



WORKOLOGY 6.0

workology® conference

2018 / Del Mar, CA

THE WAY: PROJECT INTAKE AND SETUP



THE MARCOMM INTAKE PROCESS



WHY FOLLOW THE MARCOMM INTAKE WAY?

- **More complete specs to start projects**
- **Communicate proper expectations for deadlines**
- **Centralized list of project requests**
- **Easier to manage request status**
- **Easier to create projects**
- **Business Intelligence**
 - **Demonstrate Productivity**
 - **Exposes invalid requests**



PROJECT REQUEST FORMS SETUP

- **Create custom request forms for each project type linked to project templates**
- **Define custom routing for review/approval**
- **Map all custom request form fields to projects**
- **Custom Email Subject for Approvals or Rejections**



PROJECT REQUESTS

- **Fill out an online request form (client/dept.)**
 - Key information such as the brief, due dates, etc.
 - SAML Support (single sign-on)
 - New Contact Mapping for Large Departments (SAML/LDAP)
- **Review Request (Account Coordinator)**
 - Edit/Print if needed
 - Reject to route back to requestor with changes needed if necessary
 - Approve



PROJECT REQUESTS

- **Create Project (Account Coordinator)**
 - **Specs/files copies from the request form to the project**



THE AGENCY INTAKE PROCESS



WHY FOLLOW THE AGENCY INTAKE WAY?

- **Staying on top of potential projects**
- **Improve accuracy in estimating and scheduling**
- **Easily share client expectations and requirements**
- **Streamline workflows**
- **Enhanced business intelligence:**
 - **Revenue Forecasting**
 - **Staff Resourcing**



AGENCY INTAKE PROCESS

- **Two Ways for project in-take:**
 - Confirmed new project (no oppty needed)
 - Client/prospect considering project (oppty needed)
- **Project or Campaign Opportunity (AE)**
 - Convert Opportunity to a Project or Campaign
- **Update Specifications (AE)**
 - Spec sheets or files
- **Route to Traffic for Estimating (AE)**
 - Conversations



AGENCY INTAKE PROCESS

- **Create Estimate (Traffic/Production)**
 - **Project**
 - Pull from Project Schedule
 - **Campaign**
 - Top Down with Client PO Amount
 - Pull from related project estimates



PROJECT MANAGER TODAY PAGE

- **Manage Open Items**
 - **Open Project Requests**
 - **Approved Project Requests without a Project**
 - **Open Requests for Quotes**
 - **Estimates Waiting on Client Approval**

