Mighty Guides

22 EXPERT

TIPS AND TRICKS TO FIX YOUR REVIEW AND **APPROVAL PROCESS**

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FOREWORD

How much of your work day is wasted? 10 minutes? 30 minutes? Maybe an hour? The reality, if you're like most members of a marketing team, is actually much worse. Research has shown that nearly a third of a marketer's day is wasted by tedious administrative tasks. And the worst offender? The content review and approval process.

That clumsy, complicated process is the reason 92% of marketers say they miss deadlines.

To help you tame those chaotic review cycles, work management leader, Workfront, has partnered with Mighty Guides to bring you the insights of 13 experts, who share their tips and tricks to improve, speed up, and master a marketing project's last mile—the review and approval process.

Each quick tip offers advice on how to avoid missing deadlines, conquer the feedback monster, or eliminate tech headaches. You'll get actionable advice on how to better prioritize work, quit wasting time waiting for feedback, and get your version control problems finally under control.

I hope you find the insights of these experts useful. Enjoy!

Regards,
Joe Staples
CMO, Workfront

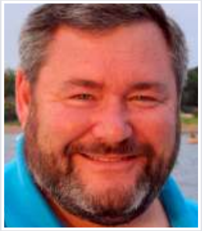
It's often said that 30 to 50 percent of a creative marketer's time is taken up by activities that have little to do with creating great marketing deliverables. Where does all the time go? Much of it is spent setting up and attending meetings, responding to email, filling out reports, gathering feedback, and solving technical problems. These activities are often tied to one of the most time-consuming and potentially frustrating parts of a creative workflow: the review and approval process.

Reviews and approvals are essential to any creative project. Beyond the creative team itself, the review process can include subject matter experts, business managers, agency people, legal reviewers, and others who must sign off on a deliverable. This cycle is often a major source of schedule delays.

To find out how seasoned marketing professionals streamline their review cycle, with the generous support of Workfront, we asked an expert group of marketers the following question:

What tips and tricks can you share with fellow marketers to improve, speed up, and master the review and approval process?

This eBook contains 22 valuable tips organized into three sections: "Avoid Missed Deadlines," "Conquer the Feedback Monster," and "Eliminate Tech Headaches." Being in the content marketing business myself and familiar with issues that creative marketing teams handle every day, I believe that the tips collected here are especially valuable because they're actionable and have been proven in the day-to-day battle for marketing excellence.



All the best,
David Rogelberg
Editor

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AVOID MISSED DEADLINES

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STREAMLINING WORKFLOW WITH GOOD ROLE DEFINITION

ANNE CURTIN

Senior Director of Marketing,
Visual IQ

Anne Curtin is the senior director of marketing at Visual IQ, where she's responsible for developing and managing multiple lead-generation, sales-support, and brand-management programs. An accomplished marketing veteran with more than 15 years of experience, Anne has held marketing roles across a range of companies, including Curaspan Health Group, Isobar, and Omgeo. Anne holds a B.S. degree from Miami University in Oxford, Ohio.

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Backstory: In our growing company, the marketing team works on many kinds of content deliverables, from marketing collateral and thought leadership pieces to documentation and research studies, that involve topics that vary in technical depth. Our master content calendar looks three to six months ahead so that we can create materials that prepare internal staff and precondition the external market for upcoming announcements, product releases, and more. The variety of deliverables our team creates means that different people become involved in approvals and sign-offs.

The problem this tip fixes: One challenge in our environment is managing the review process, including ensuring the right people are involved in the review cycle for a given deliverable and making sure those people understand their role in the review process. When expectations aren't set, it can slow down the process. For instance, undefined roles can lead to people rewriting content that only needs a review for technical accuracy, which can force more editorial work for others in the chain.

Implementation: We address this problem by clearly defining the roles of everyone involved in a marketing deliverable at the start of the project. This includes assigning ownership of roles to specific individuals and setting expectations about what the person in that role will do. Key content development roles for us include:

- A subject matter expert (SME), who is the authority on a particular topic
- A content creator, who is responsible for writing the content
- The editor, who is responsible for polishing, refining, or enhancing the content before providing final sign-off
- The publisher, who is ultimately responsible for publishing the content. This could be a website owner who publishes the content on the company website or internal knowledgebase, or the PR lead who ensures the content is received and ultimately published by a particular trade publication

In some cases, these roles may overlap. For instance, the SME and the content creator may be the same person. In other cases, particularly when key corporate messages are involved, executives may need to be part of the review cycle.

Defining and assigning these roles for each deliverable and making it clear to each person what his or her contribution will be on the project must happen at the beginning, when you add a project to the content calendar.

Benefits: Good role definition does two things. First, by knowing exactly who will be involved in each critical project milestone, you can more accurately build a schedule for that project. Second, by clearly setting expectations for each role, you minimize errors that cause rewrites or other churn that put the schedule at risk.

Build a tight schedule and work backwards, starting from the due date, delivery date, or publish/launch date. Give yourself plenty of time for review cycles and ideally buffer time for the inevitable delays to keep the project overall on time.

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Sam Faillace is a marketing leader and advisor to San Francisco start-ups. Over the years, Sam has worked with businesses in various stages of their life cycle in the areas of product, customer growth, and customer retention. Sam's previous consumer marketing leadership roles include Shutterfly and Microsoft.

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Backstory: At Microsoft I developed and implemented the RACSI framework for project management. RACSI has five designated roles: Responsible (owns the project), Approver or Accountable (signs off), Consulted (provides input), Support (plays a role in producing deliverable), and Informed (kept advised but no deliverables). Since then, I have implemented a RACSI process at every new position I've held to great success, especially for larger projects.

The problem this tip fixes: The model reduces ambiguity and clarifies who is responsible for each step in the process. By sharing a RACSI chart to specify each person's role at the start of each project, there is no confusion about stakeholder expectations. Deadlines and other important information are presented at the beginning, ensuring that everyone has access to and can be held accountable for key project details.

Implementation:

(1) For a large project, I am the *Responsible* party and "own" the project internally (note that only one person can be designated as *Responsible*). First, I write a creative brief, and then assign the roles of each person in the approval process. I choose these people carefully so that demands are appropriate and manageable.

(2) *Supporters* have a specific role to play and deliverables to contribute. In a large project, they may be creative contributors, agencies, or legal or marketing, each with clearly defined expectations and deadlines. Those designated as *Informed* are kept in the loop, but their contributions are typically discretionary and they are not assigned specific tasks. Only one person is the *Approver*. He or she has final say on the project. (The Approver is often Responsible, as well.)

(3) I use RACSI charts for the overall project as well as for smaller segments when appropriate. Contributors should have only the responsibilities necessary for their part and no more, which helps to keep workloads and timeframes under control.

Benefits: In addition to clearly defining roles and holding each person responsible for his or her part, a RACSI process invariably saves time and, most importantly, keeps projects on track. A well-organized responsibility matrix also results in fewer compromises along the way and can be a significant factor in improving the overall quality of the project.

Marketing, to a large extent, is all about routines. Campaigns, collateral, and content have to be created on a constant basis. Deadlines have to be agreed on, set, and met, and keeping track of progress is best done in one place.

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NIGEL TEMPLE

Marketing Consultant,
The Marketing Compass

AVOID FOURTH QUARTER COACHING - INVITE KEY STAKEHOLDERS AT THE RIGHT TIME

ASHLEY SPURLOCK

Solutions Marketing Manager, Scrum Master, Workfront

Ashley Spurlock has 10 years of experience writing and managing marketing projects in the tech, education, and fitness industries. In her current role, she oversees an Agile team responsible for content marketing, sales support, and product marketing for agency and marketing prospects and customers at Workfront.

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Backstory: I've spent many a late night fixing content from what I like to call "fourth-quarter coaching." With no standard review and approval process, stakeholders jump in and out of projects when they have time, offering up feedback that often changes the direction of the project at the very end.

The problem this tip fixes: Rework, rework, rework—and the late delivery of projects.

Implementation:

Standardize Your Review and Approval Process

It's important to have a standardized review and approval process that can be applied across all project types. Will you have an outline stage, a draft stage, and a layout stage? If yes, apply the process! Within the standardized process, make sure that you include the right stakeholder at the right time. Invite your key stakeholder to review your outline and provide feedback, avoiding a change of direction after you've started the first draft. Invite that same key stakeholder to review the content in draft form in round 2 and check in on round 2 of layout, as well. This gives your key stakeholder three opportunities to provide feedback, avoiding the dreaded "fourth-quarter coaching."

Get Stakeholder Buy-In

When you have a documented process, it's imperative that you get stakeholder buy-in. Without the right signoff, your process won't take flight. Run your new process by all stakeholders who typically need to review and approve projects. Ask for feedback. Adjust, and—when it's time—implement the process and stick to it, reminding everyone involved that this process will help you deliver quality work on time.

Check In to Make Sure It's Working

After implementation, check in to see how things are going. Does your manager still want to see every project in the outline stage, the round 2 draft stage, and round 2 of layout? Are you finding that your projects require more than the typical three rounds within each stage? Adjust as necessary to fit your team's needs. Remember, though, to make sure you get that stakeholder buy-in before you implement any changes. It'll help with those pesky bottlenecks and reviewers that dodge review rounds until the end of the project.

Benefits: You get work done on time. Your stakeholders have the right opportunities to provide feedback. You avoid rework, rework, rework.

The biggest deadline threat at many companies is the approval process, especially if it involves legal. I've had success streamlining approvals by assigning content (and social media responses) to agreed-upon legal "buckets." Category 1 is day-to-day content and responses that do not require legal approval. Category 2 is content that requires approval in a week, Category 3 is content that needs approval in a day, and Category 4 is an emergency. By sticking to an honest workflow, teams can manage approval expectations and make everybody happy.

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MARK SCHAEFER

Author, Business Consultant, {grow}

ASSIGN INITIATIVE OWNERS RATHER THAN FUNCTIONAL OWNERS FOR RAPID, QUALITY CONTENT DEVELOPMENT

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Chief Revenue Officer,
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Sharon Goldstein is the chief revenue officer of ShipHawk, where she is responsible for the company's sales and marketing functions, monetization strategy, and customer acquisition. Prior to ShipHawk, Sharon was an executive in residence at XSeed Capital, CMO of social commerce company Pixlee, and the director of corporate development and strategy at Shutterfly. With her agency, Amplify+, Sharon has advised dozens of startups on go-to-market strategies. Sharon holds an MBA from Kellogg School of Management and an engineering degree from Georgia Tech.

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Backstory: At large organizations, multiple projects are often in development simultaneously, with various owners assigned to different parts of the process. This tendency often results in a project manager running a "checklist" evaluation process in which more emphasis is placed on administrative details (meeting deadlines, format considerations, and so on) rather than quality checks on the deliverables themselves. My philosophy is that you really need to *create initiative owners* rather than *functional owners*. An *initiative* in this case is the business goal – what the content is meant to achieve, in what channel, and to what end.

The problem this tip fixes: By ensuring the single *initiative owner* is a core stakeholder for the results of the initiative, that individual can give key guidance on the performance aspects and the why, rather than just the what. This information ensures team members make good decisions about specific content elements and keeps the messaging on track. Delivering effective content is not about checking off steps in a production process (although that needs to be done, too) but, rather, in making sure that fundamental customer needs are met and that each submessage is part of a larger messaging strategy.

Implementation: Effective marketing initiatives that get done on time and without drama begin with a thorough understanding of customer personas, followed by a detailed content calendar—all overseen by an initiative owner who understands the big picture. Ideally, you create a mini-content brief for each item that describes the persona you're targeting, where that customer is in the decision-making process, and any details about that persona that will help get the message across. The core initiative owner should be at the manager or director level and is responsible for ensuring project management but—more importantly—that the message remains on track. I highly recommend that the content be written prior to any visual development because designer cycles are more expensive than writer cycles, both in time and energy, and are often where projects get bogged down and deadlines are at risk.

Producing a content brief up front reduces the cycling downstream, where iterations drive cost increases. It is absolutely critical that the initiative owner uses the brief in the review and development process and that he or she revisits it frequently. The goal is to eliminate these downstream iterations, making sure that each individual in the process knows how to create relevant and easy to understand content the first time through.

Benefits: You can't focus on quality content and the bigger-picture items if you're bogged down in minutia. This methodology requires that each project have an owner who can make quick decisions, understands the customer personas thoroughly, and keeps the project moving through the organization. Often, having a clearly identified, senior-level initiative owner instills confidence and allows each person in the review process to have context so that they can focus on his or her specific area without feeling the need to take on more than they should.

Good risk management is critical to avoiding missed deadlines, and part of managing risk includes choosing the right team. I've always chosen my team members based on a variety of criteria, including skill and cultural fit, but equally weighted is that they do what they say they'll do when they say they'll do it. Even so, we still build a buffer into every project to account for unanticipated delays. This strategy has resulted in a long history with no missed deadlines—ever.

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CEO, Executive Coach, Business in Blue Jeans

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Backstory: We recently worked on a brand refresh that involved redesigning all our templates for letterhead, Microsoft PowerPoint decks, and other public-facing collateral. A project like this necessarily involves inputs and approvals from people who may not typically be involved in the review cycle of regular content deliverables—often stakeholders who will ultimately use the branded templates that are being created. In such a project, communication of the design vision becomes critical to keeping the project on track.

The problem this tip fixes: In one instance, there was a miscommunication (or rather, not enough communication) between one of our key stakeholders in a template design and our design team. Our stakeholder had a clear vision for the template and so did our design team. The result was two great design ideas passing each other like ships on a dark night. This miscommunication resulted in multiple rounds of design and redesign with the stakeholder, and a work schedule that ran longer than we originally planned—both of which we could have avoided.

Implementation: Because of this incident, the design team realized the importance of having a creative brief in the early stages of certain projects, especially projects that are visual in nature and involve multiple stakeholders. A good creative brief should have two basic characteristics:

- It should be highly visual and not rely entirely on verbal descriptions. Sketches and visual representations make the idea more tangible for stakeholders
- Widely circulate the creative brief so that all stakeholders understand exactly what the creative vision is and that they approve it before detailed design work begins

Benefits: Having a good creative brief and circulating it widely will minimize the need for reworking designs over and over. The process will run more smoothly for the design team and for stakeholders, and you'll be better able to stick to schedule projections.

DO THE WORK UP FRONT TO FIND THE ABSOLUTE BEST WRITER FOR EACH PROJECT

ADAM VAVREK

Director, Marketing Operations,
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Adam Vavrek is currently a Bostonian, but he's an Austinite at heart. A sports enthusiast with an addiction to ice cream, Adam has worked the past six years at Skyword, a leading content marketing technology and services company. There, he leads marketing operations and was inducted into the summer 2016 class of Marketo Champions.

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Backstory: Often, writers and other content developers are selected based on familiarity, reliability, availability, or price. I believe that they should be selected (or trained, if necessary) based on topic knowledge, familiarity with brand tone, skill in creating the specific style of content (blog post versus white paper versus email campaign), and technical or scientific qualifications.

The problem this tip fixes: Selecting content creators based on their knowledge of the topic saves time during content development and iterations, which often saves money as well. Aligning the right talent to a specific job results in better overall content that resonates with customers and feels natural. When people write about or otherwise contribute to familiar subjects, that confidence shows in the final results, and there's more enthusiasm throughout the content creation and production cycle.

Implementation: We have built an extensive database of writers around the world so that we can search along any number of criteria. For example, if one of our clients needs someone in Germany with a biology degree to write about local drug regulations, we can search for that. We always ask writers for content samples from similar projects. Then, we often send the writer a content brief along with articles of a similar style that were successful and that exemplify the brand tone. We ask for them to create content only after they review our guidelines and the sample articles we provide.

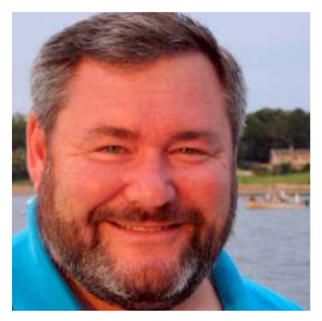
There is always follow-through. Through integrations with marketing automation platforms, we know how effective each piece is. We look at how many leads viewed the content, who the leads are, and of course the actions the lead took. Those articles that generate a lot of leads or activity we try to replicate.

Benefits: By defining the purpose of the content up front (usually accompanied by content briefs), and then selecting writers based on their abilities to follow those briefs, you will have better-quality content that more accurately addresses customers' needs and, in most cases, requires fewer iterations and review cycles, which saves time and money. In addition, when you define the work up front, it's much easier for writers to expand their deliverables to cover multiple aspects of a marketing campaign.

CONQUER THE FEEDBACK MONSTER

In This Section

QUICK CALIBRATION: THE 10-MINUTE QUICK READ TO GET EVERYONE ON TRACK FAST



DAVID ROGELBERG

Publisher,
Mighty Guides

David Rogelberg is the founder of Studio B—the first content marketing agency. Since 1995, Studio B has created content programs for technology companies like IBM, Ziff Davis, Microsoft, Intel, and Workfront, and has appeared on the Inc. 500 list twice. David also founded Mighty Guides, the first social publishing company, which publishes sponsored e-books designed to generate demand and promote thought leadership. Prior to founding Studio B and Mighty Guides, David was a publisher at Simon & Schuster, where he published numerous best sellers on technology topics.

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Backstory: At Mighty Guides, we're often asked to deliver multiple long-form pieces of content from several different writers at a time. Everyone—the client, the writer, and the editor—thinks he or she is on the same page at the time a project kicks off, but we often find that everyone has somewhat different viewpoints when the first pieces of content are delivered. This variance can lead to a slow start for a project, lots of reworking, and wasted time for everyone.

The problem this tip fixes: Ideally, we want to get a project on track with stakeholder expectations as quickly as possible. To do this, we get each writer to produce a relatively short sample of what he or she is working on, and then share it with the client's stakeholders. We then ask the stakeholders for a quick read to see if we're on the right track. This quick feedback often reveals key issues quickly and allows us to make adjustments before we have completed a large body of work.

Implementation:

(1) Have a kick-off meeting to get everyone on the same page.

(2) Each writer creates a sample of the piece he or she is working on—just a one-page "taste" that we can share with key stakeholders to begin a discussion.

(3) Ask the stakeholders to do a 10-minute read and answer the following multiple-choice question within 24 hours:

This sample shows me that the writer:

______ understands the assignment and seems to be on the right track.

______ may have potential, but this sample has the following glaring problems ___________.

______ isn't a good fit.

(4) Based on the feedback, you'll quickly learn whether your client's expectations are being met and which of your content creators are on the right track. The writers who need to make adjustments can get high-level feedback that could dramatically improve their first submission, and we can remove the writers who are too far off from the project before they have invested too much time.

Benefits: We get a much faster initial ramp-up period and produce content that everyone is happy with from the start.

STANDARDIZE YOUR REVIEW AND APPROVAL PROCESS

HEATHER HURST

Corporate Marketing Director,
Workfront

Heather Hurst is the corporate marketing director at Workfront. She develops attention-grabbing marketing campaigns, combining proven and emerging tactics to build brands. With more than 15 years of marketing experience, Heather has enjoyed raising the profiles of B2B and B2C companies. She is a media relations, strategic planning, crisis management, and event planning guru. Her superb communication skills let her successfully lead marketing teams in both the United States and United Kingdom.

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Backstory: I lived for years in what we in the biz call "approval hell." It's that place where everything you create languishes in approval, sometimes until it's too late to actually execute on what you created.

The problem this tip fixes: Approvals taking *forever*—too little accountability to the process (or no process at all) for stakeholders

Implementation:

(1) Create a process. First, consider who should actually review each deliverable and determine a standardized format for them to give their feedback. Next, consider how many times reviewers should see the copy as it goes through the process, and how long each review should take.

(2) Find accountability. What happens to stakeholders if they don't provide their feedback according to the timeline? Find a way to hold them accountable. Set clear expectations at the beginning and make sure that everyone understands their role in the feedback and approval process. It will go a long way in staying on track and on budget.

(3) Create approval timeouts. You can't wait on everyone forever. Work with your stakeholders to choose the maximum time you will give them for approvals (usually, no more than five days, barring vacations). If they don't provide input in that time, you move on without them.

(4) Get out of email. Whether you use shared documents or a robust work management system, find a way to track review assignments and feedback so that no one can say, "I never got that."

Benefits: You save your sanity. Your stakeholders have accountability. You get things done.

Work with a trusted system for tasks, deadlines, and reminders. It can be any of a variety of online task management and project management tools. The key is to find one and stick with it, make it a habit, so nothing falls through the cracks.

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MATT HEINZ

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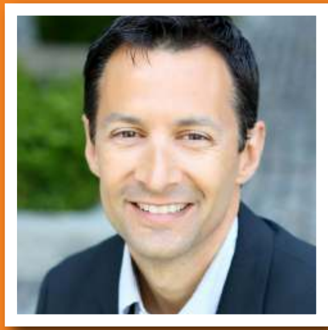

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Sam Faillace is a marketing leader and advisor to San Francisco start-ups. Over the years, Sam has worked with businesses in various stages of their life cycle in the areas of product, customer growth, and customer retention. Sam's previous consumer marketing leadership roles include Shutterfly and Microsoft.

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Backstory: Many companies have specific project management processes in place that help define each contributor's role, set specific timeframes, and provide deliverables. In my experience, however, these executions result in high-quality, on-target results that remain consistent *only* when the project owner begins the project by providing stakeholders a detailed brief defining the scope and timeline of the project.

The problem this tip fixes: If, from the inception of a project, everyone is in agreement about the scope and other considerations likely to come up along the way, then you are less likely to have to revisit or revise the fundamentals of the project later—a typical cause of extra rounds of iteration, more time devoted to execution, and additional resource requirements.

Implementation: When you are considering a new or revised project, the first step is to assign a project owner or responsible party who will shepherd the project through the process and who has final approval. With that person designated, the first contribution he or she makes should be a brief (or perhaps a series of briefs for larger projects) that those who have a specific contribution, approval, or consultation role in the final outcome will use. The development and review of this brief is also an opportunity for each stakeholder to contribute to the project's scope up front so that changes in direction are less likely later.

In creating this brief, the responsible party must clearly define the purpose of the project, expected results, brand considerations, and any additional considerations. Doing so will help to answer the typical questions likely to come up along the way and give everyone the same creative and marketing focal points.

Benefits: The combination of a clear and effective content brief with a disciplined project management framework makes for the highest-quality, most targeted results and the fewest headaches along the way. It is critical that you get participation early on from all interested parties and share this brief both internally and externally. With everyone in general agreement about the brief, final products will be tighter and, hopefully, more effective.

KEEP CUSTOMER PERSONAS CURRENT AND CONTENT TARGETED TO INCREASE RELEVANCY AND REDUCE REVIEW CYCLES

SHARON GOLDSTEIN

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Sharon Goldstein is the chief revenue officer of ShipHawk, where she is responsible for the company's sales and marketing functions, monetization strategy, and customer acquisition. Prior to ShipHawk, Sharon was an executive in residence at XSeed Capital, CMO of social commerce company Pixlee, and the director of corporate development and strategy at Shutterfly. With her agency, Amplify+, Sharon has advised dozens of startups on go-to-market strategies. Sharon holds an MBA from Kellogg School of Management and an engineering degree from Georgia Tech.

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Backstory: The best content marketing starts with a detailed understanding of who the customer is and how to engage with him or her. Use detailed personas to develop content, to reduce review cycles and improve content development cycles. Customer profiles should be well-defined collaborations agreed to by vested groups in the company. This allows you to clearly define the content that will give customers a holistic experience and address their specific pain points. Unfortunately, many companies create personas as a one-time, up-front exercise, and don't update them to keep the personas accurate and effective. This misalignment can result in content projects getting caught up mid-process, when stakeholders are unclear of the purpose and the audience.

The problem this tip fixes: Many companies believe that they know their customers well, but often, customer personas are based on a narrow window of time during which salespeople are reacting to specific market developments or challenges, decreasing the accuracy of the personas. The result is content that doesn't hit the mark or falls short for certain groups of customers—a mistake often discovered late in the process that can create extra work.

Implementation: I structured an integrated revenue team so that there's better cohesion between what customers are telling sales in the field and the narrative that marketing uses to tell the story. I have the marketing team sit in on weekly meetings with the sales team so that they can learn more about our customers, which keeps the content fresh. What you really need is to hear from the salespeople who are talking to the customers every day so that you can learn what the pain points are and where the friction is. In some cases, marketing team members listen in on actual customer conversations; I also recommend that marketing staff attend industry trade shows to gain important insights directly.

On a quarterly basis, the marketing team refreshes the personas with the assistance of sales and account management so that everybody's working from the same perspective. The team gathers input from all stakeholders – marketing, sales, and account management to ensure both motivations and language are on target.

Benefits: Accurate personas ensure that everyone in the process is working toward the same goal and using the same language and narrative to tell the story. This approach helps not only the writers but also the designers and other content developers, reducing the number of content revisions needed throughout the process. Combined with a robust content brief, this up-front understanding of customer personas saves both time and money.

Provide management with an estimate of the dollar amount of staff time spent on your organization's current review and revision system. There is a cost, and it can be measured. Get management's approval to reduce those costs. Then, get to work and start with the following: (1) Stop calling it an approval process*. Call it a* comment process *or a* technical verification *so that expectations are set for what individuals in the review process are supposed to be providing. (2) Don't provide the content to be reviewed in a format that allows reviewers to edit the original. Make them have to print it out, mark it up, scan it, and return it. Or require them to provide their input in a separate message. (3) Assign one person to make the final call on all input obtained during the review process, even input from higher-ups. (4) Don't stop measuring.*

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Adam Vavrek is currently a Bostonian, but he's an Austinite at heart. A sports enthusiast with an addiction to ice cream, Adam has worked the past six years at Skyword, a leading content marketing technology and services company. There, he leads marketing operations and was inducted into the summer 2016 class of Marketo Champions.

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Backstory: To save time and focus attention on content quality (as opposed to formatting or other more technical details), it is essential that reviewers provide feedback based on their area of expertise, not check general content parameters. Often, reviewers become overwhelmed trying to fix all the issues they see in a document rather than contributing one or two unique changes based on the depth of their knowledge. If they know, for example, that an article already has the right number of characters in the headline, the right style of subhead, and the right word count, they can focus on improving quality and making sure the content reaches the customer as defined in the brief.

The problem this tip fixes: By using either manual or automated systems that require the creative to meet certain parameters, like a headline or subhead of a certain length, reviewers are free to focus on content quality and effectiveness. Your team faces less repetition and more specialized revisions among reviewers.

Implementation: We want our editors to focus on improving the quality of the content, not formatting. Content has to meet certain criteria before the content creator submits it for review. For example, our internal systems won't allow us to submit an article if it doesn't meet the word-length goals, image parameters, or technical headline requirements. We also run all content through a grammar and spell check and establish a readability score, and our platform's plagiarism check is crucial for discovering whether any other material on the web offers similar content. There's also a content checklist on the platform to remind creators of other content requirements.

In addition, we use content calendars extensively to allow us to move things around easily if we have to. Calendar planning is a major component of our platform.

Benefits: By doing all these things as part of the initial review process, our editors don't need to spend time on those technical aspects of a piece, instead putting their time and energy into optimizing content quality.

What's great about our internal approval and workflow processes is that we can send a piece out to as many people as we want, either on our side or the client's. With each iteration, we look at a specific aspect of the actual content, not at formatting and other issues (although that will happen at some point).

We work hard to break down silos, so we will ask people from different departments to look at content before it's approved and published. With the rapid pace at which digital marketing is changing, you have to be able to adapt quickly.

DAVID ROGELBERG
Publisher,
Mighty Guides

David Rogelberg is the founder of Studio B—the first content marketing agency. Since 1995, Studio B has created content programs for technology companies like IBM, Ziff Davis, Microsoft, Intel, and Workfront, and has appeared on the Inc. 500 list twice. David also founded Mighty Guides, the first social publishing company, which publishes sponsored e-books designed to generate demand and promote thought leadership. Prior to founding Studio B and Mighty Guides, David was a publisher at Simon & Schuster, where he published numerous best sellers on technology topics.

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Backstory: One of the most challenging projects we worked on this past year required us to deliver 500 1,000 word technical articles in fewer than three months to a demanding client. We organized a team of 19 writers, three editors, two copy editors, and a project manager to get the job done. Given the short deadline and our relationship with the client, we knew that we had to construct a streamlined process that would deliver high-quality content.

The problem this tip fixes: This tip reduces the number of feedback loops and focuses review efforts where they will make the greatest impact.

Implementation:

(1) Rather than review each article individually, we batched five articles to minimize the number of pieces we had to deal with.

(2) An editor carefully reviewed each writer's first batch of five articles. She provided detailed feedback to the writers as part of their training process, and they were told that they couldn't make those mistakes again or they'd be replaced.

(3) After the initial training process, each batch of five articles went to a "fixer." The fixer corrected the problems rather than sending the documents back to the original authors, and then sent the pieces to the copy editors. If a writer's work was substandard, we replaced the writer.

Benefits: We ensured speed and cost savings. Everyone had a job, and everyone understood that he or she needed to deliver high-quality work to the next person on the team. We managed to deliver all 500 pieces a full month early as a result of that process, and our customer (Ziff Davis) loved the work.

ELIMINATE TECH HEADACHES

In This Section

MICHAEL BECKER
Content Marketing Strategist,
Sharpen

Michael Becker is a content strategist and online marketing aficionado. He's currently creating and promoting marketing content at Sharpen, a cloud-native contact center in Indianapolis. He graduated with a B.A. in journalism and communications from Butler University in 2014 and is an avid Bulldogs basketball fan.

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Backstory: I once worked in a large business with a geographically dispersed creative marketing team. Not only was there a lot of long-distance collaboration among members of the team, but people involved in approvals often traveled. In spite of the distances, it was important that the process work predictably so that we could set deadlines and anticipate when projects would be completed.

The problem this tip fixes: We implemented a tool to meet our needs for a universal asset management / creative review mechanism that could unite geographically dispersed teams. Once this tool was implemented, the challenge was enforcing the review and sign-off commitments of approvers in a way that would keep projects on track. If a key person was traveling or otherwise unable to complete a review, it held up the entire workflow. Our company addressed this problem by adopting a workflow management tool the marketing team could use for their own workflow but that others in the approval chain could access from wherever they were. It was a solid technology solution. The problem was that people didn't use it.

Implementation: In analyzing why people weren't using the tool, we found that there was a lack of understanding and awareness in the company about the tool itself and how, exactly, it should be used. We developed three strategies to fix this problem:

- Encourage use of the tool across the company, and set the expectation that everyone collaborating on and reviewing marketing deliverables had to use it
- Invest in technical support to help customize the platform for our process with templates, customizable workflows, and calendar configurations. The goal was to make the tool intuitive and easy for people to use
- Start using it, and hold people accountable for their work on the platform through its built-in activity tracking. People should know that if they aren't working through the tool, their feedback won't be accounted for

Benefits: A workflow solution doesn't help if no one uses it, and people won't use it if it doesn't support their process effectively. You must invest not only in the platform but in the customization, training, and setting of expectations in such a way that people discover they can work more effectively with the tool than without it. Only then will the tool contribute to streamlining your workflow.

Be intentional about the tech you're using. Don't let the tail wag the dog: Focus first and foremost on tools that further your strategy and objectives rather than those that distract you from the goal.

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MATT HEINZ

President, Heinz Marketing Inc.

ASHLEY SPURLOCK

Solutions Marketing Manager, Scrum Master, Workfront

Ashley Spurlock has 10 years of experience writing and managing marketing projects in the tech, education, and fitness industries. In her current role, she oversees an Agile team responsible for content marketing, sales support, and product marketing for agency and marketing prospects and customers at Workfront.

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Backstory: It's exhausting using a different process or tool to review and approve different types of content. As a content marketer, I'm working with video, PDFs, landing pages, blogs, and banner ads. It's difficult to keep track of the right tech to gather feedback, implement changes, and send assets around for approval.

The problem this tip fixes: Adding tools to your toolbox, which ultimately means adding more time to the project.

Implementation: I've read that marketers use an average of 13 different formats for their content marketing efforts. That's a lot of content! When you think about the different types of reviews and approvals around the 13 different formats, your head might start to spin. Some people are using Microsoft Word to track changes to e-books, others are using staging servers for website review, and I still know people who are printing out PDFs, marketing them up by hand, and walking the reviewed asset back to the desk of the person who needs to implement the changes. Keeping track of the different processes and tools just isn't feasible for marketers who are always running against the clock.

My tip? Use one tool—and just one tool—to review *all* your assets. Get that one process inside the same solution. Using the same approach for all reviews opens your day more than any other tip you can implement. Choose a solution that allows you to review all types of assets—video, websites, blogs, PDFs, banner ads—and follow a standardized review and approval process for everything. Having one approach will make it much easier to track feedback (because you're gathering all feedback in *one* place), review the content (you won't have to run around trying to find the right printout!), and respond to changes (writers and designers can see final feedback without having to follow up with stakeholders for confirmation).

Want something even better? Choose an online proofing tool that allows you to automate reviews and approvals, "templatize" your process, and review content anywhere, anytime. The best part? You won't have to deal with version-control hell (but that's a tip for another day).

Benefits: You get more time to work on actual work without tracking down the right tool to review a new asset type. Plus, you're more likely to have key stakeholders review content on time if they know that the process is the same for every asset.

To eliminate tech headaches, take the time to find the right tech solutions for your needs. Sometimes an "all-in-one" option might seem like a great idea, but the components may not actually work exactly the way you want, causing more headaches than necessary.

It's easy to use a one-stop tool for customer relationship management, contracts, project management, client care, and invoicing, but despite the efficiency of logging into a single portal, it's possible that none of the tools completely meets your needs, leading to an ongoing, low-grade tech headache.

Instead, select the tools that best meet your needs. Separate tools can often work more effectively, doing the one thing they're designed to do, and still working in harmony with your other tools. When you've chosen your tools, conduct annual audits to assess how well each tool is performing, and don't be afraid to migrate when it's the right choice, even if it's a big job. Often, making a switch can avoid a ton of frustration and improve overall team happiness and performance.

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SUSAN BARONCINI-MOE

CEO, Executive Coach, Business in Blue Jeans

Conquer the Review and Approval Process with ProofHQ

Workfront's ProofHQ online proofing solution streamlines the review and approval of creative content and assets, giving marketers a single tool to:

- Automate review and approval routing
- Standardize proofing tools and review workflow
- Complete reviews and approvals faster and with less effort

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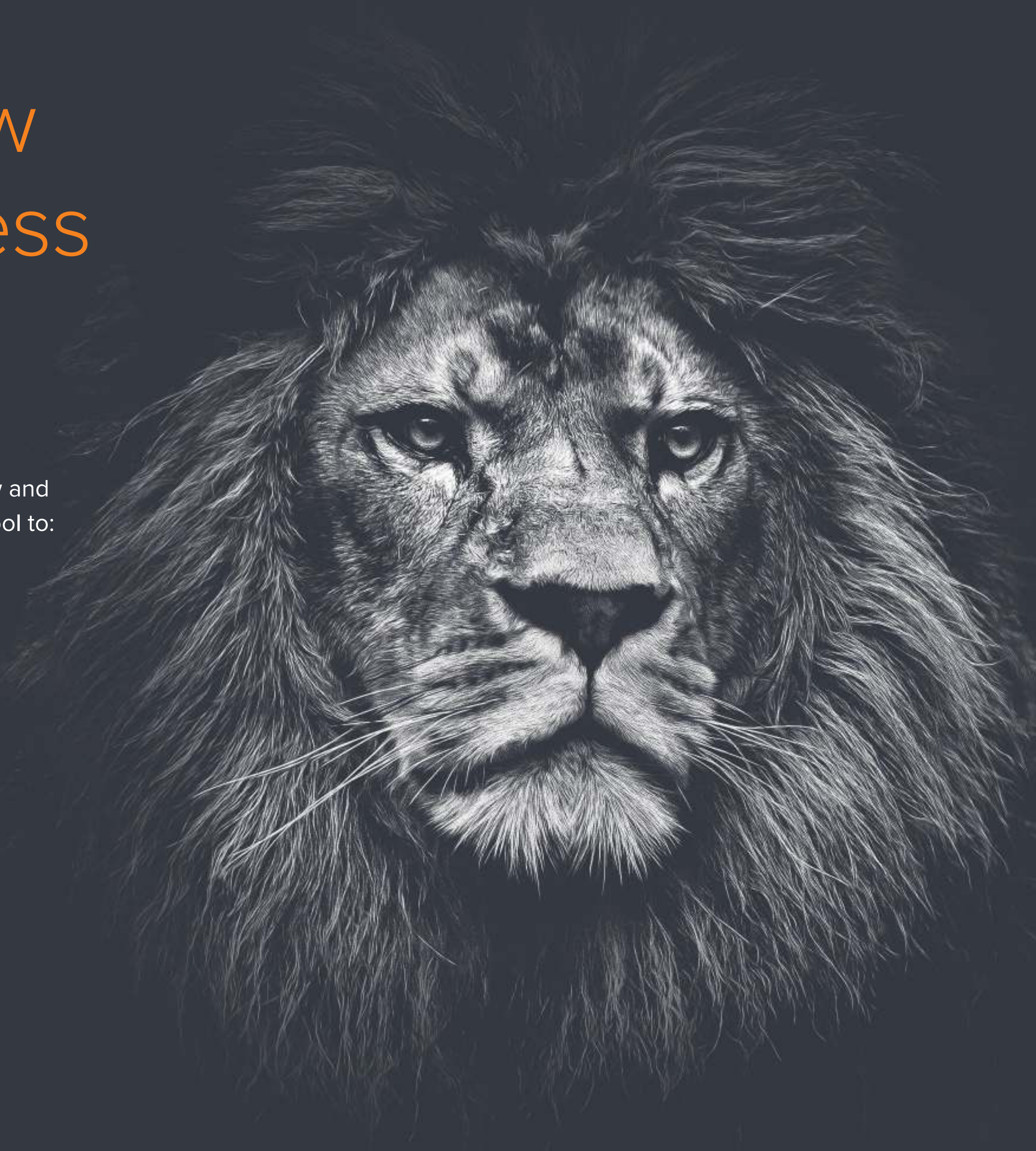

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