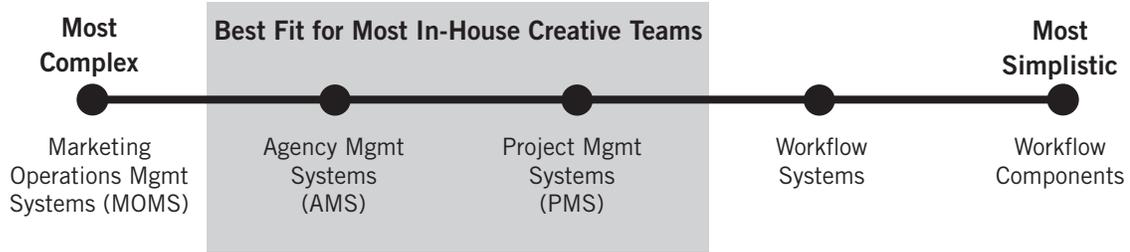




## Workflow & Project Management Technology Providers



### Marketing Operations Mgmt Systems (MOMS)

Enterprise wide marketing and campaign management; Usually purchased at the CMO level; Very expensive to implement (\$100k/yr plus)

- Adobe Marketing Suite
- Aprimo
- BrandMaker
- Freedman International
- IBM Unica
- Marketing Pilot
- PaxPro
- SAS

### Agency Management Systems (AMS)

Focused on the needs of agencies; Usually include accounting and media buying in addition to project management

- Advantage
- Agency Central by IBM
- Clients and Profits
- Marketing Pilot AMS
- Workamajig

### Project Management Systems (PMS)

Focused on the needs of agencies and in-house creative groups that don't need accounting and media buying

- FunctionFox
- Infowit
- Marketing Central by IBM
- MetaCommunications
- RoboHead
- Tenrox
- Sohнар Traffic
- Streamtime
- Workzone
- FileMaker Pro (Custom Build Platform)

### Workflow Systems

Focused on managing workflows

- @Task
- Basecamp
- Clarizen
- ProcessMaker
- TeamworkPM

### Workflow Components

Focused on one or more functions collaboration, DAM, time entry, database; components can be used to build a custom system or to address individual issues

- Access
- Adobe Product Suite
- Artesia
- Chuckwalla
- Harvest
- inMotion
- MarcomCentral
- SharePoint
- Replicon



## Automated Workflow Systems—Your Choices

The recent announcement of IBM's acquisition of Unica prompted me to think about the current landscape of options for automated workflow systems and how it keeps changing. For some companies, their history has included many acquisitions and changes in ownership, while others have been providing workflow solutions to the marketing communications market for decades. So, what are the choices available today?

First, a disclaimer: I will be mentioning some companies and sources of information as examples. This is not intended to be a comprehensive list of all options, as some very good companies will not be mentioned specifically, even though they may be very good options for your particular organization.

There are hundreds of software applications that offer some form of automated workflow solution. You only need to do some basic web searching to find examples. These can be broadly categorized as:

- **Comprehensive enterprise marketing management systems**, such as Aprimo, Unica and Marketing Pilot that offer everything from high level marketing planning and budget management, to integrated CRM for web and print, to task management for creative execution.
- **Agency management systems** that have focused on the capabilities needed by creative agencies. These systems, such as the MetaCommunications suite of products, or Advantage software offer all the tools needed in an agency setting. These tools range from customer management, to back-office financials, to execution tools such as automated workflow and digital asset management. Often, as is the case with

enterprise systems, the solutions are modular so you only purchase the capabilities you need but have an option for future growth.

- **Project management/collaboration tools** are also available for creative services. These tools are often hosted and users pay a relatively small configuration charge along with a monthly fee based on the number of users. These can be very useful for smaller organizations or possibly as a first step in getting work processes under control. These systems, such as RoboHead, Workamjig and others offer tools for managing tasks, collaborating on projects, managing review and approvals and some rudimentary asset management. Often they are somewhat limited in managing detailed project information and in reporting, but are still very valuable for the right organization.
- **General workflow systems** are also available that can be configured to manage creative workflows. Systems such as @TASK and ProcessMaker (an open source application) provide the platform for building simple or complex workflows, but they do not provide out-of-the-box creative services tools. However, they are extremely flexible and are a very good option if your organization's needs don't fit well with a typical agency-like model.
- Another way to handle workflow with general tools is to **build your own** (or make use of available options from many providers) using a database such as FileMaker Pro or Access. It's possible to develop a simple solution that manages information well and can generate very specific reports using these systems. Of

- course, the downside is that much of the work and maintenance needs to be done by your staff or a third party vendor.
- Finally, many creative tools provide a **workflow component**. These range from Microsoft SharePoint, to the Adobe product suite, to digital asset management systems such as Artesia or Chuckwalla. These systems often treat workflow as an integration between technology and people and may include automated image processing steps in conjunction with tasks for creative staff.

One of the best sources of information comparing solutions is the industry analysts, such as Gartner. Their Magic Quadrant analysis can help you determine the industry leaders and the niche players that may be a good fit for your needs. They also can help you understand the strengths and weaknesses of the various providers.

The selection of an automated workflow solution is mainly dependent on the needs of your specific organization. It is very important to understand your functional requirements, the scope of the solution you intend to implement (both now and in the future), and the technology infrastructure you have at hand. Developing a detailed set of requirements can be a considerable amount of work, but it is well worth the effort when it is time to select (and justify to management) a workflow solution.

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## Don't Miss Out Because You Didn't Calculate an ROI

Many Creative Service Managers have great ideas to improve productivity and efficiency but many of those ideas require investments in additional resources like technology, equipment or staff to make them viable. Many great projects wither on the vine because champions could not convince management or finance of the efficacy of their idea. The presentation of ROI (Return on Investment) and other cost benefit analysis can improve the chances of important projects being approved.

ROI represents the value of a project to the enterprise. The value calculation is important to decision makers, because monetary resources are limited and they need to decide which projects to undertake to put these resources to best use. If you want the best chance to get approval for your project, you will need to show the highest ROI of competing projects.

The ROI formula is relatively straight forward. The numerator represents the net benefits of the project...so project benefits less project costs. The denominator is the project costs. ROI is usually represented as a percentage:

$$\text{ROI \%} = \frac{\text{Project Benefits} - \text{Project Costs}}{\text{Project Costs}} \times 100$$

It is generally easy to convert costs to monetary values, but it can sometimes be a challenge to convert benefits to monetary values. I believe that everything can be converted to a quantitative value. If it exists it can probably be measured. Take human intelligence as an example. Intelligence is an extremely complex abstract concept yet psychologists have come up with a way to quantify it through an IQ score. So I guarantee it is possible to quantify and convert all project benefits to dollars.

Easy to convert benefits can include expected time savings from process changes or from adopting technology to help improve or automate process. It can also include savings or cost avoidance by insourcing internal process or technologies that were previously outsourced. In fact you can use ROI to help make the case for your department's existence. For example, if you can calculate the cost savings your department provides over outside agencies doing the same work and you have cost data available you can calculate an ROI for your department.

Difficult to convert benefits might be improved customer satisfaction, improved cycle time and improved accountability to name a few. The question is...is it worth the time and effort to convert them or is it ok to present them as "soft" benefits? I believe that intangible benefits can be crucial in evaluating the potential of a project. In fact some projects are implemented primarily because of their intangible benefits. They may not carry the same weight as measures expressed in monetary terms, but they are nevertheless important. So any project should include a tangible and credible ROI calculation and a list of intangible benefits expected from the projects undertaking.

One key point here is the qualifier "credible." You can use ROI to validate past decisions by calculating the effect a project has had on your operations. All you need to do is agree on measurements, measure the baseline state and value the change in performance. Credible, in this case, means that you are measuring benefits that can clearly be attributable to your project and no other factors. Historical ROI data can help you sell future projects by validating your past claims. Past success makes your future claims more credible. When you use ROI to sell potential projects you need to make

sure your projected benefits are directly attributable to your project, demonstrate that your benefits are measurable, and ensure that your projected change in performance is credible. Or you may, less credibly, borrow industry expert analysis and project it upon your organization. If you present unsubstantiated claims of improved productivity or reduced costs you run the risk of making the entire project incredible.

Let me give you a brief example of how this might work. Let's assume you wanted to buy a workflow tool to more efficiently manage your process. The cost would be relatively easy to collect. You might include the cost of software, licenses, support, hardware, customization and training. Let's assume that we believe our benefits will be improved productivity, improved accountability, improved client satisfaction and reduced cycle time. It will be relatively easy to calculate improved productivity by measuring how long it takes us to process jobs in the current state and how long it would take to

accomplish the same tasks after installing a system. Potential vendors would be happy to help you calculate this change in performance. It might be difficult to credibly calculate the value of improved accountability, improved customer satisfaction and reduced cycle time. If your case is strong enough without attempting to value these things, don't bother. Just leave them as powerful intangible benefits.

The inclusion of ROI and other cost benefit analysis in your proposals to undertake future projects can significantly improve your chances of approval. I believe that all major projects should have projected ROI and realized ROI calculated. This process will force project teams to work through detailed cost benefit analysis, will help make project champions more accountable for the project's success and make your organization better at choosing those projects that offer the best chance of making a difference.

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