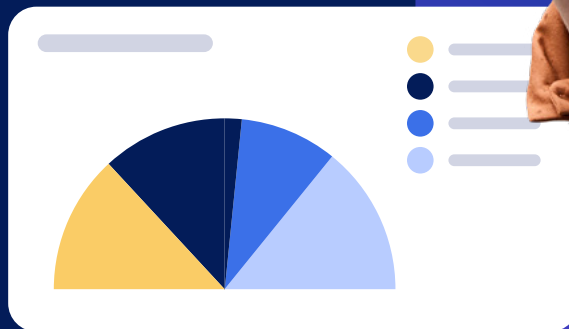




# Align, design, and deliver:

The ultimate marketing  
management toolkit



# Contents

Introduction	3
Marketing alignment & strategic planning	4
Request intake & capacity planning	7
Work management	10
Content collaboration	13
Delivering, measuring & optimizing impact	16
Ready to transform your marketing processes?	21

# Align, design, and deliver: A toolkit for marketing management

Marketing and creative teams are under more pressure than ever. Between chasing down feedback and updates, managing various complicated multi-channel campaigns, and making sure you're getting the most bang for your marketing buck, the struggle is definitely real. Seventy-two percent of marketers report wasting five or more hours a week switching between tools to complete tasks, [according to research conducted by Smartsheet](#). And let's not even start on the time lost creating status reports for stakeholders with varying priorities!

With pressure mounting from leadership to deliver more, it can be tough to feel like your work is making an impact. And as visibility into the work gets more obscured, it's easy for your efforts to feel siloed and unmeasurable.

Luckily, there's a better way. We designed the toolkit for marketing management to help you build confidence in the challenges you face every day. In this toolkit, we'll dive into top ways to overcome common pain points, from feeling disconnected on campaign vision to not knowing who's working on what, with practical tools such as pre-built templates and real-world success stories. We'll break down the five critical steps of the marketing work process, so whether you're planning, doing, or scaling the work, you've got the tools you need to tackle those pain points head-on.

**Ready to make inefficient processes a thing of the past?  
Let's get started.**

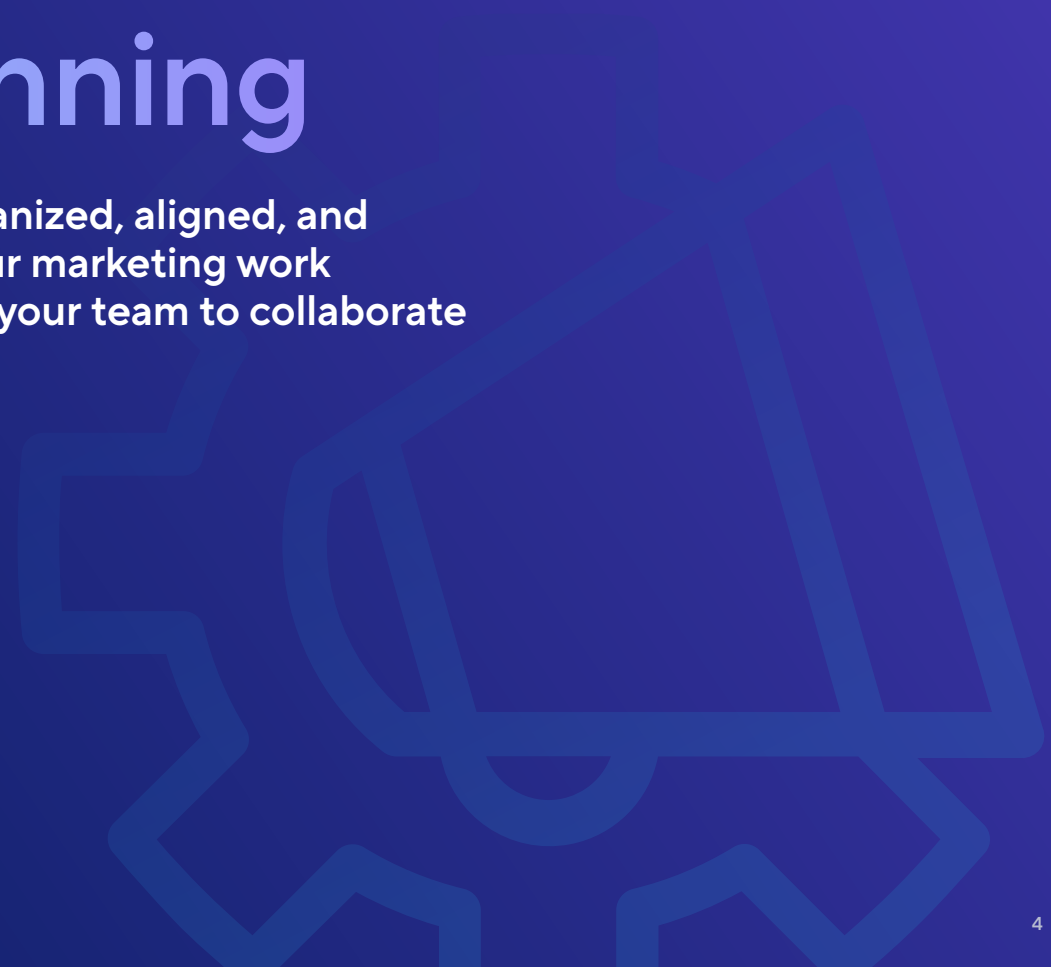


72%

**of marketers waste 5+ hours a  
week switching between tools  
to finish tasks.**

# Marketing alignment & strategic planning

helps managers keep marketing projects organized, aligned, and on track. By centralizing and streamlining your marketing work management efforts, you'll make it easier for your team to collaborate effectively and deliver quality results.



## Marketing alignment & strategic planning

### Common challenges

- Disconnected campaign vision
- Unclear or unrelated goals
- Inaccurate forecasts

### Key consequences

- Teams aren't aligned on the overall approach to tasks or campaigns
- Difficulty prioritizing important campaign resources
- Budget and timeline overruns

## IMPROVEMENT OPPORTUNITIES:

### Cross-functional collaboration

Establish touchpoints between your marketing team and other departments to improve visibility and stay aligned on campaigns. Meet on a regular cadence to **align your goals and KPIs**.

### Strategic goal setting

Use a **centralized program or dashboard** to communicate ongoing goals and make sure that every campaign leads toward your broader company initiatives.

### Data-driven planning

Incorporate **past and real-time performance data** to inform the decisions you make and improve your strategic planning by making your marketing efforts **proactive rather than reactive**.



## PRO TIP:

Some of the best options for marketing management software include robust alignment and strategic planning features, combining pre-built tools and templates to create the perfect mix to manage marketing work without requiring a lot of technical know-how.

[Learn more about marketing work management.](#)

Try this template:

## Marketing Project Management Checklist

Get started

- Break down the steps for a marketing campaign.
- Organize your marketing strategy.
- Assign owners, mark deadlines, and track progress for each task on the checklist.

Task	Progress	Owner	Rating	Due Date
Define campaign goals	<div></div>		★★★★★	
Identify target audience	<div></div>		★★★★★	
Develop content strategy	<div></div>		★★★★★	
Create content calendar	<div></div>		★★★★★	
Design creative assets	<div></div>		★★★★★	
Set up tracking and analytics	<div></div>		★★★★★	
Launch campaign	<div></div>		★★★★★	
Monitor performance	<div></div>		★★★★★	
Report results	<div></div>		★★★★★	



# Request intake & capacity planning

can be one of the most time-consuming parts of the marketing management process. By optimizing your intake and capacity planning processes, you can help your team maintain high-quality results, keep project plans on track, and avoid burnout.



## Request intake & capacity planning

### Common challenges

- Overwhelming amount of marketing requests
- Overworking or underutilizing your resources
- Difficulty knowing which requests to prioritize

### Key consequences

- Time lost understanding and assigning requests
- Burnout or boredom of your best talent
- Important work is sidelined for less effective tasks

## IMPROVEMENT OPPORTUNITIES:

### Intake automation

Some marketing management software solutions include automation features that can **automatically sort and assign requests** as they come in based on the availability of your team.

### Resource management

Tap into historical and current workload data to **forecast your teams' capacity**. Balance workloads to ensure everyone on your team is neither overloaded or underutilized.

### Prioritization

Develop a prioritization framework to help evaluate and rank requests based on the criteria that are most important to you, such as strategic value, impact, cost, and more.





## PRO TIP:

Some leading work management platforms include powerful, built-in resource management tools to help track your team's workload, project budgets, and more across multiple projects.

[Learn how Webex saves 1,350 hours per year via automations to achieve more with less.](#)



## Try this template: Marketing Shared Services

Get started

- Track marketing requests by department, type, and status.
- Proof, review, and approve assets all in one place.
- Provide leadership visibility into the full scope of marketing work.

# Work management

is the heart of any successful marketing team. Successful work management allows teams to execute to their full efficiency, and when done right, is a well-oiled machine ensuring everyone's job flows smoothly.



## Work management

### Common challenges

- Disparate teams with unique working styles
- Not knowing who's working on what next
- Difficulty keeping up with sending reminders and notifications

### Key consequences

- Duplicative efforts, mismatched expectations
- Missed deadlines and pushed-back timelines
- Wasted time that could be spent on more productive, strategic work

## IMPROVEMENT OPPORTUNITIES:

### Standardized workflows

Use templates like briefing documents and software tools to standardize your workflows and ensure consistency between teams and campaigns. This will also improve your teams' overall efficiency, keep projects moving smoothly, and help you spot potential roadblocks before they occur.

### Real-time task tracking

One of the most well-loved and useful tools of any project management software is real-time task tracking. Use it to provide visibility into a campaign's status for stakeholders, and make sure your team is meeting its critical deadlines..

### Automated notifications and updates

Save your team time and headspace by automating those necessary but repetitive tasks, such as sending notifications and reminders. Use automation to set up alerts for things like upcoming deadlines, delayed tasks, review requests, and more.



### PRO TIP:

Collaborative work management software reduces the time required to get campaigns over the finish line.

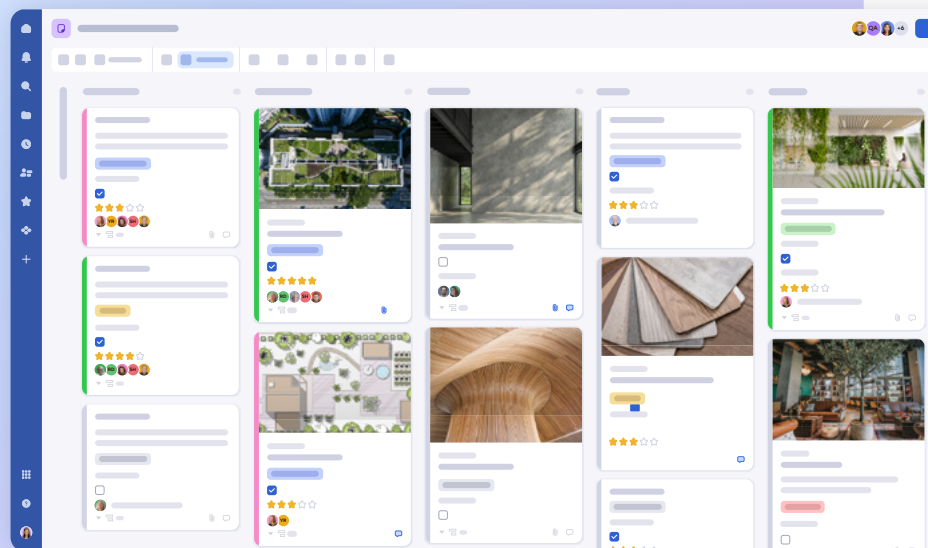
[Learn how PTC reduced the time required to plan and execute campaigns by 30%.](#)

Try this template:

## Marketing Campaign Management Plan

Get started

- Create project tasks and keep track of milestones.
- Assign tasks and track their progress on a built-in Gantt chart.
- Attach important assets and make comments in real-time.



# Content collaboration

is essential for managing marketing projects. No project exists in a vacuum, and marketing projects often bring together teams that do not usually work closely together. It's essential to bring people together early so everyone has visibility into the work being created – and all teams can keep moving forward.



## Content collaboration

### Common challenges

- Scattered content creation processes and workflows
- Inefficient feedback and approval processes
- Disorganized campaign assets

### Key consequences

- Time lost from inefficient task management.
- Scattered, confusing review rounds that are missing important stakeholders
- Time wasted searching for approved assets, or use of the incorrect ones

## IMPROVEMENT OPPORTUNITIES:

### Centralized content

Set up a central hub for content creation, review, and approval processes. Consider project management software with proofing tools to keep draft versions, feedback, and communication surrounding content creation all in one easily accessible place.

### Improve feedback loops

Adopt a centralized proofing tool and implement version control so there is one source of truth for content to streamline your review rounds. Not only does this make things easier for the content creator, but also gives higher-level stakeholders a more holistic view of the feedback process.

### Asset management

Set up a digital asset management system that surfaces the most recent, approved versions of branding materials for teams to use. Your team will save time searching for the right image, and your campaigns will always be on-brand.

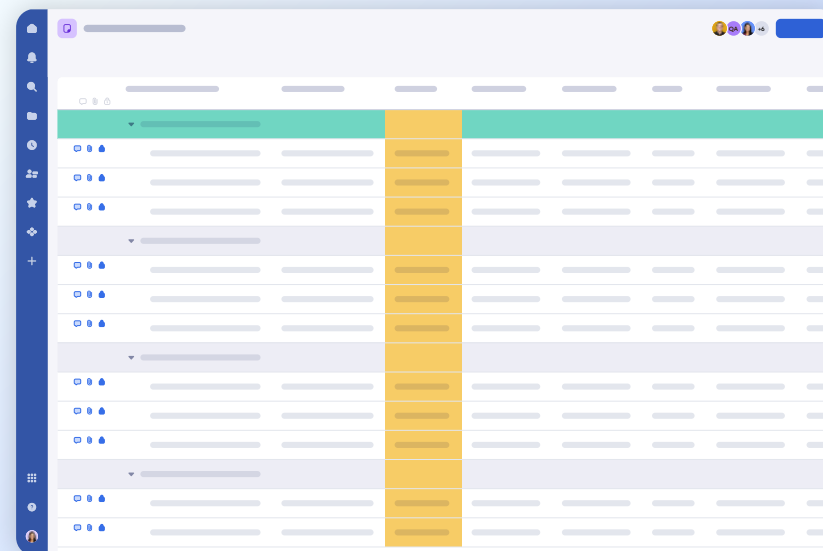




## PRO TIP:

Work management software with real-time project plan dashboards and automations such as workflows, notifications, and reminders can be a game changer for aligning cross-team efforts.

[Learn how McLaren provides race footage access to 50+ partners as quickly as possible.](#)



Try this template:  
Team Charter

Get started





# Delivering, measuring & optimizing impact

might just be the most important part of the marketing process. You want your campaigns to have an impact. And the best way to do that is to improve your processes based on the data you gather as you move forward. It's not enough to simply launch a campaign — tracking performance and adjusting strategies are musts to stay effective. By doing so, you can ensure that your work delivers on its ROI promises and always aligns with leadership's expectations.

## Delivering, measuring & optimizing impact

### Common challenges

- Difficulty showing campaign effectiveness
- Gathering data from multiple tools and compiling reports manually
- Barriers to achieving full potential

### Key consequences

- Tighter campaign resources
- Time wasted on repetitive and laborious, but essential, tasks
- Inability to grow with the market

## IMPROVEMENT OPPORTUNITIES:

### Campaign and performance dashboards

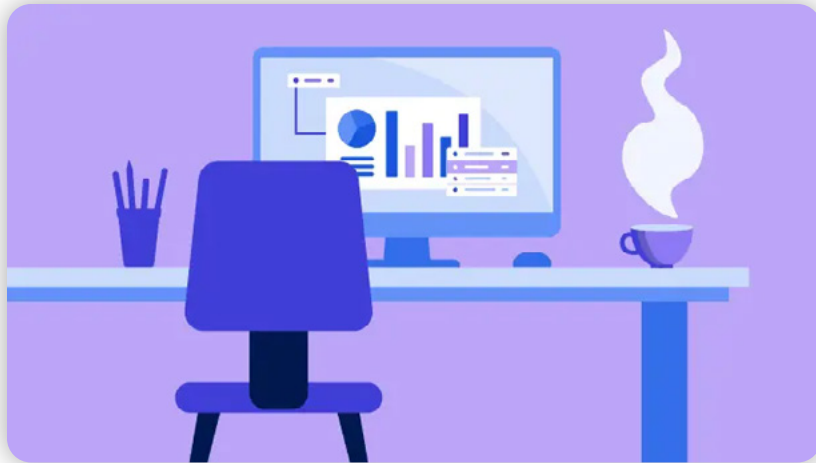
Use dashboards to provide a real-time look into the status of a campaign, compare campaigns over time, track performance, and more. With this data right at your fingertips, marketing teams can quickly adjust strategies on the fly, and stakeholders get the information they need to stay informed.

### Reporting templates

Use templates to save time and ensure consistency in your reports, or simplify reporting even more with marketing management software that has built-in reporting tools. Some solutions allow you to customize reports for each viewer based on the data they most want to see.

### Continuous optimization

Even when you have a system that works, regular audits are key to uncovering workflow improvements and shaping future strategies. Marketing work management tools can offer real-time insights, allowing you to easily identify opportunities for optimization.



### PRO TIP:

Don't just focus on the final outcome – measure your marketing efforts at each stage of the funnel. By keeping track of performance from awareness to conversion, you can maximize your impact throughout the entire customer journey.

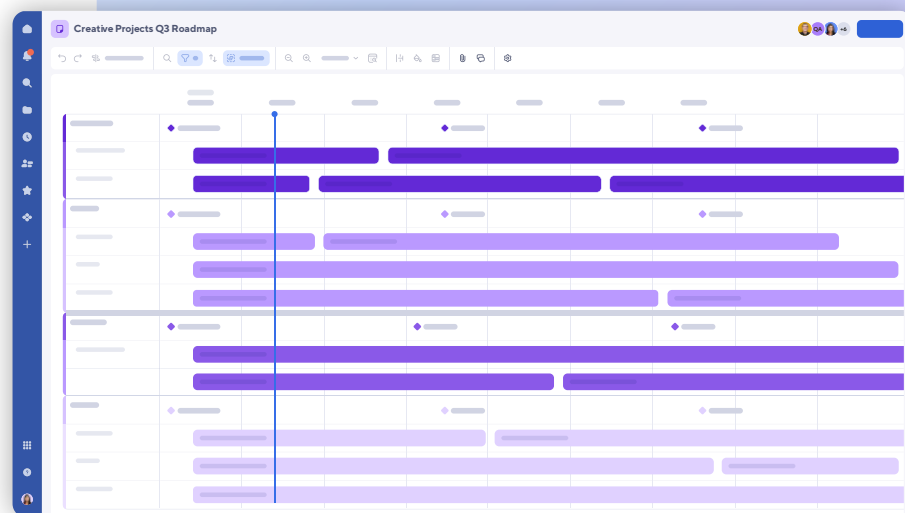
[Take our quiz to spot gaps and learn ways to improve how you manage your marketing.](#)

## Try these templates:

### Marketing Prioritization & Alignment

Get started

- Easily visualize your marketing campaigns with real-time dashboards.
- Manage and prioritize marketing initiatives.
- Track and analyze campaign progress across every channel.



# Ready to transform your marketing processes?

Streamlining processes, aligning your teams, and effectively managing resources can make all the difference when it comes to driving real marketing impact. Luckily, Smartsheet has the solution. It gives you everything you need to drive marketing success, from real-time dashboards to efficient form-based intake, automated workflows, and an integrated digital asset management system. Ready to take the next step? Watch this video to learn how Smartsheet can transform the way you work.

Discover the  
solution now



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