INFUSIONSOFT TRADES MANUAL INEFFICIENCY FOR CUSTOMIZED VISIBILITY WITH ATTASK

As the marketing creative department at Infusionsoft slogged through capacity issues and lack of project visibility, they made the choice to adopt AtTask Marketing Work Cloud. This choice would bring order to their processes and replace stress with unprecedented visibility.

Infusionsoft

Infusionsoft

Industry: Sales and Marketing

Company Size: 495

www.infusionsoft.com

Chandler, Arizona

PROJECT BLACK HOLES

Infusionsoft was created in 2001 to provide all-in-one sales and marketing software to small businesses. By 2013, the 495-person company had grown to serve more than 16,000 customers and just over 59,000 users, but this increase in volume was proving challenging to their Marketing Creative Services group. Using project management software that only allowed the team to submit work requests without any further collaboration, the company limped along in managing their workflow. Google Docs was their ad hoc solution for scheduling information and time tracking, and complicated Excel spreadsheets handled their resource allocation.

Unfortunately, this mishmash of tools left the team blind to much of their work. Projects often disappeared from the corporate radar screen for extended periods of time after entering the queue, without communicating the change to stakeholders. Months later, those projects would resurface—often behind schedule and too late to repair the damage. Consequently, the team had to start jobs over from scratch, pushing back other urgent projects.

These tools also made it impossible for Infusionsoft's Marketing Creative Services team to properly gauge their capacity. Naturally, requestors assumed that the team was an infinite resource. As a result, the team received more work than they could realistically complete. Doing their best to keep their heads above water, they gave inaccurate time estimates and made critical priority decisions on the fly. The end result was stress across multiple departments.

In the midst of these challenges, Senior Marketing Project Manager Jennifer Sloat was brought in to help analyze the issues and recommend a solution She quickly determined that the marketing and creative teams needed a work management solution to facilitate department processes.
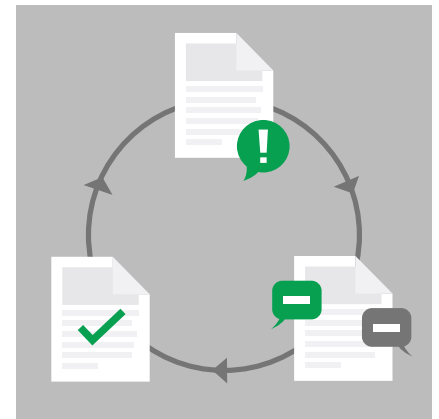

GAINING INVALUABLE VISIBILITY

Using AtTask, Infusionsoft could now provide, up to the minute, report on resource workloads and team productivity. In turn, management's decisions would be driven by data, rather than by opinion.

ORDER FROM CHAOS

Using research and demos to guide her next steps, Jennifer surveyed six different marketing project management software packages. It was AtTask Marketing Work Cloud, however, that quickly stood out from the rest.

Jennifer recognized right away that the customizable dashboards in AtTask were exactly what her team needed. She could build a dashboard to match each department's needs. She could also build templates and workflows to support the processes the team so badly needed. Despite so much customization, AtTask would remain intuitive enough for anyone in the company to use.

On top of that, AtTask would provide implementation, training, and education services to help Jennifer's team get the most from the solution. From video tutorials to a dedicated on-site implementation consultant, Jennifer's user base would get support and have AtTask configured to their specific needs.
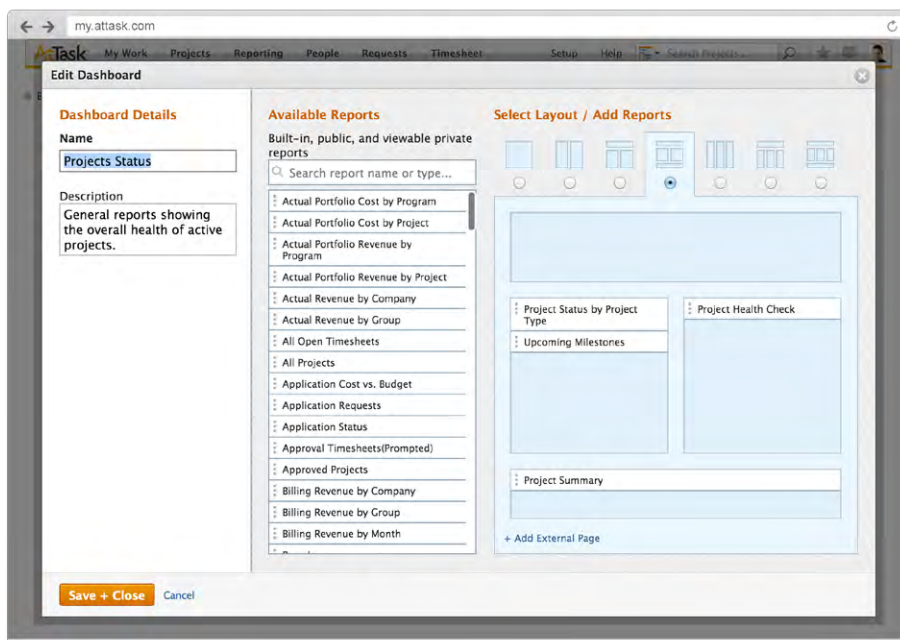
ANTICIPATING ACCURACY, ACCESSIBILITY

With an AtTask implementation consultant working on-site to get the solution set up, Jennifer could focus on building a standardized workflow to bring work visibility to her organization.

In fact, AtTask was expected to generate positive changes throughout the company. Requesters anticipated knowing at any given time what was happening with their projects. The creative team looked forward to knowing exactly what they had to work on each day and how much time they spent on each of their tasks. Armed with quick updates in AtTask, writers, developers, and designers would spend less time sending emails and more time on the creative tasks they most enjoyed.

"Essentially, no one was planning, and it made for a lot of chaos as far as communication and prioritization. In addition to not having a tool that could help us with all of this, there was no process put in place."

JENNIFER SLOAT
Senior Marketing Project Manager
Infusionsoft

"Other products we looked at weren't intuitive, and we needed a higher level of customization. But AtTask met all of our needs: it was easy to navigate, it was customizable, and it worked for every kind of user who would rely on it."

JENNIFER SLOAT
Senior Marketing Project Manager
Infusionsoft

Finally, with all of these activities captured in AtTask, Jennifer would soon be able to answer high-level questions from her CMO. She could, up to the minute, report on resource workloads and team productivity. In turn, management's decisions would be driven by data, rather than by opinion.

> *"We'll be able to accurately track time, have scheduling and capacity nearly automated through very simple clicks. We'll be able to do real backlog management planning, which didn't really happen before."*

JENNIFER SLOAT
Senior Marketing Project Manager
Infusionsoft

AtTask Enterprise Work Management

AtTask is the leader in Enterprise Work Management Software and helps global enterprises recognize, understand, and solve work chaos caused by insufficient visibility. Using a combination of technology and expertise acquired from observing the customers we've served, AtTask provides a single system of truth that eliminates work chaos, provides global visibility, and increases productivity.

To learn more about AtTask Enterprise Work Cloud and how it increases enterprise visibility, please contact us at the following:

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