

Shelter Increases On-time Delivery of Marketing Projects by 40% with RoboHead®

THE ORGANIZATION

Shelter is a not-for-profit organization that helps individuals and families in the U.K. find and keep a home. The group's campaigns for new laws and policies, its policy research, and its work with the housing sector in promoting good practice all play a part in tackling Britain's housing crisis.

Shelter's thirty-person Publishing and Editorial (P&E) team provides print and online communication materials to a wide range of internal clients, including the Policy & Research, Services, and Legal departments.

The team fulfills upward of 1,000 jobs each year, with assignments including billboard advertisements, magazines, annual reports, e-mail campaigns, and Web sites.

THE SITUATION

The P&E department was founded in 2004 to respond to the steady increase in Shelter's internal and external communications requirements. Since its founding, the organization had not developed successful systems or processes to manage project workflows efficiently and effectively. Clients underestimated the time it took to create materials, and neither the creative team nor their clients kept a firm grip on project status. Deadlines were difficult to establish or maintain and, consequently, deliverables were often late, to everyone's disappointment.

For example, fund-raising—where timing is everything—was particularly affected by the lack of a scheduling and workflow tool. When an invitation, campaign, or appeal went out late, Shelter would be less likely to achieve its objectives.

P&E's clients found it difficult to understand the group's process and were frustrated by a lack of transparency and clarity in how the department worked. It was evident client expectations were not being well managed.



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Recognizing the urgent need to redress the problem, the then production manager, Scot Matthews, began to review creative services project management tools. The goal was to find a system that clients and P&E team members would embrace, understand, and quickly recognize the benefits of. Shelter's search led the organization to several creative project management solutions, including RoboHead from Aquent.

THE EVALUATION

Selection Criteria

During the evaluation process, Shelter identified a number of key criteria each system needed to meet to pass muster with the organization:

- ← Enable management of the full project life cycle, from posting a creative brief to trafficking files and reviewing schedules and resources.
- ← Provide an easy and effective sign-off process to ensure pre-execution project approvals.
- ← Facilitate regular communication between creatives and internal clients.
- ← Be easy to learn and to use.

The Aquent Advantage

After a rigorous review, Shelter selected RoboHead. Matthews and his team were impressed with the solution's overall look and feel, particularly its user-friendly navigation. Matthews noted, "After having no formal process for so long, I wanted a tool that was so easy to use our people were more likely to use it."

Shelter originally thought it needed an installed solution rather than RoboHead's online model. However, after reviewing RoboHead's comprehensive security features, simple installation, lower IT costs, and ability to include some remote office employees as system users, Shelter found the online solution more appropriate to its needs.

THE SOLUTION

Training: "Early Adopters" First

Aquent's top RoboHead trainer traveled to Shelter's London headquarters to conduct a two-day training session for the full P&E department and a select group of four clients. "We chose clients who were keen to jump into the RoboHead system," said Matthews. "They were generally comfortable with technology and intrigued by RoboHead's possibilities. We wanted these clients to be 'cheerleaders' for the product and talk it up among their colleagues."



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Each team was given hands-on instruction in using RoboHead's integrated Web-based tools and time to develop a comfort level with its scheduling, workflow, and project approval capabilities—the components Shelter was most interested in conquering first. Each training session was developed for the specific type of user attending.

The Pilot

The original plan was for a six-week pilot for the four clients, beginning with small projects. "However, the confidence grew quickly," said Matthews. "The creatives and the clients all found RoboHead easy to use, and within three to four weeks we went beyond the pilot and brought additional clients into the process." The "cheerleaders" turned out to be great RoboHead supporters, encouraging their department mates to get trained on the program. One client was so enamored of the new system, she began affectionately calling her team the "RoboHead geeks."

Full Rollout

After the pilot, the team quickly started rolling out RoboHead to a larger audience. Matthews conducted the training for the new end users with the support of the Aquent team. This round of training closely matched the first—users were broken into like groups and trained according to their specific type.

THE RESULTS

In just three short months, RoboHead has become an integral part of Shelter's creative operation and has attained full participation throughout the organization. In this early stage, the most critical features for Shelter were the following:

Scheduling

The scheduling tools are indispensable for initiating, creating, and delivering jobs on time. "Before RoboHead, there was no accountability and a lot of finger-pointing about schedule lapses," said Matthews. "Now I can see when or why a schedule has gone wrong, address it quickly, and move on."

Matthews said the e-mail prompt feature has been a godsend for users. "Many clients—and even some creative team members—don't have publishing backgrounds, so they need some assistance knowing what tasks to do when. Having an e-mail prompt from RoboHead in their inbox is a great way to keep people on schedule."



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Approvals

Accountability is also secured through the approval process. Prior to RoboHead, clients and creatives were unclear of the approval process and jobs often went to print or online without final sign-off by all involved parties.

Now projects can't be sent to press/production without a sign-off via RoboHead—it is an absolute requirement for doing business with the P&E department. There has been a significant reduction in corrections at the printing proof stage, significantly reducing printing costs.

Project Templates

Much of the P&E department's print work is repetitive, such as Shelter guides and stationery. Prior to RoboHead, the team would "reinvent the wheel" every time a job was needed, reducing productivity and taking time away from newer projects. Since implementing RoboHead's project templates, creatives can complete repetitive work in less time and with greater accuracy.

The ultimate proof of RoboHead's impact on Shelter's communication operation is in the numbers. Matthews cited a 40 percent increase in on-time project delivery..

