captures all of the essential information from the get-go, such as job numbers, target audience insights, media, single-minded value propositions, due dates and KPI's.

Instantly assign collaborators

A must-have workflow is a smart briefing form that will instantly assign individual collaborators.

Having an online creative brief hosted in one online location and accessible to relevent collaborators, means everyone can focus on creating content that achieves great results and brand compliance.

> "Our IntelligenceBank Platform provides a centralized and streamlined repository for our digital assets, brand guidelines and project requests. The ability to use one platform for all of these related tasks has helped save a tremendous amount of time and resources. In addition, it has simplified the creative workflow, while providing an easy-to-use system for all of our users."
>
> **BAPTIST HEALTH**   *Andrew McLeroy*

2

Democratize marketing compliance:
Auto-generate the fine print

One of the biggest bottlenecks in campaign development is determining the 'fine print' that needs to go on which piece of content. Incorporating a workflow within IntelligenceBank's Disclaimer Engine democratizes marketing compliance, reduces risk and saves time during creative production.

The Disclaimer Engine takes into account any variable, such as the type of media, distribution channel, location and audience.

How can a Disclaimer Engine help?

- **Auto-generate the fine print -** During the design process, conditional logic systems allow marketers to self-serve by inserting the correct disclaimer

- **Eliminate human error -** Negates the risk for human errors and removes any guesswork around disclaimers

- **All in one place -** Provides a clear audit trail of 'who' approved 'what' and 'when'

The decision engine is a workflow tool that uses conditional logic. It guides the process along and when certain decisions are made the logic is automatically triggered, displaying the correct 'fine print'. More importantly, it drives a culture of ownership when it comes to legal disclaimers.

> "The introduction of IntelligenceBank has improved efficiency, accountability and risk management. It has enabled the way in which our Legal team and Brand & Marketing work together to be transformed for the better."
>
> **SUNCORP** ◯   *Eloise Lyons*

3

Escalate approvals to the correct owner:
Score content based on a risk profile

Producing and distributing creative content comes with the possibility of having incorrect information, messaging or even design. To avoid these risks, all branded content must go through a proper approval process.
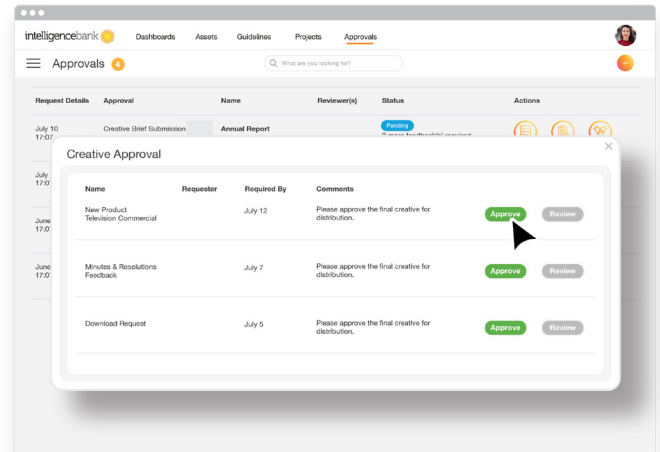
Triage approved content to the correct department

It can be difficult to escalate potential concerns without a system that can identify and accurately triage approved content.

Having an approval workflow in place saves time and ensures that all published content has been approved by the correct department - such as management, brand, legal and/or compliance teams.

Decrease risk by automating a risk profile

With IntelligenceBank's creative approvals workflow, you can also automatically score content based on its risk profile. The workflow easily identifies factors such as 'price points' and 'guarantees' and will automatically triage approvals to the correct owner for final sign-off. Decrease risk and manage projects from end-to-end with a full audit trail of approvals.

"Having a self-serve online platform where our team can access the most up to date branded assets ensures that we are providing our customers with a consistent brand experience."

Presley Brown

4 Connect tools across your MarTech stack:
Instantaneous API workflows

No system is an island. For marketing departments who rely on multiple technology solutions, connecting their Digital Asset Management (DAM) or Marketing Operations Platform to other systems such as Microsoft Teams, Jira, Slack and other project management systems is a must.

Using IntelligenceBank's Handshakes ensures that process is always present across your entire MarTech stack.

Handshakes are out-of-the-box 'if this, then that' API workflows that instantly connect alerts, files, briefs and tasks to other applications across your MarTech stack.

Take for example:

1. If someone requests a landing page in a creative brief from the IntelligenceBank platform, the workflow automatically creates a task in Jira. Once the task is complete, it's marked as 'done' in IntelligenceBank

2. If someone is assigned to collaborate on a marketing project from the IntelligenceBank platform, the workflow notifies them via Microsoft Teams

3. If a new whitepaper is uploaded to IntelligenceBank's DAM, a Slack message is sent to the relevant team members.

Having integration workflows enables marketing teams to connect to the tools they use every day.

"When you choose a platform, make sure it can grow with your needs, and it can mirror the way you work. That is, make sure the technology can map to your processes, not the other way around. There are many options available, few that offer the level of quality we expected, and only one that meets our demanding needs: IntelligenceBank."

The Good Feet Store®
America's Arch Support Experts

Blaise Nauyokas

5 Local area marketing made easy:
Create localized content at scale

For marketers in every industry, getting great work out the door quickly can be difficult. This is especially the case for marketers in highly regulated industries where claims you make in advertising cannot be misleading and it's a fine line between selling a service and providing illegal advice.

Given that most marketing teams also have a stable of external partners and brokers who are required to create co-branded marketing ads on the fly, they need a solution that enables local stakeholders to customize marketing content without risking brand compliance during the production process.

Create on-brand content at scale

IntelligenceBank's user-friendly creative template solution ensures all content created by anyone in your team (brokers, partners, staff, sales, marketing etc) is on brand and has been created within your set parameters and design.

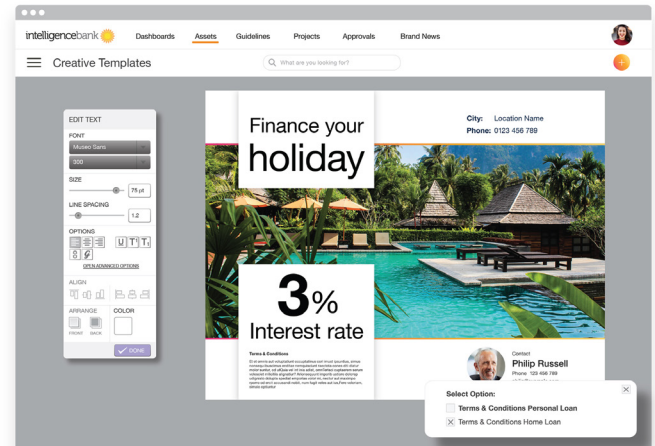## Automate the creation of local content

This workflow exists between databases of information and the creative templates that are automatically populated when a specific design is needed. Once the end-user chooses the information needed for their ad, the workflow automates the creation of the content.

Therefore if you have teams working in different regions, they can customize marketing material to:

• Personalize their contact details

• Make tweaks to the products and/or services based on their geography

• Ensure the necessary 'fine print' is present

Disclaimers remain intact

This workflow provides complete assurance that all disclaimers remain intact, the design is correct and overall messaging is compliant - regardless of who edits the template.

> "IntelligenceBank has proven to be a very flexible software platform that has helped us to manage a large number of assets and external users in an effective way."

HYATT   *Ashley Nash*

6 Stop the email chaos:
Streamline repetitive marketing requests

With the constant influx of inbound marketing requests from the wider business, a marketing inbox capability can help manage and reduce the email chaos.

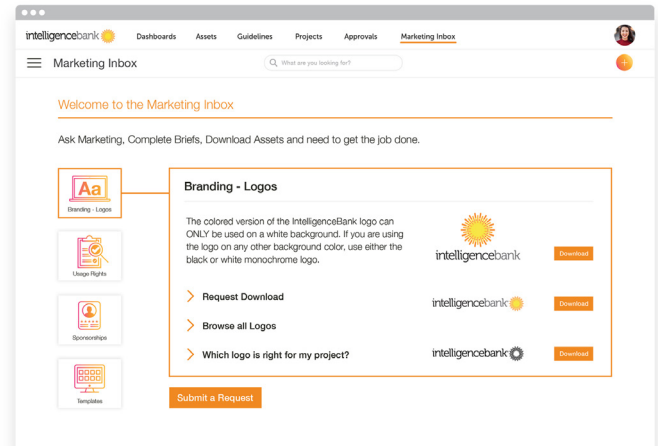### A digital destination for marketing requests

This workflow is a simple online form called 'Ask Marketing'. It's a digital destination for anything required from the marketing team, bypassing unnecessary human-hours where they're not needed.

Self-serve inbox workflow

If it's a repeatable request such as "Where's the logo?" or "I need to start a sponsorship" - you can automate the responses with a self-serve inbox workflow.

This gets people out of email and forces them to provide marketing with complete information, as well as streamlining the marketing job request process.

Using IntelligenceBank's marketing inbox workflow reduces marketing administration time up to 30% and allows marketing to work on bigger and more strategic projects.

"Simple to use and great customer service. The tool is fairly simple to understand and update. I also like how it can be customized to your brand (landing page, colors, menu)."

Tathyana Pires

7 Effective brand management:
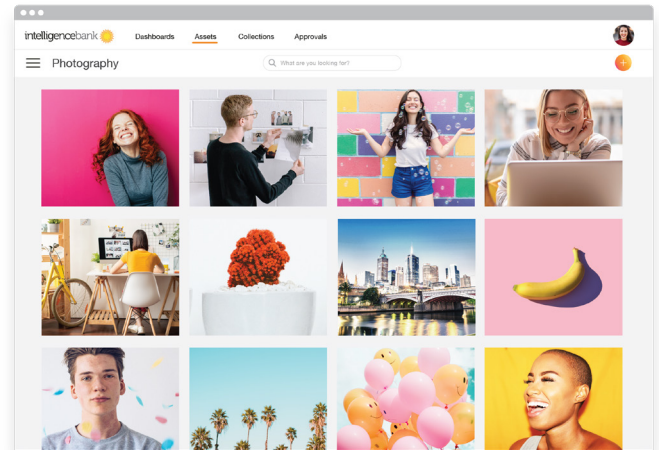## Control how creative assets are used

Effective brand management is more than just beautiful design. It's about ensuring that you have the right measures in place to control how your brand assets are being used by the rest of the business, agency partners and third parties.

When you provide access to branded assets to the broader organization, you may want to control which files can be automatically downloaded.

Maintain brand compliance

Take for example, a custom download approval form. You can 'ask' users to nominate 'why' they need a piece of content and for 'how' long. This is especially useful when there are usage restrictions associated with that file. Once the download request is approved, only then can the asset be downloaded for use.

A clear audit trail

Controlling how creative assets are being used ensures that important factors such as talent usage rights are being adhered to and provides a record of 'who' is accessing 'what' and 'when'.
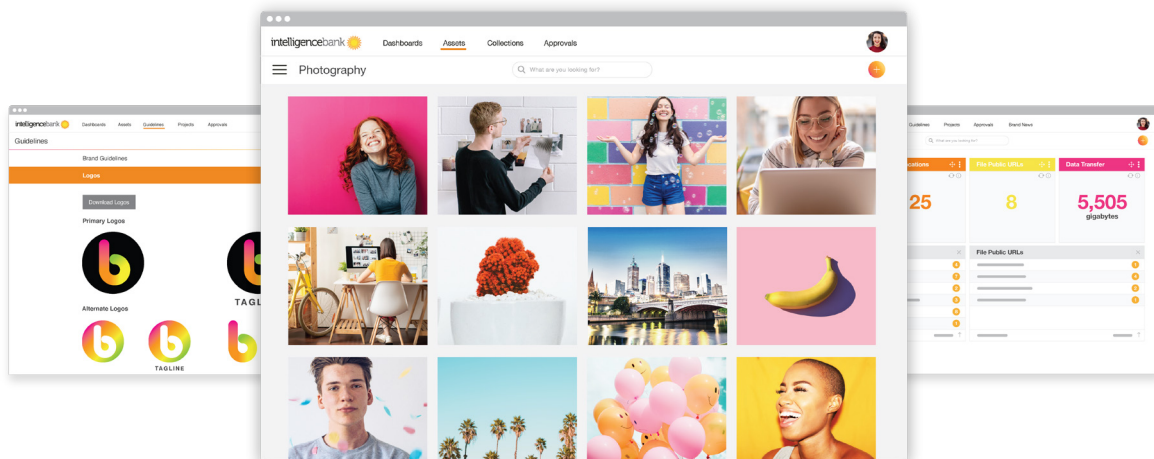
> "The ability to showcase our Brand Guidelines in a dynamic way increases user engagement and helps maintain brand consistency. We chose IntelligenceBank because not only does their platform serve as a central area for digital content, but it also provides a way for us to communicate in a manner that's consistent with what each of our three distinct brands represent."

Hertz *Rhonda Williams*

Advance your digital transformation journey

IntelligenceBank Digital Asset Management and Marketing Operations Software is used by leading brands worldwide. Our unique workflows help move content through the marketing compliance process so you can get work done faster, have an audit trail of approvals, track what's important and stay compliant.

To step up your marketing with consistent content while keeping everything compliant and efficient, contact us. We'll share best practices for optimization, creation, distribution and management of all your marketing content.

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