

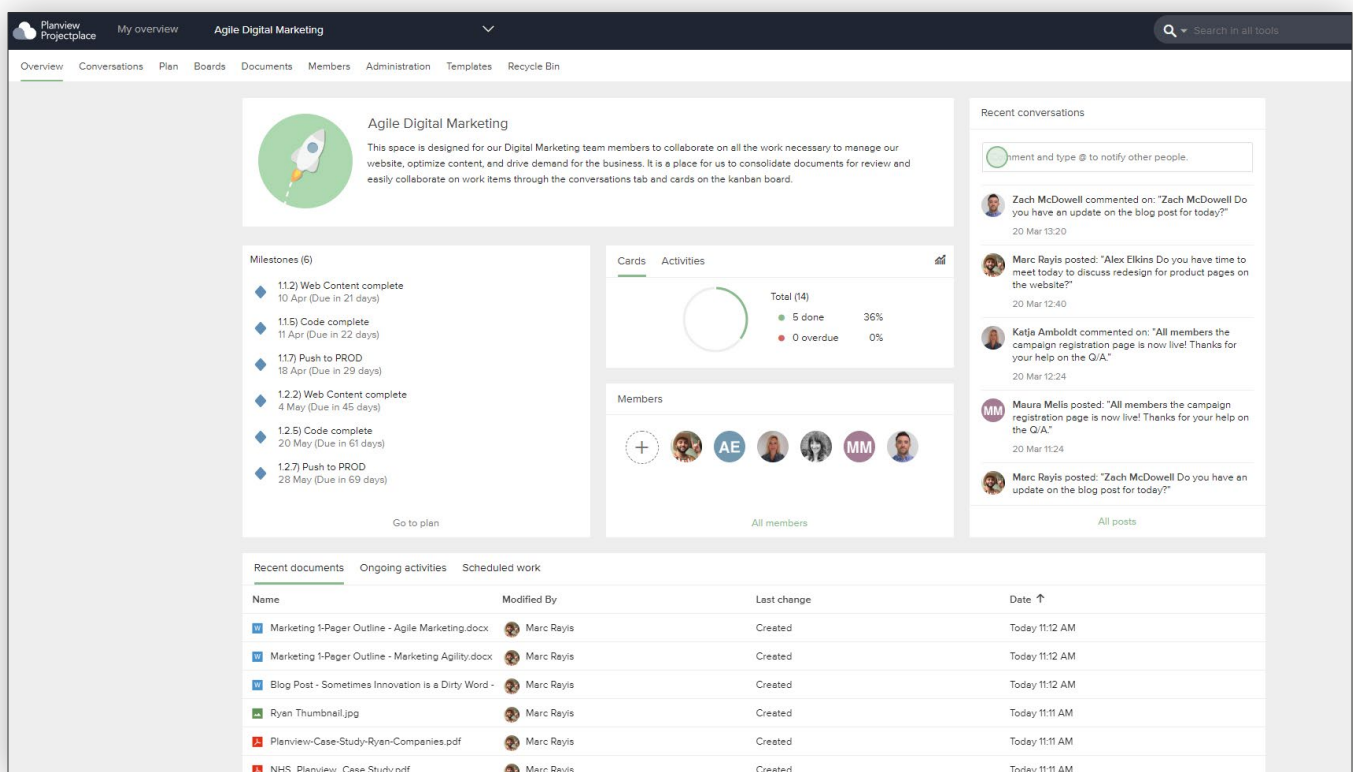
## INFOSHEET

# Embracing Agility with Agile Project Management

## How Planview's Digital Marketing Team Is Accelerating Their Time-To-Market

As organizations strive to adapt to ever-changing market conditions, customer behavior, and business strategy, marketing organizations are increasingly adopting Agile practices and principles to improve processes and accelerate delivery. It is incredibly important for today's marketers to better visualize work and collaborate effectively on campaigns to ensure that they are providing the right content to their target audience and generating demand for their organization's products/services. It is imperative that Marketing teams have a solution in place to visualize work in a single digital workspace to optimize their workflow and prioritize based on strategic objectives.

Planview Projectplace™ helps marketing teams improve work visibility and collaboration in a single solution, allowing them to focus on generating quality web traffic, optimizing their websites and delivering enough impactful content to keep leads flowing. Whether working in a traditional, hybrid or agile way, marketing organizations can leverage Projectplace to visualize their entire process digitally and ensure that work is delivered fast and on strategy. As a result, they are more effective at generating new business and growing customer loyalty.



The screenshot displays the Planview Projectplace interface for the 'Agile Digital Marketing' project. The top navigation bar includes 'Overview', 'Conversations', 'Plan', 'Boards', 'Documents', 'Members', 'Administration', 'Templates', and 'Recycle Bin'. The main content area is divided into several sections:

- Agile Digital Marketing Overview:** A central card with a rocket icon and a description: "This space is designed for our Digital Marketing team members to collaborate on all the work necessary to manage our website, optimize content, and drive demand for the business. It is a place for us to consolidate documents for review and easily collaborate on work items through the conversations tab and cards on the kanban board."
- Milestones (6):** A list of key dates and tasks:
  - 11.2) Web Content complete (10 Apr (Due in 21 days))
  - 11.5) Code complete (11 Apr (Due in 22 days))
  - 11.7) Push to PROD (18 Apr (Due in 29 days))
  - 12.2) Web Content complete (4 May (Due in 45 days))
  - 12.5) Code complete (20 May (Due in 61 days))
  - 12.7) Push to PROD (28 May (Due in 69 days))
- Cards & Activities:** A Kanban board showing a total of 14 cards, with 5 done (36%) and 0 overdue (0%).
- Members:** A section showing team members with profile icons and initials (AE, MM).
- Recent conversations:** A list of recent team discussions, including comments from Zach McDowell, Marc Rayis, and Maura Melis.
- Recent documents:** A table listing recent documents, including marketing outlines, blog posts, and case studies.

Name	Modified By	Last change	Date ↑
Marketing 1-Page Outline - Agile Marketing.docx	Marc Rayis	Created	Today 11:12 AM
Marketing 1-Page Outline - Marketing Agility.docx	Marc Rayis	Created	Today 11:12 AM
Blog Post - Sometimes Innovation is a Dirty Word	Marc Rayis	Created	Today 11:12 AM
Ryan Thumbnail.jpg	Marc Rayis	Created	Today 11:11 AM
Planview-Case-Study-Ryan-Companies.pdf	Marc Rayis	Created	Today 11:11 AM
NHS_Planview_Case Study.pdf	Marc Rayis	Created	Today 11:11 AM

# Planview Use Case

## Business problem:

In 2016, Planview's Digital Marketing and Marketing Operations teams were having trouble visualizing and prioritizing their work. Everything was managed in spreadsheets and team members didn't have any visibility into upcoming or in-flight projects. Without a solution in place to visualize work, it was unclear what team members were supposed to be delivering, especially since priorities often shifted quickly and without warning. Much of their work was driven by hard deadlines, such as analyst conferences or customer events, and a lack of planning meant that most work was being done last minute. All these factors combined with the difficulty of accurately measuring individual bandwidth and team capacity made it difficult to meet deadlines and develop a marketing strategy.

## How Planview helped to address challenges:

Lori Baldwin, VP of Digital Marketing and Operations, decided to have her teams move all their work into Projectplace, which provided them with a single source of truth for all current work information and an engine for demand intake. She put a structure in place that incorporated elements of the Scrum methodology; this involved treating the web property as an actual product whose objective is to generate leads. Lori's teams began doing bi-weekly Sprint planning and were able to plan more effectively and adapt to shifting priorities without slowing delivery of work items. Projectplace's flexibility allowed them to mirror their new process exactly onto a digital Kanban board, making it easier to understand team members' capacity, commitments and work status. Being able to attach documents and all critical information onto cards helped Lori's teams to deliver work faster even when priorities shifted.

## The results they achieved:

Using Projectplace and a Sprint framework, Digital Marketing completely revamped Planview's website, turning it from a brochure site to a real demand engine. This led to a huge increase in demand generated for the business. They also launched German, Swedish, French and Norwegian sites, driving more demand in Europe. As Planview® acquired companies, the DMO team used Projectplace to manage the work required to consolidate back end marketing systems, resulting in a much more seamless transition and less disruption to lead flow. Being able to consolidate all project information including documents, conversations and status updates in Projectplace has enabled them to improve work visualization and increase collaboration among team members and with other marketing and business functions.

## Links to relevant assets:

### ***What is Agile Project Management for Marketing?***

Dive into the key elements of agile project management for marketing, the most common benefits, and five practical tips to help teams get started:

<https://www.planview.com/resources/articles/agile-project-management-marketing/>

### ***5 Ways to Transform Project Collaboration in Marketing – Real-World Projectplace Use Cases***

This eBook features Projectplace use cases told by marketers who use the solution every day. Read how they are easily planning team projects, scheduling tasks, collaborating on documents, and tracking their group's progress using integrated Kanban boards, Gantt charts, and communication tools.

[https://info.planview.com/rs/456-QCH-520/images/v.a\\_5\\_Ways\\_to\\_Transform\\_Project\\_Collaboration\\_in\\_Marketing\\_EB947LTREN.pdf](https://info.planview.com/rs/456-QCH-520/images/v.a_5_Ways_to_Transform_Project_Collaboration_in_Marketing_EB947LTREN.pdf)