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Tackling marketing inefficiencies: Less talk, more action

Michael Loughrey and Courtney Finger

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Tackling marketing inefficiencies

Less talk, more action

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Marketing Solutions Engineer

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Principal, Product Marketing Operations

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Sr. Brand Manager

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Common challenges, Smartsheet solutions, and experienced outcomes

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Conga’s story

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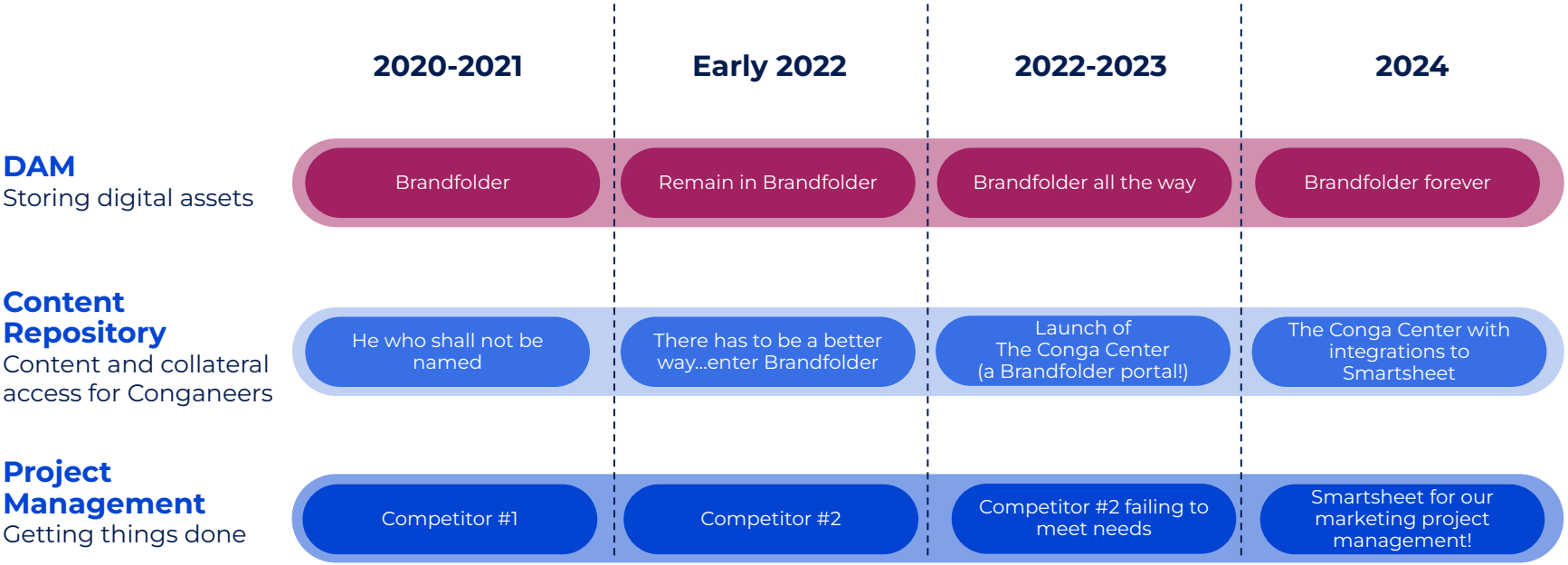
Conga's Smartsheet Journey

From chaos to collaboration



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2

Content Development and Approval

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Content development and approval: challenges

Getting the right content into the hands of the right people

Content is the lifeblood of a marketing organization

- That could be product demos, brochures, instagram ads, customer stories, data sheets, decks, event materials, or blog posts
- Do we have the content the team needs to be successful? How is it being used?

Are we sharing the right content? Who can access it?

- Did the right people approve it?
- Are they accessing the right version of content?

You'll now see:

- Board View
- Smartsheet's Proofing and Versioning
- Structured automated approvals

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Content development and approval: outcomes

Get to market faster (and better)

Better assets

- Reviewed and approved within the context of their final environment
  - Example: YouTube skippable
- Reviewed and approved within the context of other assets our target audience may also see
  - Example: vibrant Instagram story
- Approved by all necessary stakeholders
  - Confident use

Faster go to market

- Reduce time from version 1 - final version
- Reduce time spent on inefficient communications

Content development and approval: outcomes

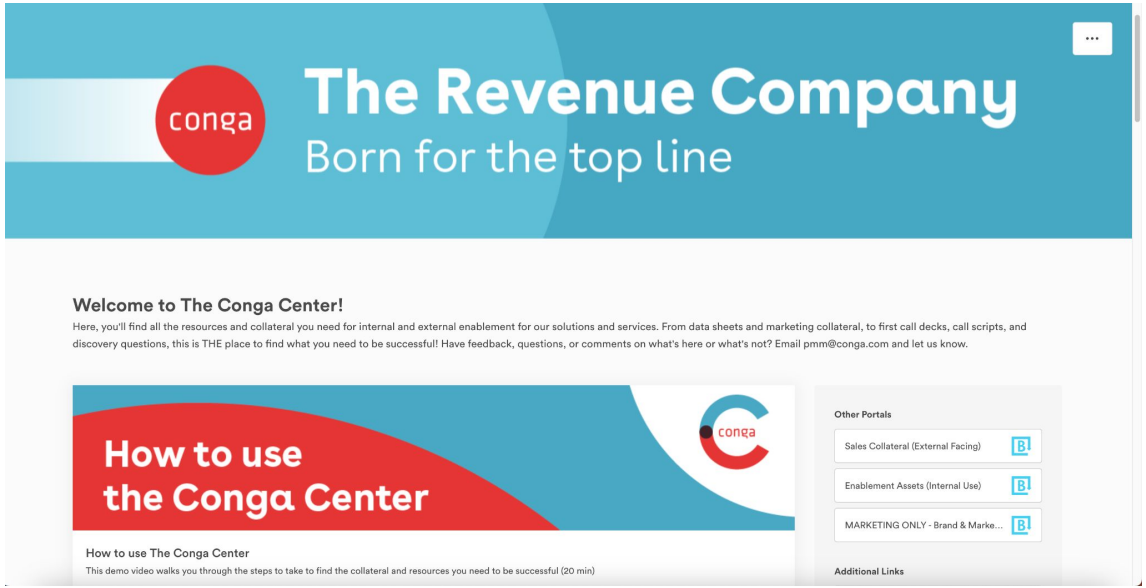
Ease of use, peace of mind, one stop shop

One place to go, no version control issues

- The most up-to-date version of every asset, in one place
- Access for everyone, no matter your role

Teams get what they need, fast

- Sellers quickly send assets that move deals forward
- Both what's inside Brandfolder and external links when needed



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3

Work Management Best Practices

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Work Management: challenges

How did we get here?

Raise your hand if the words “project manager” are in your job title.

What is a project? A set of tasks that must be completed within a specific timeline to achieve a specific goal.

Now, raise your hand if your job responsibilities include some variation of project management.

Modern project management = work management

You’ll now see:

- Timeline view
- Timeline slippage
- Resource and capacity planning

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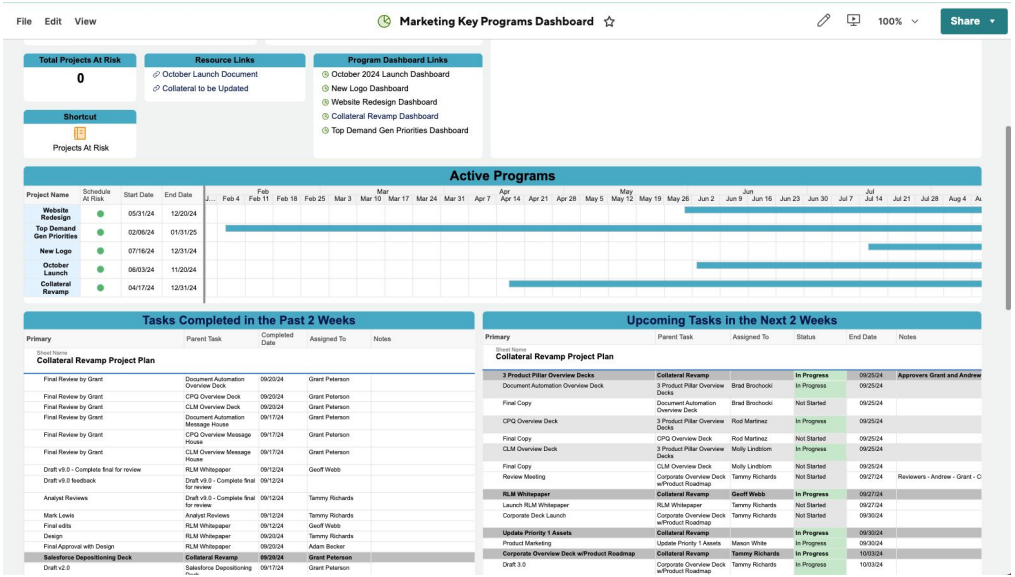
Work Management: outcomes

Providing Organizational Visibility

What have we gained?
Confidence and time.

- Conga's marketing teams rely on the project management features within Smartsheet
- We always know what our upcoming deadlines are, what the project status is, and who is involved
- We free ourselves to focus on marketing strategy and creativity
- Organizational visibility is key and Smartsheet provides that



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4

Data Aggregation

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Managing data and reporting: challenges

How did we get here?

Let's talk about building blocks...

- Data sprawl
  - Blocks scattered across the entire room
- Data Variations
  - Building four different, complete castles that only have one small difference
- Outdated decks
  - Destroying your prized castle to only rebuild it again and again.

You'll now see:

- Dashboards to report on information in real-time
- Data Shuttle to enable no-code integration

How Conga plans to use this

Conga Connect event planning

What I have learned **to make our upcoming event planning process even better**

- Data connection with CVent
- Using speaker dashboards to convey timelines
- Using forms to gather any needed accommodations, technical needs, etc.
- Smartsheet will be used as our total project management system for breakout sessions and speaker content

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Next steps...

- Attend the “Creative Solutions to Your Creative Team’s Biggest Challenges” session on Tuesday
- Attend the “Power Your Marketing Potential” session on Thursday at 10:30am
- Come hang out with us at the Marketing Creative Management Booth.

Take the survey

We’d love to hear your thoughts on the session.

Open this session in the mobile app, click “Survey,” and answer two questions — it's that easy!

Thank you.

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Share your experience at ENGAGE

by participating in the conversation on social media!
Use **#SmartsheetENGAGE** and tag Smartsheet
in your posts all week long.

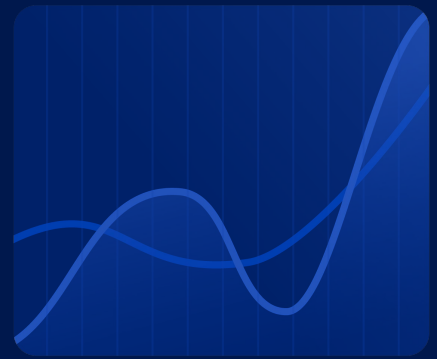
@smartsheet

@smartsheetplatform

@smartsheet

@smartsheet

@smartsheet



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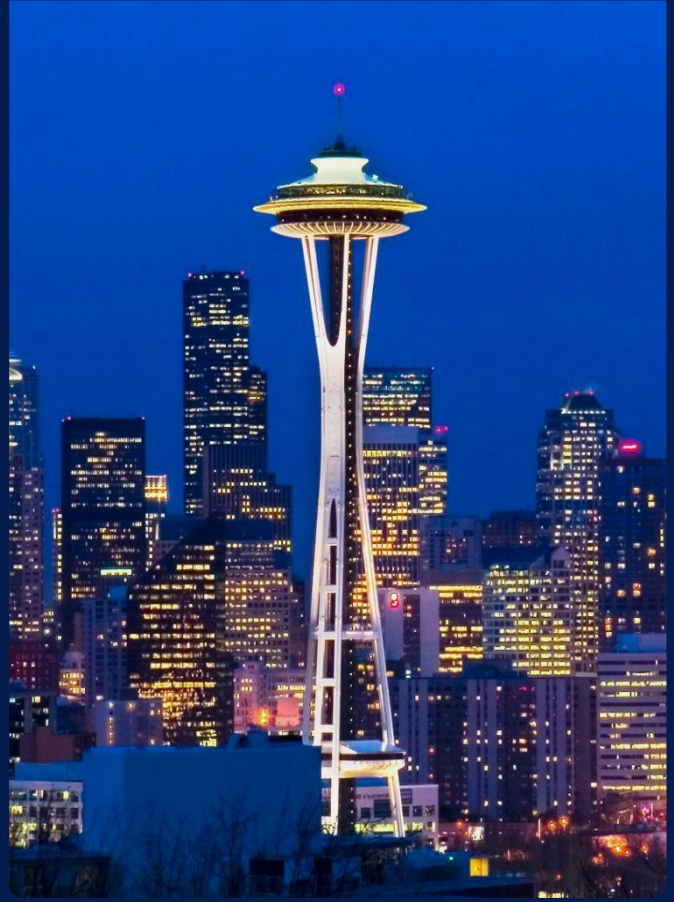
Questions



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Appendix

Demo Screenshots

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(5) Active Creative Assets - S

app.smartsheet.com/sheets/rhP3XWGQwFvpJJppp3hwF34c9wg86Wp89fJ6QgP1?view=board&cardViewByColumnId=8324192150966148

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Active Creative Assets

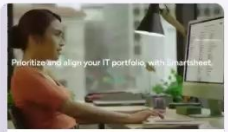
Help & feedback

Share

Board | Filter | Status

Status: Uncategorized (21)

Not Started (259)



:15s

Video
o@ph-us-enterprise
US EN
itpmo-15
https://youtu.be/7UAORPPlaCY

:6s

Video
o@ph-us-enterprise
US EN
itpmo-6
https://youtu.be/5QjQBw4D76w

:15s

Video

In Progress (4)

970 × 250

Display
o@ph-us-enterprise
US EN
marketing-align
https://brandfolder.com/s/p6cmctrqmq2sx4q3xpqvjg

:15s

Video
o@ph-us-enterprise
US EN
itpmo-15-qr

SMAR Approved (2)

Double Decker A

OOH
o@ph-au
AUS EN
https://brandfolder.com/s/3jkxtxkhwf7nxmfwg5xxthsv

Double Decker B

Complete (182)

NSW, Hornsby Station Footbridge (OND-0139N),

OOH
o@ph-au
AUS EN
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NSW, Sydenham, Princes Hwy

OOH
o@ph-au
AUS EN
https://brandfolder.com/s/6rsbxzqxgf9ctp4mwng7rjpp

NSW, Burwood, 420 Parramatta Rd (OND-0125E)

OOH
o@ph-au
AUS EN
https://brandfolder.com/s/6rsbxzqxgf9ctp4mwng7rjpp

VIC, Thomastown, Metropolitan Ring Rd (OVD-0137W)

OOH
o@ph-au

Posted (5)

Showcase

OOH
o@ph-au
AUS EN
https://brandfolder.com/s/nx6zwmm4xwf5qp9x7bxkfwh

Business Lounge

OOH
o@ph-au
AUS EN
https://brandfolder.com/s/mm3ptvsvj6k3fbm84fbs5779

Not for use (0)

Add lane

Board View showing Creative Requests by Status

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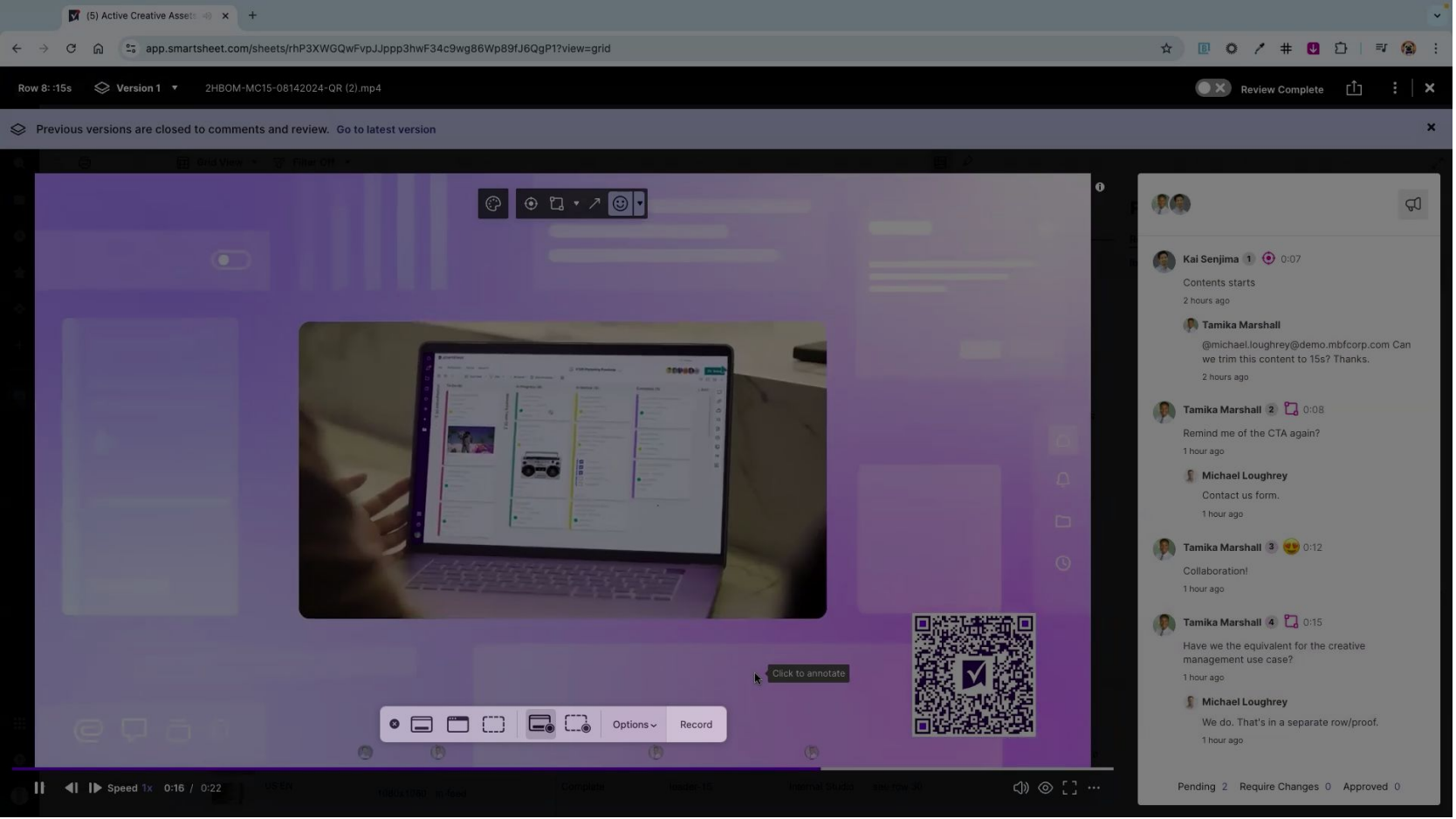
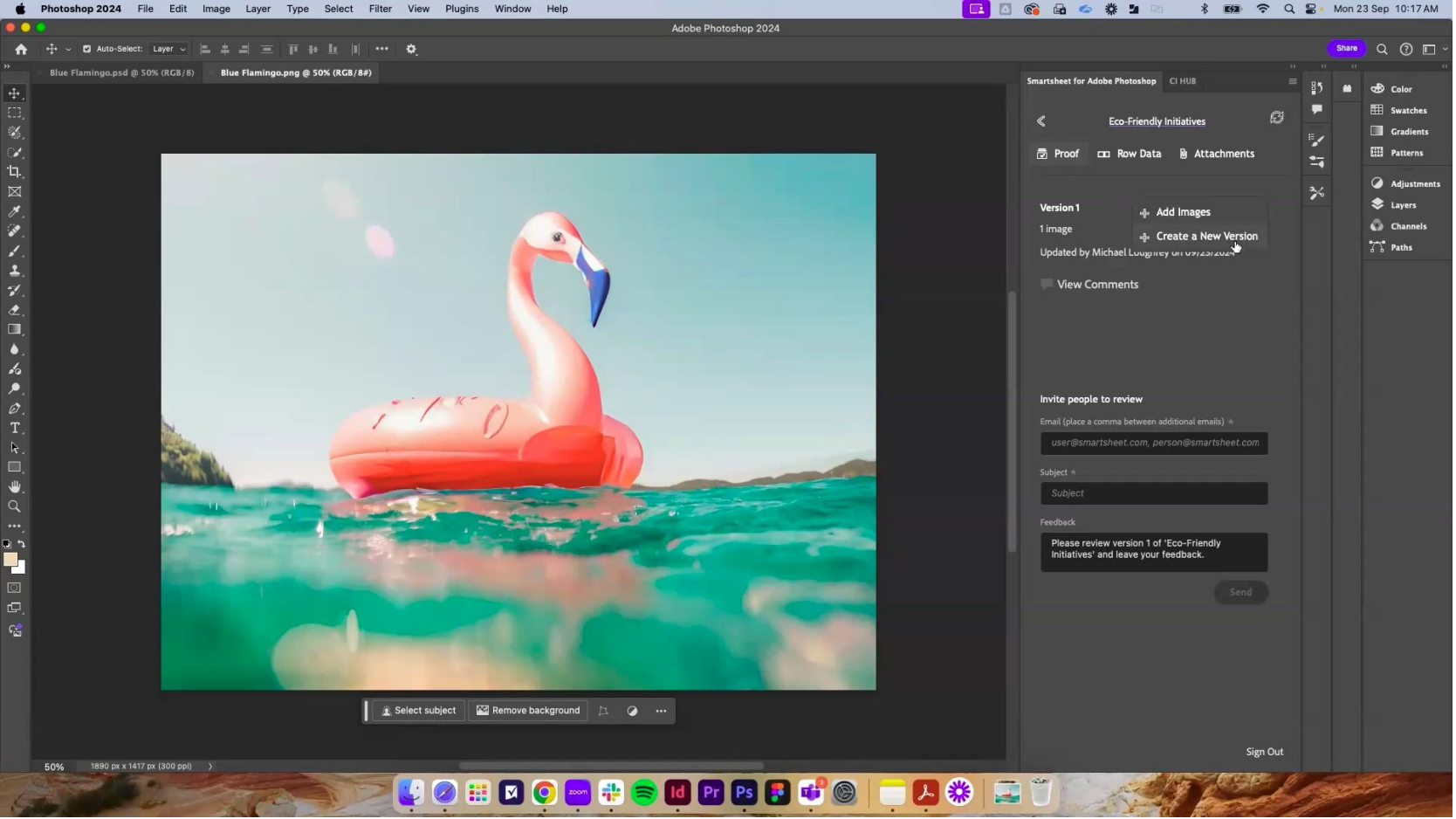


Smartsheet Proofing with in-time annoations

smartsheet ENGAGE



Smartsheet's Free Adobe Creative Cloud Integration

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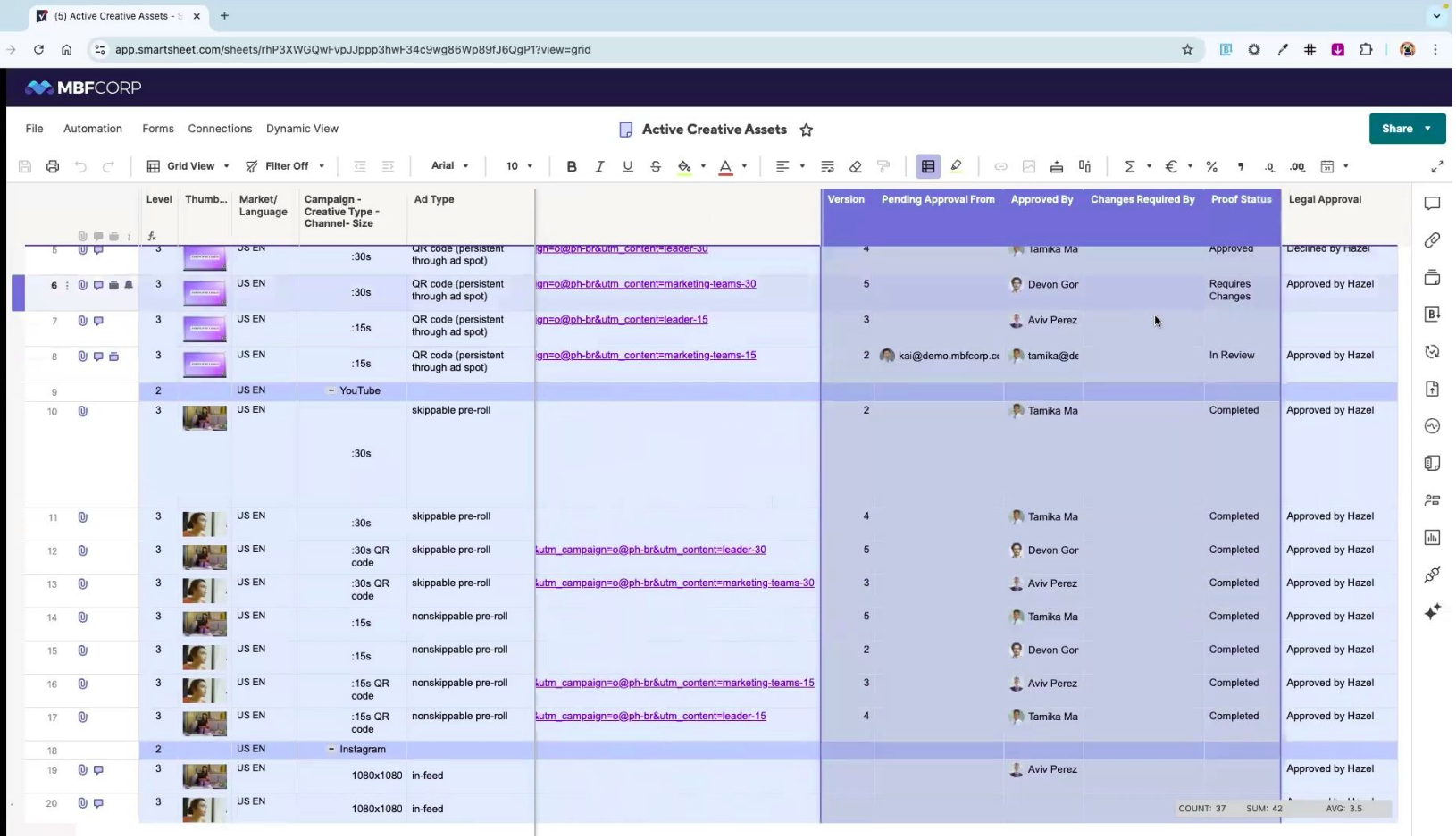
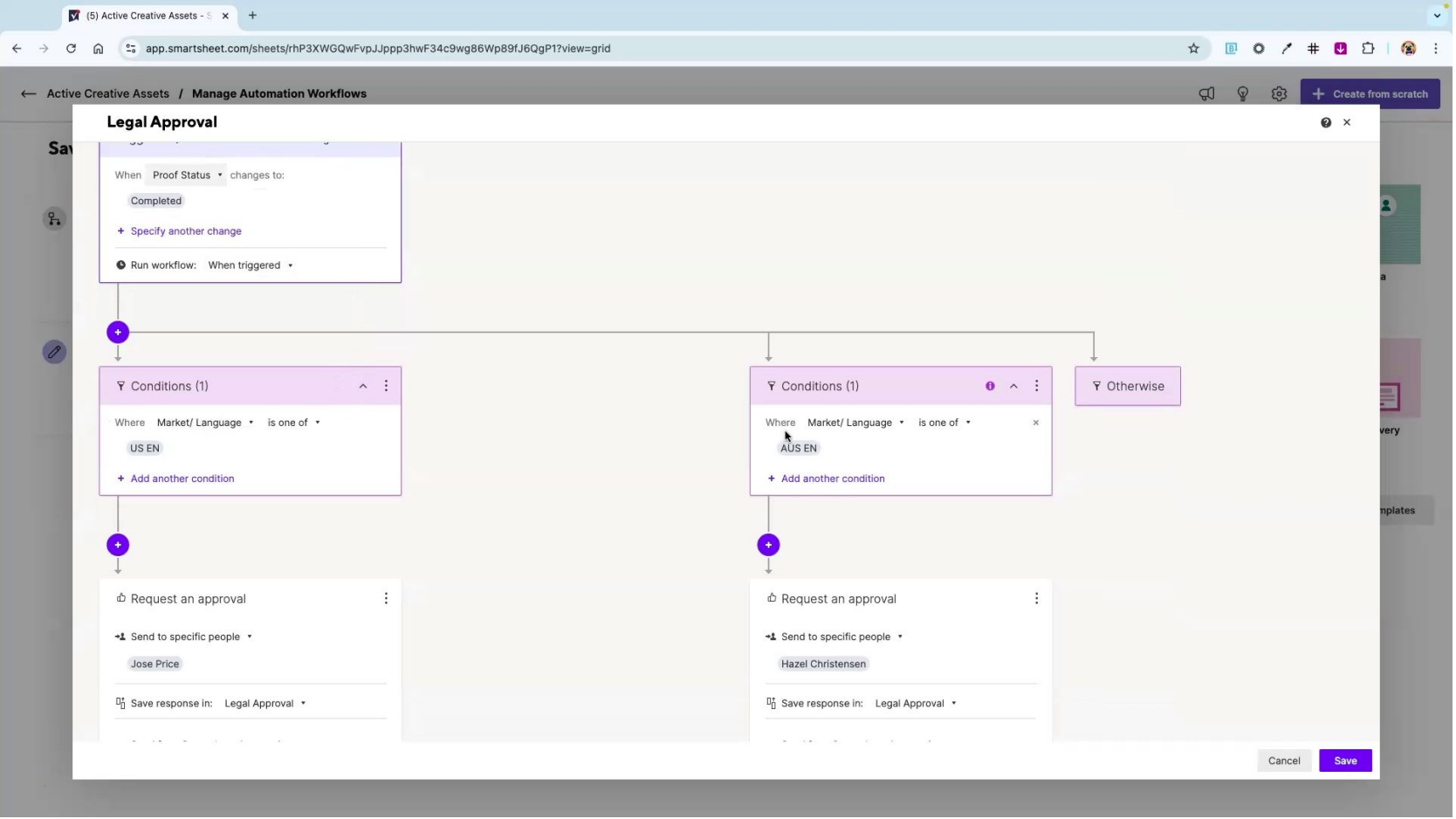


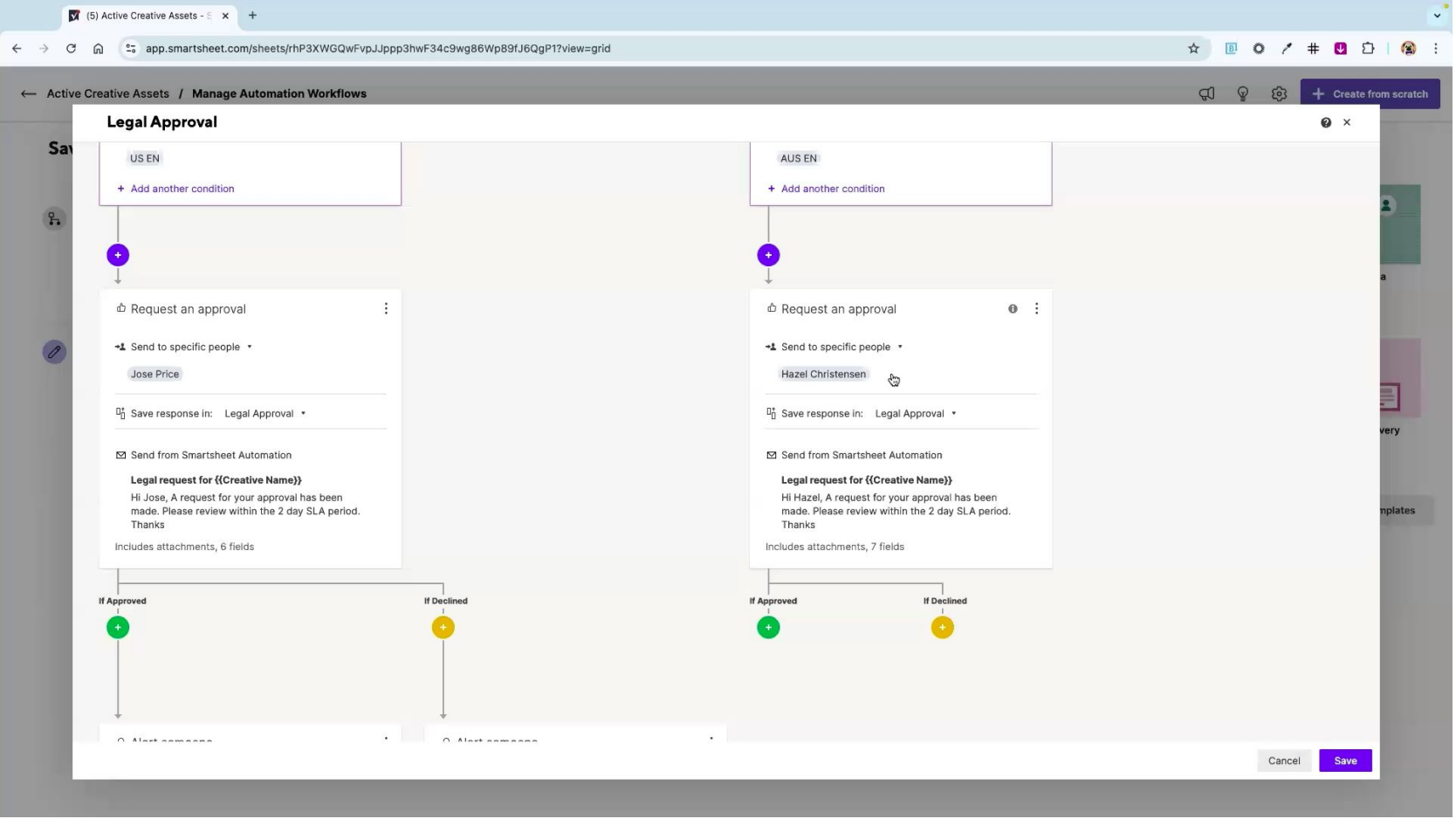
Proof Info Columns tracked in a sheet

smartsheet ENGAGE



Approval Workflow driven by proof completion

smartsheet ENGAGE



Multi-step approval based on conditional path

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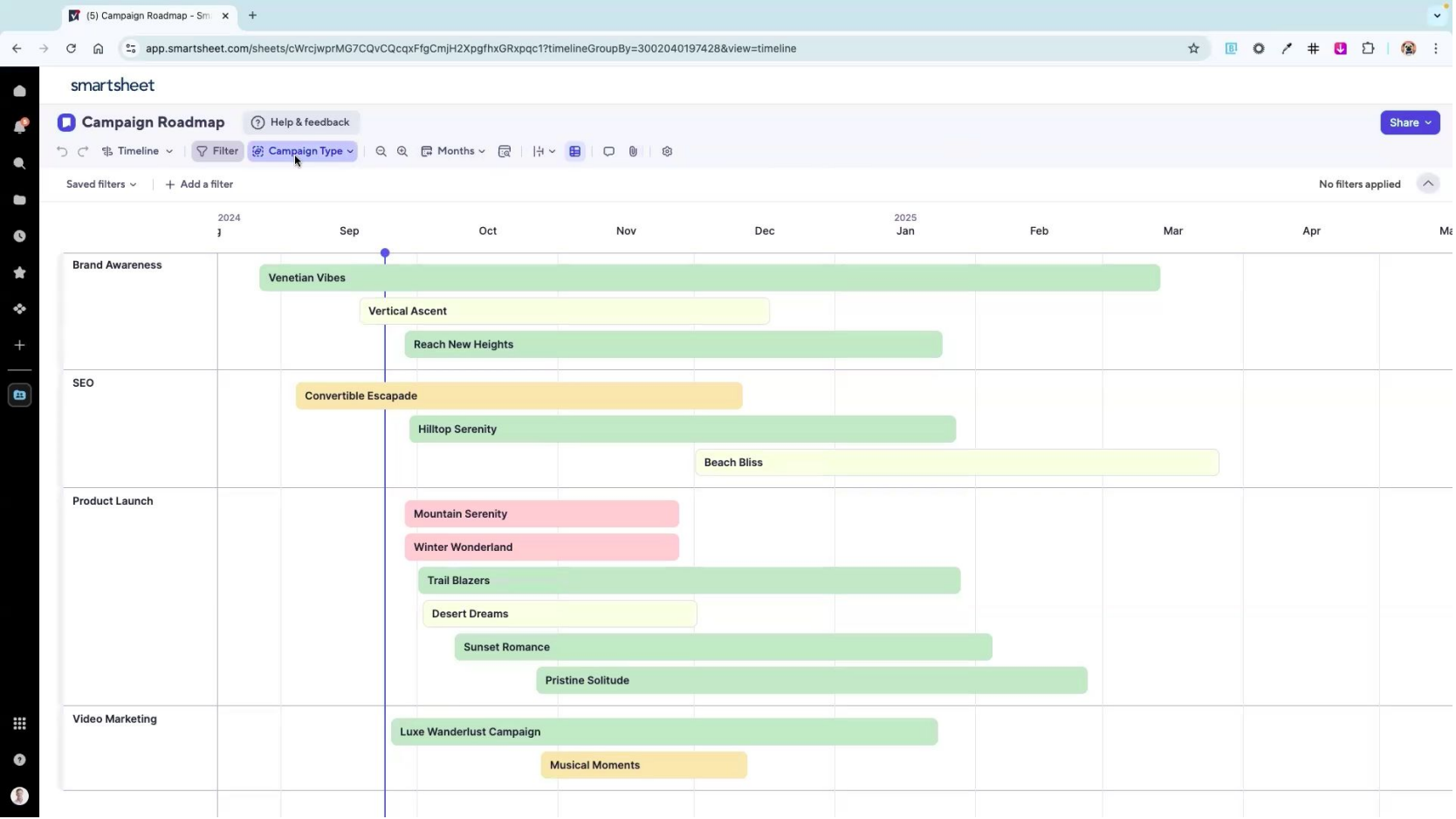

Timeline View showing Campaigns by Campaign Type

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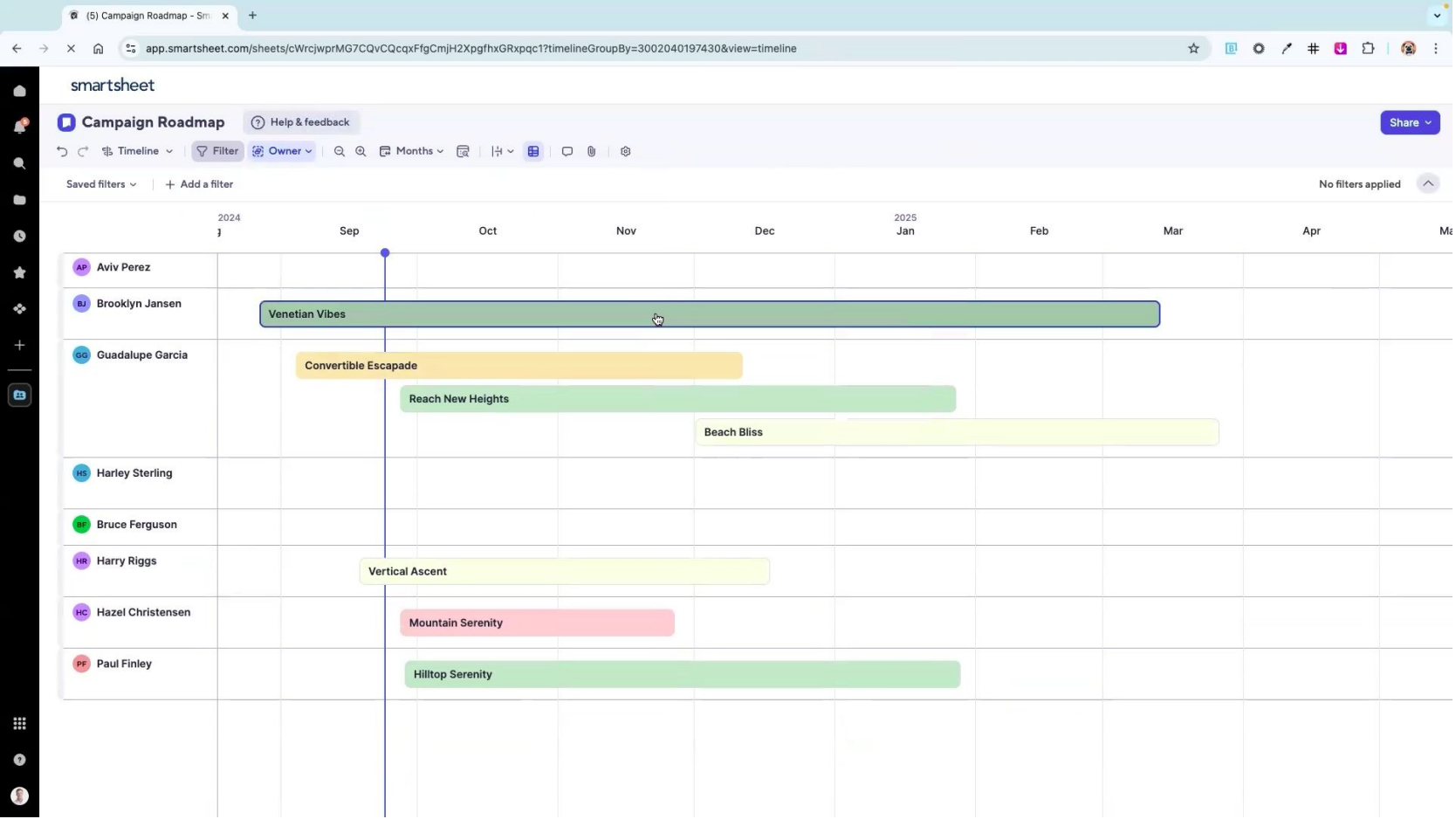
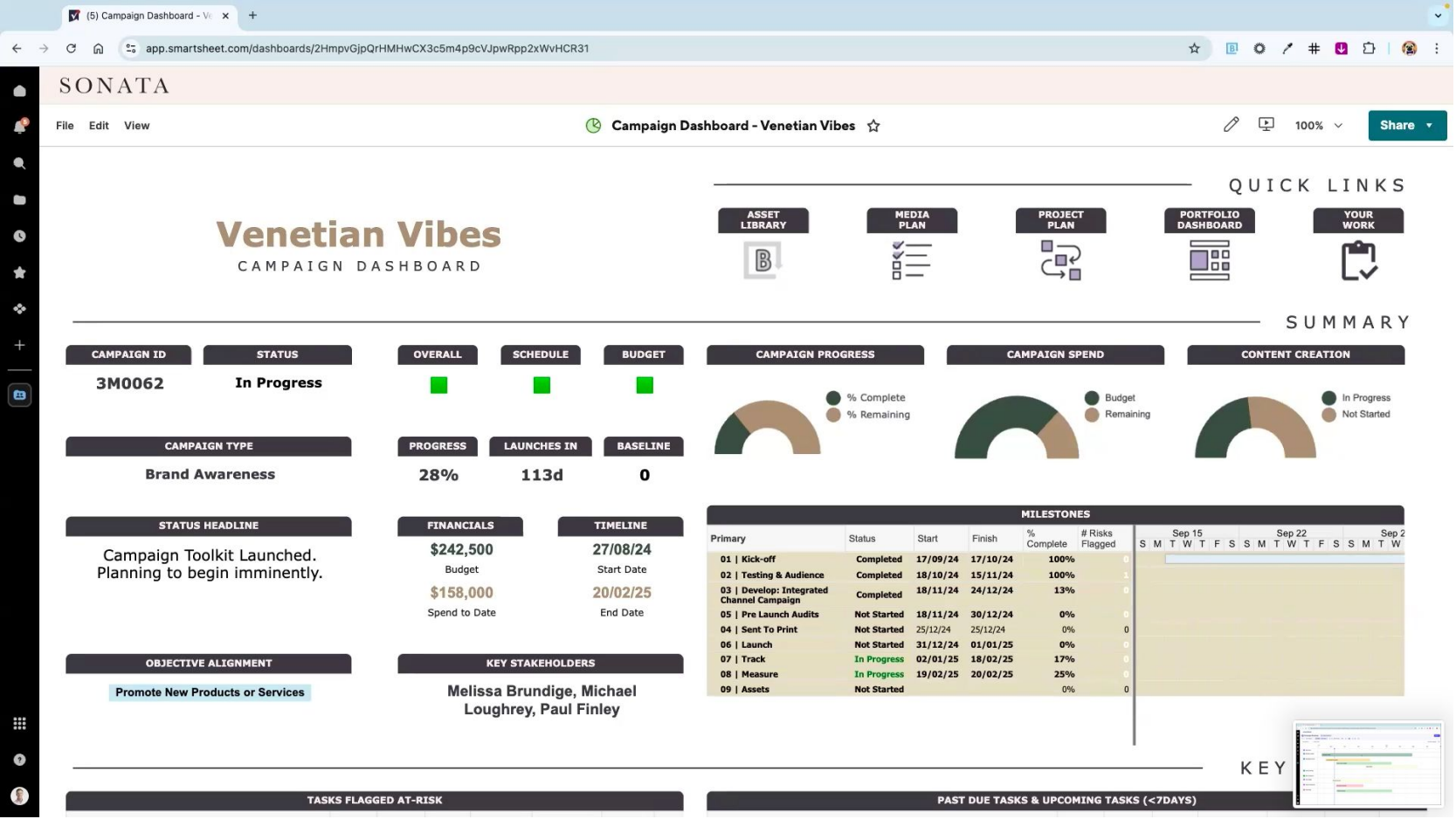


Timeline View showing Campaigns by Owner

smartsheet ENGAGE



Campaign Dashboard

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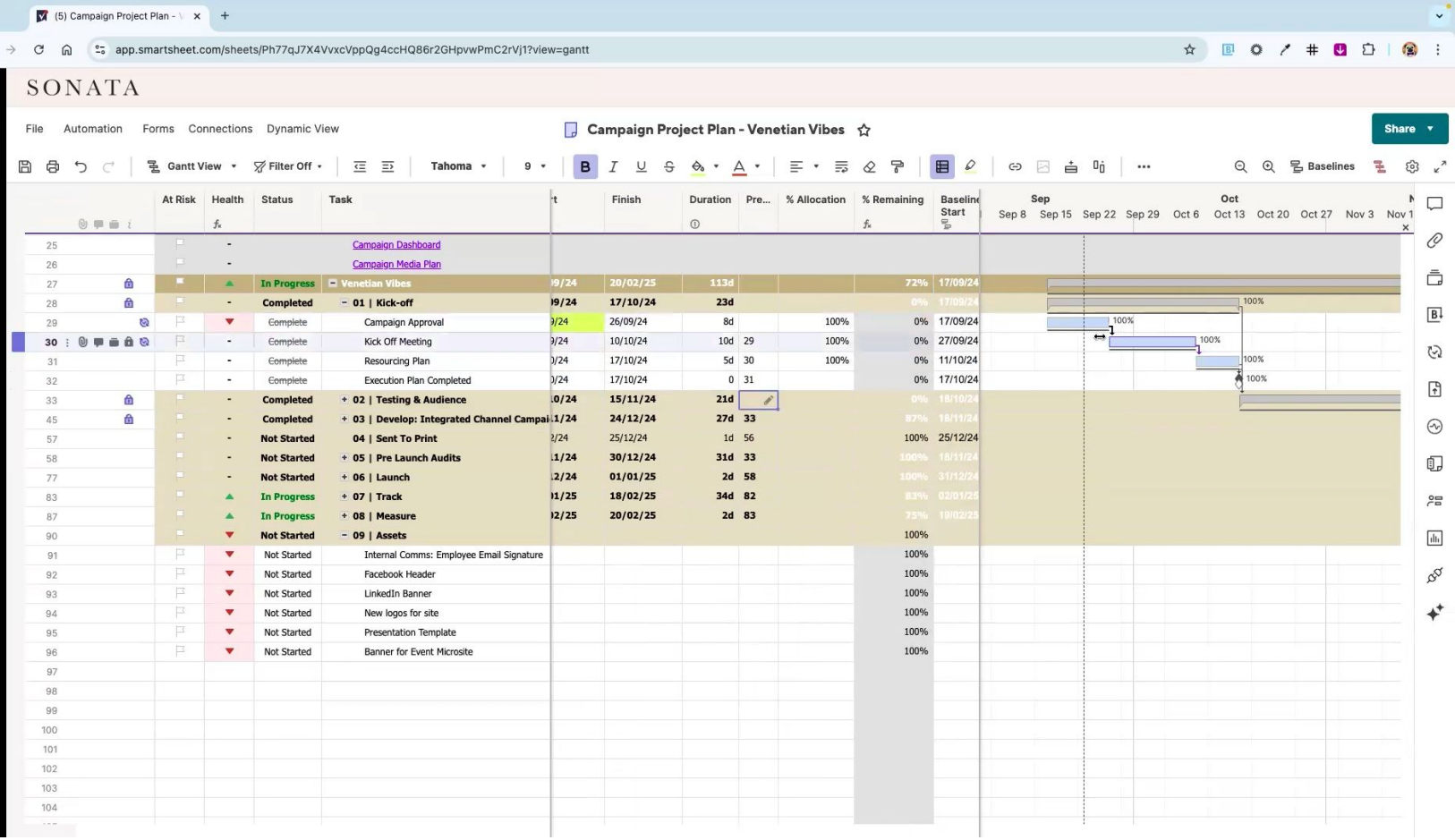

Project plan showing Finish-to-Start (FS) dependency

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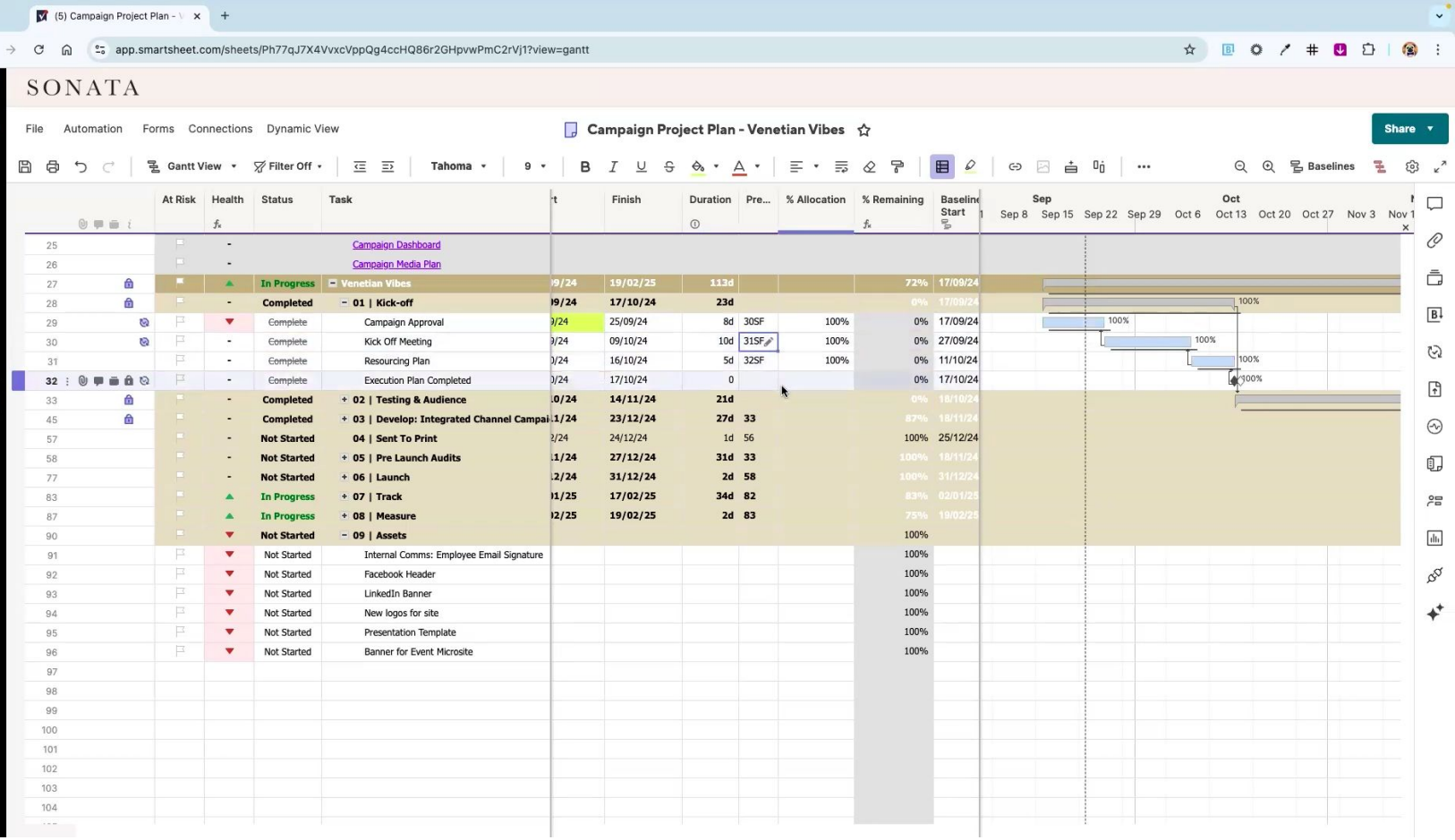
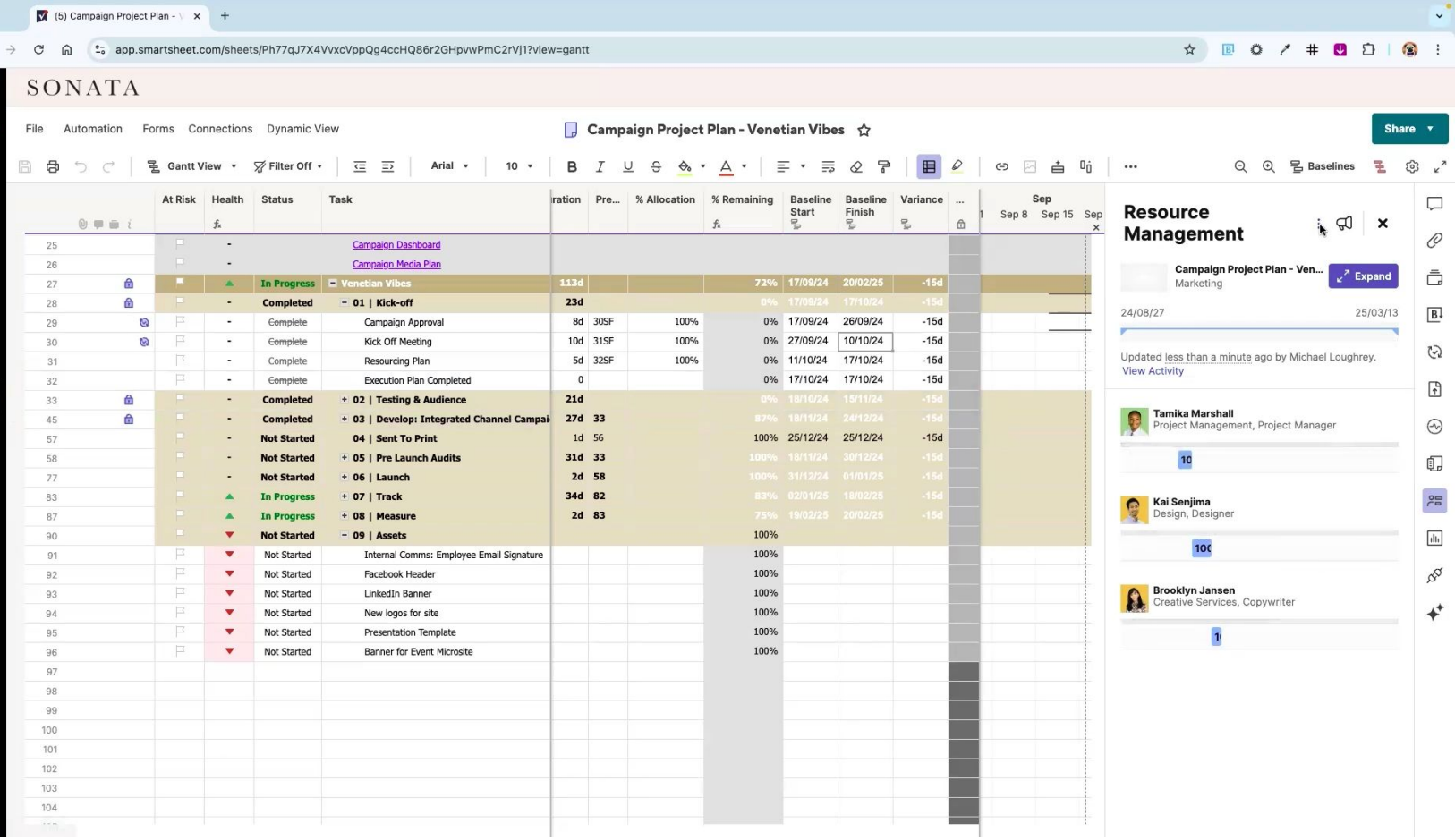


Project plan showing Start-to-Finish (SF) dependency

smartsheet ENGAGE



Resource Management side panel

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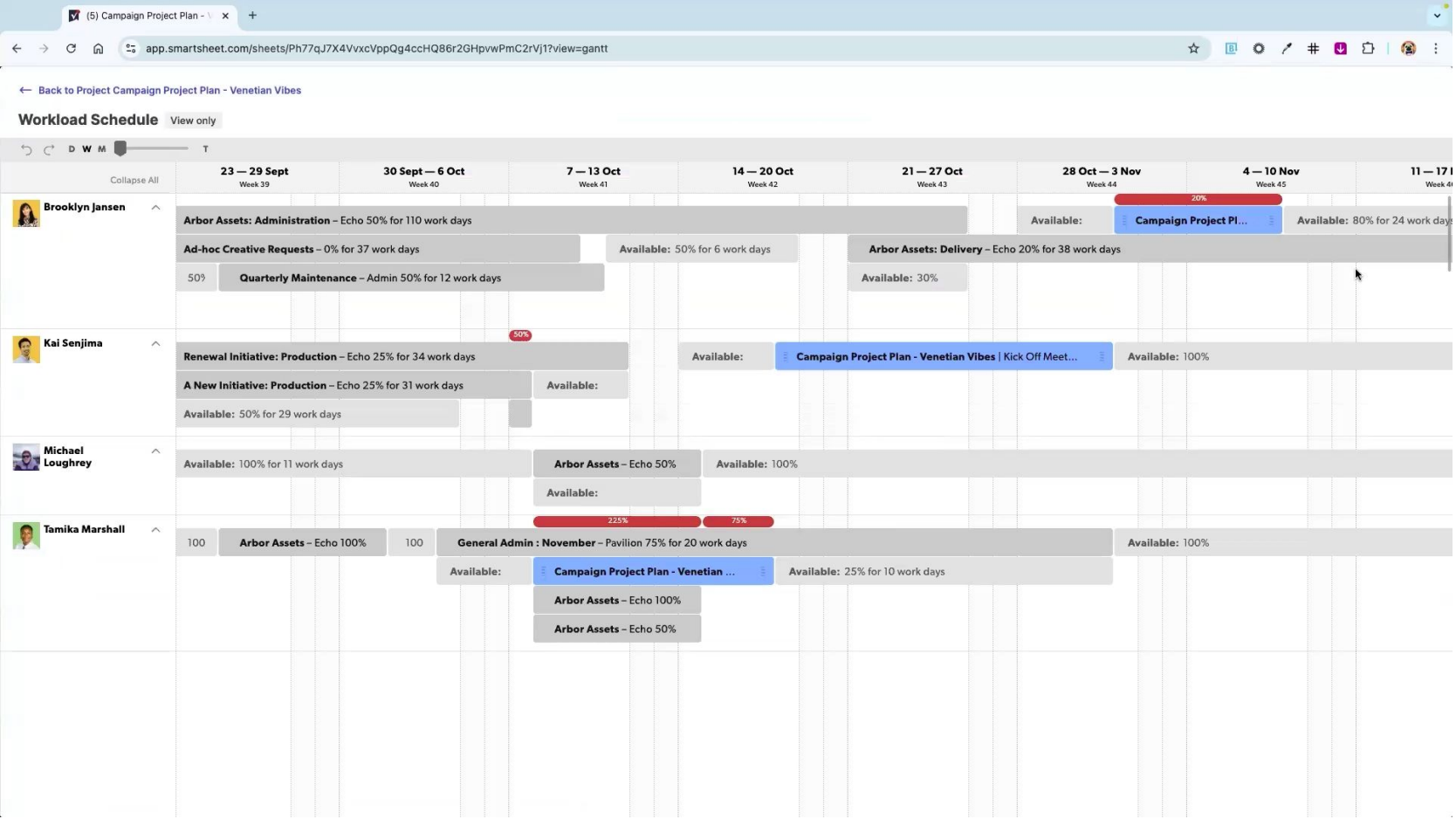

Workload Schedule

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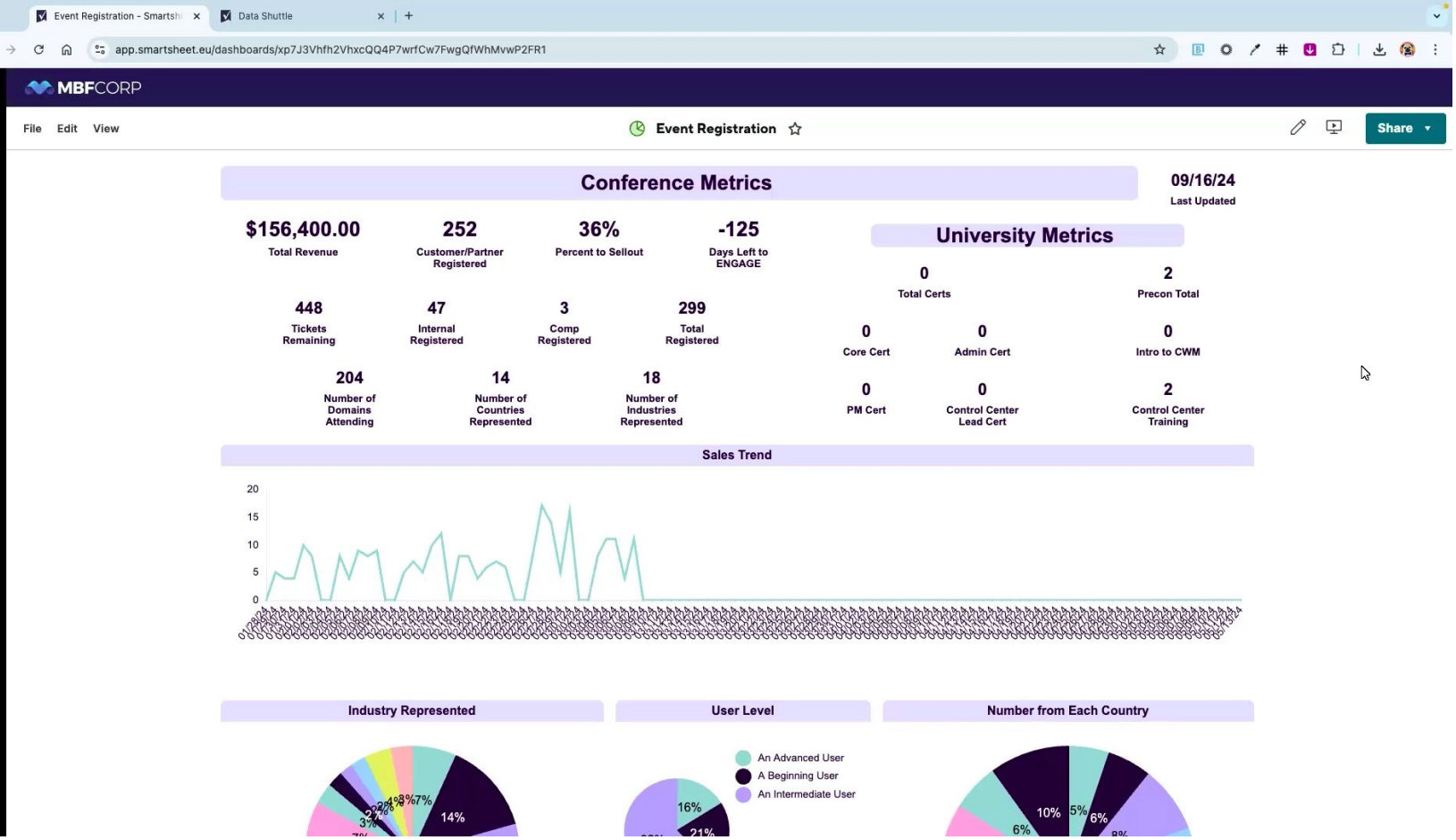

ENGAGE Registration Dashboard

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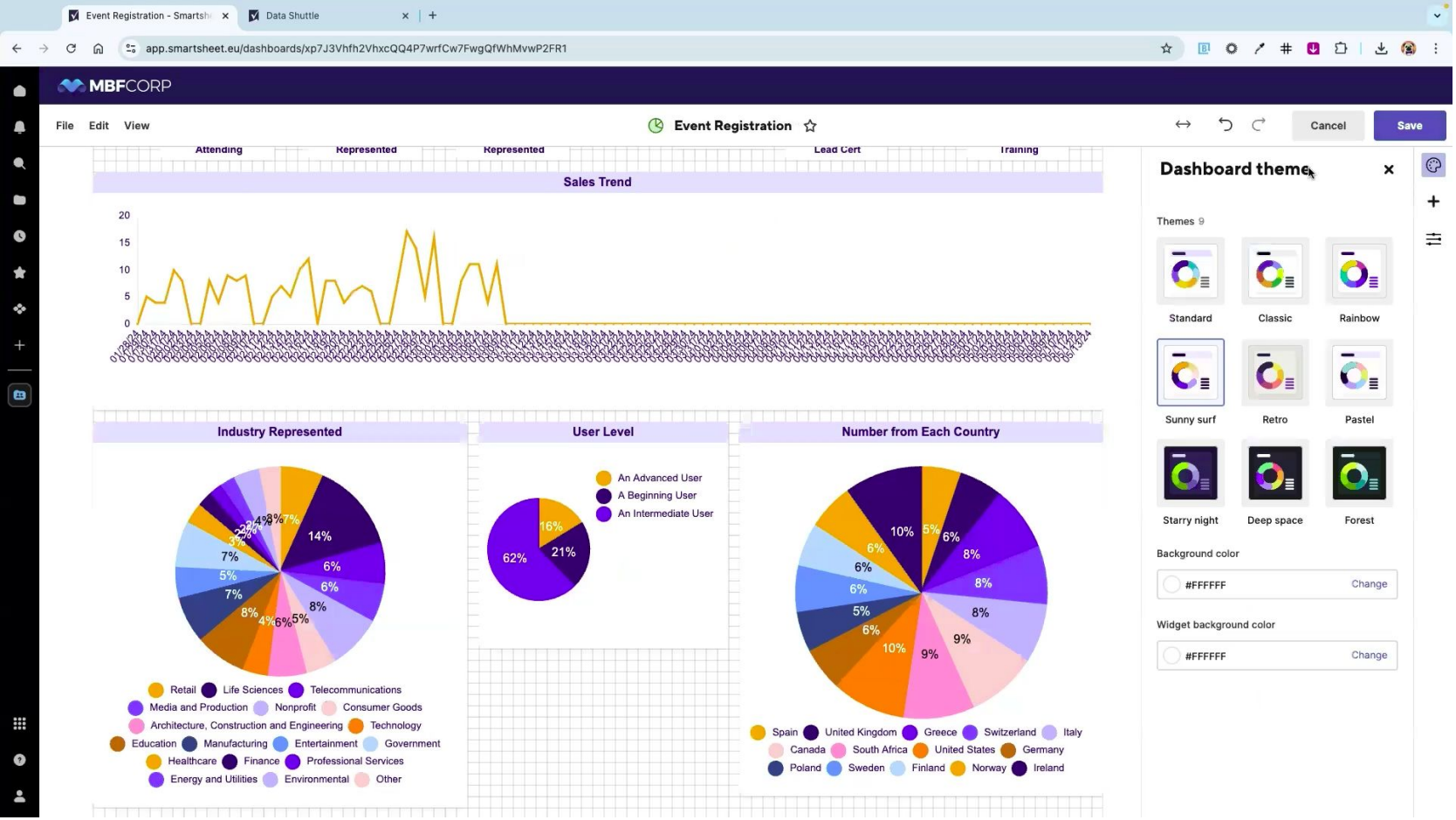

Dashboard Themes

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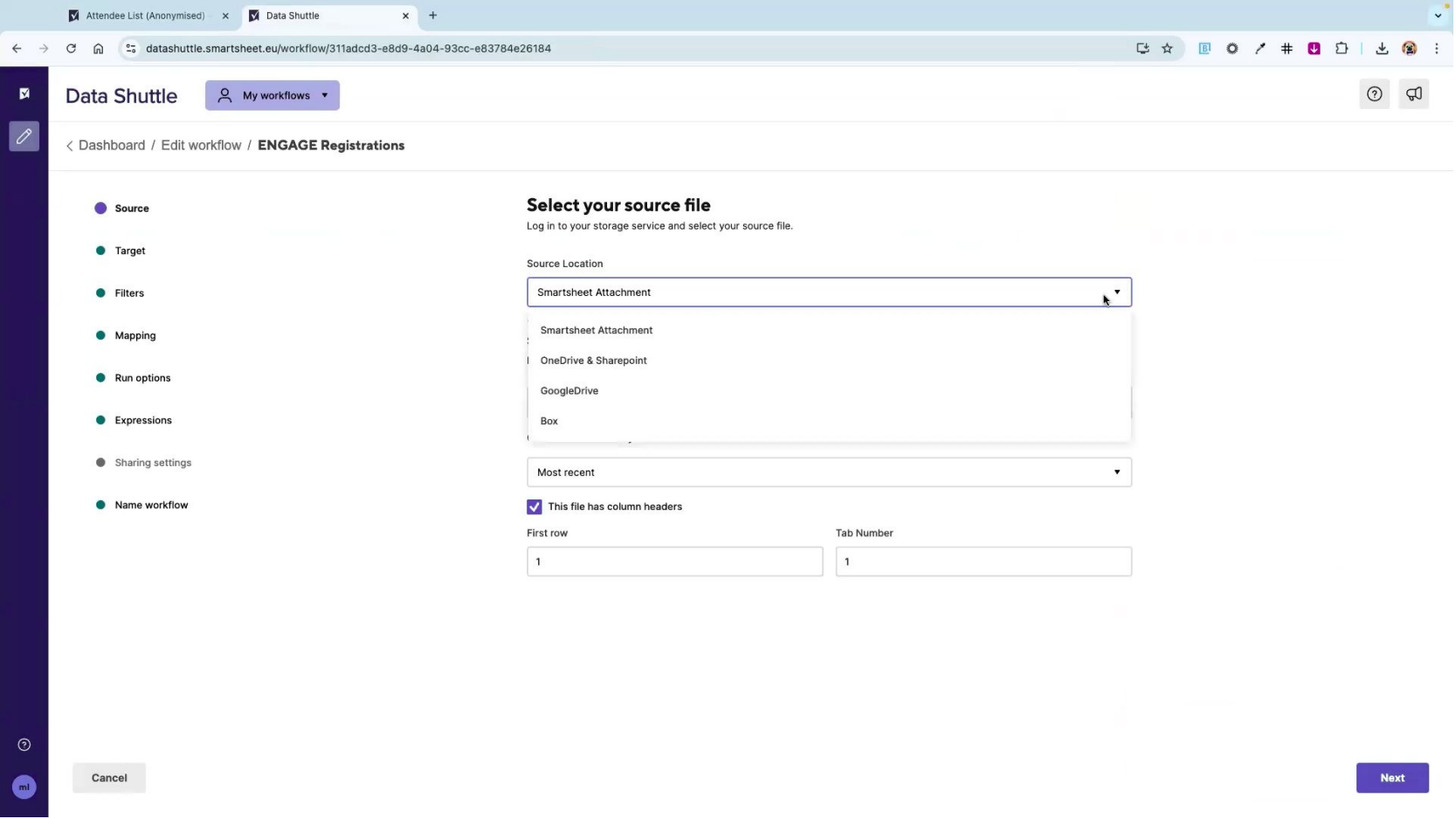

Data Shuttle - Source selector

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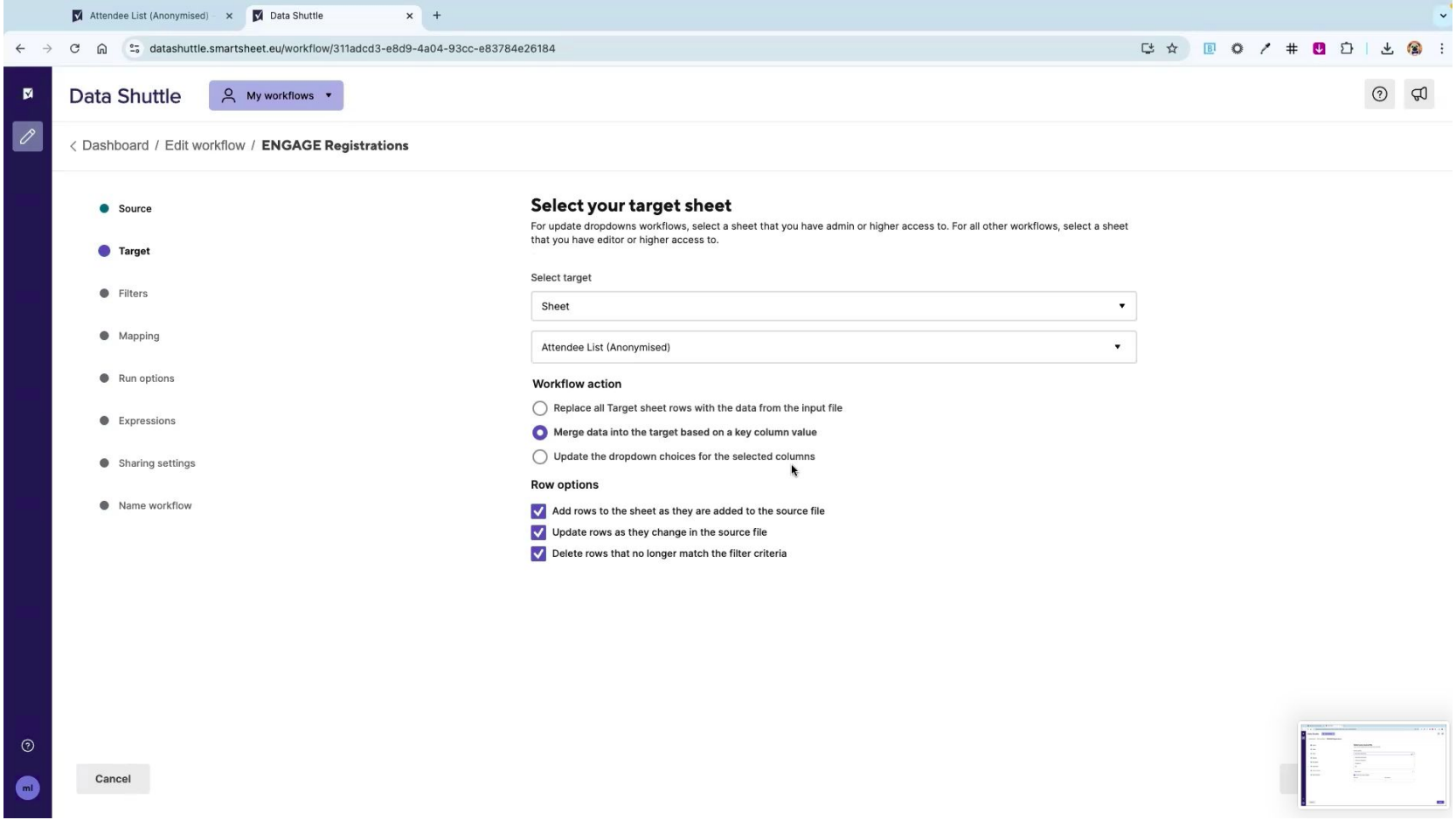

Data Shuttle - Target selector

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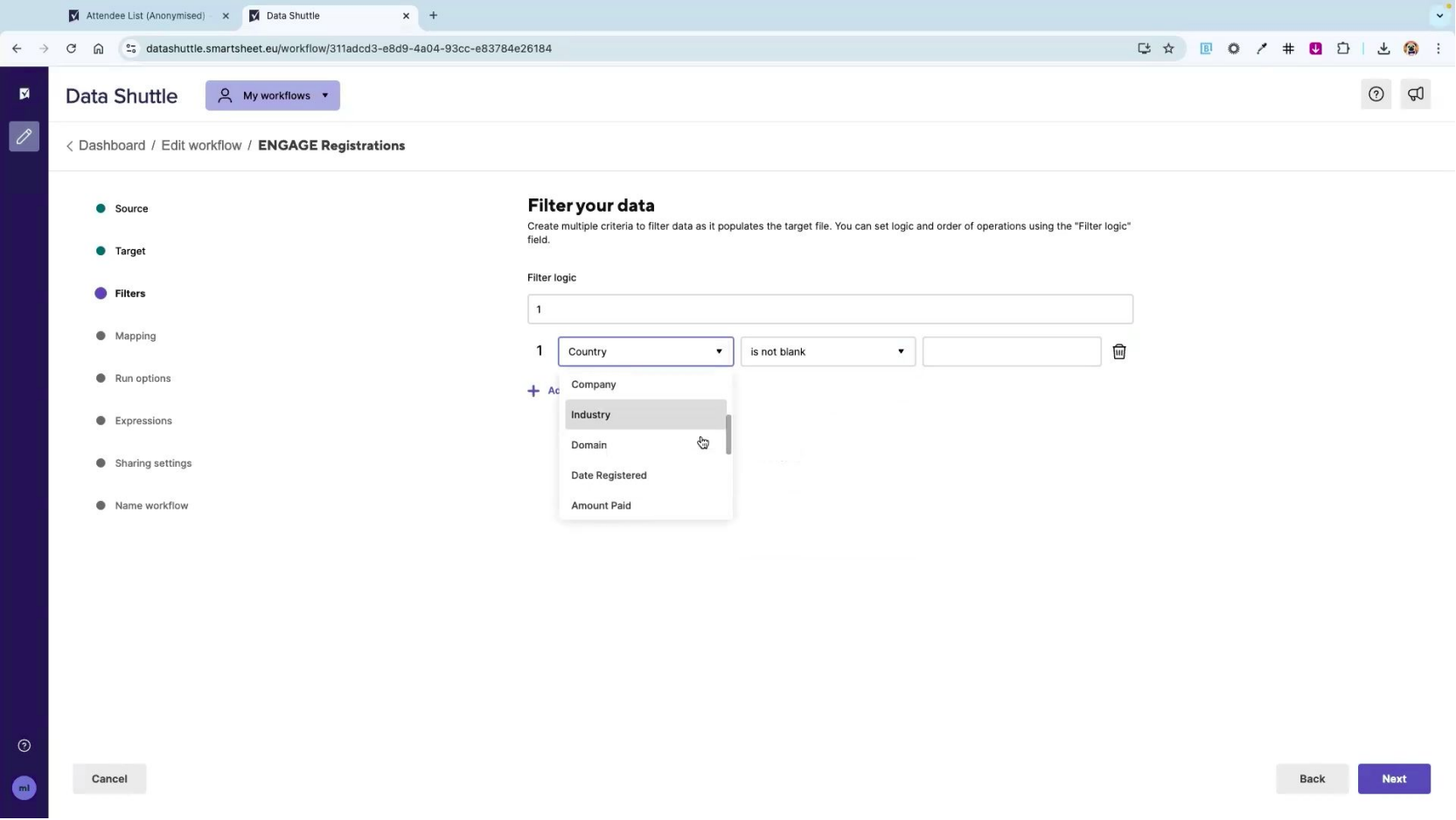

Data Shuttle - Applying Filters

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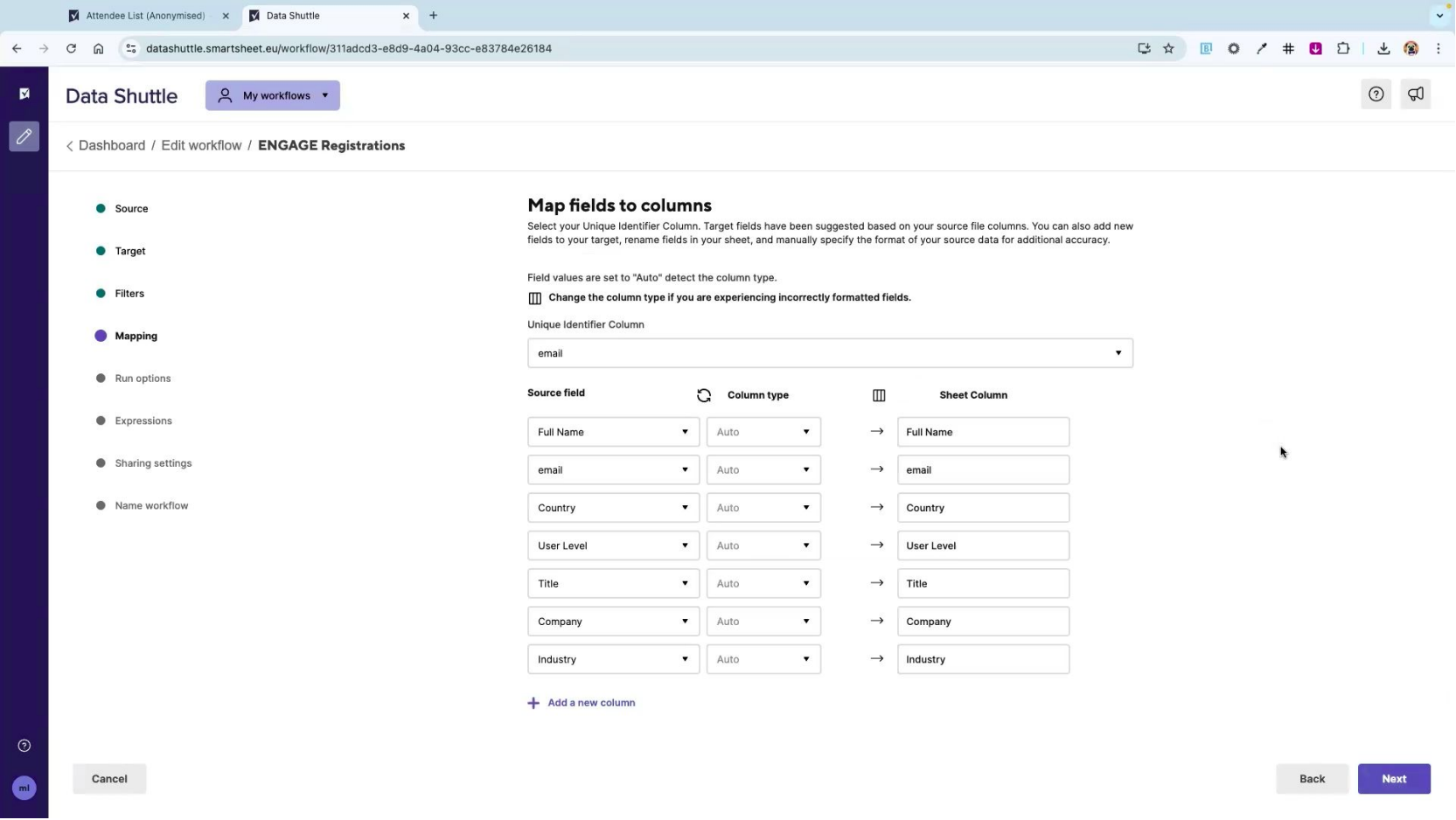

Data Shuttle - Map source columns to target columns

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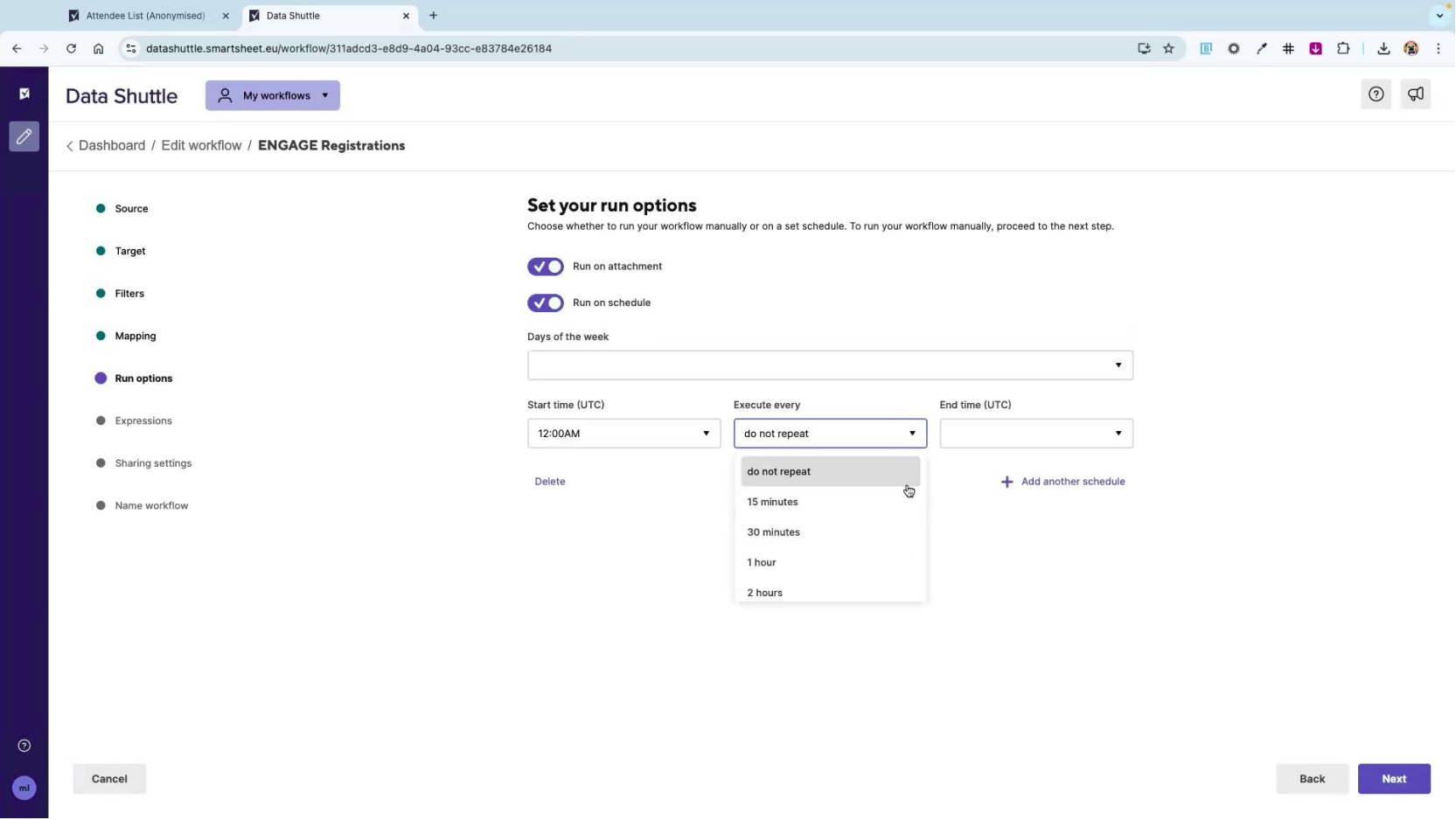

Data Shuttle - Define run Options

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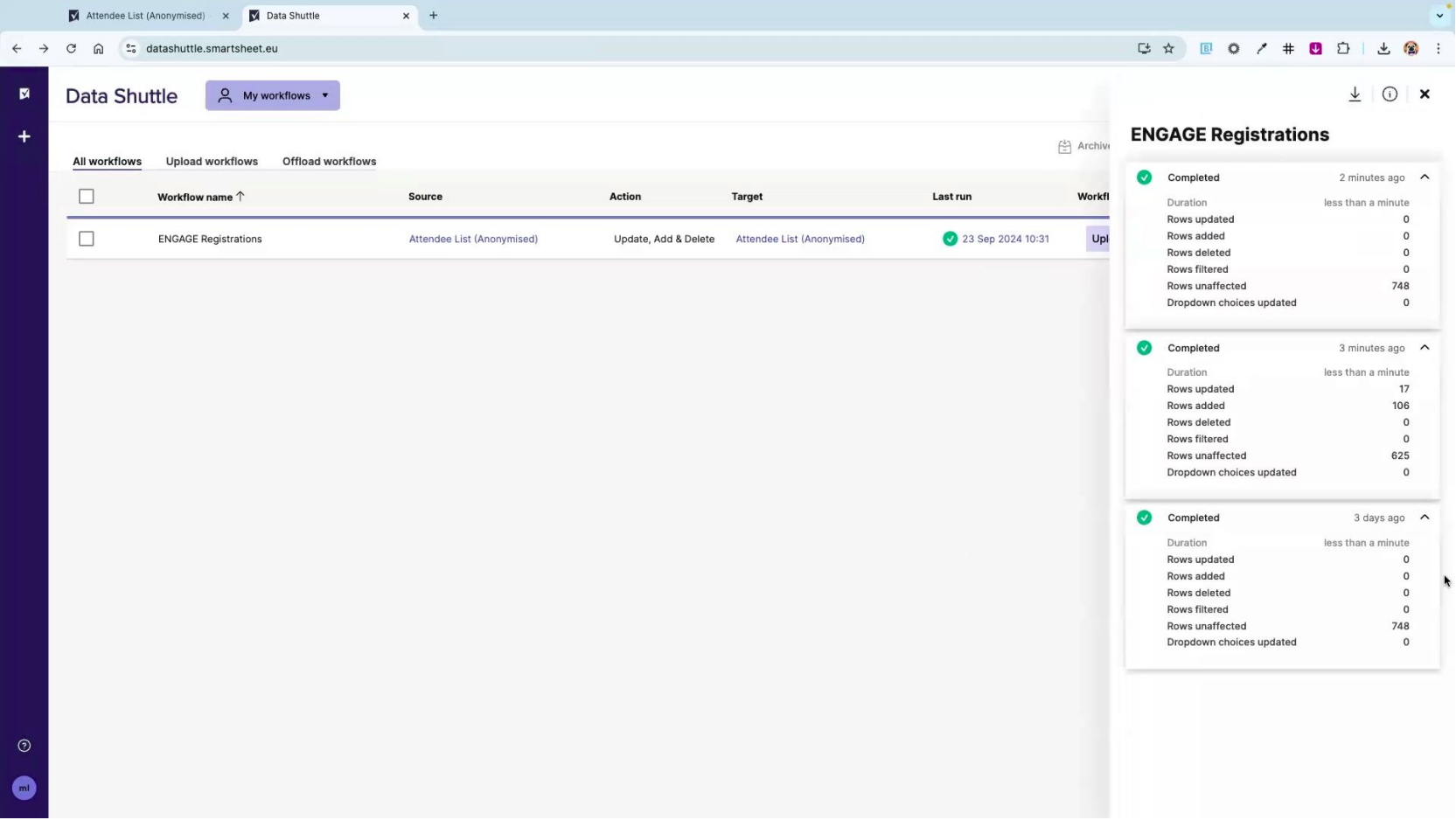

Data Shuttle - Workflow History

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