

The Marketer's Handbook:

Managing marketing requests

Campaigns, events, product launches, email promotions, website updates—oh my! That's just the tip of the iceberg for today's marketing teams. All of these marketing activities require compelling creative and assets—eye-catching digital ads, engaging web experiences, click-worthy content, and persuasive sales collateral, to name a few. To get these materials produced, marketers typically need to work with their creative counterparts, like designers, video producers, copywriters, and content creators.

But with so many different activities and projects to juggle at once, it's easy for requests for new design assets and content, for example, to fall through the cracks.

The next thing you know, your new ad campaign can't go live on time because you're missing approved assets from your designer, who didn't know you needed different dimensions for display ads. As a result, you might miss your top-of-funnel awareness goals, which could affect other business goals downstream like revenue.

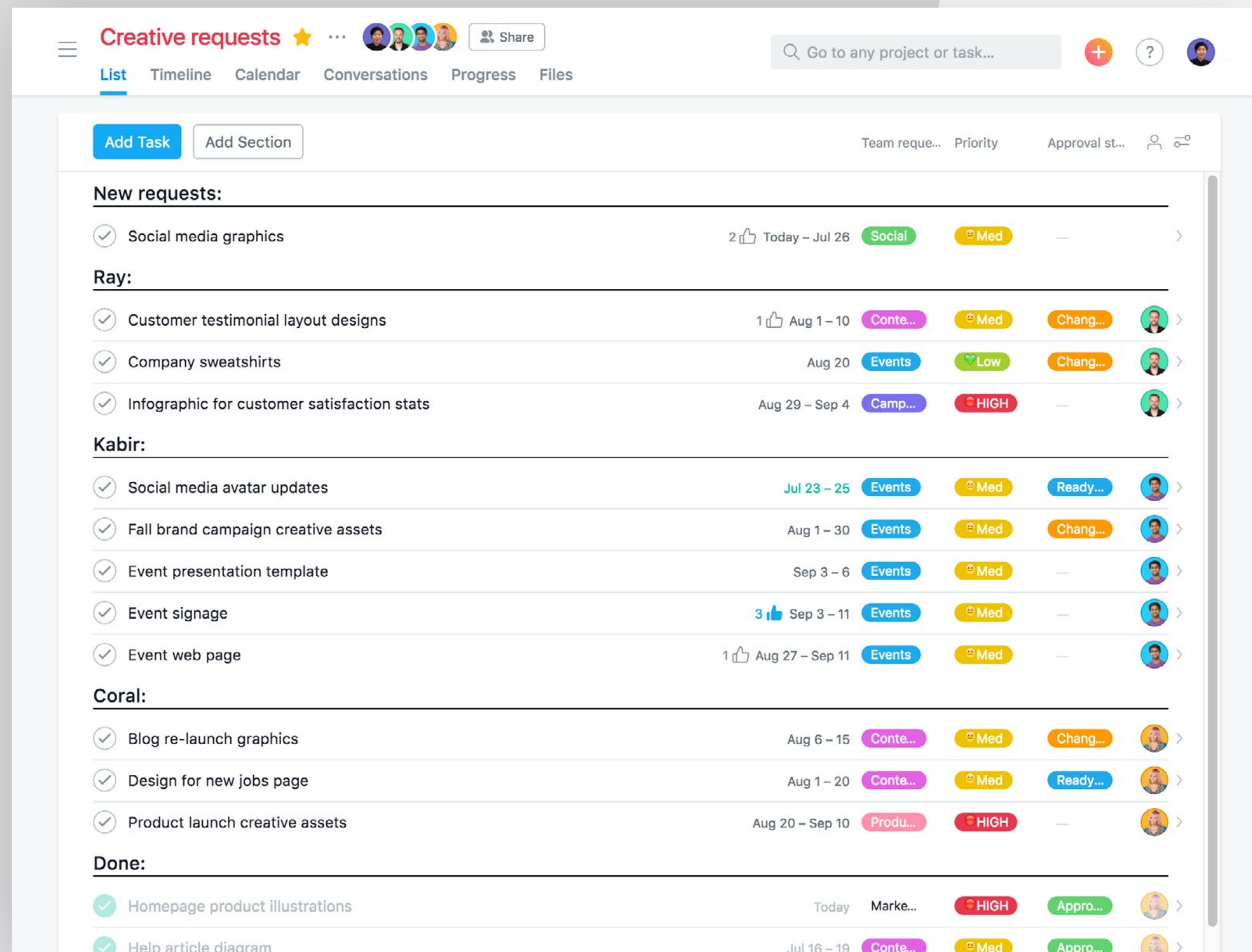
Unfortunately, this scenario of priority work and important details falling through the cracks is all too common for many marketing teams. The reason? Requests for marketing assets are being tracked and managed in different places like email, chat, docs or spreadsheets, and everyone submits them differently.

You don't have a way to see everything your team is working on, critical information like priority and creative requirements are missing, and the approval process isn't clearly defined. Once work is underway, it's hard to know when requests are off track until it's too late and deadlines are missed. And reporting on the status of multiple requests? It's a tedious and manual process that takes time away from actual work.

So, how can you address these challenges? The answer is an end-to-end work management process for collecting, tracking, and managing marketing requests for creative assets on your team.

IN THIS GUIDE, YOU'LL LEARN HOW TO DO THE FOLLOWING WITH ASANA:

- Create a scalable, collaborative request and production process between marketing, design, and other teams.
- Prioritize requests against business goals so your team is focusing on the most leveraged and impactful work.
- Report on the status of requests so stakeholders know where work stands for their important projects. Track and manage requests from start to finish so you deliver marketing assets on time and on budget.



Create an Asana project for all requests

For many marketing teams, it's not uncommon for work requests to come in from every direction: messages over Slack asking for help creating content for a presentation, passing hallway conversations about a new landing page, emails to different designers asking for the same thing. Keeping track of all these seemingly random requests gets tricky, fast. The best way to manage this is to centralize your work request process.

Let's take creative requests, for example. All of your campaigns, events, launches, and other marketing projects likely need creative assets. So how do you make sure these are prioritized correctly and created on time and on budget?

Set up a “Creative Requests” project in Asana to track all design and copy work for your marketing team in one place. Moving forward, this is where you will track, assign, and manage all creative work for your marketing team.

HOW TO CREATE A PROJECT FOR MARKETING REQUESTS IN ASANA:

- From the Quick Add button in the top bar, select Project.
- Use our Creative and Work Requests template or start with a blank project.
- Add sections to organize your requests project in the way that makes most sense to your team. Some sections might include: “New Requests,” “Need More Information,” “Ready to Review,” and “Changes Needed.”

Tip: In Asana Premium, you can add custom fields to your project to track more information than just assignee and due date, like priority, channel, and team. The Creative and Work Requests template includes fields for priority and approval stage, for example. And you can add more—like approver or requester—depending on your needs.



Standardize your request intake process

Now that you've created a project in Asana to track and manage all requests, the next step is to standardize the intake process so requests are submitted correctly. Otherwise your designers will still get last-minute requests via email, critical information like format and channel will be missing, requests will fall through the cracks, and your carefully structured project won't accurately reflect all of the work your team is doing.

Depending on your preference, you can require teammates to submit new requests via a web form or a new task in the requests project you've set up in Asana. The important thing is to designate one place—and one place only—where marketers and other teams go to submit a new request.

This way, marketing managers know where to request creative assets for their campaigns. Designers and copywriters know where to look for new tasks. And most importantly, senior marketing leaders have a single, clear view of all the work happening on their team at any given time.

“With Asana, we execute on requests with greater speed and efficiency without letting anything fall through the cracks. We now have more time to focus on being creative.”

—SARAH WORMSER, CREATIVE PROJECT MANAGER AT CLASSPASS

Tip: Asana has integrations with a few web form tools, like such as Jotform and Google Forms. If you use another provider, you can connect your web forms to Asana with our open API.

Next, specify the information that must be included with each request. Think of this as a project or creative brief. It will get everyone on the same page early on and is a useful artifact to refer back to throughout the creation process to help team members stay aligned.

AT A MINIMUM, EVERY REQUEST SHOULD INCLUDE INFORMATION THAT:

- Defines the marketing and business goals that the work needs to accomplish
- Sets expectations around scope and deadlines
- Includes specs such as delivery format, sizing, channel, etc.
- Links to or attaches any relevant documents
- Clarifies stakeholders and what their roles are (i.e. reviewer, approver, advisor, etc.)
- Outlines the review process so it's clear when feedback is needed and by whom

The screenshot shows an Asana task card for 'Event web page'. At the top, there are two dependency bars: 'Dependent on Confirm venue from Alejandro Luna due Aug 1' and 'Dependent on Finalize event logistics + agenda from Kat Mooney due Aug 24'. Below these, the task title 'Event web page' is displayed. The card includes metadata: 'Assigned To Kabir Madan' and 'Date Range Aug 27 - Sep 11'. It also shows 'Team requesting Events', 'Priority Med', 'Approval stage' (empty), and 'Designer Kabir'. A list of details follows:

- Goals:** Foster customer advocacy by driving registrations to a VIP event
- Audience:** Senior executives at manufacturing companies
- Creative considerations:** Web page look and feel align with company brand guidelines
- Creative specs:** Standard web dimensions, Sketch file submitted to WebDev
- Channel:** Website
- Timeline:**
 - 8/24 v1 ready for review
 - 9/4 v2 ready for review
 - 9/11 design approved
 - 9/28 launch page
- Stakeholders:**
 - Kat Mooney (approver)
 - Jennifer Lu (reviewer, project manager)
 - Ray Brooks (design)
- Approval process:**
 - v1 review: Jennifer Lu
 - v2 review: Kat Mooney
 - Design approved: Kat Mooney

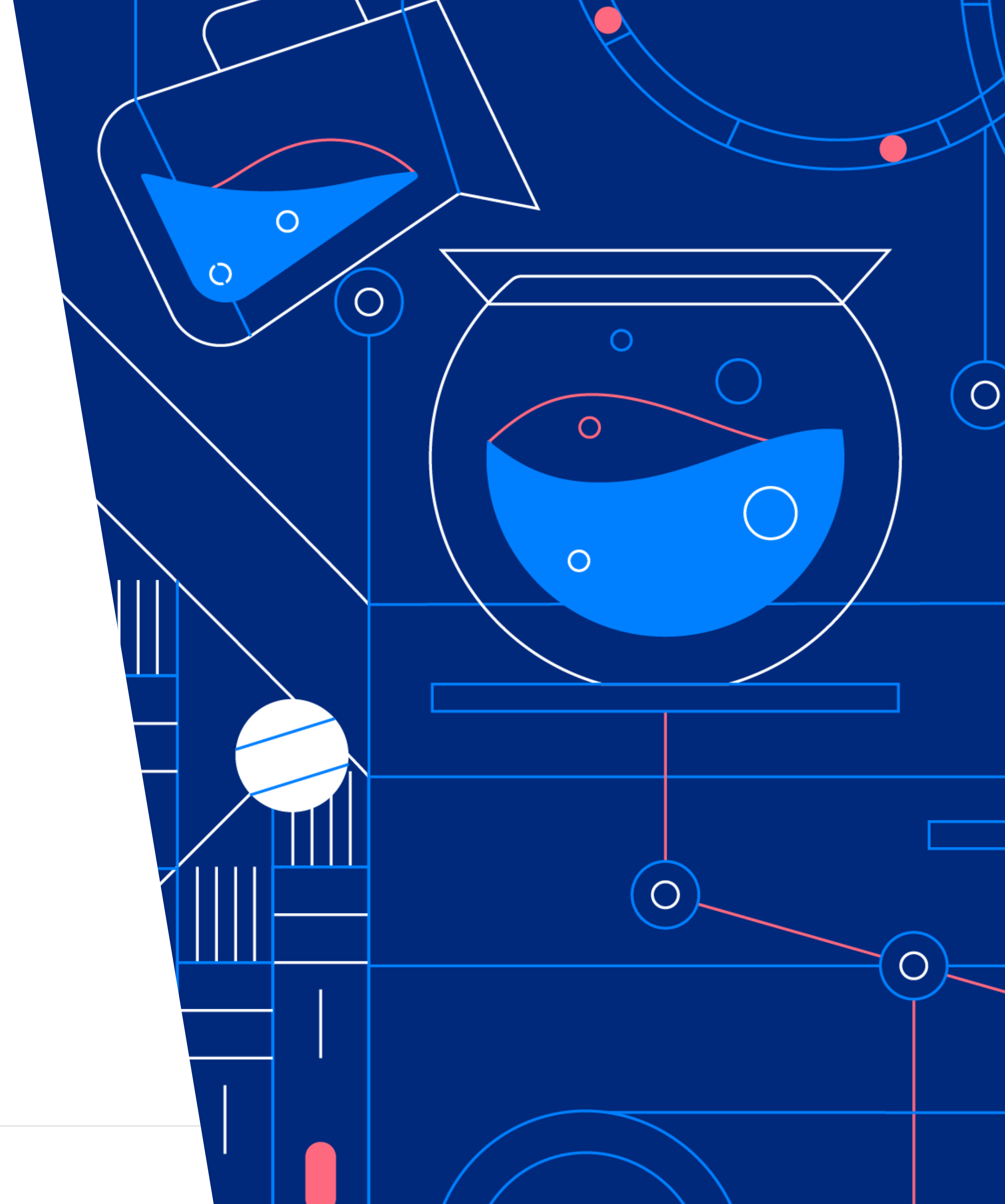
At the bottom, there is a 'Write a comment...' field and a 'Followers' section with several user avatars and a '+ Following' button.

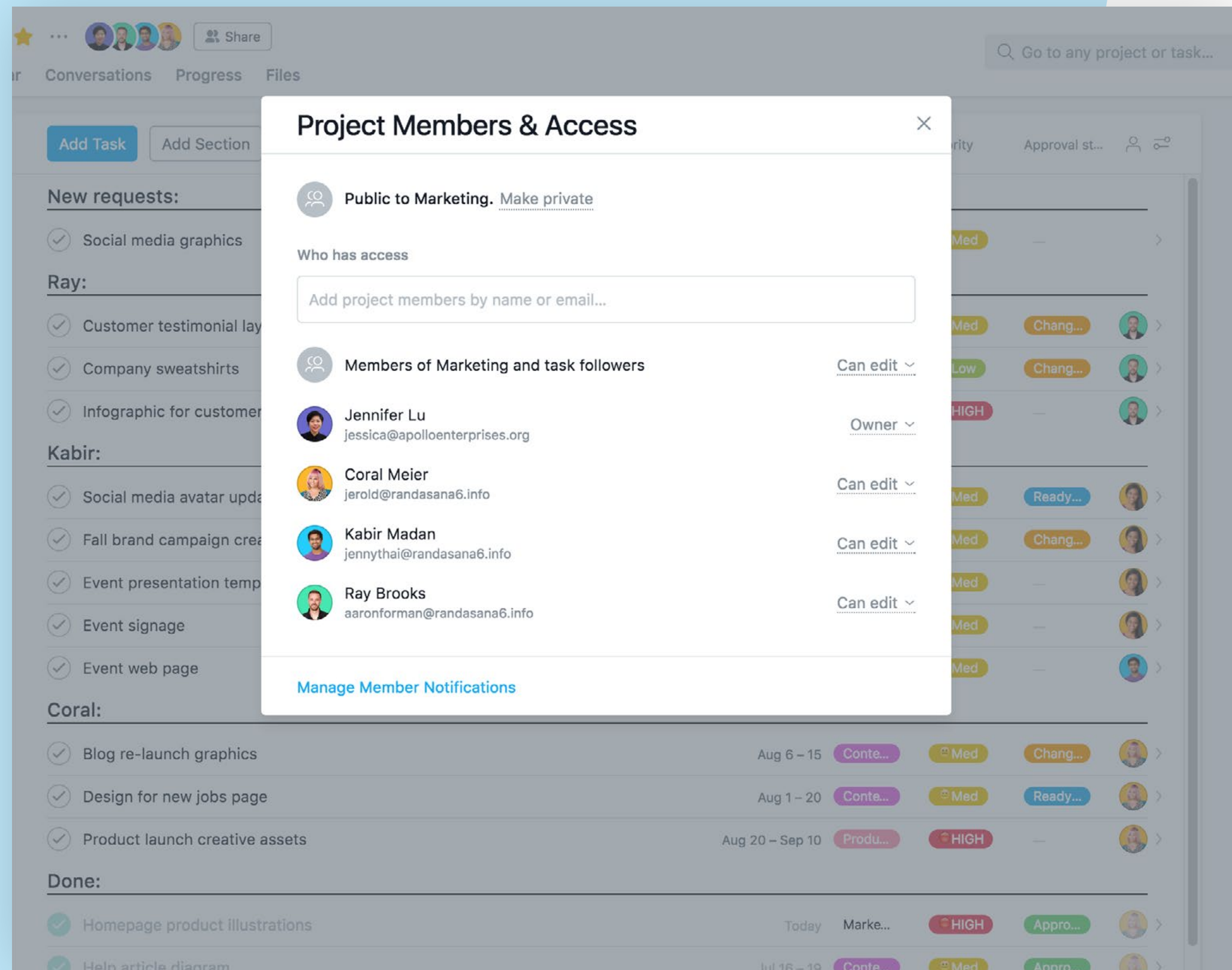
If you're using a web form, you can create required fields for this information. Or if you're using a template task in your requests project, you can specify the required information in the task description.

Finally, don't forget to let everyone know where and how they need to submit marketing requests for your team—whether via a web form or a task in your requests project in Asana—moving forward. One way to make sure teams follow your chosen process is to make it clear that any requests submitted through another channel and not added to your requests project in Asana will not be worked on.

Designate one person to manage requests

Once you've created your work requests project, make sure you've designated someone to be in charge of it so that requests get prioritized and assigned promptly. For smaller marketing teams, this might be the program lead or manager. On larger teams, this might be a project manager or senior marketing producer. Either way, you need at least one person to monitor and manage incoming requests on a regular basis so nothing gets missed.





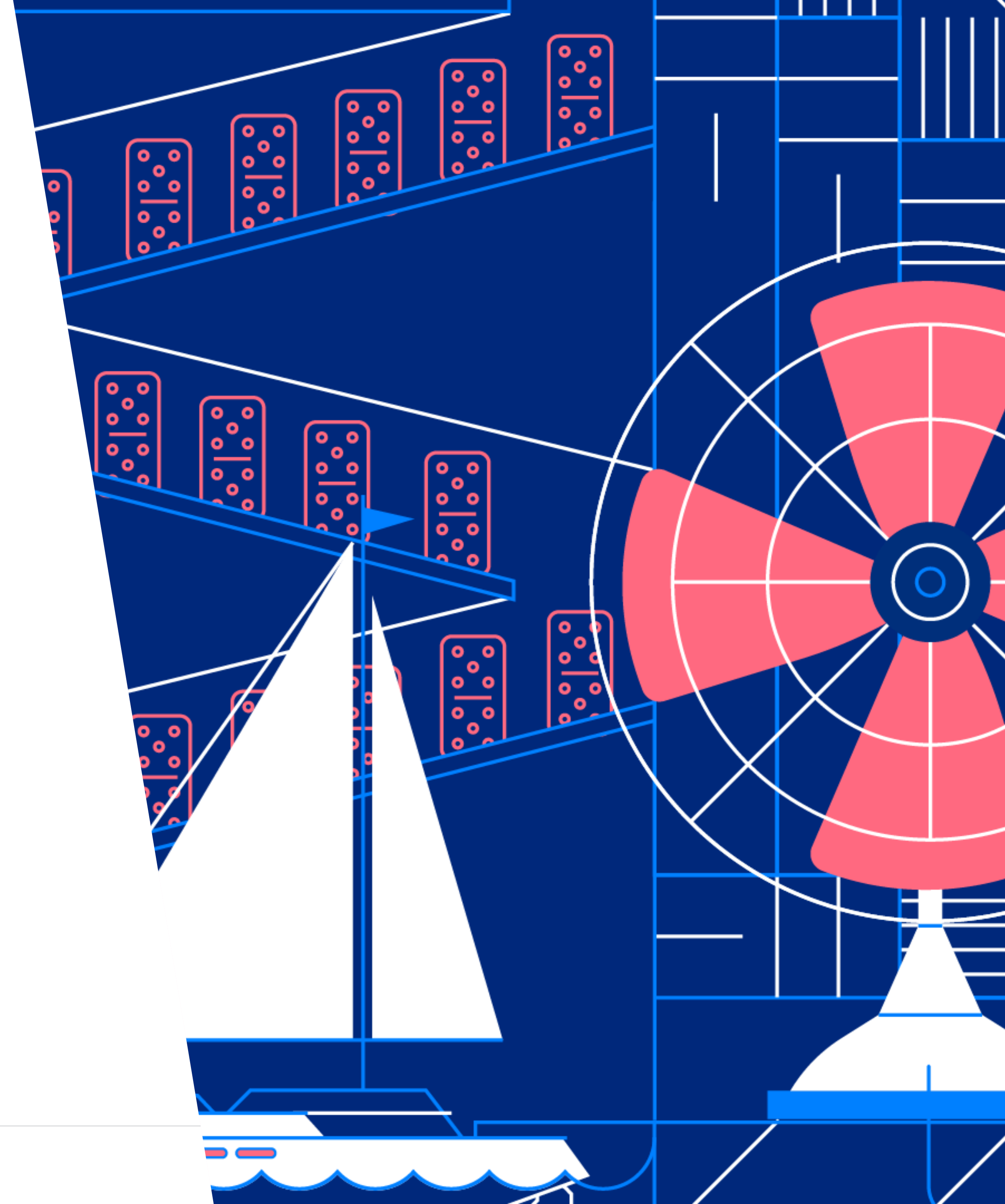
Tip: In Asana Premium, your marketing producer or program lead can also add start dates and dependencies to requests. This makes it clear when work should start in order to hit the deadline and if the task is waiting on other work to be completed first. To take it a step further, you can use Timeline to see if there are any timing conflicts and get a sense of each teammate's workload. Then you can adjust request dates and assignees so work stays on track.

“We have over a hundred creative requests to deal with at any given time, for everything from product packaging to digital content for our partners. Tracking all requests in Asana lets us make sure our designers are focused on where they're most needed, and enables easy communication with context to manage stakeholder expectations.”

-ANDREW MARKUS, CREATIVE DESIGN MANAGER,
ROKU

Manage feedback and approvals together

On many marketing teams, requesting work and reviewing it are often two separate processes. For instance, your events manager might request a design for a new registration site in your creative requests project and then send feedback directly to the designer over chat a few weeks later. If there are multiple rounds of reviews and different approvers, next steps can quickly become confusing because feedback is in different places, it isn't clear which feedback has been incorporated, and who's seen which version. And when you're managing a lot of requests—whether tens or hundreds—it gets even more chaotic.



✓ Completed

Homepage product illustrations

Assigned To: Coral Meier | Due Date: Today

Team requesting: Marketing

Priority: HIGH

Approval stage: Approved

Designer: Coral

- Timeline:**
 - 7/2 v1 ready for review
 - 7/11 v2 ready for review
 - 7/20 illustrations approved
 - 7/27 QA new illustrations
 - 8/3 new illustrations live on homepage
- Approval process:**
 - v1 review: Jennifer Lu
 - v2 review: Kat Mooney
 - Design approved: Kat Mooney

Creative requests Done

[Feedback] v1 of illustrations Jul 4

[Feedback] v2 of illustrations Jul 18

To keep up with everyone's feedback and ensure reviews don't spiral out of control, it's important to unify your request process with your approval process. Because the approval process should be defined when requests are first submitted (as mentioned in step 2 above), you'll be part of the way there already.

Next, organize all relevant discussions and notes (from design critiques, for example) as subtasks of the original work request. Doing so gives the task assignee, like your designer, the full context that they need to update work for any given request, and reviewers can quickly get up to speed on where things left off from a previous design iteration.

To make it clear where a request stands in the review process, track the approval stage directly on the task with custom fields. This way, it's clear when work is ready to review or be approved and no one assumes something is final, only to find out a few days later that it actually isn't.

HOW TO MANAGE FEEDBACK AND APPROVALS IN ASANA:

- Once your teammate, such as a designer or copywriter, has completed their work for the task, they update the approval stage custom field to “Ready for Review.”
- Then they’ll reassign the task to the first reviewer (if there are multiple review rounds) or the approver (if only one review round) so they can review the work.
- After the work has been reviewed, the approver updates the custom field to “Changes Needed” if updates need to be made or “Approved” if it’s ready to go.
- The approver reassigns the task back to your teammate so they can update the work based on feedback or complete the task so everyone knows it’s done.

Tip: In Asana Premium, you can use the approval stage custom field you added to your marketing requests project in step 1 to track task progress and easily see where a specific request stands.

Bobbi Brown

MANAGING THE DETAILS: BOBBI BROWN CRUSHES

GLOBAL MARKETING CAMPAIGNS WITH ASANA

“With Asana, I am able to map out steps in the production process at a more granular level, such as when design layout needs to go to the online team, when we expect feedback, and so on,” Andrew Chin, Creative Project Manager at Bobbi Brown, says.

For Andrew, the success of a global marketing campaign depends on a ton of tiny details coming together to create something magnificent. He

tracks all of these important details in Asana using custom fields—status, type of launch, and team, to name a few—which are built into the project template he uses. Everything is also color-coded so team members can easily see if a project is waiting on an asset, on hold, or complete. This at-a-glance visibility helps provide accountability as well as the ability to quickly see changes and updates.

[Read the full story](#)

Report on the status of work

Specific requests for marketing assets, like a new homepage design or product video, are usually part of a larger marketing strategy with specific business goals. As a result, senior leaders and marketing managers will want to know how work is progressing to ensure big initiatives launch on time.

But looking through each task in your requests project to see how it's progressing isn't a productive use of time, nor does it give you an overview of all requests—what's on track, at risk, or blocked. Luckily, there's an efficient way to see progress for all your requests in Asana.

Refine Search Save Report

Coral Meier

- ✓ Homepage product illustrations Creative r... Today >
- ✓ Help article diagram Creative r... Jul 16 – 19 >
- ✓ Product launch creative assets Creative r... Aug 20 – Sep 10 >
- ✓ Design for new jobs page Creative r... Aug 1 – 20 >
- ✓ Blog re-launch graphics Creative r... Aug 6 – 15 >

Kabir Madan

- ✓ Event web page Creative r... 1 Aug 27 – Sep 11 >
- ✓ Fall campaign landing page < Fall brand campaign creative assets Aug 30 >
- ✓ Design fall campaign ads < Fall brand campaign creative assets Aug 30 >

Ray Brooks

- ✓ Infographic for customer satisfaction stats Creative r... Aug 29 – Sep 4 >
- ✓ Customer testimonial layout designs Creative r... 1 Aug 1 – 10 >
- ✓ Company sweatshirts Creative r... Aug 20 >

Now that you're tracking all your marketing requests in one project, as well as their priority and approval stage with custom fields, you can easily run custom Advanced Search reports to see how key work is progressing and what each teammate is working on.

For example, you can run a report based on the approval stage custom field within your creative requests project. This lets you see what work is ready for review or needs changes made before it's approved. From this report, you can then click into a specific request for more context or to take an action on the task.

Tip: In Asana Premium, you can use Advanced Search to create custom reports based on criteria you specify, such as priority, approval stage, assignee, and due date.

YOU CAN RUN REPORTS IN ASANA:

- By approval stage: See where key work stands in the review process and what work is waiting on your feedback.
- Requests that are overdue: Dig into why deadlines were missed and help get work back on track so it isn't delayed even more.
- By teammate: See all the assets your team is working on to get a better understanding of each person's bandwidth.
- Requests due this week: Help set top priorities for your team and determine if it's likely requests will be completed on time.

From initial request to final approval

To successfully execute your marketing activities, from campaigns to events, your team needs to deliver creative and assets on time and on budget. By implementing a scalable marketing request and production process in Asana, you can prioritize work against business goals, manage requests from start to finish, report on progress to senior leadership, and give your team the information they need to do their best work. It's a win-win for everyone.

Ready to manage your marketing requests process in Asana?

[Try it now](#)

[See it in action first](#)