What are enterprise workflow and project management tools and how do they help marketers?

The Project Management Institute (PMI) defines a project as “a temporary endeavor undertaken to create a unique product, service or result. A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources.”

For marketers and agencies, a project might be a particular campaign or initiative, or it may be the development of a website or a mobile app. These efforts might involve in-house or contract developers or designers and may require collaboration across regions or around the globe.

In our recent Martech Intelligence Report, we examine software that documents and optimizes the processes, workflows and projects undertaken by digital marketers. For various reasons, marketing is an ideal use case for these tools and vendors are recognizing marketers as high-value customers.

More about Workflow and Project Management

Speaking on the company’s most recent earnings call, Smartsheet chief product officer Gene Farrell explained why it has focused on attracting marketers by building a premium add-on and other features that accommodate “more advanced marketing workflows.“

“Marketing is one of those functions that really exists in almost every company in the industry and many times is a lighthouse or very visible part of how companies actually execute,” Farrell said. “It’s also an area where you’re typically collaborating across both internal and external stakeholders with agencies and other creative groups.”

The big picture: The project economy and the projectification of work

We’ve heard a lot about the “gig economy,” where software enables companies to harness workforces on a per-gig basis, whether that’s an Uber ride, a grocery shopping trip with delivery or any other discrete unit of work.

At the same time, there has arisen what’s being called a “project economy,” which is driven in part by business’ needs to transform their operations for the digital age, but also by the perennial imperative for companies to keep up with local and global trends.

Other influences on the growth of this category include marketing organizations’ adoption of Agile marketing, a philosophy and workflow pioneered by software developers, and the growing interest in the flexibility offered by the utilization of remote employees and contract workers.

We expect that the impact of COVID-19 on Americans and the U.S. economy will spur even greater interest in enterprise workflow and project management solutions, because they provide transparency and accountability, in addition to collaboration and file sharing – all features that help marketers (as well as C-Level executives) keep projects on track whether employees are at home or in the office.

“The boom in working remotely may prove temporary – even if

the trend behind it is not – but having more staff operating away from traditional offices is having an impact on the tools that many companies use to coordinate and communicate while apart," writes TechCrunch reporter Alex Wilhelm in a March 6, 2020 article titled "As coronavirus pandemic spreads, demand for remote-work startups spikes."

"We believe that organizations are going to have to really rethink the way work is done in their businesses," said Sunil Prashara, president and CEO of PMI, in an interview with *European CEO*. "So we're seeing the world at the business level becoming projectified."

In this new environment, Prashara says successful professionals need a strong understanding of technology and how it can help them achieve their goals. "Technology is helping project managers and other professionals to optimize the way they do their work," he said. "So leveraging technology, leveraging big data to give you insights as to what your next step and decision should be."

In an article called "The 'how' of transformation," McKinsey analysts noted that "70 percent of complex, large-scale change programs don't reach their stated goals." One part of the remedy, they concluded, is adopting sophisticated workflow and project management tools.

While it's difficult to estimate how many marketing departments are using workflow and project management tools and how much they're spending on them, a Capterra user survey indicates that marketing and advertising companies are outpaced only by IT and financial services businesses when it

comes to utilization of this type of software.

Additionally, anecdotal evidence – such as Twitter threads among search marketers and agencies – suggests the use of these tools is widespread.

Getting Agile

Though it's been around for a while now, the pivot to Agile marketing workflows appears to be accelerating. 41% of marketers questioned in a recent survey said they are currently using Agile and 42% of non-users said they plan to adopt it, according to an Aprimo and AgileSherpa report.

The practice of Agile marketing doesn't require any particular software, but marketers adopting this methodology are likely looking for tools that mesh with their new philosophy. Given that, it makes sense that many of the vendors we contacted for this report said they offered reports and interfaces geared for Agile, such as Kanban boards and a place to input backlog items. Most also enable more traditional Gantt charts.

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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