

Process Improvement + Strategic Alignment

Reimagining Value Delivery Helps Marketing Department Turn Project Chaos into Productive Collaboration

Starting Point

One of the largest financial institutions in the United States faced significant challenges within its marketing department. With a small team of five members, the internal creative agency was involved in 90% of enterprise projects and handled internal marketing requests from over 20 business units. The team was overwhelmed, leading to late deliverables, an extensive project backlog, missed opportunities and a deteriorating reputation. The department struggled with lack of visibility for ongoing work, often operating in a reactive rather than proactive manner. The team needed a better way to prioritize and complete quality work on time.



Solution

A transformative value delivery experience that centralized, streamlined and visualized work in progress from intake and creation to approval and launch. The solution involved strategic changes including a virtual help desk, introduction to agile project management strategies, alignment to enterprise and cross-functional activities and more consistent stakeholder engagement.

Approach

- ◆ Reimagine the creative workflow to better triage and prioritize work and keep stakeholders engaged throughout the project lifecycle
- ◆ Leverage existing project management technology to aid adoption and enhance operational efficiency
- ◆ Introduce an interactive approval solution to aid timely completion and accurate deliverables



Outcomes

The transformation led to remarkable improvements:

- ◆ **Control:** The marketing team regained control over their workload and time. The intake process made work more manageable for the team by enabling them to triage and prioritize project requests by criticality.
- ◆ **Quality & Timeliness:** Deliverables produced on time -- or early -- and were of higher quality. Team members were no longer over capacity and had adequate time to allocate to tasks.
- ◆ **Collaboration:** Enhanced visibility into the work in progress improved stakeholder satisfaction, accountability and collaboration, leading to greater goal attainment on cross-functional initiatives.
- ◆ **Well-Being:** The team experienced increased sanity, camaraderie and joy in their work, resulting in the highest department engagement score in the organization.



Conclusion

By reimagining and strategically aligning its value delivery experience, the financial institution's marketing department achieved significant improvements in organizational effectiveness, operational efficiency and team agility, demonstrating how structured processes and strategic leadership can transform overwhelmed teams into highly productive and engaged performers.

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