

CASE STUDY

Creating a Marketing Workflow to Grow Using Teamwork Projects

**NAME**

Chris Casseday

POSITION HELD

Director of Operations

COMPANY NAME

GNGF

PRIMARY INDUSTRY

Marketing

SECONDARY INDUSTRY

Legal

NUMBER OF EMPLOYEES

15

HEADQUARTERS

Ohio, USA

WEBSITE URL

<https://gngf.com/>



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We get an immense amount of time savings from having everything integrated into as few tools as we can. Teamwork Projects has become the living version of our process.

Chris Casseday is Director of Operations at GNGF (Get Noticed Get Found), a full-scale marketing agency working exclusively with clients in the legal industry. The company uses an integrated marketing approach to help attorneys and law firms build every facet of their online presence so legal teams can focus on running their law practices.

The Challenges

When GNGF started out in 2011, they were using Basecamp as a task management tool for their digital marketing work. As the company started to grow, Chris and his team realized that they needed a tool capable of more than simply managing tasks. What prompted this realization was that the company began to notice a large

portion of their growing client base had the same project needs—with the tasks for these projects being fairly standardized.

The company recognized that in order to take on more clients and complete projects for these clients to a high standard, they needed to find a project management solution that could offer four specific features that Basecamp couldn't provide at the time:

1. Project and task templates

"Our service offerings were very consistent across our clients. We had an upfront project followed by monthly retainer based work that mostly had the same tasks each month. We wanted a tool that had project and task templates to make the creation of our projects consistent to match our process."

2. Recurring tasks

"Many of our monthly retainer tasks recurred each month. So we wanted a task that when checked-off created itself to appear again the next month, similar to a recurring calendar appointment request."

3. Task priorities

"Some tasks were critical to do each month and some were nice to have, so we wanted to assign a must-do vs. a nice-to-have. There was no concept of priority in Basecamp at the time."

4. Task dependencies

"A large number of our tasks had dependencies between them. You couldn't develop until you had a design, and you couldn't deliver until it went through QA, etc. There was no way to force dependencies in Basecamp."

Once GNGF knew what they needed from a project management solution, they were met with another obstacle—any Basecamp alternatives they evaluated were either too basic for their needs or overly complex.

"At the time, with cloud based project management solutions, there seemed to be complex Gantt chart style resource allocation or the Basecamp type."

The Solution

After researching and considering the available options, GNGF came across Teamwork Projects and decided to make the switch for two reasons:

"Teamwork had all the features we were looking for. We emailed a few questions to the support team and got very fast responses, so that helped too."

Over the last 6 years, Teamwork Projects has been GNGF's tool of choice for growth—helping to speed up and streamline their processes. Chris said that his company has remained loyal to Teamwork Projects because of the software's ability to integrate with the other core tools that GNGF uses.

"I have seen firsthand at other companies the quick proliferation of different tools. We decided early on to center the operations side of our business around as few tools as possible. We use Google Apps for email and calendar, Salesforce as the central view of our prospects and clients, Box for all documents, and we use Teamwork Projects for managing projects and tasks, workload prioritization and time tracking."

Results

One reason that GNGF has been able to increase client numbers so quickly is due to Teamwork Projects' detailed project and task list templates features. Instead of wasting time setting up each new project or task list, these templates already have default priority levels, dependencies and privacy settings. Tasks and subtasks are also simplified considerably because they are automatically assigned to the correct team members.

"Our Teamwork projects have become the living version of our process. Instead of over-documenting processes in one place that few people will reference, the process lives in our project templates."

Chris says his company has used the time tracking feature to analyze performance, reduce inefficiencies and manage their workload more effectively—so that deadlines are always met.

"While we use more of a monthly retainer model and don't bill based on hours, we still want to make sure we know where our hours are going. We want to make sure we aren't spending too little time on one client vs. another, and we want to know how much is going to client work vs. internal work, etc."

"We had issues early on tracking time consistently. Teamwork makes it very easy, though as tracking is built right into the app."

Streamlined, time-saving workflows make Teamwork Projects the clear winner for GNGF's project management needs, and the commitment of the Teamwork.com support staff increases Chris' confidence in the product.

"There are a lot of features that Teamwork has built in out of the box, so new users should really dig in and see how to maximize their use of the tool. The product is top notch, but the team at Teamwork.com is the intangible that is worth more than you pay."



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