# Marketing Operations Whitepaper

How Marketing Operations Software streamlines marketing processes and brand compliance.

# About Marketing Operations

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Unless you have access to a magic wand, genie or unlimited budget, you'll
know that managing multiple marketing projects is hard.  There are more channels,
segments and techniques to choose from, tighter timelines and greater compliance
risks to avoid.

We know that juggling dozens of projects, people and processes can be exhausting.  That's
where Marketing Operations Software comes to the rescue.  It takes you out of spreadsheets,
shared drives and email chains into a scalable system that ensures projects are delivered on
time, on budget, on brand, and prevents you from getting fired, fined or sued.

Marketing Operations Software brings order to the chaos by giving marketing departments a
system to manage how things get done versus managing hundreds of projects haphazardly.
Just like sales teams need a CRM system to manage their world, modern marketing
departments need a Marketing Operations Software to manage content marketing processes

In this Whitepaper you will learn about:

1. **Key features of a robust solution**
2. **Use cases to consider**
3. **How you can bring order to marketing chaos**

# The Power of One
# Marketing Operations Platform

The beauty of a Marketing Operations Platform is that all of the tools you need to manage creative development process, content, planning, approvals, distribution and reporting are available within a single application.  With a comprehensive system that manages creative content, approvals, projects, brand guidelines and reporting all within the same interface, not only will you gain better efficiencies and compliance, but your end user engagement will be higher as there is a single source of truth for all marketing assets, audit and compliance.  Here are some of the integrated features your team will love using:
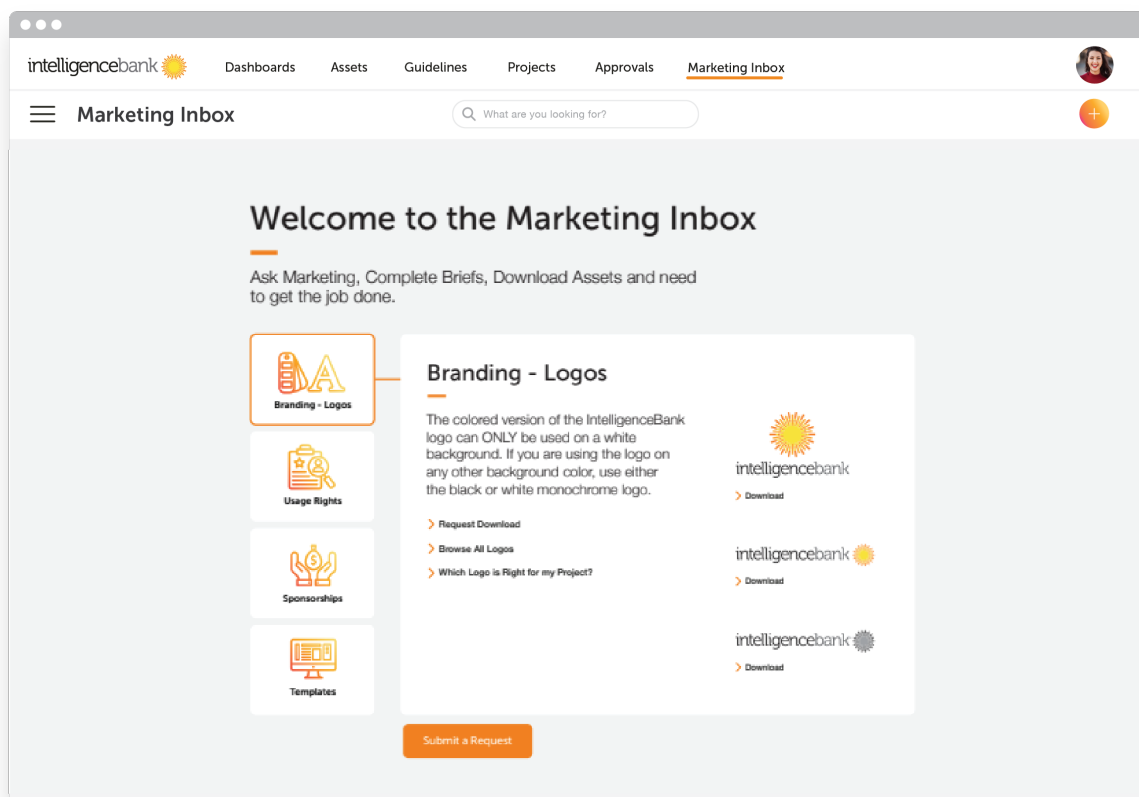
**Marketing Projects Management**

Create custom forms to capture project requirements - from creative briefs, campaigns, budgets, tasks, campaign performance criteria and forecasts, and even contracts with suppliers. You can also use marketing projects as an interface to the rest of the organization who need to submit a marketing request.

**Dashboard Reporting and Analytics**

Instantly view the status of projects, designer workloads, expired artwork, marketing risk profiles, spend vs. budget, and performance metrics. Our usage analytics enables you to do a deep dive on how users are interacting with creative content.

**Marketing Calendars and Kanban**

From marketing projects, easily view all key dates across various date ranges and link through to creative.  When campaigns get pushed out.  Instantly see where overlaps occur and use Kanban Boards to track stages of project completion and workflows.

## Transform Marketing Operations

**Brand Compliance**

Automate risk scoring on projects to determine your overall marketing risk and to elevate only specific issues to legal and compliance.

**Workflow Approvals and Alert Notifications**

Sign off creative briefs, work in progress creative files, final artwork, the downloading of logos and other brand assets, and anything else that needs a process.  Receive notifications based on custom triggers, such as when a project is overdue or approvals are pending.

**Digital Asset Management**

Centralize both work in progress as well as final artwork files, link files to projects and seamlessly share them internally, externally and embed them into third party marketing applications such as Web CMS, Email Marketing, Marketing Automation and other systems.  Magic links resize the files within the URL so you can store files once, and re-use them multiple times across your marketing stack.

# Use Cases for a Marketing Operations Platform

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While Marketing Operations is a very broad term, the following are some of the most common techniques our clients use to manage the processes around developing and distributing creative content:

## Front Door to Marketing

A massive challenge for any marketing department in a large organization is interfacing with the rest of the company.  Logo requests, how to request sponsorship, how to initiate a project and other simple requests can often take up 30% of the day.  By creating a 'front door to marketing' interface, you can direct users and manage requests in a methodical manner.

By providing a system for users to communicate with marketing, you benefit from a consolidated view of requests and tasks. From here managers can assign requests to other team members, prioritize work and have granular reporting for insight into which types of marketing requests can be further automated.

To reduce time spent on administration, the marketing inbox enables users to 'self-serve'. Pre-loaded questions direct users to the most frequently needed assets or provide information on the most commonly asked questions which frees the marketing department from admin tasks and enables them to work on more strategic projects.

## Creative Briefs

Every great piece of content starts out as a creative brief, but efficient creative production and marketing compliance is dependent on the quality of information provided initially. As they say in the classics, you get out of it what you put into it.

With customizable creative brief forms, you can streamline the briefing process and ensure all briefing elements are properly captured, including propositions, target, performance objectives and budgets. In regulated industries, creative briefs also capture important information to ensure final work complies with industry standards and regulations. In fact, many IntelligenceBank clients include marketing risk assessments as part of their briefing forms.
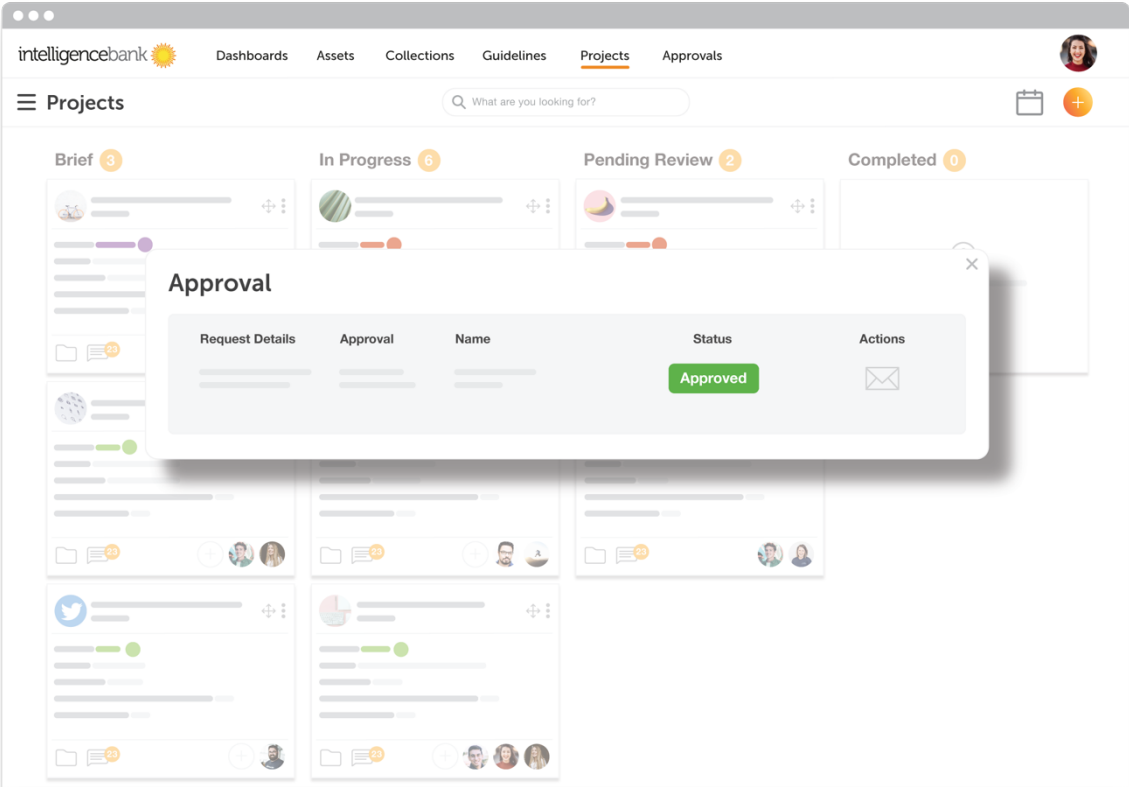
# Creative Approvals, Content Risk Scoring and Compliance

With brand reputation consistently ranking as the #1 corporate risk, and inaccurate claims in advertising causing large fines and headaches, having a robust system for creative approvals and compliance has never been more important.

It's vital to score content based on risk profiles and elevate projects for approval based on conditions. By triggering conditional workflows, you can ensure that projects with significant risk can be prioritized by legal and compliance teams, while creative with a lower level of risk can be self-assessed or approved by marketing managers.

For example, a new healthcare product with benefit claims, price points and media spend of over $1 million will automatically be routed to brand, legal and compliance for sign off. Whereas a social media post promoting a team event can be recorded but approval is not required.

By using workflows to trigger approvals and provide an assessment of the work being completed, you can be confident that no non-compliant creative ever gets out the door again.

*"Compliance, along with innovation and creativity is an important part of our marketing processes. Ensuring all creative is on-brand, relevant and complies with both legal and clinical requirements is of the utmost importance, and IntelligenceBank is making this process easy for us."*

**Fiona LeBrocq**
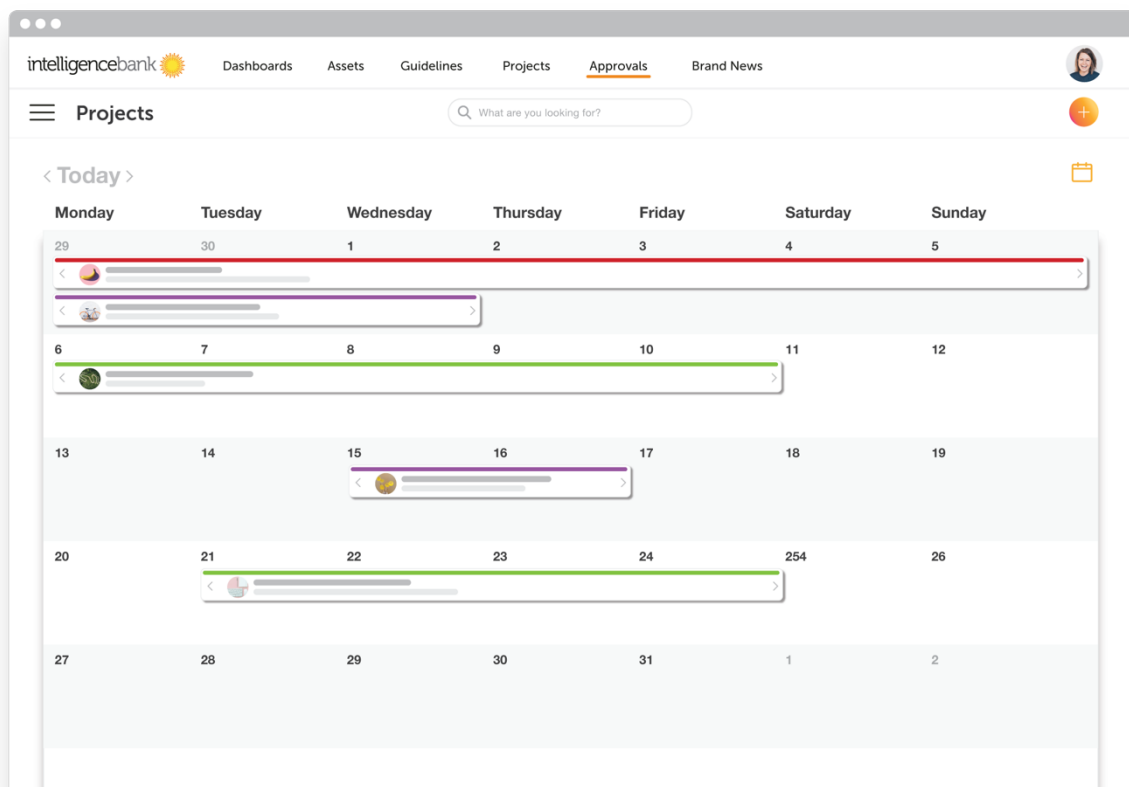General Manager, Marketing Customer & Portfolio
Medibank

# Planning and Scheduling

The average marketing department has more than 300 projects 'on the go' at any time. From smaller social media posts to global TV campaigns, the need for a bird's eye view over all projects has never been more important.

Being able to view all work in a yearly, monthly, weekly or daily calendar gives you the ability to complete your marketing planning as well as having a more focused view of immediate work by filtering down to a specific project, team or output.

Say your team is producing a new video which will take up two weeks in the month. This can be viewed alongside all of your other projects or elaborated on by viewing the associated tasks. Each of these tasks can be clicked into so that you can see delivery details, associated assets or the original brief.

Features such as calendars and Kanban are powerful tools in completing the creative production circle. They link together all parts of the process from briefing to production, approvals to distribution, and giving you the power to manage workloads and plan for the future.
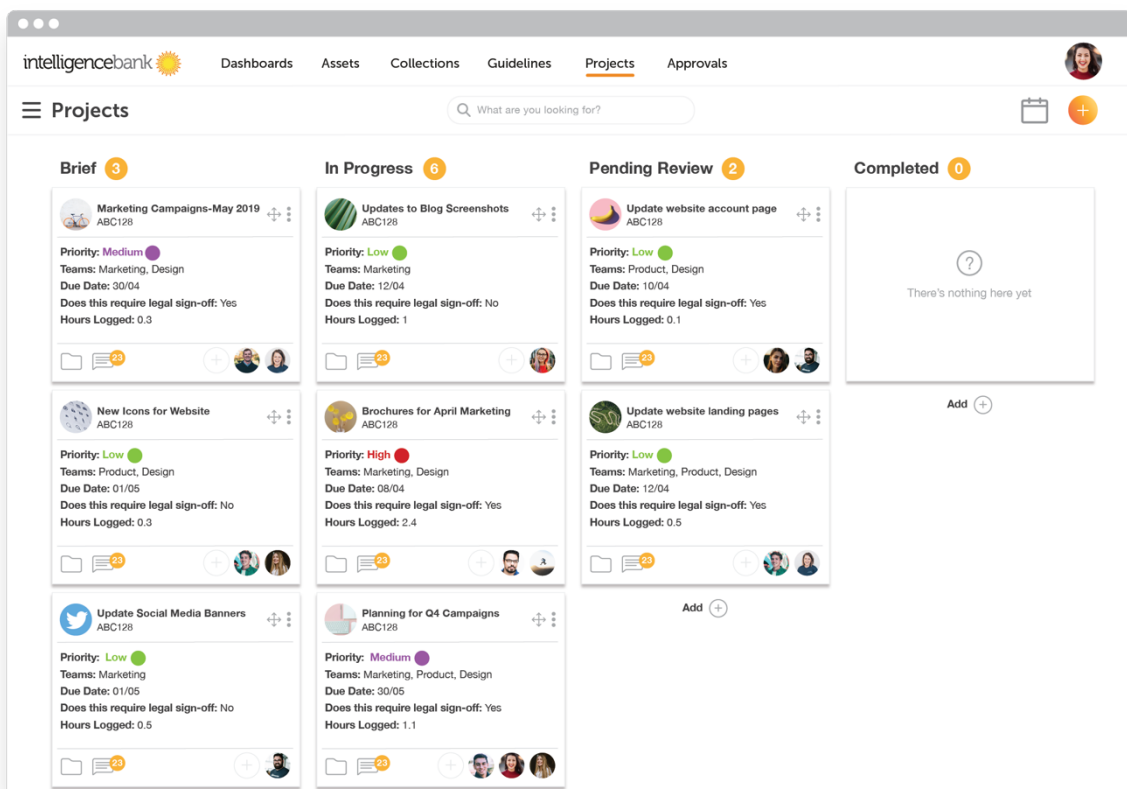
# Resource Allocation and Task Management

While having a holistic view of work in calendars is important, being able to see the progress of each task or project is vital to managing creative production. Kanban boards are great for visualising tasks as they move through a process, providing an instant snapshot of next steps and how far you are from completion. Easily see when work is behind schedule and isolate bottle necks that may hold up future work. Kanban boards that are fully integrated within your Marketing Operations Software allow you to re-distribute work when resources are overloaded, triggering workflows and approvals between stages.
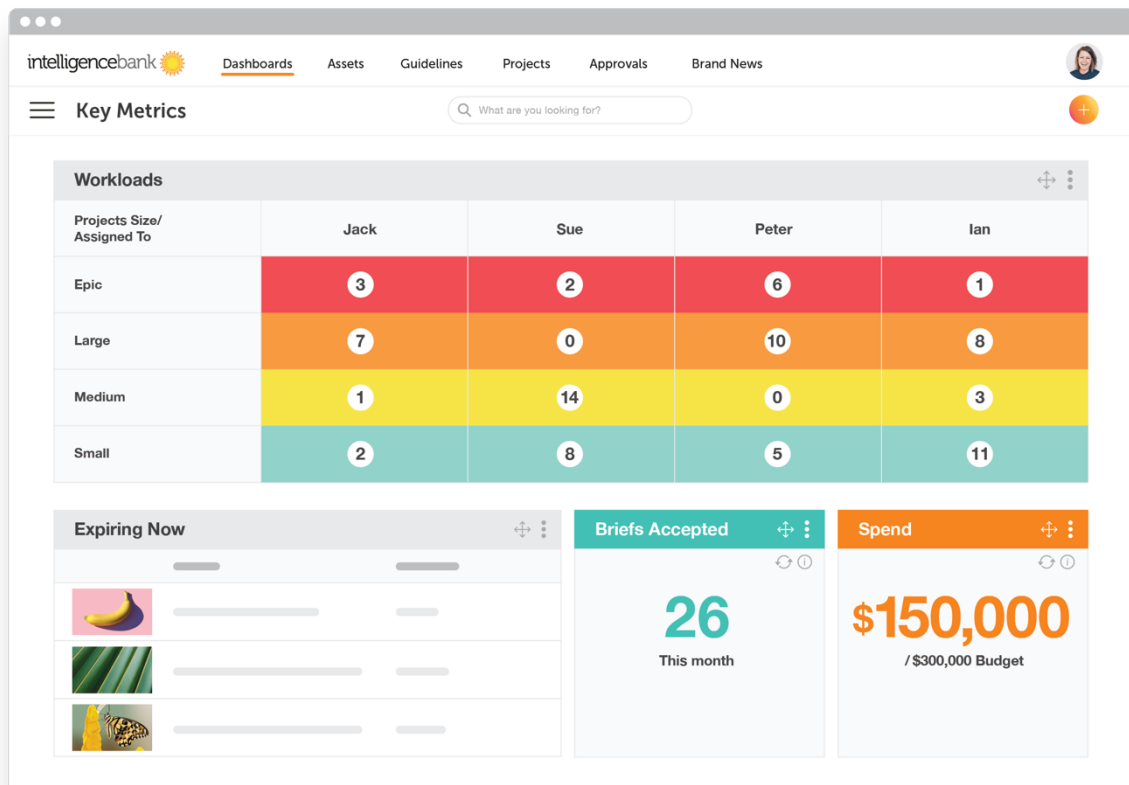
For more advanced teams who work to agile project management methodology, this view of the creative production process allows you to fine tune your operations, becoming more efficient over time and empowering your team by working in a more rewarding way.

# Creative Project Management and Reporting

Once a brief is accepted, it's scheduled in with designers and given due dates, allocated a job number and assigned actual budget – all steps which are recorded in the system and can be reported on using dashboards and custom report downloads.

Using dashboard reporting, managers can instantly see what people are working on, who's overloaded and which designers or project managers have capacity.  You can also set up budget and performance widgets to see how expenditure and campaigns are tracking. Dashboards can be configured to each user, working in tandem with calendars and Kanban so that at the beginning of the day your staff know exactly what they need to do and if new work has come in.
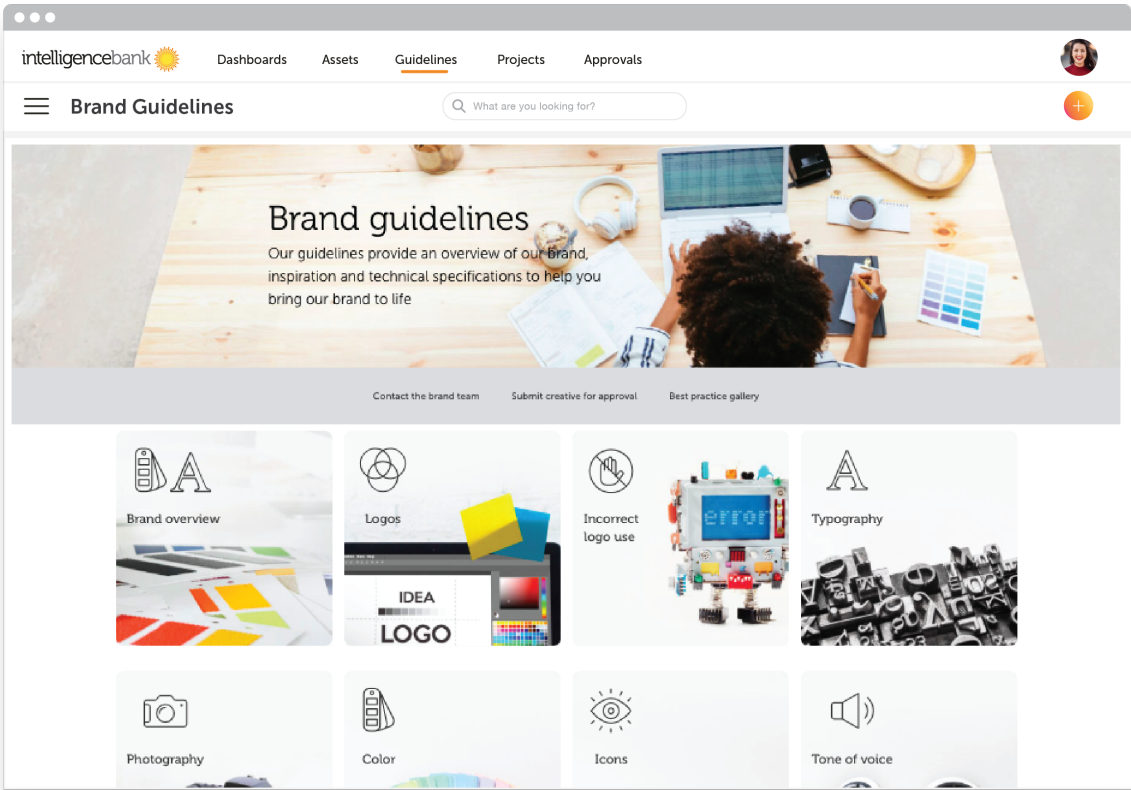


The great thing about executing the entire creative production process within the one platform is that it's fully reportable and trackable.  Reports can easily be generated for a full marketing audit, providing a digital trail of briefing, creative production to final approval and sign off, distribution and usage of all assets.

# Take Your Brand Online

Brand guidelines are the point of reference for all marketers involved in creative production and therefore it's necessary that they are easily accessible to your team and all brand stakeholders. By digitizing your brand guidelines and showcasing them on your website or internal system you increase brand governance by remove barriers to access.

In extracting your brand guidelines from PDF, you can transform the way that people navigate and interact with them, using the correct version every time. Custom pages allow you to showcase key areas, providing instruction for use and directing users to download the relevant and correct assets. It also gives you visibility over who is visiting your BrandHub and using your assets.
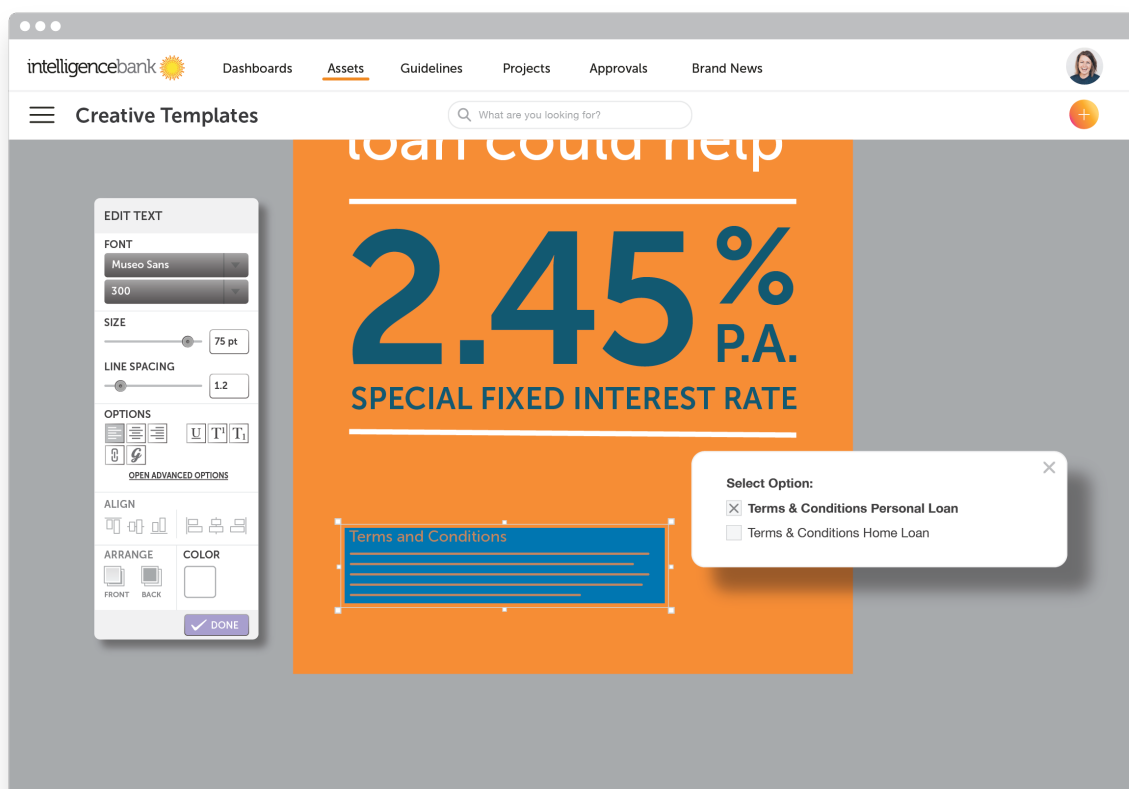
# Local Area Marketing

Brand consistency and quality usually falls down the farther away it is from the centralized marketing team.  The cringe factor when the CEO walks into a retail location and sees clip art on signage or comic sans on marketing collateral is never ideal.

Adjusting creative content for local area markets has never been easier with Web-to-print templates.  With easily accessible locked InDesign templates your hotels, retailers, franchises, dealers or local markets can fine-tune specific areas of creative like location and price point from within the platform.
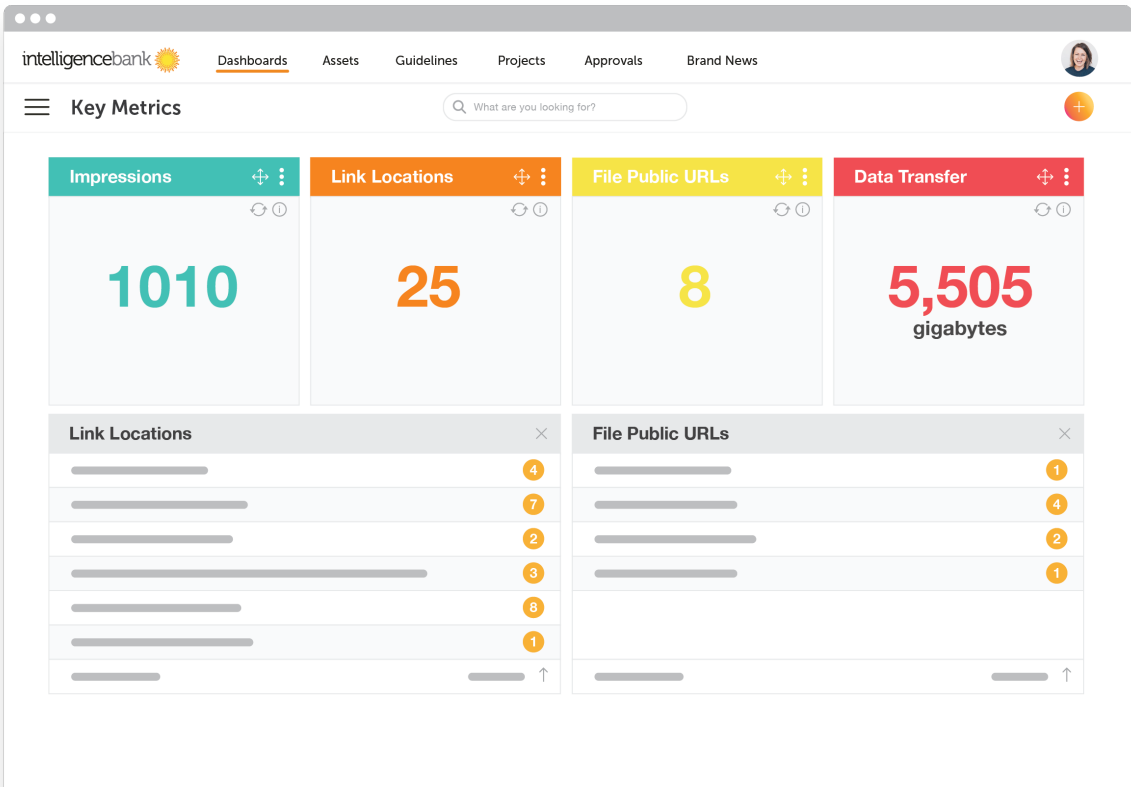
When dealing with regulatory requirements such as disclaimers, users can drop in pre-selected items, sending off an approval request before the design can be distributed.  Templates link back to your Digital Asset Management library so users can select logos, text boxes or images to include, if permitted.  With creative templates, you will cost effectively achieve creative consistency across diverse markets without the need for the central marketing team to have to customize content for local markets.
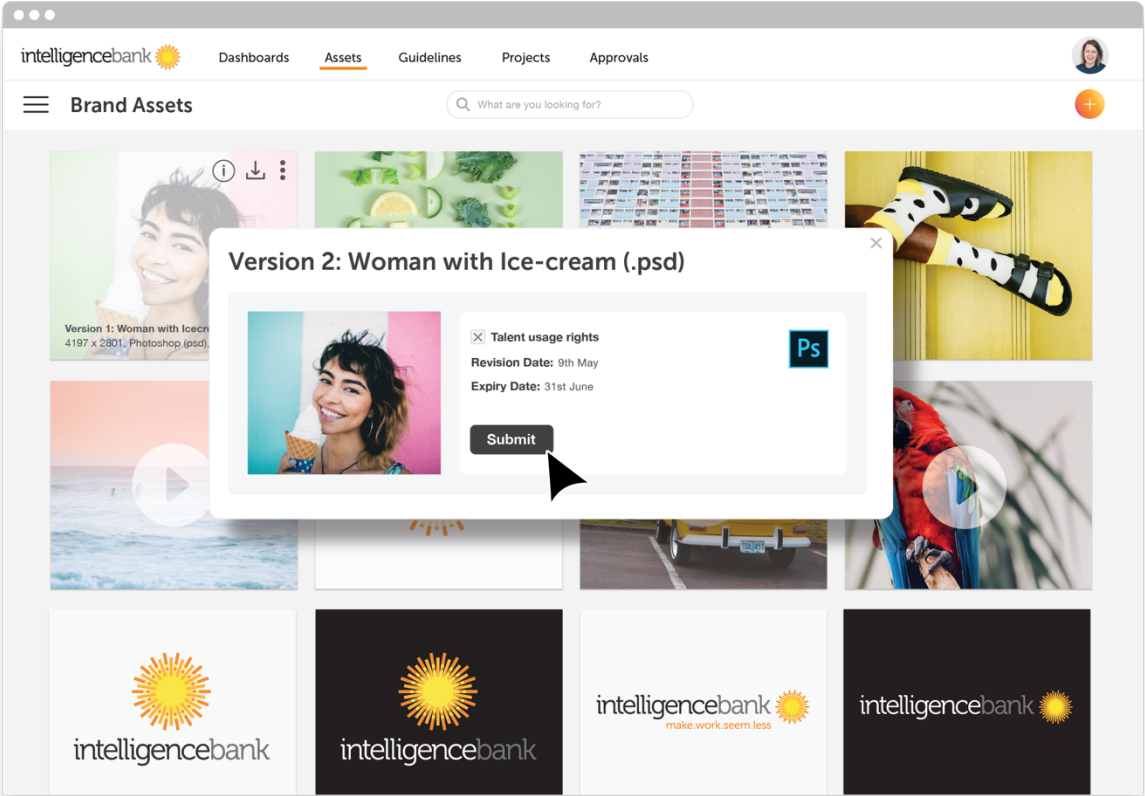
# Tracking Asset Usage, Contracts and Expiry Dates

Your Digital Asset Management module needs to be more than just a place to centralize content.  You need the ability to actively manage your content based on usage reporting and talent usage rights.

Easily view how often and where content is being used, ensuring expired versions or unproductive assets are retired.  By distributing your content directly from within the platform you can ensure that any time an asset is updated to a new version, it is changed globally.

Ensure you don't get fined by adding review and expire dates to assets which have usage rights or marketing contracts attached. Easily view important clauses and renewal dates in custom registers.

*"The system educates stakeholders on brand/logo style and allows us to quickly brief and supply material to designers. The platform offers a quick snapshot of assets due to expire and pending approvals. We love the way we can link images to signed consent forms."*

Carly Gilchrist
Australian Red Cross Blood Services

# About IntelligenceBank

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IntelligenceBank is the leading Marketing Operations Software provider, helping content marketers seamlessly manage brand governance, digital assets, creative content approvals and compliance, and creative project management.  IntelligenceBank's beautifuly designed platform is used by leading brands globally.

If you would like to know more about how Marketing Operations Software can protect your business against a marketing compliance breach, our friendly experts are just an email or phone call away.

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