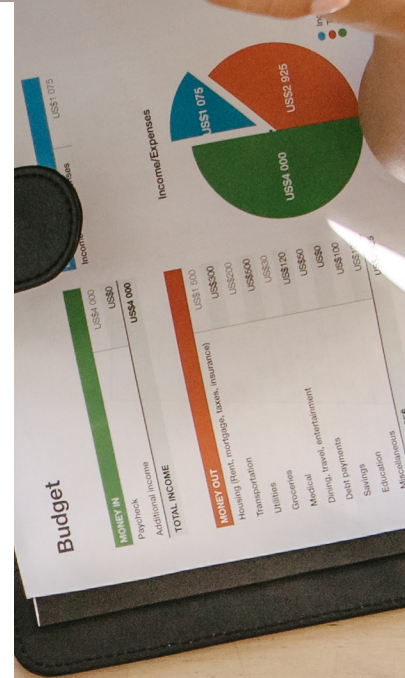


# Save Money (and Your Sanity) With Better Marketing Processes





Every marketing department runs on processes. When we ignore them, we may as well be a racecar driver who doesn't think engines are important. The result is processes that slow us down, frustrate everyone, and create chaos.

At the same time, while it's easy for us to say processes are important, it's usually much harder to actually isolate and address the problems that arise from bad processes.

That's why we've put together this guide. It will enable you to understand why you keep ending up with bad processes, what those processes are costing you, and what you can do to improve.

We've pulled this information from the years our Sherpas have spent helping all kinds of businesses improve poor marketing practices. That's why you'll find real examples and insights that go beyond theory to show you concrete steps you can take to improve processes, save money, and make your marketing more effective.

# Contents

---

**1** The Challenges Marketers Face Today

**2** Why We End Up with Bad Marketing Processes

**3** The Cost of Bad Process Management

**4** How You Can Improve Your Processes

**5** What Implementing These Suggestions Looks Like

---



# 1 The Challenges Marketers Face Today

What businesses expect from marketers is changing right alongside the reality of how marketing works. Even without the prospect of an economic downturn, marketers are being asked to do more with less, navigate a landscape that's changing faster than ever, and prove ROI every step of the way.

This can quickly become exhausting. No wonder marketers faced some of the [highest burnout rates](#) during the pandemic.

But as we alluded to in the intro, it's easy to focus on these challenges themselves and forget that each and every one of them is made dramatically worse by bad processes. Improving processes isn't a panacea, but it will go a long way towards ensuring marketers are able to perform at their best and even feel better about their work.

All of that begins with understanding how exactly we end up with bad processes in the first place.

**74.8% of  
marketers**



**experienced  
burnout during  
the pandemic**





# 2 Why We End Up with Bad Marketing Processes

If even the best processes can fail, that doesn't mean we should simply find a better replacement. We need to begin by understanding what can go wrong so once we develop a better way to do something, it can stay effective.

## The Context They Were Created for Has Changed

Let's start with a simple truism: unless they're able to continuously adapt and improve, even the best marketing processes will ultimately fall prey to the law of diminishing returns. What once felt like an amazing solution will inevitably seem totally inadequate.

Think about how many times some process, tool, or technology initially seemed revolutionary and irreplaceable only to eventually become standard, then obsolete. There's no avoiding the reality that the circumstances those processes were designed for at some point won't exist anymore.

For example, you may have developed a process for writing content back when you had a single writer and an outsourced editor. But over time you ended up with four writers and an in-house editor. So the amount of work being managed has expanded vastly, so the basic system you used before has become a confusing mess.



# The Process Was Flawed to Begin With

Other times processes are flawed to begin with. We've seen cases where teams end up with slow and cumbersome processes developed by a process engineer without any input from an actual marketer. They're heavy, include many stage gates, and impede fast flow, with lots of handoffs, approvals, and delays. In short, they are not human-centric and not built around the needs of the teams and the work.

In practice, this might be something as simple as assuming work can be done in unreasonable timeframes. After all, how many process engineers know how long editing or writing takes? Or the process may assume that every tiny step should be reviewed, leading to an agonizingly slow process.

# Processes Aren't Followed or Implemented Properly

The best process in the world isn't worth very much if it just gets ignored. This is why creating a process is just the start. You need to follow up by ensuring it gets implemented and then adjusted if necessary. This means getting buy in and actually onboarding employees on how to operate processes efficiently.

A common example of this is when someone creates an amazing but staggeringly complex system in a tool like Asana or Jira and then just expects everyone to follow along. This system might be far too complex for the team's needs and even with training its complexity means it's likely to be used incorrectly.



# No One Is Responsible for a Process

If processes require updates and tweaks to ensure they continue to work well, then you need someone to do that work. This is why processes which no single person is responsible for are far more likely to get neglected.

# Processes Focus on the Wrong Thing

Processes are also sometimes primarily focused on avoiding risk. This may be to avoid potential legal liability or to ensure nothing happens without the explicit approval of someone in leadership. This approach ensures marketers can't respond to anything quickly so crucial opportunities are missed. Marketers end up sitting around waiting for reviews, wasting time and money.

In practice, this can lead to things like many layers of review and approval. You can end up with a series of executives, lawyers, and risk and compliance officers who each get the chance to say "I don't like the button there, I don't like the color blue - can you make it purple, the font is too small, make that image bigger, I don't like that word/ design/ image/ copy". Oftentimes everyone wants their stamp on the work, leading to incredible inefficiencies.



# You Never Had a Process to Begin With

Sometimes, no process actually exists and everyone does their own thing. So you end up with an infinite number of ad hoc processes that make it difficult for marketers to figure out how to do things.

# Marketers Don't Feel Empowered to Improve

While ensuring someone is responsible for a process helps, it's just as important for everyone else to feel empowered to suggest improvements. Unfortunately, marketers often end up working in silos where they may simply assume there's a reason for the bad process that's just outside their knowledge. Or they might simply see it as someone else's problem.

For example, you might have a process designed for digital marketing teams to request visuals from a design team. Both teams think the process is awful but assume it must be better for the other team, so everyone goes along using it. Without an excuse to openly discuss how they feel about it, the process can go on annoying everyone for years.





# ③ The Cost of Bad Process Management

Clearly a lot can go wrong to create bad processes, but what's the actual cost?

---

# In short, it's staggering.

One [2019 study from Asana](#) showed that the average employee wastes 60% of their time on “work about work” compared to only 27% actually spent doing skilled work. For marketers, this translates into waiting for approvals or review, wondering what to work on next, searching for information, manually managing work that should be automated, as well as all the frustration and demotivation that results.





# Often, the costs can feel small.



Let's say each marketer spends 10 extra minutes a day because of a bad process. Multiply that by 50 employees and add a few minutes for [context switching](#) and that minor process issue can quickly translate into hours of lost productivity every day.

But all of this tends to multiply over time, because when processes don't work, people start to ignore them. This results in people dealing with ad-hoc processes that throw work at

them from all directions as everyone scrambles to get their priorities through. Instead of something like a line at a grocery store, you have a crowd of people each trying to find a way to check out first.

It's hardly surprising that this leads to higher turnover rates. LinkedIn recently found that [marketing experienced one of the highest turnover rates](#), about 22% more than average. With the [average cost of onboarding](#) running to over \$4,000, the cost of higher turnover adds up quickly.

So you begin with the actual inefficiencies (work takes longer to happen), add the emotional costs (loss of productivity and worse retention from frustration and demotivation), and you still haven't even gotten to the organizational costs. Bad processes make it far more difficult for marketing to respond quickly, leading to missed opportunities.

**Taken together, it's a scary equation.**

### **Our Agile Transformation lead [Elizabeth Venter](#) describes what companies experience as a result:**

“It’s impossible for people to prioritize work properly, manage their capacity and workload, work is not visible as it comes in from all sides, employees feel bullied, and marketing ends up being a dumping ground for work and are never seen as strategic partners, just order takers... you burn through resources and it costs serious money.”

For many organizations, the solution is simple: hire someone to handle all the extra work bad processes have created. That way, you don’t need to take away so much time from people focused on execution. The problem is that this is essentially putting a very expensive band-aid on the problem.

### **[Monica Georgieff](#), our EMEA Training & Delivery Lead shared how bad marketing processes can quickly turn into a nightmare:**

“Working with enterprises in highly regulated industries has shown me that entangled processes are the bane of the marketing department’s ability to experiment and, therefore, deliver timely, valuable work. When just a single sentence getting swapped out means we need to get back in line at legal and compliance’s door — Houston, we have a problem. This ends up being a drain on budget not because it discourages experimentation, but also because it wastes resources internally.”

Slow, complex, or no processes all cost real money and create an ongoing cycle of slow delivery, loss of opportunities, and the inability to respond to change for the benefit of the customer. All of this leads to burnout, low morale, frustration, and mistrust, and contributes to a toxic culture.

**The good news is that it doesn’t need to be this way.**





## **4 How You Can Improve Your Processes**

**There's a lot in this section because our Sherpas have seen many different approaches work.**

**Don't feel you need to do every single one of these. Instead, look for inspiration and find the combination of tactics you want to try out.**

# Clarify Roles & Responsibilities

One of the most basic and easy improvements you can make when your processes are chaotic is to simply clarify who should approve what, when, and why. For example, if content needs to be reviewed, instead of saying “someone from legal will review” or just “review,” assign a specific person to that task and give them a deadline.

The people assigned to roles need to be aware of what’s expected of them, another reason managing work with a tool which makes it easy for everyone to view all their tasks is so helpful. Those roles and responsibilities should also be reviewed regularly to ensure they remain relevant.

# Change Your Prioritization

While there are many different [ways to approach prioritization](#), what matters is ensuring work gets prioritized based on the value it delivers. Then, that prioritization should be clearly visible to everyone. This makes it easy to see what work is important and to quickly act when that work gets stuck.

Systems like [stack ranking](#), [MoSCoW](#), and [Planning Poker](#) all ensure that prioritization is approached in a uniform way. This is important because ad hoc systems create scenarios where priorities aren’t comparable because they were made based on totally different criteria.

# Quantify Your Processes

Another common problem is that we evaluate processes based on anecdotal evidence. By actually tracking data and analytics on the efficacy of your processes, you can both evaluate them and quantify their costs (and benefits) in the form of delays, rework, time to market, etc. This can be difficult, so it helps to find tools that automate this kind of data collection.



# Decentralize Decision-Making

For low-risk work with standard outputs that requires fast turnaround times, it's best to push approvals close to the team. Within teams, people will have greater context and knowledge about work being done, meaning outsiders don't constantly need to step in, learn the context, and make a decision.

In addition, because Agile teams usually use meetings like daily standups to keep everyone up-to-date on work that's happening, internal approvals can be made far faster. So always default to internal approvals unless you have a specific reason to go external.

# Try Value Stream Mapping

[Value stream mapping](#) enables you to map out your processes, identifying the [cycle time](#) (the amount of time it takes to complete a task from when work begins on it to finish), [lead time](#) (the time between when work gets requested to when it gets completed), and [process efficiency](#) (the amount of time it takes to complete a task divided by the days required).

Once you know what steps are involved and how each one contributes value, causes delays, etc. you can more easily find ways to improve those processes. For example, you might notice that one approval step contributes an average of 3 days to your cycle time but adds very little value. Or a step might get done very quickly but also fail to add any value. In both cases, value stream mapping makes it easy to identify and adjust these steps for more efficient processes.

# Engage with Stakeholders

If you optimize your processes solely for the marketers on your teams, they might end up being extremely streamlined but not actually deliver much value to stakeholders. This is why it's essential to engage with key stakeholders to get feedback on processes and ensure they're delivering value.

# Create Lightweight & Flexible Processes

We mentioned before that processes will always need to adapt and evolve over time. So it makes sense to craft those processes with evolution and flexibility in mind from the start. For example, you might want processes that can be easily adapted to apply to digital vs brand work. One way to do this is through the [PDCA \(Planning, Doing, Checking, Acting\) cycle](#).

This system ensures that continuous improvement is built-in to how you create and use processes, instead of merely an afterthought. By regularly identifying problems, testing solutions, confirming how effective they were, and implementing the best solution you develop, your processes can easily evolve and improve over time.

Here's a set of steps you can follow to do this:

- Begin with value stream mapping to identify and quantify delays.
- Update and re-design processes to improve the flow of work, cutting down on handoffs and delays wherever possible.
- Implement the refined processes, testing and optimizing based on the key improvement metrics you've identified.
- Align the workflow tool with refined processes.

Bear in mind that re-designed processes need to be adaptable to accommodate valuable, urgent work, especially for digital execution. So be wary of optimizing your processes solely for your standard workflow.

## Use Examples

Optimizing your processes to streamline the process of getting risk, compliance, or legal approval is great, but reducing the likelihood of rejection can help even more. This is why it can be helpful to build a repository of examples of work that was approved by those departments. Doing so can help team members avoid making the same mistakes and thereby creating mistrust and frustration for reviewers.



# Work More Closely with Legal/ Risk/Compliance

Aside from using examples, it can help tremendously to work more closely with legal, risk, or compliance teams to better understand their guidelines, requirements, and what they view as red flags. This is also a chance to create a single definition of work prioritization, timelines for review completion, and other factors to ensure everyone operates from the same set of understandings.

“Although marketing shouldn’t be encouraged to bypass legal and compliance entirely, creating a melded, streamlined process between these two distinct teams means working as a collective to make it happen. It also means one function learning from the other. When marketers develop the eagle eye of the legal and compliance team and when the legal and compliance team open themselves up to the marketing reality, these two functions can work better together for best results.”

– Monica Georgieff, EMEA Training & Delivery Lead

# Ensure Processes Are Followed Consistently

We mentioned earlier that one reason processes can break down over time is that people simply don’t follow them. To avoid that problem, everyone from leadership down needs to emphasize the importance of consistently following processes. That said, you can still break a rule or two when something is mission-critical, but these should be the exception.

Besides communicating the importance of following processes, you should also use [retrospectives](#) to ask how people feel about processes and whether they’re being followed. If you’ve created a good [Agile culture](#), people should feel comfortable admitting when they aren’t following a process, enabling everyone else to understand and address why.

# Plan Ahead

Oftentimes stakeholders or other teams might not plan or prioritize their marketing-relevant work. They might be used to marketing pulling out all the stops to adapt when this happens. Instead, leadership needs to push back and ensure everyone involved plans ahead and follows processes.

## Try Quarterly Big Room Planning

[Quarterly Big Room Planning](#) allows you to shift planning to a quarterly cadence, meaning stakeholders need to work with marketing leaders to prioritize valuable work, agree on outcomes and measurement, and stick to the plan.

Like with other things on this list, however, [leadership support](#) is key to make sure this happens. Trying to change the cadence or style of your planning without the backing of senior leaders is more likely to simply cause disruptions or frustration because those leaders likely won't understand why the change is occurring. They may even insist on returning to how things were done previously.

So before you try making a major change like this, start by educating leaders on why you'd like to make these changes. This might mean a course on [Agile Marketing Leadership](#) or simply showing them some [case studies](#).

## Use Service Level Agreements (SLAs)

[SLAs](#) enable you to effectively balance demand and capacity alongside workflow. As a tool, they make it far easier to work closely with stakeholders to align on realistic delivery times, expectations, and more. SLAs also make it easier to create flexible capacity planning because you can specifically account for what should occur when workloads increase.

Start by drafting SLAs to accommodate different types of work, for example digital or brand, before amending them over time as needed.



# 5 What Implementing These Suggestions Looks Like



All of the advice here is tied in with **Agile marketing**. But it’s easy to make any approach to process improvements sound great in theory. So what does it look like in practice?

To find out, every year we survey hundreds of marketers to understand how Agile (or the lack of it) impacts their work. Here, you can see how full Agile adoption affects a range of the challenges discussed here:

Benefits of Agile Transformation	All marketing teams use Agile	Some marketing teams use Agile
Very empowered to push back on unplanned work when it doesn't align to my team's goals and/or puts high-value work at risk?	82%	52%
Very easy to the team to connect its daily activities to the corporate strategy and objectives	54%	25%
Very satisfied with how the marketing currently manages its work	75%	59%
Marketing department effectively contributes to the organization's long-term success	92%	76%
Very confident marketing department can take advantage of emerging opportunities	82%	66%
Marketing department is able to handle fast-paced marketing work	86%	71%
Very confident marketing team can collaborate regardless of where team is working	85%	73%



**All the advice here has been developed  
through years of hands-on experience  
helping marketing teams overcome process  
challenges to accomplish more.**

**Interested in exploring what Agile can do for you?  
[Click here](#) to get in touch with one of our Sherpas.**

