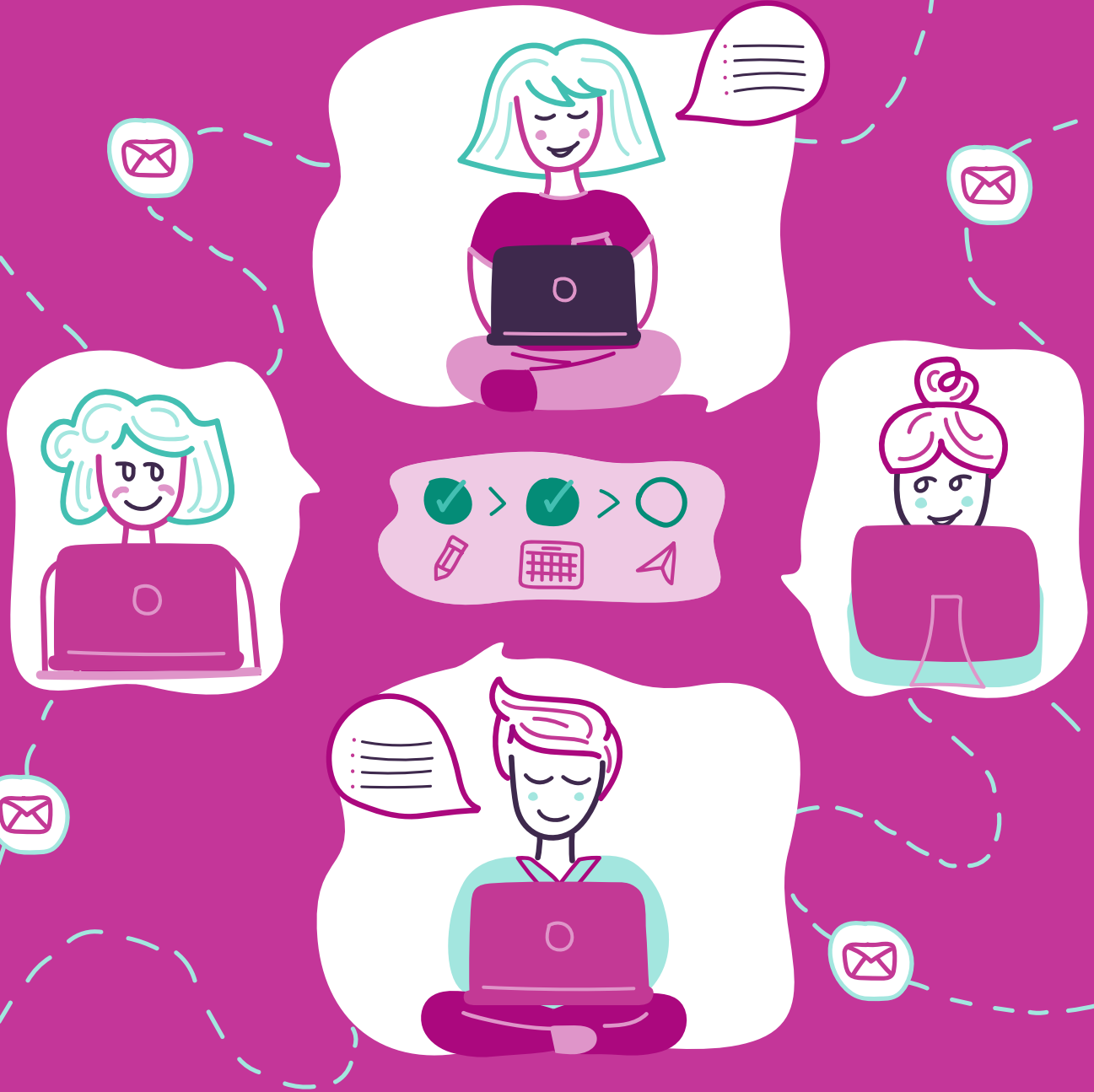


gain



Guide to Streamlining Your Team's Workflow

by The Gain Team

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This guide provides actionable advice for marketing teams to identify inefficient processes and learn how automation can smooth their daily workflows. It was authored by the team at Gain, a collaboration tool designed to bring content producers and their clients together in a seamless workflow. Learn more at gainapp.com

We regularly share our thoughts on team productivity, agency-client relationships, marketing automation, and much more on our blog. Check it out at blog.gainapp.com

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Introduction

Do a quick Google search for “marketing content calendar,” and dozens of downloadable spreadsheet templates from some of the biggest names in marketing will appear. While these templates are filled with creative ideas, there is one major issue: most of them are spreadsheets and ***spreadsheets are a terrible way to create, share, and collaborate on content.***

What’s more, sending spreadsheets full of posts off to content approvers (or clients) can become very overwhelming very fast, leading to feedback and notes scattered across multiple documents and emails, miscommunication issues, and ultimately, a lot of lost time.

Our mission at Gain is to help marketing teams realize how they can avoid internal timesucks (like using spreadsheets), as well as address team collaboration and communication issues head-on to work together more productively. The advice outlined in this guide comes not only from our experience developing Gain, but also from our experience leading our own digital agencies.

For many years before Gain, we planned and executed digital media strategies for dozens of global, award-winning brands. During this time, we learned first-hand about the challenges that marketing teams face on a

daily basis. It was frustrating for teams like ours to realize that the only way to collaborate on content and send it to clients for review and approval was with complex spreadsheets and back-and-forth emailing. We knew there had to be a better way, so we decided to develop our own solution. Since launching in 2012, Gain has helped thousands of agencies around the world ***automate their workflows and become more productive.***

After reading this guide, teams should have a better understanding of where they're wasting the most time, why and how automation can eliminate inefficiencies in their workflows, and finally, how team leaders can keep everyone on track.

Let's get to it!



01.

CHAPTER 1:

How to evaluate team workflows and work more efficiently

All marketers wish they had more time in their days. From client requests to internal meetings, stressful and time-consuming tasks can mean fewer hours each workday for planning, strategizing, and writing. Microsoft's study on interruptions found they happen 4 times per hour⁽¹⁾, and another study showed that 73%⁽²⁾ of interruptions are handled immediately, which means it's incredibly hard to focus during the workday.

Let's begin solving the problem by addressing exactly where marketers lose the most time and what workplace inefficiencies take away from productivity.

Marketers' distractions come in many forms, each unique to work environments, the tasks at hand, and the individuals themselves. Maybe it's a demanding client or a disruptive workplace, but whatever the reason for the distraction, there are a number of effective, tested ways to improve workflow during the day. One of the most broadly applicable solutions, and perhaps least vulnerable to the downside of distraction, is automation.

What is marketing automation?



“Currently, only **4%** ⁽³⁾ of businesses in the US with 20 or more employees are using marketing automation. For companies outside of the technology sector, that number drops to **3%** ⁽³⁾.”

Marketing automation refers to the software and technologies that help automate marketing tasks. No automation tool can replace the creative force of a team of individuals combining their talents. However, such tools can provide marketers with respite from time-consuming, repetitive tasks that eat up valuable hours in the day, and sap away at the time team members have to pour their energy and focus into strategy, research, experimentation, and execution.

Automating tasks not only helps marketers shave hours off of their workday, but it also cuts down the opportunity for human error. And while the benefits of incorporating automation into the marketing workflow are generous, many are still hesitant to take the leap. Why?

For most, the biggest obstacle is the first one: identifying the tasks that can and should be automated. Next, we'll break down the biggest benefits of automation, where exactly marketing teams are losing the most time, and the solutions for faster and more streamlined workflows.

What are the benefits of automation?

Saves time



of marketers said automation has helped them save time ⁽⁴⁾.

This came before:



Increased customer engagement

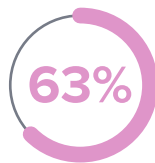


Increased selling opportunities



More timely communications

Provides a competitive edge



of companies are outgrowing their competitors using automation in their marketing strategies.



of top companies have been using marketing automation for two years or more ⁽⁶⁾.

Reduces repetitive workloads



of marketers said automation has helped them reduce time spent on repetitive tasks ⁽⁵⁾ (such as preparing reports and analysis), giving them more time for campaign strategizing and managing client relationships.

Helps keep existing customers

Automating tasks helps marketers spend *less time acquiring new customers*, which can be more expensive than keeping existing customers.



of the revenue businesses generated using automation came from existing customers.

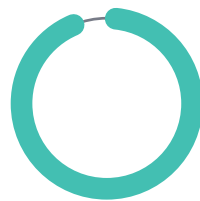
For businesses that did not use automation, it dropped to **30%**.

Where teams lose time and productivity

There are several core aspects of a marketing campaign and workflow in which teams should have some form of automation in place – especially if they want to see a real boost in team productivity. Let’s take a look at each of these areas.

1. Email

Email is one of the biggest time-sucks for companies of all sizes, all around the world. Innumerable studies have attempted to pinpoint exactly how much time is lost to email; some reports say we use email for six hours per day ⁽⁷⁾ and others say it’s 13 hours per week ⁽⁸⁾. One study found that in 68% ⁽⁹⁾ of companies, just one email can take over a week from concept to send. Either way, for marketers, email takes up a lot of time.



96% ⁽¹⁰⁾

of workers agree that unnecessary emails waste their time.

How to stop losing time to email

Organize and collaborate on projects elsewhere and use email only when necessary.

Marketers should strive to use email only when necessary. There is a wealth of collaboration, messaging, and workplace tools available to teams of all sizes, from startups to large enterprises.

Begin by evaluating what kinds of email tasks are consuming the most time. Is email used to go back and forth on copy or design? Is it for clarifying projects and communication? ***Audit your 50 most recent emails between you and your team, and assess what kinds of conversations***

are bringing you back to your inbox the most. After an evaluation, it's then possible to begin to understand what tools can replace the email overload.

Companies have a natural interest in an efficient and productive workday, and benefit from encouraging best practices. Use chat apps like Slack if timely questions arise and organize projects on platforms such as Basecamp to facilitate project updates.

Managers can encourage employees to stop checking email 5 times per hour and instead check in at regular intervals throughout the day, such as 8 a.m., 10 a.m., 1 p.m., 2 p.m., and 5 p.m. Alternatively, set up 30 to 60 minute times in the day to focus just on answering emails.

As long as there is a way to get in touch in case of an emergency, getting out of the habit of checking email constantly will increase productivity.

2. Repetitive tasks

Marketers often find themselves performing repetitive tasks, according to [HubSpot^{\(1\)}](#). This includes:

- Building and maintaining marketing lists
- Monitoring, responding to and analyzing various social media platforms
- Creating and sending email
- Building and optimizing landing pages
- Collecting, organizing and analyzing marketing data

The HubSpot study went so far as to calculate how much time marketers save if they can make these routine tasks just one-fourth of their day. The results? 247 hours saved per year!

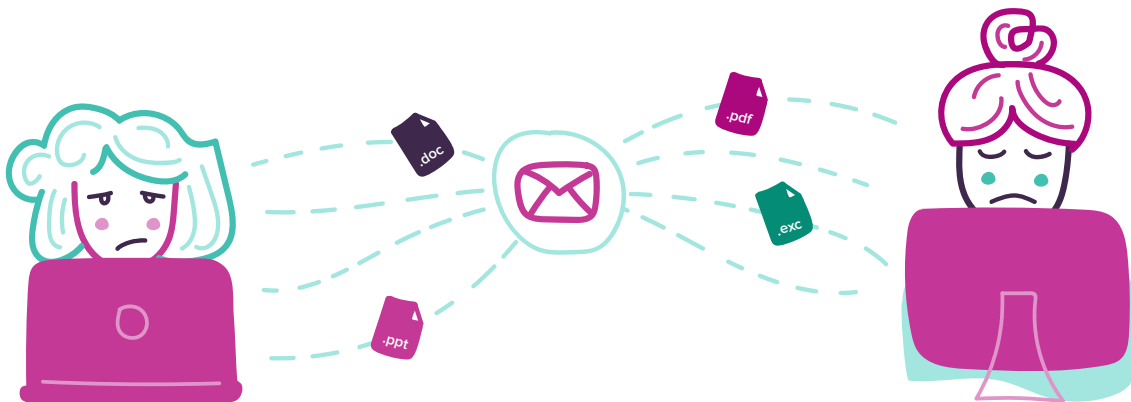
How to find tools that can handle repetitive tasks

Turn over tedious tasks to the right tools and software.

It's essential that marketers analyze what repetitive work they can offload to a tool or even an intern. First, measure how much time is spent on each task. For social media, we have [a great blog post that can help teams estimate time spent](#) ⁽¹²⁾.

Marketers should turn over monitoring media to tools like Google Alerts that can send updates each time a client is mentioned in a publication, or when certain keywords are mentioned, to monitor industry trends and competition.

All social media creation, approval, and scheduling can go through Gain. Using Gain to automate social media means less back and forth with team members or clients, and less time spent on email. Marketers can then set time in the week to analyze marketing and social media data with the help of an analytics tool such as HubSpot or Google Analytics. Without the proper software to dissect the data coming in, marketers will be at a loss on how to read the data results.



3. Workplace stress

Team members that are stressed do not perform their best. According to a study by Willis Towers Watson, 57% ⁽¹³⁾ of employees who said they were very stressed at work felt less productive and disengaged. However, only 10% of low-stress employees reported feeling less productive and disengaged.

But is there one stress, in particular, that takes away from our productivity? Studies answer with a resounding yes, and that stressor is ***being assigned too many tasks***. Work overload decreases productivity by 68% ⁽¹⁴⁾ in employees who feel they don't have enough hours in the day to complete their tasks.

How to talk to management about stress

Make sure you have enough time to complete tasks comfortably and avoid burnout.

It can be awkward to think about talking to a manager about stress, but don't let any initial trepidation deter you. As in any industry, we must all occasionally "manage up," or manage our managers. Sometimes marketers find themselves under poor or strained leadership, but that doesn't mean they have to sit quietly and let the work pile on without enough time to complete each task.

Furthermore, engaged employees outperform those who are disengaged by 200+% ⁽¹⁵⁾, and 46% ⁽¹⁶⁾ of HR leaders say employee burnout is responsible for up to half of their annual workforce turnover. If someone is unhappy or burnt out, it will cost the company, so it's worth it to take steps to make everyone more comfortable in their positions.

A mistake many leaders make (and we'll discuss this in a later chapter) is piling work on the high-performing employees instead of distributing tasks evenly. If someone on the team notices this is happening, managers should set a time to listen to what team members feel they need to function better. It could be extra help on repetitive tasks, help to manage a demanding client, etc.

4. Communication errors

Clearing up communication, whether over email, in-person, or via chat, takes away time and hampers productivity. 86% ⁽¹⁷⁾ of corporate executives, employees, and educators say that ineffective communications are a big reason for failures in the workplace. Communication mistakes can happen because of poor management, and 58% ⁽¹⁸⁾ of employees say poor management is the biggest deterrent to productivity.

Email is one of the biggest time-sucks that marketers face. The average worker spends an estimated 28% ⁽¹⁹⁾ of the workweek managing emails and receives an average of 121 emails ⁽²⁰⁾ per day. For many of us, the thought of abandoning email seems about as likely as giving up the internet altogether.

We just can't get enough of email

We spend 6 hours a day (30 hrs/work week) checking email



18%
while
driving



43%
while on
the phone



70%
watching
TV



42%
while in the
bathroom



50%
while on
vacation



50%
while in
bed

Source: [Subject: Email, we just can't get enough](#) ⁽⁷⁾

The cost of poor communication in the workplace is high. A business with 100 employees spends an average downtime of 17 hours ⁽²¹⁾ per week clarifying discussions, translating to an annual cost of \$528,443. In total, United States businesses lose roughly \$500 billion ⁽²²⁾ per year due to workplace stress.

Email is not meant to be a task management or team collaboration tool. The fast-paced environment we work and thrive in, coupled with the growing number of remote and decentralized teams, has driven the need for more instant communication tools that increase productivity instead of dragging us down.

Remember:
Clients should never get fatigued from your emails!

How to improve day-to-day communication

Replace email with more automated, collaborative communication tools.

Moving away from email not only benefits a marketing team's productivity, but we've learned it also benefits client relationships. For example, marketers often need to communicate changes and opportunities with clients quickly. However, if clients are numb to constantly seeing a marketer's name in their inbox, they might ignore an important, timely message.

Managers must lead by example to set the tone for how teams are to communicate on a daily basis. For example, we organize our communication as follows:

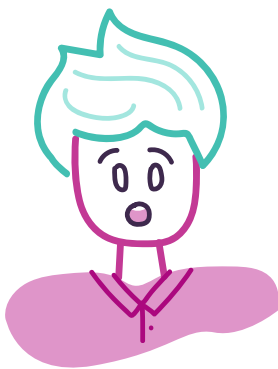
- **Slack and Slack channels:** Our team rarely experiences miscommunication because if anyone needs clarification, there is a Slack channel set up to discuss that theme. Teams can organize Slack channels by client, so everyone is on the same page when a question comes through.
- **Basecamp:** We use Basecamp for project management so that, all documents get to the right team members by due dates.
- **Gain:** Of course, we use Gain for all marketing content creation and approval. Our creative asset channel in Gain helps us stay on track and sends reminders when copy or design hasn't been approved yet.

Plus, we don't even have to think about scheduling social content because it happens right on the platform.

- **Email:** Yes, we use email too. We mostly use email for sales, external partner communication, and to talk to new team members to get them up and running internally.

Teams that set a precedence on how to communicate will see their productivity soar. Also, it's not too late to shift communication values internally – simply ensure everyone on your team knows how to use each tool and has access to each platform.

5. Content creation



“
*People post at least **55 million status updates** ⁽²³⁾
to Facebook and blast out **500 million tweets** ⁽²⁴⁾
every day.*
”

Now, more than ever, marketers must be savvy if they want to stand out in the digital ecosystem and engage their audiences. However, a single tweet may pass through 6 or 7 hands before it goes live – and that's before it's even sent to the client for approval!

Beyond creating the copy and visual assets for each piece of content, scheduling and publishing content on a regular basis can also be a time-consuming process, and upon closer analysis, it's also one that's rife with opportunities for automation.

Marketers need to make sure their content goes live at times when their audience will notice. For example, what might be a perfect time for

Facebook may be a slow time for Twitter. The best times to publish content can vary significantly by channel and by audience, but researching the best times to share content is simplified by automated publishing tools. Many tools are capable of identifying the best times to post and can send reminders to upload content at specific times.

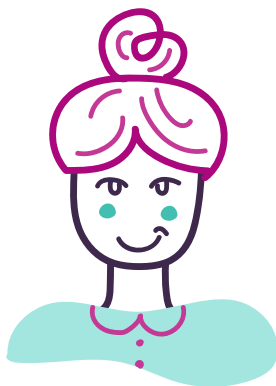
How to automate the content creation process

Reduce the manual, time-consuming steps of taking content from the idea stage to the publish stage.

Marketers can automate several steps of their content marketing campaigns and reduce the amount of time it takes for a post to go from a draft to the published product.

Curating great content is one step to automate with helpful tools such as Scoop.It and Feedly. Simply plug in a search term and these tools will automatically generate a stream of relevant articles ready to share.

After drafting copy, plugging in links, and adding photos or videos for each piece of content, another important step to automate is scheduling the post. With automatic scheduling tools (like Gain), marketers can schedule out an entire month's worth of content in just a few hours, producing content calendars for internal or client use automatically.



*“When marketers automate their social media posts and ads, it’s possible to save more than **6 hours** ⁽²⁵⁾ per week. –Entrepreneur*”

Content pieces such as blog posts and email newsletters require a scheduling strategy, too. For example, if your new blog posts are shared via an email newsletter, then automated email marketing tools like MailChimp or HubSpot should be part of your time-saving marketing stack.

Finally, monitoring an audience’s reaction to content often requires just as much time and effort as producing it. Mention, Google Alerts, and similar tools can automatically notify marketers any time their brand is mentioned or their content is linked to online. In addition to monitoring brand mentions, these tools can be used to notify marketers when competitors are mentioned automatically.

6. Approvals

We all know just how crucial it is for marketers and the brands they manage to review and approve content and marketing materials before they go live. However, managing the workflow for each piece of content can become a nightmare for the content creators as well as the final approvers or clients when large amounts of content for a variety of channels are being produced.

Even with all of the tools available, marketing teams still spend too much time emailing content and feedback back-and-forth. Very few teams have a streamlined way to keep track of every comment or revision request made.



Source: [2017 State of Marketing Work Report](#) ⁽²⁶⁾

The truth is, legacy team communication and collaboration tools, such as email and spreadsheets, have failed to keep up with today's demands.

How to gather content approvals from team members and clients

Organize your approval workflow so content goes to the right person at the right time for review.

The pressure on marketing teams to produce high-quality, shareable content, engage audiences, and remain accountable to results has never been greater. By introducing automation into the process, marketers can spend less time on the initial stages of gathering internal and client feedback and approvals.

Not only can the right tools help automate their workflows so that content is automatically sent to the right person at the right time, but these tools can also send content for review in a cleaner and more uniform way.

An automated approval tool can help marketers take content from the brainstorming and draft stages to the review and final publishing stages in fewer steps and with far less manual effort.



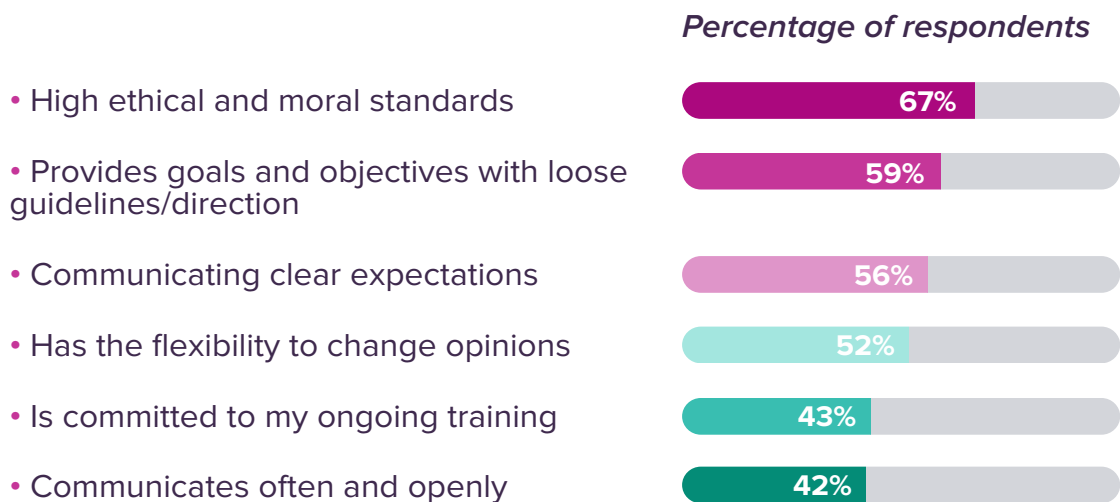
02.

CHAPTER 2

How to lead a team like a pro

It may surprise you, but as many as [71%](#) ⁽²⁷⁾ of organizations do not feel their leaders can lead their organization into the future. This number says a lot about the state of leadership and proves that managers and executives should invest in creating better leaders internally. But what makes a good leader?

A [study](#) ⁽²⁸⁾ that polled 195 leaders in 15 countries over 30 global organizations found the top 3 qualifications to be:



It's crucial that employees trust their managers. While they don't need to be friends, a co-worker dynamic that includes openness, flexibility, and mentorship is vital. Effective leadership promotes an atmosphere of respect and admiration amongst all team members, and begins on the day a new employee walks into the office.

How to onboard a new team member

Let's take a look at how to onboard a new team member after you hire them, their first day on the team, their first week, and the time after that.



After Hiring: It's vital to establish strong lines of communication with the new hire as soon as possible. While the new hire does not need to do work before they officially start with your company, you can let them know any tools your company uses and ask them to become familiar with them. Check in to see if they have questions on employee protocol, dress code, and office hours to make sure they're ready to go on day one.



First Day: The first few days are crucial to define a new hire's role and show them how they fit into a dynamic team. New team members want to feel comfortable and as though they have a natural place to fit in to the internal workflow. For their first day, make sure to set up their workspace with any supplies needed and provide them with access to platforms and necessary passwords. Any first day can be overwhelming, so try to ease the burden.

It's also important not to overload new hires with information on the first day. Team leaders may be tempted to run through the A to Z of everything that goes on in the office as soon as they walk in the door. Instead, let the new hire breathe. In all likelihood, they won't retain most of the information taught to them on the first day anyway.



First Week: During the first week, assign the new hire a mentor. Connect them to a long-term employee who can teach them the culture and answer any queries as they come up. If possible, pair new hires with someone

who has had a lot of contact with clients and can speak authoritatively about the work. Not only will this person ease their transition onto the team, but they can also teach the new hire about how the team operates. Assigning a mentor to them can also help tremendously by teaching them as issues come up, which will feel more organic.

Set up a week-long or month-long orientation plan that helps new team members become acquainted with the work, clients, and culture slowly. Don't throw them straight into the fire; that's a recipe for burnout.

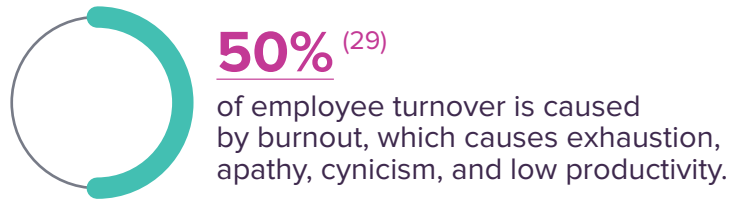
Another good idea is to introduce new hires to their team and organize a team-wide activity during the first week. Set aside half an hour to bring everyone together to share stories or break out a team-building activity that requires the entire office to interact. Bringing in pizza or a cake never hurts, either. Make sure the team celebrates the arrival of the newest hire; after all, they're filling a gap on the team, and they'll all be working together closely. Finally, new hires should understand their role, who they are managing, who they are managed by, and how the office runs by the end of week one.



After the first few weeks: It's a good idea to check in after the first month to see if they have new, fresh ideas on how to make the team work better. Remember, this person was brought in for a reason, so they might have some good ideas on how to be more productive. Set aside 30 minutes to discuss how things are going, if they have questions, and any suggestions they'd like to make. Remain open to their ideas and try to implement the ones you think will work on a team-wide level.

How leaders can avoid team burnout

As we mentioned in Chapter 1, employee burnout means a less productive team and higher turnover rates. Leaders need to make sure no one is working too hard or too much, and that everyone is doing their part.



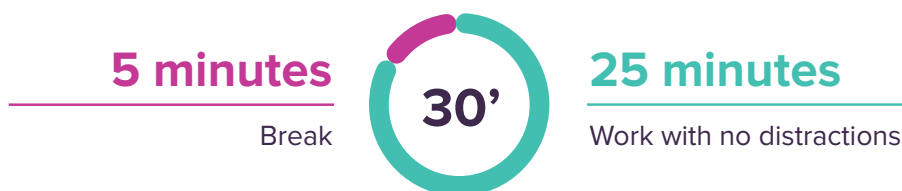
Leaders have to be vigilant and differentiate between normal work stress and potential burnout. Here are 3 ways to avoid the latter.

1. Eliminate the multi-tasking culture

Science says that humans are not capable of multitasking. When we try to complete multiple tasks at once, it often takes us twice as long to finish the work, and we are half as effective.

Workers often attempt to multitask when their tasks are prioritized poorly or when they incur in multiple distractions during the day. Leaders should help organize projects clearly by priority level and try to space out deadlines appropriately to avoid overlap.

The Pomodoro technique



For day-to-day work, try out the [Pomodoro technique](#) ⁽³⁰⁾ to bring out hyper-focus on the team. Set a 25-minute timer, work with no distractions

until it goes off, and then take a five-minute break. Rinse and repeat throughout the day. Short breaks are known to correlate with higher productivity. The productivity app [DeskTime](#) ⁽³¹⁾ suggests another method of working for 52 consecutive minutes followed by a 17-minute break. Spending those 17 minutes away from the computer by walking around, doing a quick exercise, or conversing with coworkers can reboot your energy.

Each team member works differently, so if this technique doesn't work for someone, offer a different work style. Some applications and platforms block out Slack and email notifications so workers can focus on one project at a time. Automating the mundane tasks covered in Chapter 2 will also help team members focus and work more productively.

2. Give frequent and constructive feedback

The yearly review is an outdated concept, and of the organizations that use one, many regard them as formalities. Managers should meet with employees frequently to provide them detailed feedback on their work, and development should be an ongoing conversation.

Team leaders should always be open in their communication, whether they need to deliver constructive criticism or want to congratulate someone for a job well done. If a team member feels their managers are in touch with their work, they'll also be more willing to come to them with problems before they burn out.

This open door policy is what team members expect from their leaders, so encourage honest and respectful feedback and dialogue on projects.

3. Set clear goals and achievable standards

We set high standards to motivate our team to do their best work, but if team leaders set impossible deadlines, provide little guidance, or don't explain the purpose of a project, employees can feel overwhelmed and

inadequately prepared to complete a task. They may even feel helpless and give up, producing low-quality work or missing a crucial deadline.

Instead, speak openly with the team about how long a project will take and explain how it adds to the growth of the company. Everyone works more efficiently when they feel there is a broader mission behind their work. Set achievable, realistic goals and celebrate once they're met.



Often, the best thing leaders can do to prevent burnout is to foster a culture of open and honest communication within the team. If the door is always open, team leaders will be more likely to catch problems early and solve them before they take a turn for the worse.

A culture of productivity often starts from the top, so model good behavior by prioritizing tasks effectively, taking time off, and not contacting employees outside of certain hours. Employees are not computers. Show them that their work and skills are valued to help them feel fulfilled, rather than exhausted, by their jobs.

It's easy to send multiple tasks to top workers. However, this can lead to them burning out quickly and becoming frustrated in the workplace. Instead, leaders should distribute the workload fairly, which is not always easy to do.

How to distribute a workload fairly



Distributing a workload fairly does not mean equally. Instead, leaders need to step back and examine each employee's strengths and weaknesses. We found success and balance by applying the five aspects of workload distribution that [Mike Figliuolo, founder of thought Leaders](#) ⁽³²⁾, uses to assign tasks:

1. Priority

Prioritizing tasks first is key to allocating a team's workload. Some things simply need to get out the door ASAP, so teams have to start here. If there is a high priority project and a team member who can complete that project, then they should be assigned to that task first.

Find the right balance when prioritizing tasks. If team members treat every task as a priority, it may be a sign that they aren't thinking strategically, and the team lead or manager is prioritizing tasks at an

unnecessary level. Instead of scrambling to complete every task as if it were the only important task of the day, teams should discuss how they can better balance the smaller, everyday tasks with the larger, more strategic ones.

2. Skill sets

If teams have a large number of assignments to get through, allocating the workload based on each team member's skills is an excellent way to ensure high-quality results. Paying close attention to who is assigned tasks based on their capabilities will increase that team member's chances of success and completion of a project promptly, with little guidance necessary. Equally, it's important to check in with team members on a regular basis to understand any new skill sets they may have picked up and include those in future task planning.

3. Availability

Another way to allocate a workload across multiple members of a team is based on each person's availability. If priority and skill set are equal, who is available to complete the task? There's no need to shift resources if someone is willing and able to get the job done. If leaders are organizing their team's workload from scratch, then they can start by reviewing each person's current schedule and workload for a clear picture of what's going on before allocating additional projects.

4. Development

When assigning tasks, be aware of how team members can have opportunities to learn a new skill or stretch into new areas of interest. Leaders should have this information available from employee reviews. Always ask team members what they want to learn. If there is a non-priority task that a novice employee can try, offer that as a learning opportunity for professional development.

5. Interest

It's important to consider if a person has an interest in performing specific tasks. If someone on the team is passionate about a topic, then it's highly likely he or she is going to be motivated to complete the job well. Make sure team members are still open to trying new things and not only gravitating towards tasks they enjoy or are comfortable doing.

There will be times when some team members are called on to do more work than others due to the roles each of us plays in our organization or a particular situation. However, thoughtfully allocating work up front as fairly as possible can help prevent imbalances. So whenever the team's workload starts to feel out of whack, consider going through each of the 5 steps above to restore harmony and happiness across the team. Remember, an open door policy and regular check-ins will help make sure leaders are allocating the work fairly.

Lastly, automation can help everyone work better. It can be difficult to get new team-wide tools up and running, so here's how we suggest doing so.

How to work automation into your team workflow

1. Choose the right tool

Before leaders can decide which automation tools to use, they need to evaluate what they want to gain from automating their team workflows. Below are a few good questions we recommend teams answer and discuss.

- Where do you think your team spends too much time? Is it when you're organizing and scheduling social posts? Monitoring multiple social channels? Emailing content revisions back-and-forth?

- Are you looking for a tool that can streamline your entire marketing process or just some of the steps?
- Is your goal to improve communication and collaboration internally or with clients? Or both?

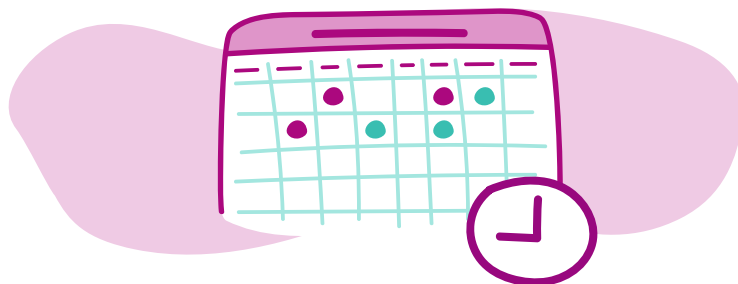
Most marketing teams already work with some form of automation, so it's important to consider how any new tool will integrate with existing processes. Having too many systems layered on top of one another can do more harm than good, causing team-wide slowdowns, disorganization, and hampering productivity further.

Above all, team leaders should choose a solution that covers their team's current needs and is also flexible enough to grow with their workload and can handle everything from simple one-person workflows to complex, multi-member workflows.

2. Get team members on board

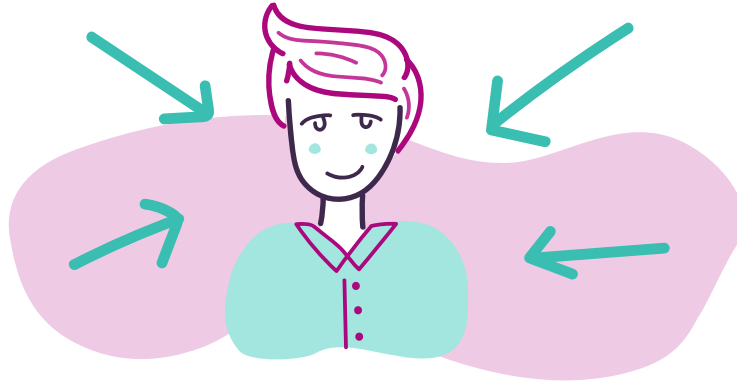
Reliability, ease of use, and ease of integration are the top 3 requirements managers look for when deciding which tool to implement company-wide. However, after finding the right tool, the work isn't quite over. Team leaders still have to get everyone to start using it.

Here are a few tips to make the onboarding process a breeze:



Mandatory training sessions: Make training sessions mandatory to ensure everyone across the team understands how to use the new tool.

Split sessions by junior and senior-level team members, or by roles such as content creators and content approvers. Most importantly, be sure that everyone thoroughly understands how to use the tool.



Appoint someone to lead the way: Questions may arise on how to use the new tool, so appoint 1-2 team leaders that others can go to with questions. Make sure these team leaders really like and understand the new tool so they can help others use it and get excited about its benefits.



Lay out the benefits in numbers: If a team member knows they'll save 3-4 hours per week by using a new tool, then they're much more likely to buckle down and invest the effort to begin using it. Pinpointing these data points about the tool upfront can help with team adoption.

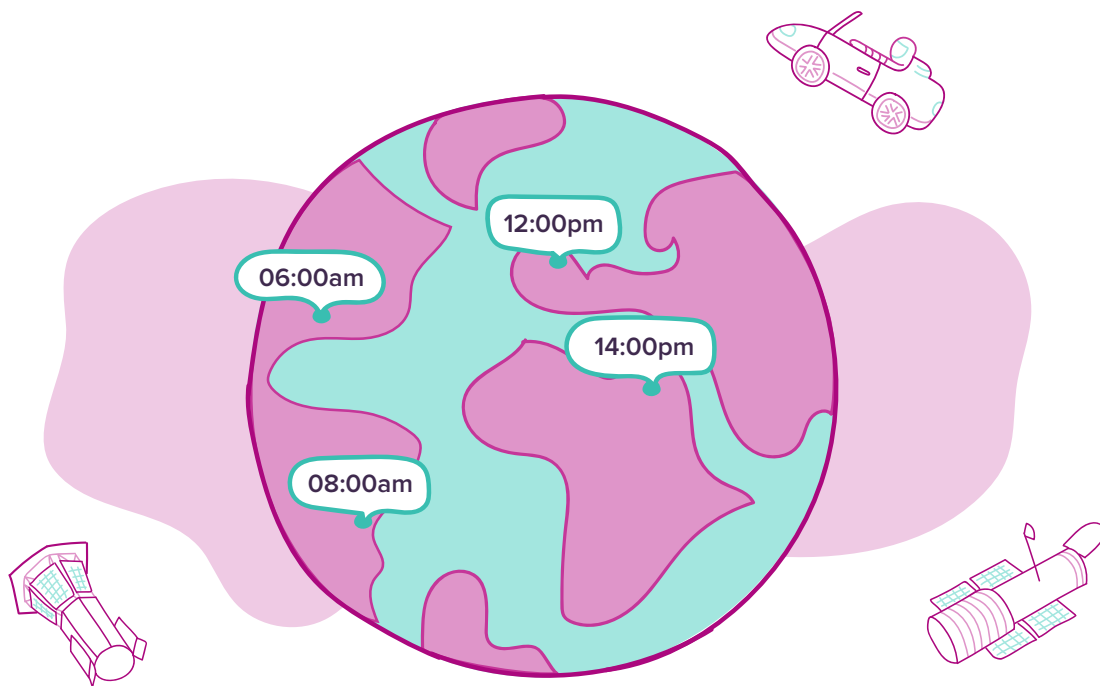
Patience will be key to make sure the entire marketing team is using the new tool, and it'll become easier as time passes. The most important thing is that new team members understand that this is the tool used teamwide and that they receive adequate training.

3. Continuously seek new ways to automate tasks

Once core aspects of the marketing workflow – like the ones mentioned above – are automated, the work doesn't stop there. It's important for team leaders to reevaluate the workflow every few months, or on a quarterly basis, for weaknesses.

Leaders especially should examine if there are ways to improve the workflow by eliminating unnecessary steps and help everyone save even more time.

How to lead a remote team



Now that more teams are spread across the country and the globe, leaders are challenged with the task of managing remotely. Instead of more meetings, leaders can use the following strategies to manage a remote team.

1. Make team collaboration tools mandatory

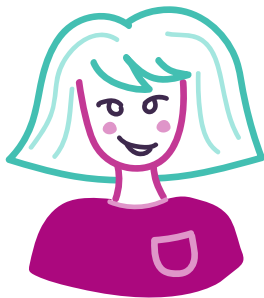
We often see our conversations going from chat apps to email to phone so quickly that we are then unable to find a conversation or information that we need. This is a big problem, especially for remote workers, that can be solved by implementing a team collaboration tool such as Jira, Trello, or Wrike.

Team collaboration tools can cut out confusion and eliminate the need for additional back-and-forth. Leaders should make sure all notes are kept organized in a tool, and everyone has access to necessary folders.

2. Tie each employee to metric-based responsibilities

Most companies track remote workers' time, but time-tracking doesn't necessarily ensure productivity. Just because someone worked 10 hours according to a timesheet doesn't mean they had an efficient day.

Having daily or weekly results-oriented goals that are defined by metrics is a great way to keep everyone on track and moving forward. Tools like iDoneThis measure progress instead of just time, keeping everyone on the team updated with one email.



“*Technology firm Dynatronix saw a 20% increase in on-time delivery rate ⁽³³⁾ after implementing ROWE, or “results only work environments”.*”

3. Hire carefully and breed trust within the team

Remote work is certainly not for everyone. Remote work functions well for team members who have strong communication skills, are proactive about asking questions, and understand how to stay productive in at-home settings.

Once you have a strong team, it's essential that each team member is trusted to hold themselves accountable, so they don't need to be hounded or micro-managed while working remotely. Remember, that's why they were brought on in the first place.

The open door policy can extend to remote workers. Make sure everyone on the team is comfortable chatting with managers and managers take the time to address employee's needs.

4. Always have a chat room available

Since remote teams are not going to run into each other getting coffee, it's important to find another way to foster team camaraderie.



Source: [McKinsey Global Institute](#) ⁽¹⁹⁾

Connected employees use technology to communicate, collaborate, and share knowledge. Tools like Slack allow conversations to be segmented by clients, projects, or teammates. Having a place where the team can connect is a great way to make remote workers seem closer together, but not having to check the chats constantly allows workers to keep up their workflow as well.

5. Recognize team members for their work – even from afar

If someone completes a big project early or introduces a new time-saving tool to the team, managers are not going to be able to take them out to reward them. Instead, remote managers must find a way to make each employee feel recognized and appreciated, even from afar.

69% of employees say they'd work harder ⁽³⁴⁾ if they were better appreciated and recognized — which can be extremely difficult to do remotely. Be sure individuals receive company-wide recognition on shared platforms for their accomplishments. Try installing a Slack integration such as 'Hey Taco' that displays appreciation to team members in the company channel.

6. Lead by example

Whether you mean to or not, you are probably already leading by example. Leaders' attitudes set the tone for the office and often trickle down, so it's important to maintain positivity and work hard to show team commitment. Not leading by example can lead to team members feeling alienated and reduced morale. Be sure to show your team you are ready to jump in and tackle any challenge that arises.

Leaders that foster an environment with open communication, guidelines with clear metrics, and trustworthiness will find themselves with a dedicated team who wants to perform well. Team leaders should continually strive to lead better and check in with employees who seem to be going off track. In other words, “As we look ahead into the next century, leaders will be those who empower others.” – Bill Gates

Conclusion

After reading this guide, we hope that teams can reflect on what they're doing well and areas where they can improve. While we don't always want to think about, it's important to think about our less-successful campaigns, what went wrong, and where we're wasting too much time. Reflection and evaluation are critical for improving both individual and team workflows, and producing high-quality work for highly satisfied clients.

As marketers, it's essential to remember that we represent the outward face of our clients. If team members are struggling to communicate with each other internally, with team leaders, or with clients, the results will show in the work. Leaders have the responsibility to lead by example, teaching others how to solve problems and creating spaces for dialogue. A culture of collaboration and open communication comes from the top and designing workflows that reflect on these values is crucial. We hope the advice laid out in this guide will provide leaders and their teams with the right ideas and tools to make a productive work environment a reality.

For more advice on streamlining your team's workflow, head to [our blog](#), where we regularly discuss this and related topics.



Thanks for reading!

If you enjoyed this guide, drop us a line, let us know your thoughts and share it with friends!

Resources

Chapter 1

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- ⁽²⁶⁾ <https://www.workfront.com/resources/how-email-meetings-and-automation-are-shaping-the-future-of-work>

Chapter 2

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