The benefits of using workflow and project management tools

Digital marketing – involving everything from search engines to social media to display ads to email to mobile apps and more – is a complex endeavor, whether marketers are in-house at a brand or employed by an agency.

Enterprise workflow and project management tools can offer significant benefits that help marketers get a handle on their work and better communicate with colleagues, including the following:

More efficient management of global operations. Workflow and project management tools can help distributed employees coordinate with each other, allowing for accountability and consistency across markets. Some tools specifically support collaboration and approval processes geared toward marketing collateral.

Ease and transparency of reporting. Though it’s possible to use manually-updated spreadsheets to manage projects, they don’t offer the native reports and dashboards offered by workflow and project management tools. Most of these platforms offer highly customized reporting capabilities that are widget- and wizard-driven to make reporting faster and easier. These reports are often easily shareable and can be exposed to executives at the VP- and C-levels, progress can be tracked across multiple initiatives.

More about Workflow and Project Management

Visualizations that aid in planning and resource allocation. Most workflow and project management tools provide

visualizations that allow marketers to see multiple projects at a glance, allowing them to adjust schedules or tasks as necessary to avoid overtaxing, or underutilizing, resources.

Improved coordination with clients and other stakeholders. Many tools allow "guest" access or other flexible permission structures that allow for the sharing of some information while other aspects are hidden. This is especially helpful for marketers working at agencies or as outside consultants, because they can document what they need to within the tool, without being concerned about appearing less than professional when the client logs in and sees their own view.

Digital asset management and file sharing. Most workflow and project management tools allow users to upload files or link to them in cloud storage, serving as something of a DAM "lite". The features don't come anywhere close to those offered by a true DAM (see our Martech Intelligence Report on Digital Asset Management platforms), but they can work well for some use cases.

More seamless communication with development team and other groups. Digital marketing initiatives often include a technological aspect that calls for the talent of developers. When marketers and developers are in different functional departments, but utilize the same workflow and project management tool, their work together runs with fewer hitches. The same applies for any other department with which marketing interfaces.

Easier tracking of billable hours and human resource management. Many tools track the time that has elapsed while an assignee works on a task, allowing agency account managers to easily tally up the number of hours spent on a particular client's projects. This feature can also help managers keep an eye on employee productivity levels.

For more in-depth discussion of Workflow and Project

Management Tools, including profiles of 15 different vendors, download our Martech Intelligence Report today!

About The Author

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