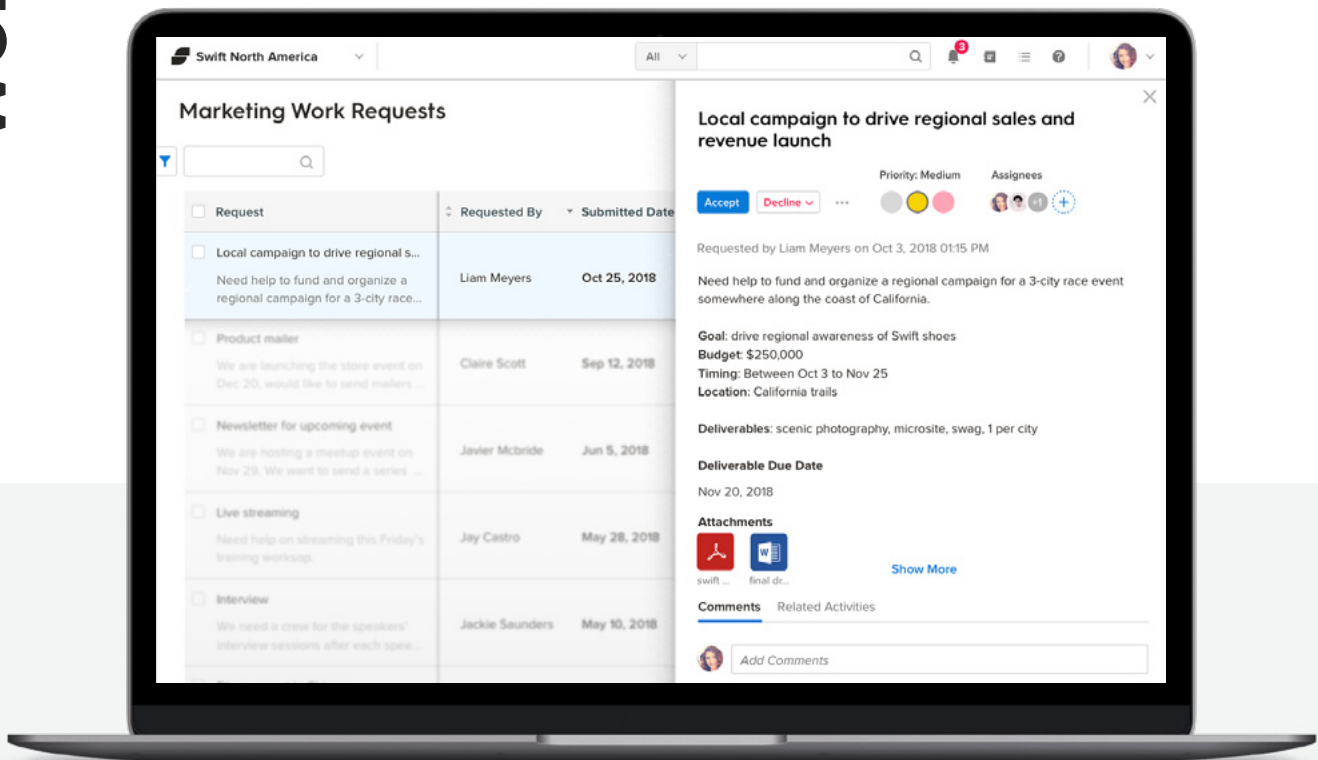


Work Requests

Emails. Chat messages. Meetings. Shared docs. Intranet communities. Texts, phone calls, and more...

Every day, marketing teams receive dozens of requests through a wide variety of channels. Ranging from highly tactical to more strategic, these ad hoc projects support a number of stakeholders across Sales, Customer Support, Product, and other global functions. As companies scale to introduce new teams and more personnel across additional markets, fielding this inbound work can become time-consuming and unwieldy, making it difficult to track, prioritize, and respond efficiently.

How can marketing teams free up resources so they can spend more time completing (and less time managing) these requests?



✓ Solution

Designed to bring order to the chaos of inbound work, Welcome helps marketers streamline the collection and management of ad hoc requests received from other functions of the organization.

Requests, a new feature within the Welcome Marketing Orchestration Platform, allows marketing teams to publish intake forms for external (i.e. non-marketing) requesters, and automatically route each project to the appropriate individual or group using an intelligent, pre-configured rules engine. By centralizing every request within a dedicated module, marketing teams are able to monitor, prioritize, and initiate work directly from the CMP, ensuring cross-functional collaboration while providing complete transparency for every stakeholder.

Key Features

External Intake Form

Streamline and simplify the process of submitting requests by providing global stakeholders with a dedicated form for soliciting marketing work, such as an upcoming campaign or content asset. The best part? Anyone within the organization can access and fill out the form — via an SSO-protected URL — even if they don't have a CMP account.

Automated, Intelligent Routing

Design an intelligent rules engine and ensure requests are fielded by the appropriate marketing resources. Built on powerful, pre-defined logic, each request is automatically routed and assigned to a specific team or individual based on its attributes. Upon submission, an alert is triggered, immediately notifying the respective owner(s) and eliminating work delay.

Customizable Template Builder

Ensure the intake form meets the needs of every global stakeholder by configuring a variety of templates — such as “Case Study” or “Sales Deck” — along with relevant associated fields. Accessible as a dropdown on the intake form, these pre-approved templates not only provide structure for the requester, but ensure marketing teams have the relevant information needed to kick off the work.

Centralized Request Hub

Collect and manage every request within a centralized workspace for optimal work management. A dedicated module within the CMP allows marketers to approve/decline work, assign priority levels, and monitor collaboration. Once accepted, each request moves through a workflow, where both requesters and assignees can track the progress of all tasks being completed to fulfill the request.

Key Benefits

Implement a formal, standardized process

Eliminate the dozens of random, one-off touch points. By centralizing how and where ad hoc marketing requests come in, marketing teams are able to more efficiently manage workloads — as well as map incoming requests to more strategic goals.

Maintain organization & ensure team-wide accountability

Establish a single-source-of-truth for all incoming requests. By automatically assigning and immediately notifying owners of new work, team members are able to hold each other accountable and ensure nothing falls through the cracks.

Provide visibility & create great content

Foster collaboration, even after the request is made. By empowering stakeholders to monitor progress, add comments, and track deadlines across all requests, teams are able to manage expectations and achieve better outcomes — together.

Streamline management & accelerate turnaround times

Centralize every request in a single dashboard. By providing a single-pane-of-glass view across all work requests, marketing teams can triage, prioritize, and respond systematically, leading to more efficient workflows.