



Listrak Standardizes Creative Project Communications Across its Client Portfolio

About Listrak

Listrak is an industry-leading digital marketing cloud platform that assists retailers in unifying, interpreting, and personalizing their customer data. Its platform includes a comprehensive set of marketing automation and CRM solutions built specifically for retailers that want to engage customers across multiple channels and devices.

In addition to Listrak's solution offerings, the company's Professional Services team also provides direct marketing campaign planning and support to over 1,000 clients from its offices in Pennsylvania and California. The Professional Services team works in step with Project Management and Creative teams to manage account onboarding and control the delivery of design, creative, and strategic assets for each client.

THE CHALLENGE

Servicing a Unique Client Approval Processes

Like many in-house marketing teams, Listrak’s Professional Services team must continually balance its internal creative processes with personalized client service.

With so many different clients on its roster with their own individual working styles and creative preferences, Listrak often receives project comments in many disparate forms.

Prior to using online proofing, the unstructured logistics of client feedback frequently undermined the creative and project management team’s ability to act quickly on project revisions. From email, Word, Excel, PDF markup to physical printing and re-scans of images, each client had their own way of sending project feedback. Sometimes, the team might receive comments without any accompanying visual context and try to match comments with design elements.



“Each client seemed to have a different creative approval process,” said **Bill Gartrell, Listrak Project Manager**. *“It could be challenging to gather comments.”*

This variety in client feedback channels added confusion to Listrak’s internal creative production process. Creative project managers struggled to facilitate proper version control on projects. To forward comments into an actionable format for copywriters and designers, project managers had to manually copy and paste client comments from many areas into a master Excel document.

THE SOLUTION

Creating a Standard Feedback Loop for Each Client

Although there are many project management tools available to solve Listrak’s process challenges, the Professional Services team was attracted to Ziflow’s internal and external project and production management capabilities.

In addition to being able to manage both the creative team’s creative review process and all client-facing review and approval activities from one platform, the team also saw the value in being able to:

- Implement automatic version control.
- List edits and tie them to different design elements.
- Send timeline notifications.
- Allow multiple teams to provide edits and comments simultaneously

Currently, Listrak’s Professional Services team uses Ziflow as a standard tool for delivering assets across all of its new client projects and as an internal platform for managing internal project review.

Now, when a new project request comes in from a client, the Creative and Professional Services can manage all project tasks, proofs, and revisions both internally and externally with the client in one system.

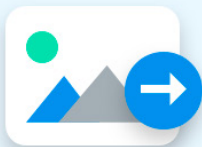
- Project managers send a design request to the creative department.
- The creative team then creates the design, uploads the proof to Ziflow, and sends it out directly to the client with the Project Manager copied for visibility.

One Review Process for Every Client Project



FIRST DESIGN CREATED

Project managers send a design request to the creative department



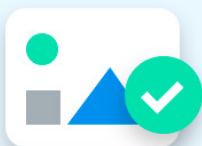
ZIFLOW SENDS DESIGN MOCK-UP TO CLIENT

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CLIENT FEEDBACK ADDED TO ONLINE ZIFLOW PROOF

Once client comments are received in the system, Ziflow sends comments on the proof directly to the copywriter or designer to complete the next round of revisions.



CONCURRENT REVISIONS AND REVIEW OCCUR IN ZIFLOW

Designers, copywriters, and creative managers work concurrently to review designs, upload the actual proofs, then review comments and proof decisions so the project can move to completion.

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“Being able to see multiple versions of each design was a huge win for us; we could show the client that we did indeed address all their concerns,” said Cartrell. *“We like the ease of visually showing where changes could be made and the ability to hold each team accountable for changes and review.”*

Because the solution can be used to manage both internal creative production and client-facing feedback, Listrak’s Professional Services team can offer all clients streamlined communications while meeting each client’s unique project needs.

“It was definitely a great investment. We have clearer communication and reduced back-and-forth with the client are definitely the biggest gains,” said Gartrell.

“At Listrak, we deliver results for our clients, and Ziflow certainly helps streamline the process.”

BENEFITS

No matter how much or what type of feedback is provided, Ziflow's feedback workflows have drastically reduced internal transfer times of comments and files between Listrak and its clients.

As a result:

- ✔ Edits are more organized and easier to understand from the clients
- ✔ Real-time editing is transparent and visible to the entire team.
- ✔ Reduced task time and faster project delivery times for clients
- ✔ Creative and project management teams have **Increased capacity to take on new projects and clients.**
- ✔ Fewer meetings, calls, and emails are required from clients to keep projects moving.

50

projects a month

17


clients

25

internal users

Ziflow online proofing was used for the review and approval of this customer success story.

Our proofing scorecard:

-  2 versions shared with 4 total team members
-  3 comments, 1 replies to comments
-  2 changes required decision, 3 approval decisions

About Ziflow

Ziflow is an online proofing application for marketers, which streamlines the review and approval of creative content to deliver marketing projects faster. We do this by improving collaboration, centralizing feedback and eliminating manual steps through automated workflow. Ziflow replaces email, printouts and other ad-hoc methods for reviewing creative content with an enterprise-ready, pure-play online proofing solution.