Work Management Software
A buyer’s guide for marketing managers
# Table of contents

The marketer's ode for better work ........................................................................................................... 3

**Question 1**  
Will my team be able to kickstart projects faster? ................................................................................. 4

**Question 2**  
Will it make it easier to manage my team’s workload? ........................................................................... 6

**Question 3**  
Will it centralize our communication and save us time? ....................................................................... 8

**Question 4**  
How precisely will I be able to track my team’s progress? .................................................................... 10

**Question 5**  
Will it streamline collaboration and keep our team up-to-date? ............................................................... 12

**Question 6**  
Is it flexible enough to adapt to my team’s different needs? ................................................................. 14

**Question 7**  
Will it help us get paid accurately and on time? ..................................................................................... 16

**Question 8**  
How will it help me measure performance and tie outcomes to business goals? ................................ 18

Your Work Management Checklist ....................................................................................................... 20

Start working better, together! ................................................................................................................ 21
Well hello there, fellow marketer.

It’s been a long time since you had the luxury to read, with all the campaigns, product launches, and errands you need to run on a daily basis.

Yes, the expectations in marketing are higher than ever. Sadly though, budgets don’t live up to them. This often translates into missed deadlines, constant back-and-forths, and endless meetings that do nothing but distract you from doing your best work.

The right work management tool can take off this load and help you customize your own workflow, collaborate more easily, and have a better view of your team’s workload.

The problem? There are literally hundreds of productivity tools out there. And just like smartphones, they all look good at first, until you start using them for a while.

You don’t have time to waste around testing dozens of apps, only to come back at square one after two months of research.

And that’s why we’ve come up with this buyer’s guide for marketers.

It suggests 8 key questions to objectively evaluate top work management tools. There’s also a checklist at the end that will help you choose the right tool for your team with less doubts.
Will my team be able to kickstart projects faster?

“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

Abraham Lincoln

The same is true with every project, the first tasks sets the tone for the rest of it.

But how do you capture the project essentials from the get-go? Through request forms and estimates.

Beware though. A loosely defined form forces clients to slip in more details. While a too general one leaves room for interpretations, which leads to additional questions. Estimates, on the other hand, should take minutes instead of hours to create and be customizable at the same time.

An appropriate work management tool speeds up the project kickoff. It makes it simple for clients to submit briefs, feeding the team only the most relevant details. At the same time, estimates become a breeze as you’re able to pull them based on the existing project data, in just a few clicks.
Features to look after

- Request forms
- Automated project creation
- Automated task creation
- Convert project to estimate
Question 2

Will it make it easier to manage my team’s workload?

User surveys. Product launches. Content. Email campaigns. Social media. Marketers are wearing way too many hats, which makes it hard for managers to balance their workload.

Without a clear map, marketers are left at the mercy of ad-hoc tasks that overburden their schedules.

**Resource management** features allow you to view your entire team’s workload in a common resource calendar. At any time, you’ll know who’s available for work, without having to resort to unnecessary meetings. Ideally, the calendar should suggest automatic bookings for you to convert at a later time and account for leave days as well, so you can redistribute work accordingly to the teammates with a loosened schedule.

**Gantt Charts** on the other hand help you visualize how tasks relate to each other on a project timeline. By default, dragging and dropping tasks changes their due dates and adjusts the rest in line with their dependencies.

Look for a tool that stacks projects against each other inside a Portfolio Gantt Chart, to learn how long it takes to complete them on average. Then use this information as a reference for future forecasts or during conversations with potential clients.
Features to look after

- Resource calendar
- Built-in leave planner
- Gantt Chart
- Portfolio Gantt Chart

The scheduler helped our account managers to easily access the output from completed tasks, know exactly who to go to for any revisions, and schedule new projects with the available content team members.

Mike Begg - Cofounder
@AMZAdvisers
According to a McKinsey study published in 2012, we waste 28% of our day reading emails, 19% on searching and gathering information, and 14% on collaborating internally. Yikes!

**Question 3**

Will it centralize our communication and save us time?

According to a McKinsey study published in 2012, we waste 28% of our day reading emails, 19% on searching and gathering information, and 14% on collaborating internally. Yikes!

The best work management tools act as a single source of truth, centralizing all conversations from email, meeting memos, and spreadsheets in one place.

Communication happens in the context of a specific project, task, or file, so no important update slips through the cracks. Co-workers are notified in real time through assigned comments, while emoji reactions are great for acknowledging a comment. Together, they both help with shortening the feedback loops and speeding up the overall delivery process.

Since your team probably works in a bunch of different apps, your work management tool should too. Choose one that integrates with popular apps like Slack and Google Calendar, so your team can work where they feel most comfortable.

**Templates** are another time-saving feature. These allow you to save a project first, along with key details such as task durations, assignees, and dependencies. Then plug them in whenever a new project is up, instead of adding it from scratch. Besides regular tasks, look for *recurring ones* as well to automate everyday chores like social media posts or product announcements and be reminded when to act upon them.
Features to look after

- Centralized communication
- Integrations with chat tools
- Project templates
- Recurring tasks
Question 4

How precisely will I be able to track my team’s progress?

Managing a small marketing team becomes second-nature after a while: you’re aware of all the project details by simply being in the trenches. Things get out of hand with growth though.

A growing team comes with a lack of visibility in terms of the project’s progress and what tasks are being worked on. Yet you can’t risk interrupting your team for every status update, especially if they’re a remote one.

The good news is that you don’t have to. The right work management tool lets you monitor how tasks move through projects on a visual meta board. In return, you’ll spot bottlenecks early on, before turning hairy. Couple this with project statuses that help maintain a healthy project pipeline, and you’ve got a serious combo for keeping everyone on the right track.

Budgeting projects and tasks is another essential feature to benchmark your team’s progress against. You might be in for a surprise and find out you’ve scoped way too optimistic budgets, which need readjustments.

To instill more accountability, choose a tool that includes native time tracking. This way, your team clocks-in their work, while you check their timesheets at the end of the week. If still not enough, customizable time reports should provide you with the full picture of your team’s efforts.
Features to look after

- Kanban and Meta Kanban boards
- Project and task budgeting
- Visual progress tracking
- Project statuses
- Native time tracking

Paymo has helped us streamline our project organization, gain real-time perspective on our time investments, and be as transparent as possible with retainer clients.

Brian Winkeler - Principal Partner
@RobotHouseCreative

We didn’t accurately track time before Paymo. We now managed to do that because the team is more focused on every project since they rarely interrupted by missed tasks that need urgent attention.

Cristian Stoicescu - Business Developer
@Cromatic Studios
Collaboration is the cornerstone of every high-performing marketing team. But with too many touchpoints, deliverables, and different contexts, everyone gets slowed down.

**Question 5**

**Will it streamline collaboration and keep our team up-to-date?**

You don’t have to hire an office manager to piece projects together or hunt down after missing email attachments.

Top work management tools bring all relevant files in one place. Each asset belongs to a corresponding project, task, or comment, so the whole team knows where to find them. They can even be uploaded from Google Drive, Slack, and other drive tools for convenience.

In keeping everyone aligned on the same goals, notifications are your best ally. Look for the right combination of alerts: email-based for hitting the most important project milestones, and in-app ones that are much broader, but effective in catching “invisible” details that might impact your project. Their depth and frequency should be customizable, of course.

Don’t forget that collaboration is a two-way street. Clients need to have access to their projects, either in the form of exportable analytics like the project plan or shareable time reports. These act as control checkpoints and proof of work at the same time, so you can get paid accordingly.
Features to look after

- Attach files to projects and tasks
- Integrations with drive tools
- Email & in-app notifications
- External sharing
Is it flexible enough to adapt to my team’s different needs?

Everyone has their own way of doing things, hence choosing a flexible work management tool that your team enjoys using is crucial for adoption.

Marketing teams in particular are involved in a lot of processes with a wide range of assets and stakeholders. That’s why you’ll want to create custom project workflows that are tied to your internal procedures. Your co-workers will thank you later.

When it comes to organizing your own work, having a tunnel-like view that displays what’s on your plate for today and the upcoming days is a big bonus. Ideally, you should be able to group tasks after their projects, due date, and priorities to shift gears efficiently in the midst of chaos.

But not everyone works the same way. Some prefer tables, while others are more used with timelines. Whatever work management tool you choose, it should be capable enough to adapt to the different work styles of your team. As well as integrate with the tools they already use, like Slack or Adobe CC, to prevent interrupting their creative juices.

Speaking of creativity, we all know it comes when it’s least expected. Therefore, empower your team to work wherever and whenever they feel inspired with the help of mobile applications that allow them to track time on the go.
Features to look after

- Custom workflows
- My tasks area
- Multiple task views
- Integrations with creative tools
- Adobe CC extension
- Mobile app

Before using task workflows, keeping track of their actual status was so hard because of the fleeting nature of communication, which forced us to have fewer tasks running at the same time. By tracking task statuses with Paymo, it became so crucial we felt safe enough to tackle more concurrent tasks.

Leonardo Baptista Lopez - Founder
@Strongway
Will it help us get paid accurately and on time?

As marketers, we get excited about bold projects. We make our way through them and create stunning work, only to meet clients reluctant to pay us in the end.

Not every work management solution has a native invoicing module. Those that do, usually allow you to record work in different ways, then plug it into an invoice in just a few clicks.

Ideally, you want to easily customize invoices to better reflect your brand and make them more appealing to your clients. Go the extra mile here, it’s worth it, since it’s about your hard-won money.

To speed up the payment process, set automatic reminders to alert clients about past due invoices. It also helps if you can check whether they viewed the invoice or not, which gives you more leverage against ill-intended clients. They might also ask to pay online, in order to delay the transaction. In this case, probe for popular gateways with PayPal, Stripe, or Payoneer.

Finally, make sure you choose a tool that integrates with other accounting software, such as QuickBooks or Xero. This helps your accountant tie in all the financials at the end of the fiscal year, without having to ask you about any missing documents.
Features to look after

- Native invoicing module
- Automatic payment reminders
- PayPal, Stripe, Payoneer gateways
- Integration with accounting tools
Meaningful work is all about making an impact, which is not so straightforward in marketing. So how do you make sure your work gets noticed?

The best work management tools allow marketers to connect the dots much faster. Questions like “How many projects is my team working on?” or “Which projects burn the most time?” get answered in a matter of seconds through visual, project analytics. Preferably exportable ones, so you can share the fruits of your labor with the higher-ups.

User analytics play an important role in measuring your team's performance over a period of time too, in seeing whether or not they stick to the standards. These open the door for coaching sessions about hard and soft skills, say delegation and communication, in case somebody is struggling with them. And help you be fair, yet insightful during employee appraisals.

To tie outcomes to business goals, speak your management’s lingo: cash. Make sure you can easily check if the billable vs non billable ratio is how it should be, if your milestones are completed on time, and if clients have paid their invoices. This way, you’ll be in a better position to ask for extra resources - be they money or people.
Features to look after

- Operational/financial dashboard
- Projects analytics
- User analytics
- Data export

Based on the data I can easily see on Paymo, I can make educated decisions about shifting employees onto different project types, discuss issues with their turnaround, or offer raises for high performance. These reports also help me to determine which markets to target based on their profitability, which need price adjustments, or if there are any that we should no longer pursue.

David Aguilar - CEO
@Archaicus Creative
## Your Work Management Checklist

Use this checklist to compare different work management tools between each other. If you’re unable to check most of the boxes, then strike them off. The ones that tick the most are your top choices.

<table>
<thead>
<tr>
<th>Project kick off</th>
<th>Progress Tracking</th>
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<tbody>
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<td>- Request forms</td>
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<th>Usage Flexibility</th>
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Start working better, together!

There are literally hundreds of work management tools out there, hence finding the right one can feel like running a marathon. You’re two steps ahead of the majority, so use this guide to narrow down your selection pool and choose the best one for you and your team.

Paymo could be the right fit for your marketing team!

Sign-up for a 15-day free trial to try out the full-featured platform and start planning ahead, collaborating, and managing your team’s performance with more clarity.

Get Started for Free