Q1: How did strategic alignment across a team, group, or larger organization result in specific achievements and outcomes? (Strategic Achievement)

At Sage, we have three key strategies to realize our vision of being a great SaaS company:

• Customer Success
• Colleague Success
• Innovation

Of those three key strategies, our efforts in work management help us deliver most directly against Colleague Success and Innovation.

As part of Colleague Success, we aim to provide solutions and tools that make our colleagues’ lives easier. The results of our April and October 2019 user surveys confirmed that we are on track. In October, 88% of respondents elected “always,” “often,” or “sometimes” for “Do you feel that Workfront helps you do your job?” (a 14% increase from April). For the question, “Do you feel that Workfront makes your job easier?” 81% of respondents elected “always,” “often,” or “sometimes” (a 5% increase from April).

And our Innovation strategy focus is to simplify everything we do which is measured by our Portfolio Plan and simplified ways of working. After identifying Workfront Reviewers/Requesters as the users a Digital Adoption Platform could have the most impact on, we launched WalkMe with various interactive step-by-step guides to the request process as well as links to training resources.

Over the past year, our strategic alignment across Sage Marketing and Business Enablement resulted in:

1. Consolidated planning & collaboration for our regions which drive efficiencies and reduce levels of frustration

2. Standardized ways of working which drive process efficiencies & remove duplication of tasks
3. Tracked performance in a consistent way

4. A single location to access assets, templates & localized content through an integrated digital asset management system, with over 128,000 uploads and over 3800 users.

As part of FY20, the Marketing and Business Enablement division looked to execute their strategy by focusing on our operating model to better serve our customers and colleagues. Workfront will help us continue to deliver goals and objectives by focusing on optimization of existing processes and formally integrating the platform with our tech stack.

1. Transition from functionally organized ‘team’ requests to need-based requests to address colleagues’ requirements holistically and cater to the end user as opposed to the teams providing the services.

   a. Each team within marketing has their own request queue and form which, in many cases, has campaign managers briefing the same data multiple times across the queues. This transition will allow campaign managers to submit a single brief based on their needs for the creation and launch of their campaigns.

   b. Leveraging Workfront Fusion to automate the converting of requests to projects and the setting up of those projects based on campaign managers’ briefs, rather than employing a traffic controller or having this responsibility fall to the teams completing the work.

2. Enhance tracking, reporting and analytics

   a. Launch additional Dashboards for the Marketing Leadership Team and further utilize our MLT-facing KPI dashboard that launched in FY19. This dashboard contains reports that reflect how Sage is using Workfront by mix, capacity, velocity, and engagement by departments, month, and region. Measure work performance and productivity (in addition to existing measurement on adoption).

   b. Facilitating marketing campaign ROI for the CMO

Q2: Please include examples of measurement, such as utilization, service level agreements, cost savings, on-time delivery, and performance. (Operational Excellence)
At Sage, there is now one tool for our internal stakeholders to make requests for any work from Marketing, such as brand assets, content, and optimization. The work is routed to and carried out by numerous functional teams globally.

Those functional teams, once they and their process are onboard, are fully supported with an ongoing support and service model. These teams illustrate the amount of processes we have discovered, onboarded and now support through work management.

- Central Campaigns & Localization
- Workfront and Digital Library Support
- Global Content & Social
- Web Optimization
- Web Content
- Web Delivery
- Global Tag Management & Deployment
- Experience Design Requests
- Creative Requests
- Global Data Requests
- Global Media
- Marketing Automation
- North America & Shared Services
- French Sales Operations Data Requests
- Sage Spotlight
- Search Engine Optimization (SEO)

One of the most successful areas of ongoing support is our monthly Group Administrator /Centre of Excellence meetings. These well-attended sessions included one or two group administrators from each of the processes above, plus regional marketing operation leads. From initial session feedback, each month we have a different process owner present how they are using Workfront to accept and manage their team’s work. An example of these meetings truly promoting a Centre of Excellence was when two group administrators, heading up quite separate processes, agreed during one of our calls that they would be discussing further ‘offline’ how they could assist each other in improving their teams’ Workfront usage.

From that initial realization, an in-person global web workshop was held in our London office. This workshop was specifically to discuss the overall operating model between all digital and web functional teams; how work is managed; and how these teams could increase collaboration and efficiency. From the actions that came out of that workshop, the Workfront system administrators will work with the digital and web functional teams to consolidate each of their request forms into one form that will cover any and all needs related to Sage.com. A smaller working group has already been created and initial meetings on this topic have commenced.
For our 477 requestors, instead of having five web-related request forms they must decide between, they will soon only have one form. This form will then produce tasks within one project for the relevant web teams to carry out, and allow for easier collaboration between teams when needed while not relying on one team to be managing the work assignments.

As part of our April 2019 user survey, we asked if there was interest in more training; and it turned out that over half of our users desired further training. We began monthly live global training sessions to support our Workfront users with Worker and Planner licenses. These are non-compulsory and have anywhere from 35 to 50 attendees per session, with questions encouraged.

In our October 2019 survey, the majority of users who attended the training sessions said they found them to be ‘very helpful.’ All recordings are available in our ‘Training & Comms’ project that is accessible to all Workfront users.

This project also contains all user-facing documentation and training materials. We encourage users to subscribe to the project and there are over 20 subscribers. We use the project to communicate enhancements, process launches, new features, added documentation, scheduled maintenance, and more to our userbase.

Q3: Include a discussion of before/after performance, which may include both qualitative and quantitative measures such as worker satisfaction/enablement, time to value, margins, revenue, cost management, or project completion. (Technical Excellence)

We are in the process of enabling the facilitation of tracking the ROI of different marketing assets from their initial activity planning, through the work execution, to the deployment and customer engagement.

By integrating our budgeting (MRM), work management (Workfront), CRM (Salesforce) and reporting (Qlik) tools, we can connect data from the inception of the campaign to the response and ultimately sales. Our first phase will focus on the integration of Workfront and Salesforce, using Workfront Fusion, to connect data and make the execution of these four business processes more efficient:

1. Central Campaigns develops global master campaign kits
2. Localisation of master campaign kit adopted from Central Campaign
3. Regional Campaign – locally requested and sourced assets
4. Regional Campaign – mix of locally requested and sourced assets, AND localised global master campaign kits

Another example of leveraging technology to make processes more efficient at Sage is the onboarding of our Marketing Automation Process to Workfront. This process begins when a request is entered to have a campaign set up or deployed via Oracle’s Eloqua application.

Workfront Fusion has saved our marketers time by performing automated updates for the project management of each request.

A few of the Flo’s built in-house were the following:

- Automated status updates
- Validation of request data entered
- Completion dates based on SLA
- Custom notifications for requesters

Q4: Please outline or describe situation(s) in which agility in work management has increased speed to market with products, marketing campaigns, services, or process changes. (Organizational Agility)

The success of work management at Sage includes all teams, groups and stakeholders of Marketing and Business Enablement. Since using Workfront to manage work more efficiently and effectively, we have direct feedback from internal stakeholders around the globe to continuously help our work management programme improve.

The combined success with work management at Sage over the past year has led to an increased budget for additional initiatives including making Workfront an official, integrated part of our Sage technology stack.

Ways we facilitate positive client experience include:

- Biannual stakeholder survey
- Monthly Group Admin meetings
- Monthly Worker & Planner live training sessions
- Periodic notifications of webinars/events, product updates
- WF request queue for support or feedback

Some of the successes measured include:

- Notes made: As Workfront adoption increases and processes are added, users are able to move away from email and communicate within the platform. The
past six months saw an average of 19,000 notes made per month, while the six months before that had an average of 13,000 notes made.

- Help and ease: In October, 88% of respondents elected “always,” “often,” or “sometimes” for “Do you feel that Workfront helps you do your job?” (14% increase). For the question, “Do you feel that Workfront makes your job easier?”, 81% of respondents elected “always,” “often,” or “sometimes” (5% increase).

- Time saved: 73% of Workers & Planers feel that WF saves them time (1-3 hours per month was the most common answer)