



WHITEPAPER

How to Build a Business Case for an Online Proofing Solution



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Executive Summary

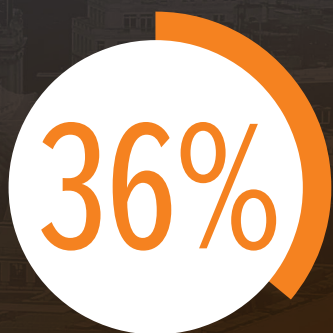
In any marketing department, an inadequate or flawed review and approval solution can overload teams, prevent them from meeting their goals, and negatively impact the business.¹ In fact, high-performing organizations are three times more likely than less successful organizations to use standardized management practices.² However, not all processes are created equal. Processes that require time-intensive manual steps, are complicated or not adaptable, and only offer collaboration in siloed, disparate tools may be just as detrimental as having no process at all. In contrast, the right online proofing tool is the ideal review and approval solution: it automates the steps, consolidates feedback, and creates an easily accessible audit trail should you need it.

While a comprehensive online proofing solution is readily available, decision-makers often hesitate to act due to budgetary, implementation, or ROI concerns.

Read this white paper to understand why staying with the status quo or implementing a partial or free solution is not only ineffective at solving review and approval issues, but could be costing marketing departments tens of thousands of dollars every year. Key points covered include:

- Managing content work in today's complex environment
- Evaluating common solutions and why they fail
- The increasing costs of doing nothing or implementing a less effective solution
- Leveraging an online proofing solution to increase efficiency and effectiveness
- Measuring benefits of an online proofing solution

This information makes a clear case for implementing a comprehensive online proofing solution to manage review and approval of marketing projects. It shows how the solution can reduce current costs, deliver a strong return on investment (ROI), and move the entire team closer to achieving their strategic goals.



of marketers say delayed approvals cause work to be completed late twice a week or more.³

Work is more challenging than ever

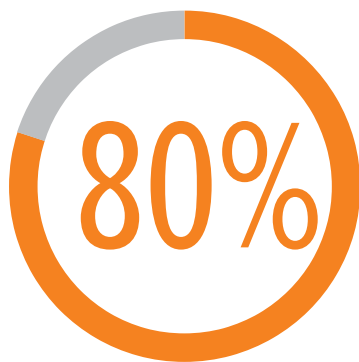
Marketing executives know that the world they operate in is evolving at an ever-increasing rate.

The road to growing a successful business is a challenging one as marketing teams juggle multiple projects with multiple stakeholders, more complex deliverables, and continually changing technology. Forty-two percent of marketers report publishing new content at least several times per week.⁴ In this fast-paced world of marketing, there are various collaboration and approval points for that content. They need to create and coordinate assets in a variety of mediums for delivery to multiple channels, which makes utilizing efficient processes for providing feedback, making revisions, and getting approvals essential for success.

With all this work, 80 percent of marketers say they're understaffed and overloaded.⁵ In this multifaceted work environment, teams need the ability to:

- Support and review all types of marketing content
- Manage the end-to-end lifecycle of developing assets
- Streamline processes to improve communication and reviews
- Spend time working on the right work at the right time

A comprehensive online digital proofing solution supports the entire workflow of content development. This helps increase productivity, allowing the team to reclaim the time they need to develop more assets that create marketing results. It also enables teams to give stakeholders the visibility and reporting they need.



percent of marketers say they're understaffed and overloaded.⁵



Searching for a solution

Traditional strategies to improve content development processes are failing. Despite attempts to apply a variety of solutions, many marketing departments find themselves missing deadlines as they waste time chasing down reviewers, addressing conflicting feedback, or trying to remember feedback that was provided verbally or on sticky notes.

To address ongoing review and approval issues, many teams search for solutions to implement for greater efficiency and control:

Asset creation solutions

Some marketing teams will provide feedback as comments in Word or PDFs. This is a limited solution because they must still be emailed or

shared, and everyone must have the save version of software. There is no easy way to find out who has reviewed what or where the asset stands in the review process. Not only is it difficult to find the status, but sometimes reviews or approvals are completely lost in the chaos because employees lose or ignore a paper-based or email memo, causing serious delays.⁴

Cloud-based tools

There are online tools available for free (or offered on a free-trial basis) that allow teams to store and share assets. Some even allow you to leave comments. However, you often end up having to open several versions to compare edits and feedback. It's even worse if you haven't established naming conventions, so you don't know which version you are looking at or where to find final approved versions. These solutions also don't tie into other tools, like your project management software, so you still end up with a disorganized, disconnected, and complex mess. And by the time you've used up too much of your free storage or reached the end of a free trial period, you must

revisit your needs and possibly start over in your search for a solution.

Free collaborative solutions

You may find a solution like Google Docs that allows you to share documents with multiple stakeholders who can leave their comments in same doc. Those tools create chaos because there are messy security hoops to jump through, and it makes collaboration confusing. To share documents, you send a link to reviewers, but they can re-share those links or you may forget to remove someone. Reviewers have to open the link with a Google email address, meaning most will use (or be forced to create) a personal, unsecured Gmail account. Anyone with access can make leave feedback and make edits, so it's hard to know what version you're looking at, and no way to mark an asset as approved. Finally, Google Docs can't be integrated into your project management system, so there's no workflow attached and you'll have to determine the status and update it elsewhere. The disconnection and lack of control waste time and leave too much room for error.

Additional headcount

Instead of looking for ways to increase efficiency with the resources they have, some marketing managers believe that if they only had more resources, things would get done on time. Even if a new employee is hired on at \$62,000 a year—plus benefits, taxes, and the cost of training—the cost of hiring one additional resource is a significant expenditure. Utilizing available resources with added efficiency is a more effective and less costly way to increase productivity.

In assessing the types of solutions marketing teams employ to proof assets, it's clear why traditional tools cause across-the-board dissatisfaction. Many tools do not provide visibility to all team members

and stakeholders, plus they stand alone and do not integrate with project management solutions so managers can see the big picture of the entire work lifecycle.

A recent Marketing Trend Watch study reports that 75 percent of companies say that lack of internal coordination is a major challenge.⁶ This is proof that the common solutions outlined previously do little to deliver the collaboration, visibility, and speed advantage marketers need to gain competitive advantage. Publication deadlines, budget concerns, and the constant influx of content work requests mean marketers need more control and visibility in the review and approval processes.

A better way: ProofHQ

ProofHQ is an online proofing solution that provides teams with a central place for the review and approval of content work. It improves productivity and visibility by eliminating time lost seeking out reviewers and approvers, as well as time spent comparing conflicting feedback from reviewers who had no visibility into feedback already provided.

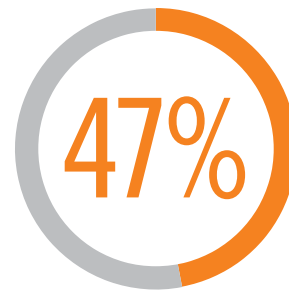
Solving the biggest challenge creates visibility

ProofHQ solves marketers' biggest content development challenge—review and approval chaos— through improving visibility, increasing collaboration, and streamlining processes. It is a single system for reviews and approvals of all types of content—video, audio, web pages, print materials, online ads, and more. ProofHQ provides real-time, contextual visibility across multiple projects and stakeholders. This visibility helps marketers:

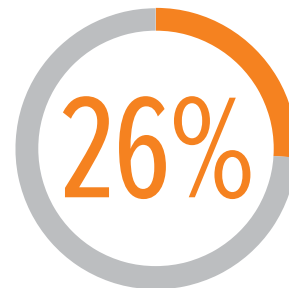
- Access the right version of any asset at any time
- See the big picture and align resources to content projects
- Plan and coordinate timelines to meet publishing deadlines
- Increase collaboration and apply feedback to improve content quality

More visibility means more productivity

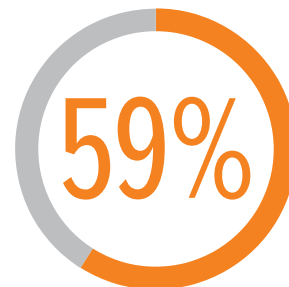
Translating the benefits of visibility into real dollar returns means increasing productivity. ProofHQ is a tool that measurably raises productivity by increasing efficiency and effectiveness. It reduces chaos caused by multiple reviewers, rework caused by missed feedback, and time spent trying to juggle versions.



of companies have more than 4 people involved in the review and approval process.⁷



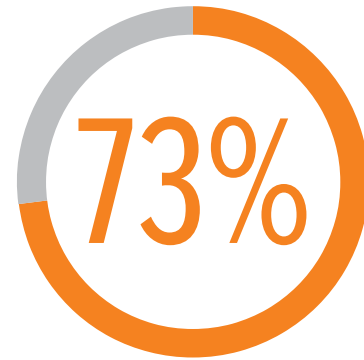
of marketers blame productivity loss on unexpected projects or rework.⁸



A digital proofing tool has been shown to cut time managing proofs by 59%.⁹

Increase efficiency by:

- Reducing time spent tracking down reviewers
- Boosting productivity without increasing headcount
- Eliminating time spent searching emails and files for the most current version
- Streamlining processes to increase output volumes for all types of work
- Increasing on-time delivery through improved communication



of CEOs think marketing teams lack business credibility because they can't demonstrate their business value.¹⁰

Increase effectiveness by:

- Placing feedback in the context of work for more accurate revisions
- Empowering employees with the information they need, when they need it
- Improving the quality of deliverables for all types of work
- Ensuring stakeholders are satisfied

Implementing ProofHQ addresses not only reviews and approvals, but also helps you streamline your processes; it increases efficiency and provides the visibility needed to produce high-quality content. Better visibility, collaboration, and improved efficiency produces a quantifiable ROI for any marketing department.

Customer experiences with ProofHQ

Organizations struggle with different kinds of challenges, but many marketing teams and stakeholders would benefit from an improved review and approval. As the following situations indicate, implementing ProofHQ enabled these organizations to solve critical challenges, improve their processes, and deliver high-quality content.

Publicis Hawkeye

Before ProofHQ ► Team members placed hard copy proofs on reviewers' desks and waited for them to review and approve them. They turned to ProofHQ for help streamlining and expediting their review and approval process.

After ProofHQ ► "As far as the review and approval process, it beats doing things old school with hard copies. [We] can expedite projects 90% quicker than the traditional methods."

—Angela Cook, Studio Manager, Publicis Hawkeye

Linemark

Before ProofHQ ► Linemark wanted to improve customer satisfaction with a better proofing solution.

After ProofHQ ► "ProofHQ gives us a competitive edge in our market. I get comments all the time about how our proofing system is much easier to use than our competitors'. It definitely separates us from the pack."

—Rob Hunt, Graphic Media Manager, Linemark

Guitar Center

Before ProofHQ ► "Previously, we relied heavily on traditional hard copies for proofing. This required printing multiple copies of each proof and 'walking' them to each reviewer for each round of commenting. As the company expanded, so did the volumes of marketing material we needed to approve. We quickly realized that hard copy proofing in this environment was a very arduous process. It was extremely manual, clunky and burdensome to manage."

After ProofHQ ► "The features that ProofHQ provides has benefited us tremendously; the threaded commenting allows each of our reviewers to see all feedback provided, focusing our discussions; version compare lets our reviewers verify that all feedback has been incorporated in latest versions of drafts; the archive facility allows us to reference past proofs at any stage; and the status view gives our managers greater visibility into the status projects alert any reviewer delaying the process that a deadline is approaching."

—James Smith, Director of Merchandise Operations, Guitar Center



“Working with ProofHQ has been such a great experience for us. The product is top-notch and the customer service has been wonderful. Guitar Center is a company that prides itself in exceptional customer service and we think ProofHQ is in alignment with the level of service we provide to our own customers.”

James Smith, Director of Merchandise Operations, Guitar Center



ProofHQ has a seamless implementation process

The teams at DBA worldwide struggled with maintaining a fast and efficient review process. Before ProofHQ, the account executive created the job jacket, then it was routed from person to person for reviews and approvals.

With ProofHQ, they now have a single solution that provides at-a-glance views of the status of every piece of content as well as who is working on what in the review process. Now everyone on the marketing team can access the information they need to work efficiently and collaboratively, and processes that took hours before implementing ProofHQ can take only minutes.



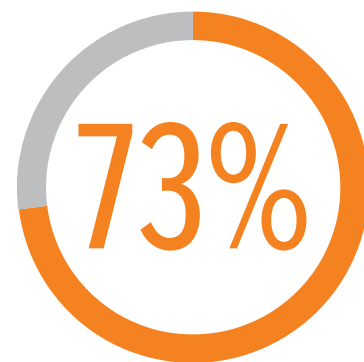
Nearly 100% product adoption rate



Building the business case for an online proofing solution

With so many technology solutions vying for attention from business leaders, gaining support from decision-makers to fund any initiative often involves a rigorous approval process. Marketing executives and managers who understand the value of an online proofing solution still need to compete for dollars with other strategic proposals, including their own. Therefore, it takes a strong business case to win funding for important initiatives like an online proofing solution.

An effective business case should include clear examples of the type of ROI expected and how it will be achieved. The benefits provided by an online proofing solution fall into two categories: efficiency and effectiveness. Efficiency benefits are easier to quantify because they typically result in saved time and saved money. Effectiveness benefits are less tangible and may include quality improvements and better decisions. However, both types are critical to evaluating the ROI of a solution.



of CEOs think marketing teams lack business credibility because they can't demonstrate their business value.

Quantifying creative workflow efficiency gains

The following efficiency table demonstrates how to quantify the value of five key efficiency benefits of ProofHQ. The calculations used in the table are based on a 10-person team with an average blended rate of \$61 (see Appendix A). Both the monthly estimated costs and gains are based on research and real customer experiences with ProofHQ.

Efficiency Benefits	Monthly Estimated Costs	Proven Success with ProofHQ	Monthly Estimated Savings
The median rate of return from a ProofHQ implementation is 4,441%.	For every \$1 spent on the solution, ProofHQ customers get \$40 back every month by making proofing workflow more effective. Premium ProofHQ annual fee average cost is \$708.33/month.	Users gain faster, more efficient workflows at a fraction of the costs.	For \$708.33/month, that would result in an average return of \$28,333.20 and a savings of \$27,624.87.
59% reduction in effort spent managing proofs	If your team spends 40 hours a month managing proofs, that costs \$2,440.	Creative teams are able to spend saved time on producing more assets.	A 59% reduction is approximately \$1,440 a month in savings.
56% improvement in average speed to market – a project that took 4 weeks now takes less than 2 to complete.	If 2 team members spent 4/hrs a day each for 4 weeks on a project, the salary cost would be \$9,760.	The streamlined approach to reviews and approvals reduces time wasted on busy work and looking for information.	Cutting the time team members spend on the project by 56% would result in an approximate savings of \$5,465 if there is one such project in a month.
Studies show that rework resulting from proof revisions was reduced by 29%, from 3.9 to 2.8 revisions.	About a third (30-35%) of project work is spent on rework. If each member of your team of 10 spends 120 hours a month on projects, then 360 hours are spent on rework, costing \$21,960.	Increased visibility and improved communication means clearer feedback and less rework.	A 29% reduction in rework equals a savings of approximately \$6,368.
Monthly Estimated Totals	\$34,868.33		\$40,897.87

Quarterly Estimated Cost Savings	Yearly Estimated Cost Savings
\$122,693.61	\$490,774.44

As the efficiency table indicates, it is important to consider not only the savings gained from increased efficiencies, but also factor in the cost of not correcting current work inefficiencies within the marketing department. Relying on the status quo, temporary “band aid” solutions, or implementing partial review and approval solutions that do not address the complete content creation lifecycle may be contributing to high ongoing costs. Work inefficiencies are estimated to cost companies significant dollars that could be better spent elsewhere.

Evaluating creative workflow effectiveness gains

The following effectiveness table demonstrates how to evaluate five online proofing tool effectiveness benefits. While it's more difficult to measure effectiveness gains than efficiency gains, these types of improvements provide significant business value and are crucial to any business case. The outcomes described are based on real customer experiences with ProofHQ.

Efficiency Benefits	Before ProofHQ	After ProofHQ	ROI	Proven Success with ProofHQ
Streamlined Processes	Reviews and approvals were time-consuming and created bottlenecks in project work.	Centralized comments prevented the possibility of delays caused by conflicting feedback.	Runnings was able to cut several weeks of employee overtime over the previous year.	Runnings was able to cut several weeks of employee overtime over the previous year.
Collaboration	Using email and attachments was cumbersome and time-consuming when tracking changes and revisions.	Improved visibility means revisions are accurate and approvers can quickly finalize projects.	Genesis Direct is able to better distinguish themselves from competitors.	Genesis Direct is able to better distinguish themselves from competitors.
On-Time Delivery	For reviews, employees walked files around or attached PDFs to emails that could easily get lost in the shuffle.	Teams are more nimble and multiple reviewers can review materials simultaneously.	Guitar Center is now able to align its proofing process with the exceptional service they provide to their own customers.	Guitar Center is now able to align its proofing process with the exceptional service they provide to their own customers.
Production	Scheduling and last-minute changes resulted in employee stress and unnecessary production costs.	Shorter deadlines and easier for employees to use, saving time for other marketing efforts.	Marketers at Innocent Drinks now have the time and ability to have fun with the marketing and create more marketing materials.	Marketers at Innocent Drinks now have the time and ability to have fun with the marketing and create more marketing materials.
Fewer Revisions	Feedback used to be gathered via email or hard copy, then collected by the marketing manager to send to designers.	Even though artwork requires approval from at least 3 departments, reviewers can now see the feedback provided by others and can agree on the appropriate way forward.	Time and cost savings has prompted Roots to expand the proofing process to other teams.	Time and cost savings has prompted Roots to expand the proofing process to other teams.

As the previous table shows, a holistic online proofing solution provides greater effectiveness across a number of areas. Its ability to provide a single source of visibility improves workflows, reduces the time and resource costs associated with managing content, empowers employees, and provides for an overall higher level of effectiveness across the team.

The global visibility offered by ProofHQ delivers value to every level of the marketing team. It allows managers and team members to:

- See when milestones are met and whether the project is running on time
- Ensure brand integrity for creative assets
- Create more efficient ways for teams to manage workflows and be more productive

The benefit of managing reviews and approvals under one system? Marketing departments can deliver more creative content, for more channels, in less time.

Assessing value potential by scale

To help assess the ROI of implementing ProofHQ for marketing departments of different sizes, the following value-potential table provides both the monthly costs and potential savings (as illustrated in the efficiency table) and shows the estimated total ROI that can be quickly realized by variously scaled solutions.

Number of Users	Monthly Cost of ProofHQ*	Potential Monthly Savings	Total Potential Monthly ROI
10	\$708.33	\$40,897.87	\$40,189.54
50	\$3,541.67	\$204,489.35	\$200,947.68
200	\$14,166.67	\$817,957.40	\$803,790.73
400	\$28,333.33	\$1,635,914.80	\$1,607,581.47

* Calculation for cost based on 2016 ProofHQ Premium edition, Plan user license pricing only.

When building a business case for ProofHQ, the numbers speak for themselves. Whether the solution is scaled for a 10-member team or a 400-member group, the organization will see an immediate return on investment in both real dollars as well as in less quantifiable, but vital, areas such as more time for execution and delivery.

Conquer review and approval chaos with ProofHQ

With the ability to calculate the costs of doing nothing, strong ROI data, and real-world customer experiences, there is now a compelling business case for ProofHQ.

ProofHQ—as opposed to point solutions or other traditional tools—simplifies the complexity of creative work and facilitates greater productivity and work success.

ProofHQ helps marketing teams:

- Streamline work delivery
- Centralize reviews and approvals
- Provide visibility into work fulfillment
- Collaborate in the context of work

Try a sample proof



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