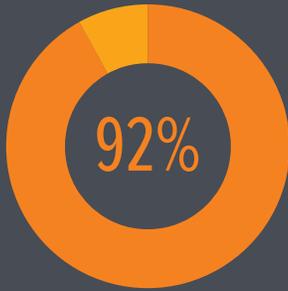




EBOOK

3 Ways to Improve Your Review and Approval Process



92% of marketers cited approval delays as the top reason they miss deadlines.³



Meeting deadlines is one of marketers' top 5 metrics for measuring their team's marketing success.⁴

Introduction

Marketers always have too much to do and too little time to do it. But the biggest barrier to meeting deadlines for most marketers is managing the review and approval process. In one recent study, 92 percent of marketers cited approval delays as the top reason they miss deadlines.¹

What makes this stage in a project's workflow so difficult? Just like every aspect of marketing, the review and approval process has become more complex. There are more versions, more approvers, and more types of content that need reviewing and approval than ever before. At the same time, there is significant pressure on marketers to keep projects on track and on time—which is why meeting deadlines is one of marketers' top five metrics for measuring their team's success.²

In this eBook, we'll tackle the three biggest reasons reviews and approvals are frequently delayed and show you what you can do to speed the review and approval process and keep your deadlines on track.

Problem 1: You waste too much time waiting for feedback

You sent out the review in an email and even included a date for when you need it back. But almost a week later, you're still waiting to hear from several reviewers. You even sent a follow-up email, but still no response. Everyone is busy and often the stakeholders that need to review or approve assets are some of the busiest people.

If a reviewer doesn't respond to your emails or calls, it can be hard to know whether the reviewer even saw your request to approve the document. And when they're done, there's often no clear way for you to see they've responded—maybe they dropped it on your desk a week ago, but you didn't notice it amid the pile of papers. In fact, 82 percent of marketers say the reason they miss deadlines is due to poor communication between stakeholders.⁵ Not surprisingly, because it can be so difficult to communicate with and get critical reviews and approvals back from stakeholders, almost a third of marketers say that getting stakeholder approval is the thing they dread most about their job.⁶

A large, stylized hourglass graphic in shades of orange and brown, positioned on the right side of the page. The top bulb is larger than the bottom bulb, and the narrow neck is in the center. The background is a solid orange color.

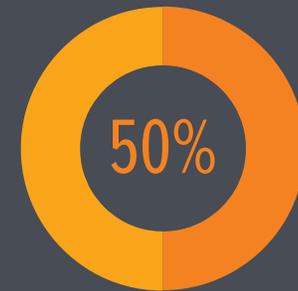
26%
of marketers dread
getting stakeholder
approval.⁷

Solution: Make sure reviewers know what's expected

While it's true that everyone is busy and that reviewing and approving a marketing asset may not be a stakeholder's highest priority, it's also true that they simply may not know what is expected of them. According to a recent Gallup poll, only 50 percent of employees say they know what is expected of them.⁸

Set clear expectations up front with all reviewers, approvers, and stakeholders. And don't just say these expectations in a meeting or while chatting in the hallway. Develop a detailed outline that you can give to each reviewer that clarifies:

- **How much time they have to review each asset:** You can either create a set timeline for all assets (e.g., three-day turnaround on all reviews), or set timelines for different types of assets, such as one day to review outlines, three days to review first drafts, and two days for final review, etc. The important thing is to make it consistent and clear.
- **How they should provide these reviews:** To help you better track feedback, have everyone proof in the same tool, such as an online proofing tool, tracked changes in Word, or hard copies. Make sure you also have a consistent method to receive feedback. For instance, an email address to a specific person; an intake basket where all hard copies are placed; or an automated notification system, if you're using an online proofing tool.
- **What the consequence will be if they miss deadlines:** Make sure reviewers understand that their tardiness may cause larger deadlines to be missed or impact business outcomes. You can also add "softer consequences." For example, with backing from the right stakeholders, you may be able to institute a rule that if feedback isn't received on time, the reviewer loses the opportunity to provide feedback at all.



Only 50% of employees say they know what is expected of them.⁹

Problem 2: You have too many versions

As an asset winds its way through the review process, there are numerous stakeholders who need to review and approve it. One recent survey found that 47 percent of companies have more than four people involved in the review and approval process.¹⁰

While this might be necessary, the fact is, the more people who are involved in reviews and approvals, the more difficult and complicated the process will be. With eight or ten versions of an asset, it gets hard to keep track of all the feedback, creates a lot of rework for writers and designers, and can quickly end up impacting deadlines. At the same time, when reviewers delay providing feedback, by the time they get to the document, there may already be newer versions that they're not even aware of—making the feedback they provide irrelevant, wasting everyone's time, and adding more delays. Reviewing out-of-date versions risks the quality of the final asset, which in some industries could lead to legal or financial repercussions.



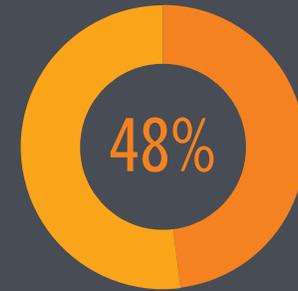
47%
of companies have more than four people involved in the review and approval process.¹¹

Solution: Organize your versions in one location

With 53 percent of organizations saying getting final approval requires numerous rounds of review with multiple groups and team members,¹² it can be tough to keep track of what version is most current and who should be reviewing it.

To keep multiple-version mayhem to a minimum, follow these tips:

- **Be more consistent about how you organize and store your documents.** Create a central location to store all your assets and a file naming system that clearly names each asset so it's easy to find the one you are looking for. Make sure all reviewers have access to where documents are stored and understand where and how to save files.
- **Track versions consistently.** When you get to version 12, it can get confusing. To make it clear which is the most current version, create a clear labeling system for each version, such as V1, V2, etc. Don't label a version final until it truly is final (i.e., ready for production). And, if you do have to go back and make changes to a final version, rename the previous final as the next chronological version, so there's no confusion.
- **Keep the number of versions to a minimum.** Multiple reviewers and multiple versions of an asset are a necessity to ensure the quality of the project. But, if you're consistently finding yourself on eight to twelve or more versions, it might be time to reexamine who you have reviewing assets and whether all those reviews are necessary. A best practice is to keep reviews to three rounds, helping to reduce the number of versions as well.



48% of marketers say excessive oversight, such as too many reviews or approvals, gets in the way of getting work done.¹³

Problem 3: You have too many types of content to review

Videos. Social media. Interactive web copy. Infographics. Webinars. The list goes on and on when it comes to the type of content marketers are creating to connect with their audiences. In fact, according to the Content Marketing Institute, marketers use an average of thirteen different formats in their content marketing efforts.¹⁴

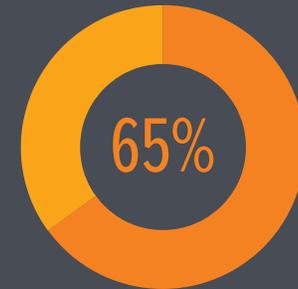
Unfortunately, all this variation can make the review and approval process a challenge—you can't track changes in Word on a video or a dynamic html asset. In these cases, sometimes feedback is delivered manually, by sticky notes, or through email. For websites, you might use a staging server. For PDFs, you might use Adobe Acrobat. And for video, you might sit next to an editor and verbally deliver edits. With no clear way to review and approve interactive content such as videos and web pages, it's hard to keep track of the feedback and make sure it's applied consistently throughout the review and approval process.

Marketers use an average of **13** different formats in their content marketing efforts.¹⁵

Solution: Use one approach for reviews

Even though 65 percent of senior marketing executives believe that visual assets, such as photos, videos, or illustrations, are core to communicating their brand story, only 27 percent say they have a process in place to manage their visual assets.¹⁶

Creating and managing a number of different types of assets is a complicated activity, but you can simplify the review and approval process by devising a solution that allows you to edit every type of asset the same way. Whether you decide to use a printed document and have everyone mark up the same printout or a process where all feedback is typed up and emailed to the creative manager, having one approach or system makes it much easier to track, review, and respond to feedback.



65% of senior marketing executives believe that visual assets, such as photos, videos, or illustrations are core to communicating their brand story.¹⁷

The Best Solution for Your Biggest Review and Approval Problems

Manual processes you can implement now are a good way to tackle your review and approval nightmares, but an even better way is to streamline, templatize, and automate the entire review and approval workflow. An online proofing solution will let you do just that. Reviews and approvals can be automatically routed, followed up on, and tracked. All feedback can be kept in a central location and all proofing can be done in the same tool regardless of the type of document—Word documents, PDFs, presentations, web content, graphics, audio, video, and more. Finally, all assets are stored in a central location, making finding the right version quick and easy.

Online proofing is the best way to manage the review and approval process:



**56% faster
speed-to-
market**



**59% less effort
spent managing
proofs**



**29% fewer
revisions
required**



**80% improvement of
internal communication
around proofs^{18,19}**

The ProofHQ Advantage

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

Try a sample proof today by [clicking here.](#)



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