

The Definitive Guide to Online Proofing



Table of contents

What is Online Proofing	3
Five Signs Your Marketing Team Needs Online Proofing	5
The Hidden (And Not So Hidden) Costs of a Weak Review and Approval Process for Creative Collaboration	8
The Three Creative Marketing Metrics Every Marketing Leader Should Track	13
Why Online Proofing is the Quickest Win in MarTech	21
The Business Case for Online Proofing	26
A Checklist for Choosing the Right Online Proofing Solution	31
Conclusion	34

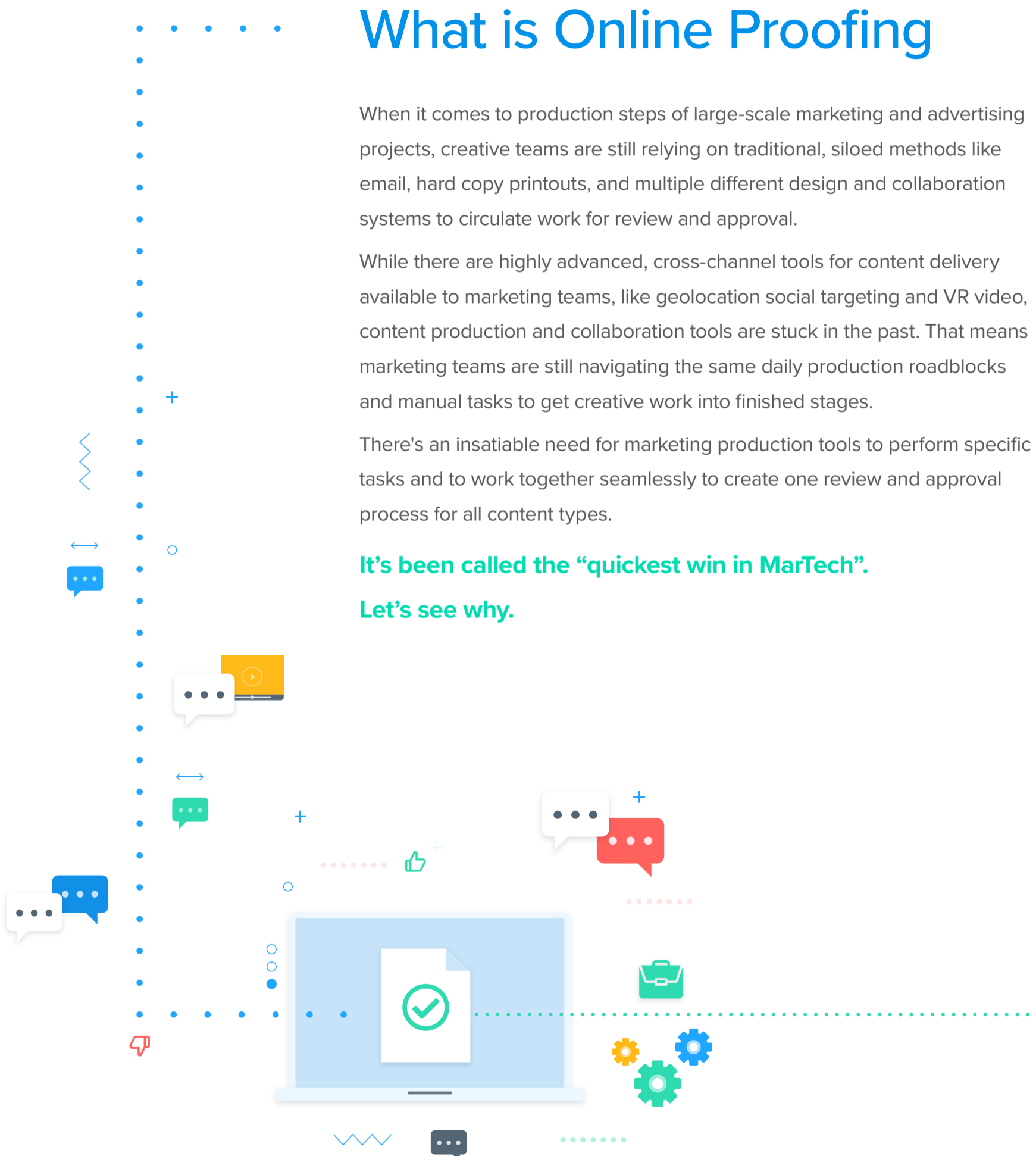
What is Online Proofing

When it comes to production steps of large-scale marketing and advertising projects, creative teams are still relying on traditional, siloed methods like email, hard copy printouts, and multiple different design and collaboration systems to circulate work for review and approval.

While there are highly advanced, cross-channel tools for content delivery available to marketing teams, like geolocation social targeting and VR video, content production and collaboration tools are stuck in the past. That means marketing teams are still navigating the same daily production roadblocks and manual tasks to get creative work into finished stages.

There's an insatiable need for marketing production tools to perform specific tasks and to work together seamlessly to create one review and approval process for all content types.

**It's been called the "quickest win in MarTech".
Let's see why.**



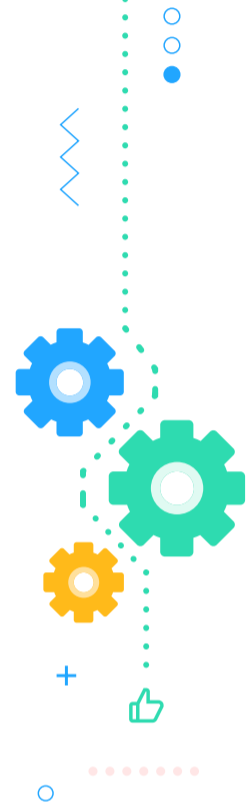
Enter online proofing

Online proofing streamlines the tasks of providing feedback throughout the creative process using:

- Proofs that can be used regardless of content type, creative producers, or clients involved.
- Multi-format markup tools and intuitive commenting capabilities that work seamlessly within an existing (and future) marketing stack.
- Automation of manual, repetitive tasks like review notifications, version tracking,

Online proofing results in more transparency and context as project evolve, which results in creative assets being delivered faster, with better quality. It's not just another marketing tool that'll muddy up your marketing tech stack, require your team to drastically change their process flow and cause an integration headache for your IT and analytics teams. It's a pluggable solution for deep-rooted production challenges that can redefine how creative projects are managed without creating more work or workarounds.

In this ebook, we'll cover the main indicators that your creative or marketing team might be ready for an online proofing solution, the basics of using online proofing, and the areas of ROI your team could expect from using online proofing to facilitate your creative process.





Signs Your Marketing Team Needs Online Proofing

01 — Lack of feedback from stakeholders

For designers and project managers alike, prompt feedback is what keeps the review process moving along toward improvements and decisions.

The average employee receives over 120 emails per day. This clear case of email overload presents a challenge - how can team members efficiently review colleagues feedback, ensuring comments are seen, and duplicate (or conflicting) feedback is avoided?

No issue with timely feedback? Great. How about the quality of the feedback, as it relates to keeping proofs moving along?

02 — Too much ambiguous and ineffective feedback

Feedback that lacks context and specificity requires additional email and hallway conversations for clarification.

Online proofing makes it easy for your team members to provide timely, effective feedback. Reviewers are provided a secure link to proofs, with integrated annotation and commenting tools.

Reviewers are able to markup content and designs while providing specific, context-rich comments, as well as engaging other users on their feedback. This feedback becomes action items, keeping proofs moving along.

Providing a method for effective feedback is online proofing's most tangible and immediate benefit. Without it, you could also be experiencing other symptoms of missed deadlines.

03 — Version sprawl

A weak process for collecting feedback can create ripple effects throughout the delivery process. One of these ripple effects is version sprawl - the churning out of new versions for feedback that wasn't supported or challenged (or in most cases, even seen by other team members). Pretty soon, every project has a version numbered in double digits.

Online proofing not only improves the quality of feedback being provided, but it also catalogs the feedback across versions. Specifically, it helps manage versions as they are created, as well as provides a comparison tool to view versions side by side, a proof-positive way to ensure changes are being made. This can drastically cut down on versions required for project completion.

The ineffective collection and management and feedback can have big impacts on the timely delivery of new creative content. But what about the challenges that can cause re-work, after you've met a deadline? Are those situations even worse than missing a deadline?

Beyond common spelling errors that can wreck an ad or design, there are other signs that your marketing team needs online proofing.

04 — Compliance is an everyday requirement

For many industries, marketing content frequently needs to meet strict compliance requirements. These can be both internally and externally mandated and can include, but not be limited to the following:

- Brand compliance
- Disclosures
- Comparative claims
- Special offers
- Substantiation
- Sweepstakes and contests
- Marketing to children
- Collection and use of marketing data

The risks of noncompliance can be significant - customer confidence lost, financial penalties and legal liabilities, to name a few. This is all before any re-work, often an unrecoverable cost in the agency world is required.

This isn't only about getting the right stakeholders involved, but also requires proof-positive, probative information on the review process for these materials.

Online proofing helps marketing teams demonstrate the control they have over their review and approval process in a few, integrated ways. First, all comments are logged and archived, tied to specific versions of each proof. Second, the teams associated with each project are notified regularly (daily, hourly or instantly) of all new feedback, keeping everyone on the same page. Also, Ziflow supports rigorous roles-based access, which can limit which team members can see particular proofs, and what they can do with them.

Most of the signs so far have to deal with intra-organizational processes that Ziflow can help optimize, such as centralizing feedback, managing versions and helping with compliance requirements.

05 — Lack of Coordination with External Teams

If your creative process includes external team members (partners, vendors, clients or agencies, for example), coordinating with them can pose challenges in keeping marketing projects moving. Your vendor might use Skype and you use Slack. You rely on Basecamp, they use Asana. It's not just technology, it's also their processes that might be different.

When adding more people to a process, a solid tactic is to reduce the variables across those team members. Specific to online proofing, this means ensuring everyone is reviewing the right content at the right time, and with the right information.

When it comes to collaborating with external teams, online proofing can help reduce the variables which may cause project bottlenecks.

By providing a consistent presentation of the content being reviewed, you're guaranteed that everyone is reviewing the right asset, regardless of their location or device. It also ensures that everyone has the same guidance, in this case, past versions and their comments, to understand how you reached the current state.

The Hidden (And Not So Hidden) Costs of a Weak Review and Approval Process for Creative Collaboration

Given the multitude of marketing channels that creative content is being produced for today, the impact of missed deadlines and other factors within an inefficient review and approval processes are not hard to identify.

Delays ricochet through creative production timelines and are felt acutely by your creative team, your project managers, and if you work in the agency world, your clients.

What's less obvious—and often more insidious—is how those poor proofing and review procedures impact total project costs and overhead. When you're struggling to get agreement on project deliverables and get them out the door to clients on time, negative cost consequences abound throughout the organization.

Based on feedback from our customers on the issues they faced prior to implementing online proofing, there are four primary areas of which to monitor for unnecessary costs due to poor review and approval processes.





Your Team is Spending Less Time on Value-Added Tasks

If your review and approval processes for creative production are sub-optimal, it eats into everyone's time. Instead of time spent on the actual creative work, valuable hours and brainpower across the team end up focused on:

- **Chasing down approvals and finding the most current revisions and drafts** across multiple locations, systems, and communication threads. Slowdowns occur due to a team-wide inability to find the feedback, files and supporting content they need to make decisions that move production along.
- **Reworking creative documents and file formats that weren't properly updated or exported the first time**, due to poor communication channels, missed revisions and feedback, or incomplete project briefs. Teams that get bogged down in the technical weeds of re-formatting documents for sharing or fixing file incompatibilities between design, markup and collaboration tools end up spending less time executive strategic work.
- **Replying to email chains and answering questions** that could be resolved with automated processes and document storage.

You're Seeing an Increase in Client Costs and Lost Revenue



Sometimes, you can shield your clients (internal and external) from internal process inefficiencies. More often than not, though, it results in missed deadlines, a quality of work that varies from an initial pitch or project scope, and poor client relationships with project stakeholders. Not only will your clients start to feel the heat (or starting feeling like you've gone cold without regular updates and progress) due to a weak review and approval processes, but you'll start feeling the heat on the project budget due to:

- **Lost Revenue for delayed deliverables:**

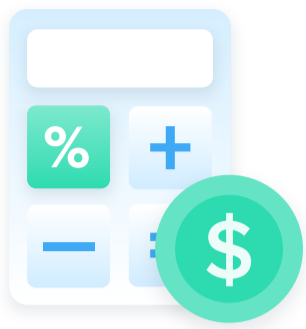
Consistently missing deliverable deadlines because of behind-the-scenes chaos means you're likely making up for messy project management in discounts or reduced rates for future work. Your account management team will also likely spend more time and manpower making up for client dissatisfaction if issues get sent up the chain of command.

- **Lost revenue from broken contracts:**

Gaining a reputation for missing deadlines or poorly managing client projects affects the way that customers see your brand. Current clients may choose not to renew contracts due to perceived difficulty with output or work that fails to meet standards upon initial or first review. Often, your client success team may not even be aware of revenue that is lost when unimpressed clients or collaborators don't recommend your team to their colleagues for potential opportunities.

- **Variable vendor costs:**

When project scopes change or revisions come in outside of anticipated deadlines from your team, the vendors and third-party collaborators you use to complete projects will be stuck holding the bag when it comes to completing last-minute changes and request. From faster turn-around for digital production to rush printing and shipping costs, your vendors will start charging more for time-sensitive orders.



You're Absorbing Redundant Costs in Your MarTech Stack

Disconnected review and approval processes lead to a very crowded field of MarTech tools across your creative team. Often, the full scale of just how many creative collaboration tools are used throughout your organization doesn't become apparent until you do a full sweep of what everyone's leaning on to accomplish day-to-day tasks. Usually, you'll uncover:

- **Overlapping implementation costs for the same systems.**
When teams accomplish their project steps in isolation, you'll find that each group has taken matters into their own hands and purchases multiple instances of the same types of tools and systems. Shadow IT includes ad-hoc deployments of Dropbox and Google Drive and side-by-side usage of Basecamp and Asana, doubling new solution costs for the same function.
- **Extraneous subscription, licensing, service, and storage costs.**
When you have redundant, your technology budget also starts ballooning with an extraneous subscription, licensing and storage costs. Even small monthly fees for simple SaaS tools, like multiple types of corporate chat tools, add up quickly when multiplied through the organization.
- **Increased integration costs between tools.**
Deploying point solutions for each specific task in the creative review timeline can mean a quick fix for a pressing inefficiency, but it also kicks the cost can down the line for your organization's technology team. When your team needs to accomplish strategic tasks, such as pulling analytics across content types or campaigns, your IT team will be stuck with an integration nightmare. Getting disconnected systems to pass information back and forth—or trying bringing new solutions into a piecemeal system architecture—requires additional time, effort, and often more tools and APIs. If you're a small shop, you'll be stuck with new costs for outsourcing these integrations or IT service projects.

You're Spending More on Workforce Costs

The lack of time management controls, lack of client satisfaction, and lack of integrative tools also contribute to an overall burden on your workforce. Without controls on your approval procedures, you'll end up with additional labor costs that cut into projected revenue and impact your headcount due to:



- **Overtime costs:** Poorly-controlled review processes with stakeholders bring in unanticipated revisions that can keep your team working around the clock to meet deadlines. Long hours are pretty common in marketing, but it's also a recipe for paying overtime hours you might not have factored into the project budget or your headcount.
- **Premium freelance fees:** Similarly, last-minute requests or rework for contracted writers, designers, videographers, strategists means you'll often be hit with premium contractor fees for rush work. You also might miss out working with preferred or in-demand contractors who don't have the bandwidth to take on last-minute projects or may refuse potential work due to the perceived chaos of working with your team.
- **Employee churn:** Employees that end up spending most of their time on completing project rework, accomplishing repeatable manual tasks, or chasing down stakeholders due to inefficient project management will start to feel burned out. You'll begin to see turnover for agencies or teams that can promise a focus on client work, not communication. Turnover means pouring additional resources into new employee prospecting and hiring, onboarding, training, and development instead of retaining employees through appealing operations and day-to-day project support.

From the costs of chasing down approvals to lost projects, poor review procedures have a wide-reaching impact on your agency or team's operating costs and revenue streams.

The Three Creative Marketing Metrics Every Marketing Leader Should Track

Today, every discipline in marketing has core KPIs that need to be monitored. From impressions and conversion rates to customer acquisition costs, it all adds up to influence how you form your strategy, campaigns, and even your teams.

What is often missing from these views are creative production metrics: the measurement of production steps and tasks it takes to produce content for the various marketing channels in use today.

This is largely due to the fact that producing materials is more like a fire hose of needs that creative teams are always trying to keep up with. It's tough to see the forest for the trees and track how day-to-day tasks impact your project's and team's bottom line when it's raining revisions and changing priorities.

Yet, creative production should be measured just as closely as your core marketing metrics, especially considering the costs involved - people, materials, and especially opportunity costs.

Based on discussions with our customers, in both the agency and brand setting, here are the three key metrics that every creative professional (and creative project managers) should have on demand, in real-time:



01 —

Production Turnaround Time

Projected production timelines and actual creative production timelines can be two wildly different things. You may know, on average, how long it takes your team to complete certain types of projects, but within that, you should be tracking:

- **Initial Creative Production Timelines:** How long does it take your team to produce a first draft for review, from brainstorm to copy to design to layout?
- **Time to “First Touch”:** How long does it take your reviewers to actually first engage with a new review request?
- **Internal and External Reviewer Turnaround Timelines:** How long does it take your internal team members to review proofs and provide all feedback on creative content? How long does it take your clients to send their feedback and sign off that revisions are ready to be made into a new draft?
- **Total Time to Completion:** Adding these steps together, what’s the total product lifecycle for your creative team?

Why Track Production Timelines

Primarily, production timelines dictate your team’s overall capacity at any given time. It helps you identify the why of process bottlenecks rather than just identifying where they happen. With this knowledge, you can:

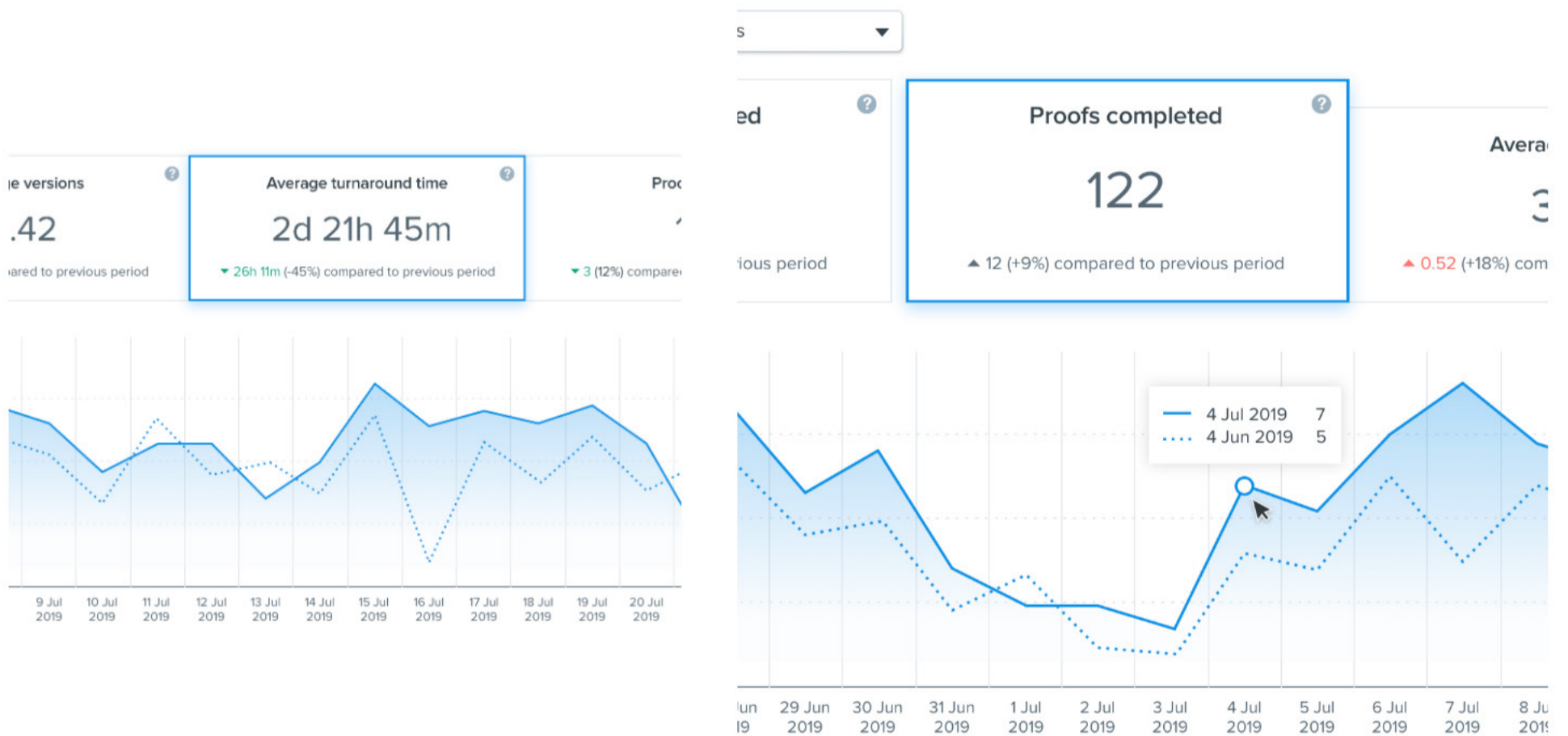
- Ensure that the timelines you’re quoting clients lining up with the reality of your team’s output,
- Plan workload for scale and measure potential new business against internal resources and capacity planning.
- Understand which areas of business require the investment of additional resources (headcount, technology, process automation) to complete projects on time.

However, there’s another important aspect to turnaround time that shouldn’t be overlooked, and that’s whether or not the complexity of the tools used, or the processes followed, have caused turnaround times to drag. Sifting through emails for feedback is one culprit, hard-to-use or feature incomplete proofing tools is another.

How Can You Track Production Turnaround Timelines?

Your enterprise-ready online proofing system should be able to identify the project start and approval time spans for content types, or at least provide that data for extraction. In the absence of a centralized review and approval system, you can combine data points such as:

- The number of projects you can efficiently work through within a given amount of time (by week, quarter or billing cycle.)
- The number of email follow-ups, reminders or Boomerangs sent across by individual team members or groups to collaborate and gather feedback.
- History of revision timestamps within Google Docs or other content management and collaboration systems.
- How long are emails sitting in team members’ inboxes unread.
- The average time it takes a reviewer to view a creative piece from that time it was sent.



Tracking how the average turnaround time for actionable tasks and the frequency of missed deadlines fluctuates over time is critical to understanding your team's capacity.

Pulling these metrics manually can be a full-time job in and of itself. Instead, a capable online proofing system can automate this analysis by tracking project progress with notifications, access controls, and engagement rates with content proofs and comments.

02 —

The Total Volume of Project Versions

Measuring project completion timelines may track your project velocity, but the number of versions within those timelines quickly show where bottlenecks live.

This includes:

- **Concepting:** How many concepts did you initially pitch to a client?
- **Initial Draft:** How many attempts does it take to get a project ready for review?
- **Revisions/Comments:** Are later drafts still generating a lot of comments and change requests, potentially veering project scope off course?
- **Final Version(s):** How long does it take creative teams and stakeholders to sign off on a finished product? Is late-breaking feedback often coming from left field? If so, why?

Why Track Version Counts?

Looking at project revisions across a variety of dimensions (comparing teams, clients, end-result media form, etc.) can give you another key insight into capacity planning. Tracking revision effort helps to determine:

- If project scopes and timelines are well-defined with all parties from the start of a project (requiring fewer revisions.)
- If action items are dispersed accurately and clearly across team members (requiring fewer comments and follow-up)
- Which creative teams that run into the most challenges implementing feedback, either due to incomplete review or poor internal collaboration abilities (requiring more comments and feedback later in the game)
- Which stakeholders provide incomplete or feedback throughout the review process (requiring more rework.)
- In the agency world, which clients tend to provide incomplete project scopes or changing requirements (often requiring your team to start all over.)

Getting project drafts right do hinge on the abilities of your creative team in some regard, but it's also a broader reflection of how effective feedback can be given, understood, and implemented at every stage of the creation and revision process.

It helps you identify if and where quality needs to be baked into the creative process earlier and faster.

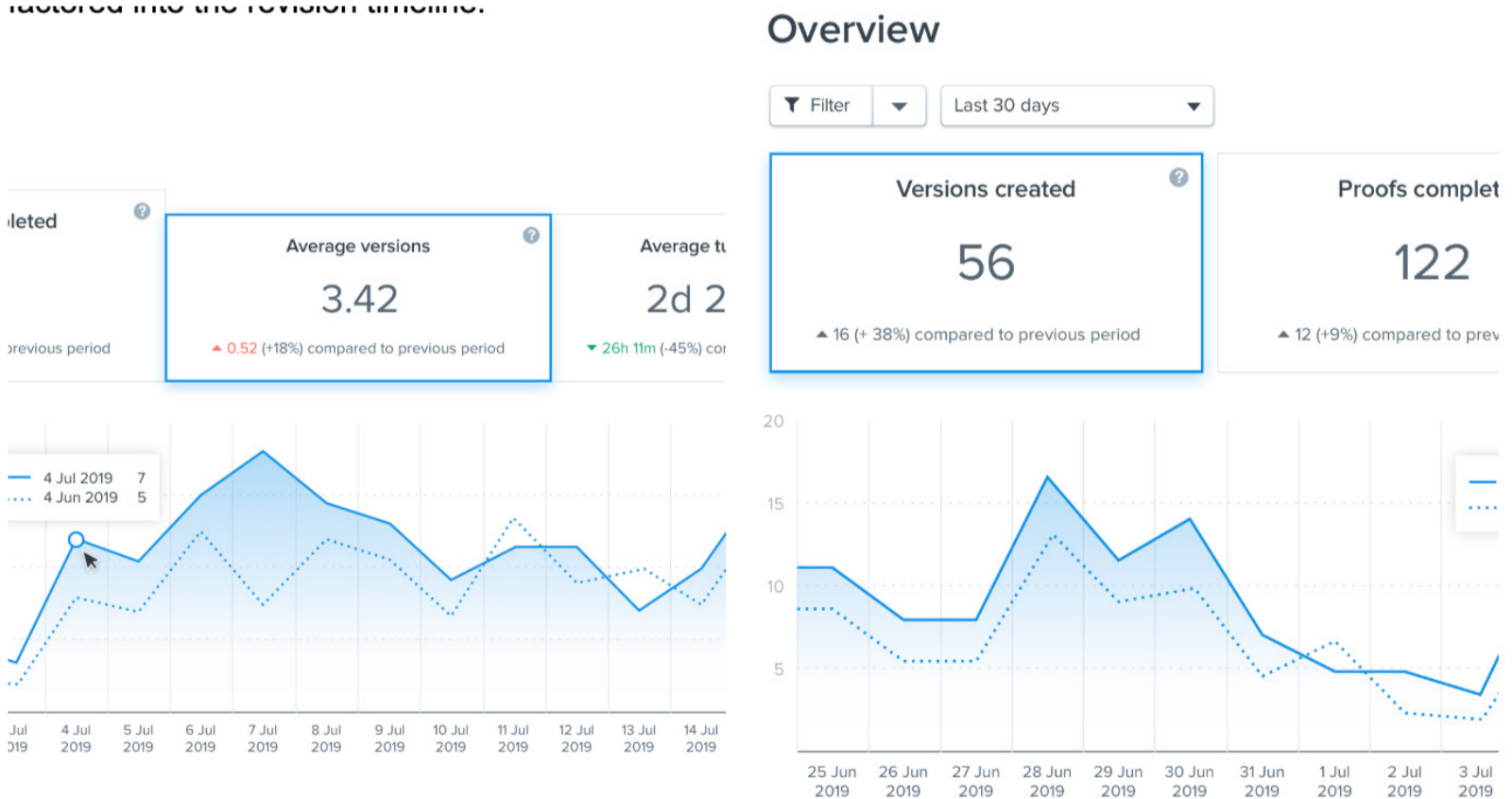
Measuring Version Counts

Measuring the number of project revisions goes beyond just adding up all the different named versions of project files. It's really a post-mortem project measure of total revision effort, including:

- The number of concepts that were pitched to a client or stakeholder.
- How many times a reviewer provided feedback on an earlier version because they didn't have the most current version.
- How many document merges your team had to do (or manually update) across different content versions.
- The number of emails or chat logs required to send project versions for review.
- The total number of versions created before it is "Approved."

Attempting to measure project revisions by tallying up email communication and file shares is basically a wild goose chase: you'll usually end up discovering that feedback was often provided against superseded versions, or that someone worked on a file on a local drive to make changes that weren't shared with the group or factored into the revision timeline.

factored into the revision timeline.



Measuring version creation with online proofing can help expose the most feedback-intensive projects or periods for your team.

This can be overcome with an online proofing system that offers robust version management and embedded markups and comments, so you're not having to hunt down all the ways revisions are communicated and implemented.

03 —

Process Management Costs

Beyond production timelines and revision volume, the cost of managing the creative process is also ripe for improvement. The time put into the manual steps of managing a creative project to completion goes beyond headcount and salaries and can be less straightforward to assess. It includes the full lifecycle of the project, including:

- **Project Management:** How many times are project managers creating and sending emails to notify team members that projects are ready for review or new versions?
- **Client Management:** How many reminder emails and IMs getting people to review the content.
- **Document Management:** How often are project managers toggling between systems to keep projects up to do, ensure revisions are made and comparing files and versions because they aren't in one place?

Why Track Process Management Costs?

It's simple: Any time wasted, administrative or otherwise, is money wasted. Project management is a delicate balance between high-value work like setting and maintaining priorities and ensuring smooth communication and basic tasks that come out of those needs, like scheduling, file sharing, and deadline setting.

By tracking the full-scale of this work, project management teams can:

- Identify routine work that can be automated with a better, centralized review and approval system.
- Free up team members' time to work on more impactful work, such as generating new business or preparing creative briefs.
- Take low-to-no-value tasks out of the creative supply chain entirely.

How to Measure Process Management

Project oversight is a bit harder to quantify in numbers, but the time sinks are clearly visible to those who are hands-on in ensuring projects move along a set path. Start by reviewing:

- How many emails and chats need to be sent to notify team members that projects are ready for review?
- How many hours are spent on assigning tasks and follow-up with creative team members on their work?
- How many systems are used to manually collecting and collating feedback into one place for revision, and what's the total cost of redundant systems?
- How many hours are spent updating statuses within project management systems, reports, or project documents?

Many of the extraneous project management time costs can be solved with a centralized proofing and review system that cuts down on the back and forth facilitation of communication, review, and revisions. Consider where these time costs live and how consolidated technology can ease the routine tasks your project management encounters across project types and clients.



Understand the true health of your review processes with a comprehensive metrics dashboard.



Making the Case for Creative Marketing Metrics

Determining the average numbers for each of these creative marketing metrics depends on the type of organization and team size. How your team stacks up is less about industry averages and more about establishing a historical baseline of output and the right measures of progress for your specific team.

The key is to implement a system that can track and identify areas for improvement without requiring your team to stop the high-value work they're already doing to gather those analytics.

Why Online Proofing is the Quickest Win in MarTech

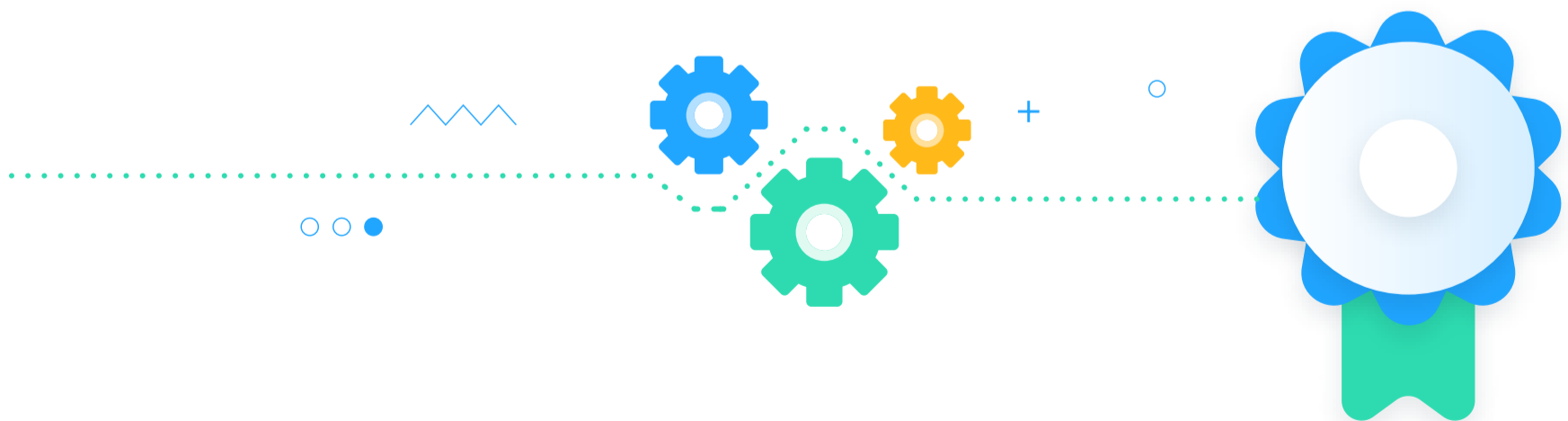
So you've figured out the major bottlenecks in your creative production workflows and how much those delays might be costing you. Why is online proofing the best solution over the other options in a wide range of technologies (MarTech) organizations need to create relevant, personalized, multi-channel content?

Most MarTech stacks that companies employ help them to manage their marketing operations in full — everything from customer relationship management to email marketing and data collection. The key to a successful marketing stack is investing in technologies that provide coverage of your needs without too much overlap between the different services that you use. No single solution exists to realistically cover all tasks that a marketing department handles, which makes a combination of solutions necessary.

While companies continue to increase their MarTech spend and add tools to their stacks, many aren't able to keep up with the evolution of the space and demonstrate clear-cut wins for their team and management.

How can you demonstrate a quick win when it comes to your MarTech stack? Look no further than the foundation of any compelling marketing campaign—the creative work itself—and consider the effort that goes into producing that work. Streamlining that process carries a tremendous ROI benefit. Why? It's fairly easy to do with online proofing over other options.

Let's dig into why online proofing is the quickest win in your MarTech stack.



Online Proofing Delivers Immediate ROI

Most companies don't fully understand the value that a proofing solution delivers until they actually start using one. In fact, 53% of marketers surveyed in our annual report admitted to not having any consistent (much less enforced) review and approval processes.

An enterprise online proofing solution delivers immediate return on investment in a number of different ways.

Getting more subject matter experts and stakeholders

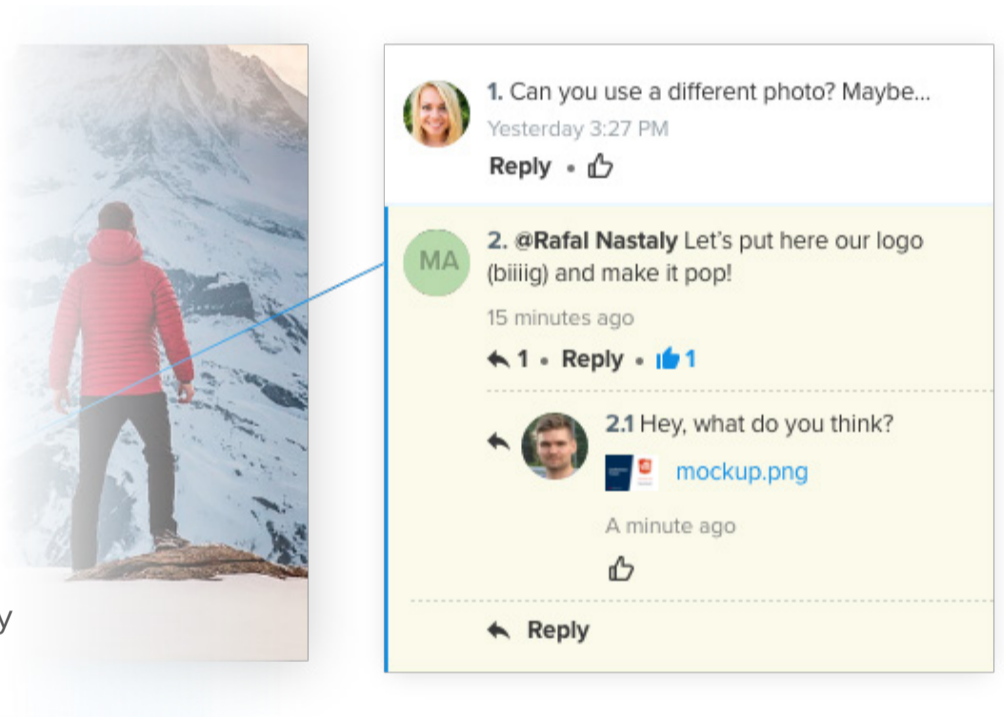
reliably involved in the review and approval process will lead to better end products that produce better results. A proofing solution will also save time on projects throughout your company as it facilitates a faster and more efficient approval process for every project.

Let's dig into how proofing solutions deliver immediate ROI to marketing teams:

Faster, more accurate content reviews and approvals. If you've been handling content approvals through email, you probably know how difficult it can be to manage that "process". Between managing emails, following up with every stakeholder, and trying to condense feedback into actionable revisions for your creative teams, an online proofing solution can save you a ton of time while improving the quality of the feedback that your team receives. In fact, our customers tell us that online proofing helps:

- Deliver projects 56% faster
- Avoid 30% of typical revisions required
- Reduce effort by as much as 59%

Improved collaboration leads to a better work product. Proofing solutions make it easier for your creative teams to collaborate, stakeholders, to review assets, and managers to oversee the process as a whole. The improvements to collaboration and project management will result in a better end-product for every piece you create.



A centralized system saves you time. Trying to manage proofing through email often leads to multiple email threads, disconnected feedback, and poor version control. Centralizing your proofing process in one online system will save you and reviewers time.

Automate time-consuming manual tasks. A proofing solution will help you to automate many tasks that a full-time employee would otherwise have to handle manually, resulting in saved time for important members of your team.

Examples of this include tasks sending email reminders, pushing review stages manually, attempting to calculate decision status, etc.

The image shows a configuration interface for a proofing stage. It is titled "Stage 1" with a dotted line underneath. There are four rows of configuration options, each with a label on the left and a dropdown menu on the right:

Label	Value
Trigger:	Immediately
Deadline:	+ 5 business days
Lock Stage:	Manual
Final Status Calculation:	All decisions

An enterprise online proofing solution will deliver immediate ROI for your marketing and creative teams and the benefits will reverberate throughout your organization.

Ease of Use Translates to Rapid Adoption

A primary concern when investing in a new solution for your MarTech stack is how easily it can be adopted by your teams. Other concerns include its fit within your existing processes and its ease of use and understanding. Complicated solutions mean slow adoption, additional training for your teams, and more hiccups along the way.

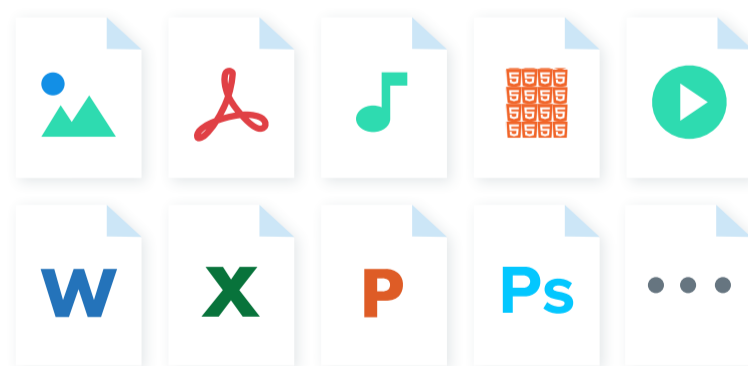
An online proofing solution that is simple to use and understand needs very little training for your teams and is intuitive to use. The majority of the training will need to be provided to managers who will manage projects that flow through the system, but even they won't need too much hand-holding as they learn to use most proofing solutions. For anyone that is tech-savvy, an online proofing solution should be easy to pick up and start using on day-one.

(Should be) Compatible with Existing and Future Buys

There are two ways to look at compatibility with your existing and future investments, as it relates to deploying online proofing in your organization.

First, any modern, enterprise-centric online proofing solution, will be compatible with all common media and file types in use by your creative team, ensuring that you can use the solution for an entire campaign.

For example, Ziflow supports hundreds of media and file types and adds to its supported list often. Wide-ranging support obviates the need to incorporate additional tools for one-off projects.



The second consideration is compatibility with existing and future tech investments. An enterprise online proofing solution will allow you to integrate, embed and extend your MarTech applications through APIs and webhooks. This not only solidifies online proofing's "quick win" potential, but it also strengthens your other MarTech investments.

Online Proofing Your Entire Organization

While your marketing department might deal with the most creative projects within your company and therefore find a proofing solution the most useful, you'll quickly find that there are uses for it throughout your organization.

Anytime that employees want to work together to produce internal or external documentation and may need approval from a variety of stakeholders, your proofing solution will come in handy. You can use Ziflow to make sure that next annual report is perfect before its sent out, get group feedback on a presentation before the next board meeting, or work with your legal teams to ensure compliance with regulations and laws that are relevant to your industry.

An online proofing solution isn't just a quick win for your MarTech stack but your organization as a whole.

A No-Brainer Addition

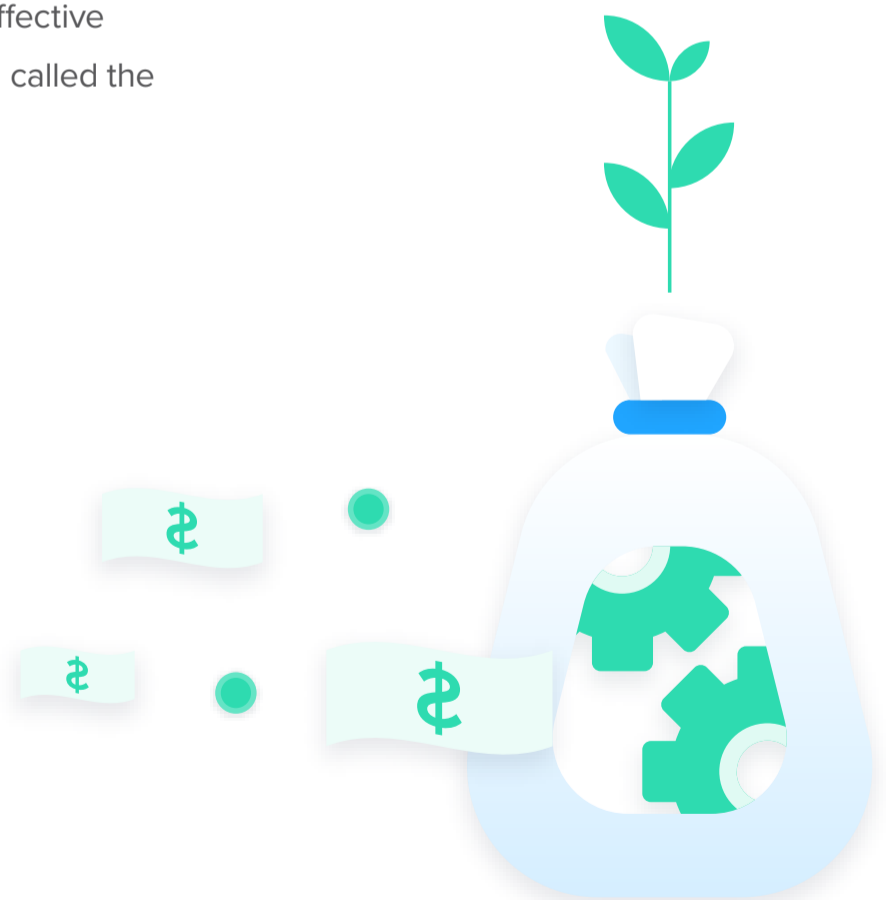
Online proofing is a modest investment that will return it's initial costs many times over for any company that produces creative content at scale. It does this by reducing challenges with manual review and approval processes, providing an easily-adopted method for collecting and implementing feedback, and working nicely with existing (and future) systems, all within days.

The Business Case for Online Proofing

Online proofing is fairly unique in the marketing technology landscape in that it can demonstrate, almost immediately, tangible cost savings and immediate ROI for increasing the effectiveness of review and approval processes, as it relates to marketing content. Acting as a consolidated presentation for feedback, an online proofing system reduces the time (and costs) associated with delivering content while improving the quality of the content being delivered.

The costly nature of many marketing technologies has often meant that they have been available only to the biggest brands and global enterprises. Online proofing on the other hand, when offered as a best of breed standalone offering, is accessible to organizations of all sizes - and has proven to be one of the most cost-effective components of the marketing technology stack. It's been called the "quickest win in MarTech".

Let's see why.



01 Increased Capacity for Faster Delivery

According to Gartner¹, “Companies are finding they need to more effectively manage their marketing resources, partly due to the growing complexity of their marketing organizations and partly to promote greater agility across the marketing mix”. Said another way, the proliferation of digital marketing channels has resulted in an explosion of demand for content from marketing teams. At the same time marketing cycles have shortened dramatically, so marketers need to produce more content in less time - but with the quality required to create strong engagement with end users.

There are several aspects of online proofing which allow it to serve as a force multiplier - expanding the capacity of team members to execute more, in the same or less time, compared to the status quo. The status quo often manifesting itself as ad-hoc processes such as email, printouts or hard copy printouts.

Examples of ways to increase capacity via online proofing include:

Example	Status Quo	With Online Proofing	Cost Savings
Collection of feedback	Team members are emailed copies of proofs and feedback trickles in, or team members must be chased to provide feedback	Team members are provided a login to a centrally located online proof where feedback is collaborative and viewed in real time	Avoidance of delays created by feedback conflicts due to asymmetrical feedback paths (email, hallways conversations, etc.)
Management of Revisions	New versions are created for each piece of feedback provided via email or printouts, due to the uncertainty of when new feedback might arrive	Reviewers and designers are able to see feedback in real time and collectively agree on which updates should be made for new versions	Fewer revisions result in faster project completion, which frees up team members to work on additional projects
Managing Team Resources for Review	Assets often are reviewed serially, slowing down project timelines	Teams can review assets simultaneously and collectively in real time	New projects can be initiated while existing projects are submitted for approval

02 Cost savings

Online proofing is fairly unique in the marketing technology landscape in that it can demonstrate, almost immediately, tangible cost savings. This is true for savings related to the reduction of contract personnel for job spikes, but also the avoidance of unnecessary costs, such as rework that may arise due to errors and poor quality control, as well as tactical costs such as printing costs.

The most significant portion of any creative organizations' budget will always be personnel, both full time, salaried employees, as well as part-time or contractors. According to the recent In-House Creative Industry Report, 86% of creative leaders surveyed planned to at least maintain, if not grow, their freelancer hiring budgets³. 60% indicated that there were no term limits in place for freelancers. Could a portion of these costs be avoided or better managed, through the use of online proofing?

Examples of cost savings opportunities include:

Example	Status Quo	With Online Proofing	Cost Savings
Hiring of freelancers	Unable to meet timelines for committed projects, many organizations turn to freelancers	Increased capacity of in-house team members allows project timelines to remain intact and open up schedules for more projects to be taken on	In-house teams are able to manage their workload more effectively, obviating the need for outside contractors, or by keeping freelancer terms more favorable to the company
Rework	Rework forced by missed feedback or errors in production, the cost of which is often unrecoverable and/or unbillable	Collaborative feedback cuts down on errors; review groups with clear approval roles ensures assets are released properly	Rework costs avoided, allowing for budget directed in more useful directions, such as employee development
Printing	Full-color assets are printed off for stakeholders to review and markup, repeated for each revision	All reviews are done online, with native markup and commenting tools, as well as pixel-level comparison modes.	Printing infrastructure (ink, paper, machine maintenance) costs are reduced every day, often paying for the online proofing system in comparison

03 Compliance - Improved internal controls and processes

Within the marketing resource management landscape, Gartner attributes the majority of their client inquiries to requests for creative production management². This is mainly due to interest in the following: the compliance review process; managing and tracking collaborative reviews and approvals with annotations in one system. This is often driven by compliance requirements, both externally and internally driven.

For many industries, marketing content needs to meet strict compliance requirements and can include, but not be limited to the following:

- Brand compliance
- Disclosures
- Comparative claims
- Special offers
- Substantiation
- Sweepstakes and contests
- Marketing to children
- Collection and use of marketing data

The risks of noncompliance can be significant - lost customer confidence, financial penalties, and legal liabilities. to name a few. This is all before any re-work, often an unrecoverable cost in the agency world is required.

Online proofing can help drive stronger internal controls and processes in a fairly lightweight, pain-free manner. Examples include:

Example	Status Quo	With Online Proofing	Cost Savings
Collaboration	Using email attachments and printouts for reviewing and feedback is inefficient and error-prone	Teams are able to collaboratively comment and engage with the content being reviewed	Improved visibility into what is being reviewed, the feedback provided and the decisions being made
Version Control	New versions are emailed or via file shares	New versions are presented in comparison to the previous for added clarity	Previous versions and their feedback are saved directly on the proof
Compliance Sign-offs	Compliance stakeholders are copied on emails, tacit approval often accepted	Review groups are created with reviewer and approval roles clearly identified	Stakeholders have ensured the opportunity to comment and approve with conditions; decisions documented
Change, Approval Auditing	Email threads must be archived, not always easily searched or discoverable	All comments, change requests are saved to each proof, indefinitely.	Approval decisions are recorded and available for auditing

When considering the core benefits of implementing an online proofing solution, it's important to also factor in the impact of the status quo. The impact of leaving inefficient processes unchecked can have significant opportunity costs associated with them. It's not just processes that can be improved. Leaving unnecessary costs to continue can stunt growth over the long-term.

Online proofing has been called “the quickest win in marketing technology”, mainly due to the ease of implementation and internal adoption of focused, best-of-breed offerings. As discussed herein, there are also long-term, tangible benefits to driving greater efficiency in marketing organizations.

Footnotes:

1. 2016 Gartner Magic Quadrant, Marketing Resource Management, p 25
2. Ibid
3. 2017 In House Creative Report, pages 24, 25

A Checklist for Choosing the Right Online Proofing Solution

Once you've decided it's time to invest in an [online proofing solution](#) for your creative marketing team, you'll then need to evaluate and compare the different available solutions. To help you through this process, we've put together this checklist which you can use to compare different proofing solutions and decide which one is right for you.

Content Types Given the wide range of marketing channels in use today, your online proofing system should support media types across design files, static content, website pages and rich media such as audio and visual files. This allows for multi-channel campaigns to be reviewed simultaneously within the same system, avoiding time-sinking context switching between apps.	Supported?
Images - JPG, PNGs, BMP, TIFF, AI, PSD etc.	
Documents - PDF, DOC, DOCX, XLS/XLST, PPT/PPTX, etc.	
Live websites, Website snapshots - review in any resolution	
Rich Media - HTML5, Animated GIFs	
Video & Audio	
Proofs accurately represent the original - see our blog post here on how to use the Altona Test Suite for your own testing.	
Handles large file uploads & loads quickly for reviewers	
Other formats not listed above - _____, _____, _____, _____, _____	
Comments & Annotations The ability to provide precise feedback via markups to content is an absolute requirement for an online proofing solution. Comments and replies should be easy to make and markups should be as simple and straightforward as using PowerPoint or Google Sheets.	Supported?
Real-time comment threads	
Several markup tools to provide accurate feedback	
Select multiple parts of text on a proof and annotate	
Attach files to comments	
Private (internal) comments that only certain reviewers can view	
@mentions to send a notification directly to another reviewer	
Label comments and filter by label(s)	
Resolve comments and filter by resolution status	
Filter comments by page, reviewer, stage, etc.	
Recover deleted comments	
Responsive design to support mobile review and approval	

<p>Version Management & Proof Comparison</p> <p>Version management and comparison is a critical feature set in any enterprise online proofing solution. Not only does it help verify that requested changes were made and progress is being made, but it's also vital to any compliance requirements.</p>	Supported?
Create and access prior versions easily	
Automatically give reviewers access to all versions	
Compare any two versions side by side	
Automatically have changes highlighted between versions	
Minor versions support for internal review cycles	
<p>Automated Workflow</p> <p>To both ensure consistency of review cycles and for large scale online proofing deployments with complex, multi-stage review processes, an automated workflow is essential to making sure the right team members are included in the process, at the right time, with the proper roles.</p>	Supported?
Create custom workflows based on your review processes	
Save and reuse workflow templates	
Set deadlines by workflow stage	
Lock stages and proofs when decisions have been made	
Set deadlines by workflow stage	
Able to add reviewers to multiple stages on the same proof	
Make a specific reviewer the primary decision maker	
Hide proofs from the dashboard until a reviewer's stage starts	
<p>Notifications & Reminders</p> <p>Given the urgency of most creative projects, real-time notifications should be available to update you on project collaboration efforts, statuses, comments and more. Additionally, flexibility should be provided to tailor notification preferences, as well as extend notifications to other applications (see "Integrations").</p>	Supported?
Notify reviewers when a new version is ready for review by email and in the app	
Automatically send reminders before, on and after the deadline	
Only notify reviewers when their stage starts	
Ability to suppress notifications at stage and proof level	
Customize email notifications	

Dashboards & Reporting	Supported?
See all your proofs, statuses and track their progress easily	
Easily drill down to track the progress by stage and reviewer	
Dynamically filter proofs by any field	
Create, save and share custom views	
Export your proof data for easy reporting	
Folders to organize proofs by projects, clients, etc.	
Account Management	Supported?
Enterprise-ready online proofing solutions should offer the consistency of group-level permissions, as well as the flexibility of individual permissions for specific reviewers. This allows clients, partners, and vendors to contribute as named group members or as guests.	
Sign-up and manage multiple accounts using a single log-in	
Branding using logos, favicons, colors	
Choose your own subdomain or customize the domain	
Manage multiple brands across accounts	
Custom properties to capture and filter on extended proof information	
Integrations	Supported?
Enterprise-ready online proofing solutions should offer integrations with other cloud-based tools and systems, either via ready-to-run extensions, or via simple programming interfaces, such as public APIs.	
Publicly available API	
Integrates with your existing technology stack	
Cloud storage integrations	
Security & Reliability	Supported?
When considering the intellectual property in your (and your client's) creative work, security standards should guarantee that all proofs, comments, and associated files are secure and private.	
Configure Single Sign-on	
Vendor is SOC 2 compliant	
Securely share proofs with users and guests	
Control sharing settings to only internal and trusted users	
Disaster recovery is part of the vendor's standard offering	
Qualys SSL Labs Score	

Conclusion

Often, the most obvious areas for improvement are marked by signs which are right in front of us every day. If your marketing team is missing deadlines or producing less-than-stellar creative content, online proofing is a must-have tool in your arsenal of marketing tools.

When review processes are already struggling, it may seem like the time and planning required to get multi-disciplined teams working on the same process flow, the same proofing tools, and the same approval timelines is an insurmountable, costly project.

However, those costs that can be recaptured from implementing one central online proofing, review and approval system greatly outweigh the status quo of using emails and disconnected systems to manage your creative production process.

Online proofing offers the quickest path to:

- Producing increasing volumes of content, across many digital channels, on shorter and shorter timeframes.
- Facilitating review and approval from multiple internal and external stakeholders.
- Meeting strict brand, corporate, and regulatory compliance requirements across new and traditional media.

From employee productivity improvements to reduced client churn to consolidated technology spend, the daily improvements generated through online proofing have wide-reaching on creative project efficiency and cost. Online proofing has come a long way from simple markup tools and offers a full suite of collaboration management tools that work directly in step modern, multi-channel marketing formats.

Ziflow online proofing was used for the review and approval of this ebook.

Our proofing scorecard:



3 versions shared with 6 total team members



36 comments, 3 attachments to comments, 26 replies and 12 upvotes 👍 to comments



1 changes required decision, 3 approval decisions

About Ziflow

Ziflow is an online proofing application for marketers, which streamlines the review and approval of creative content to deliver marketing projects faster. We do this by improving collaboration, centralizing feedback and eliminating manual steps through automated workflow. Ziflow replaces email, printouts and other ad-hoc methods for reviewing creative content with an enterprise-ready, pure-play online proofing solution.



For more information, please visit www.ziflow.com