

What do you feel is
preventing you from getting
additional resources?

How Higher Ed Marketing Leaders Can Justify Budget & Make a Case for Additional Resources



Eric Welch

Project Management Specialist



Nick Alvarado

Vice President of Communication
& Creative Services



Can you **relate?**

#1

Your team is feeling overwhelmed by the number of projects requests

#2

You want to quantify why you need additional resources

#3

You want to improve collaboration with other departments

What makes running a
higher ed marketing
department **different?**

Project requests
from multiple departments

Similar projects
from year to year

Marketing budgets
are the first to get cut



Why have operational
budgets historically
been **so hard to justify?**

Data is the key

Data you need to make the case for...

#1

Your **operational budget**

#2

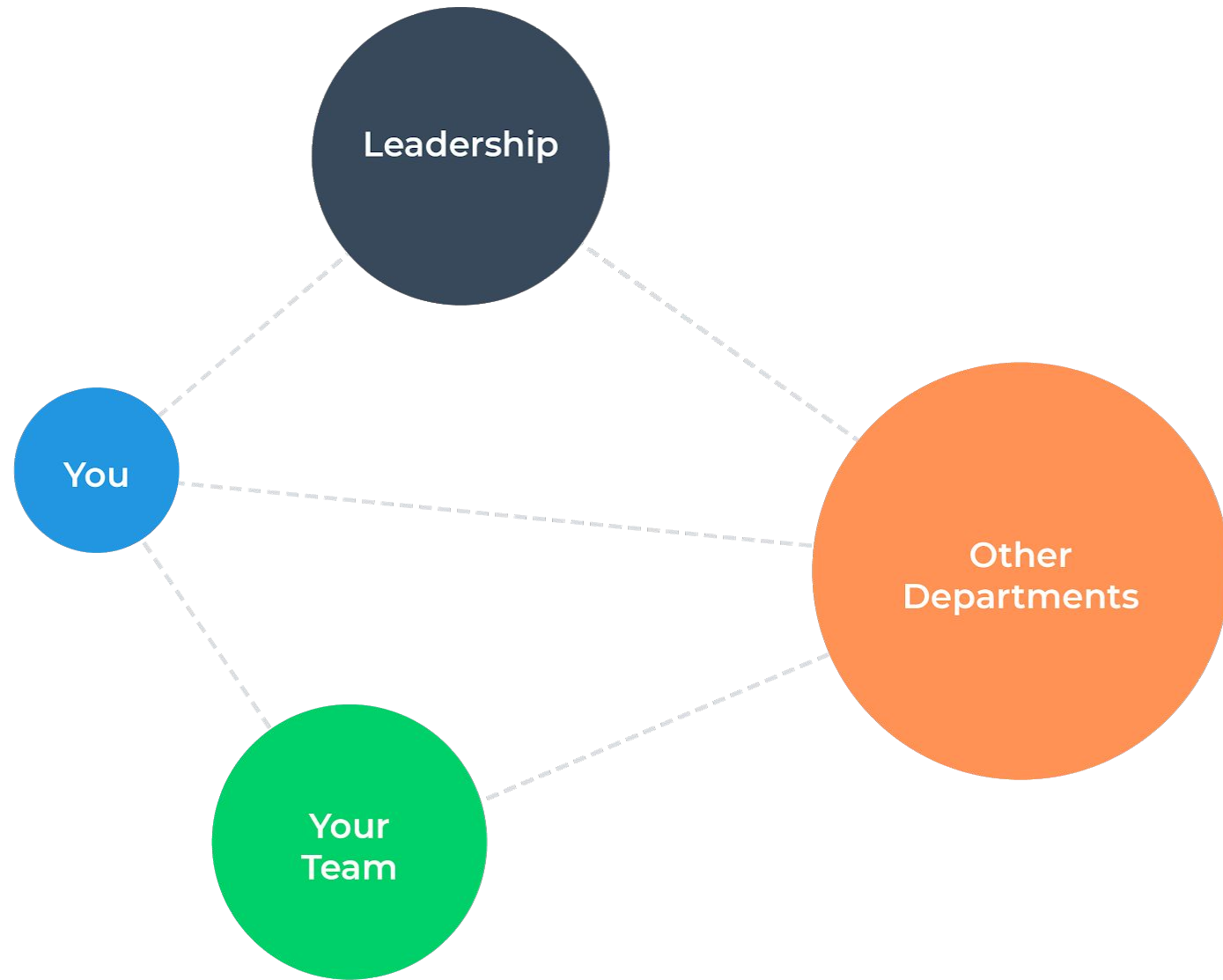
A much needed **new hire**

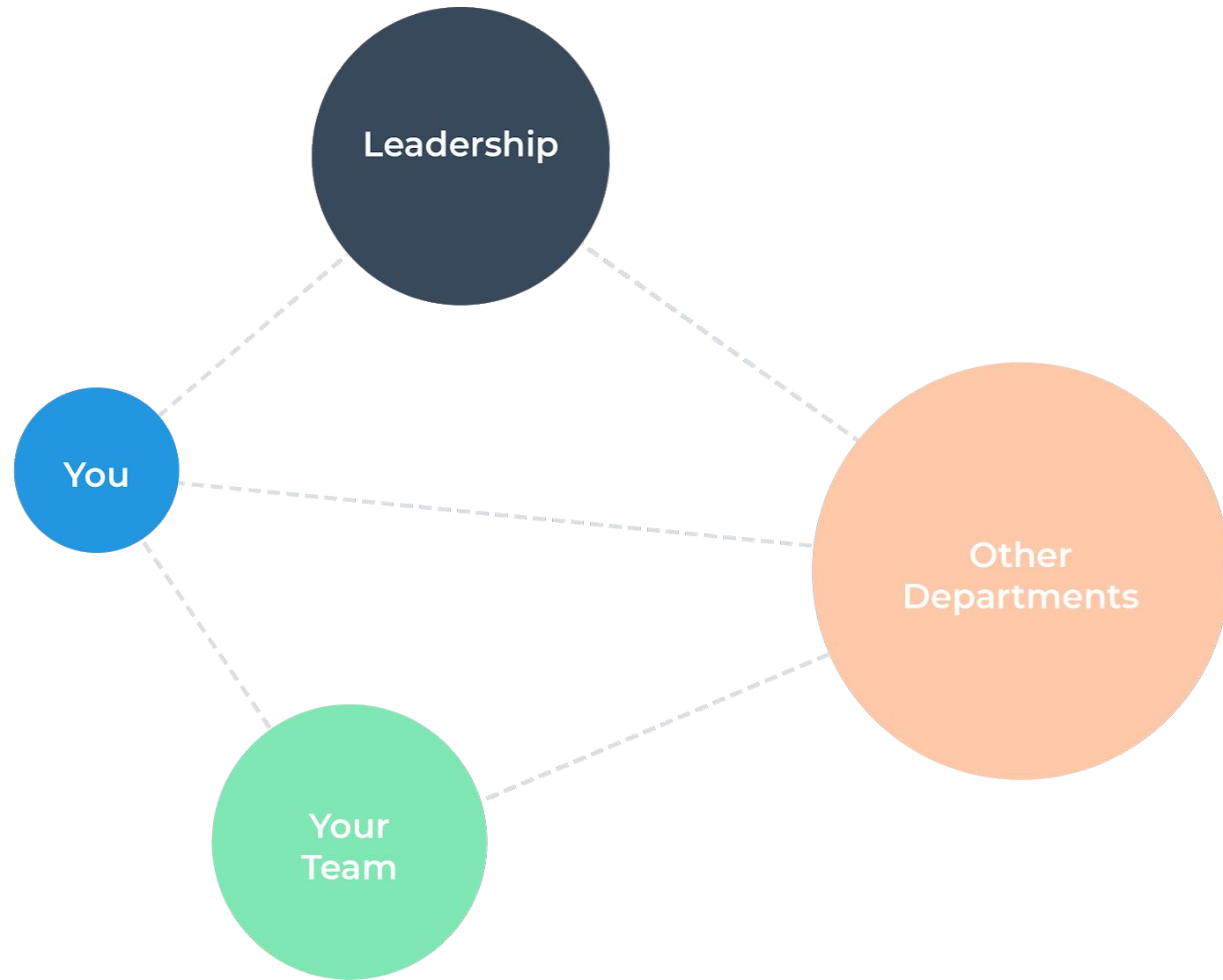
#3

External **freelancers & agencies**

#4

Compensation to help retain your team





Leadership wants to know...

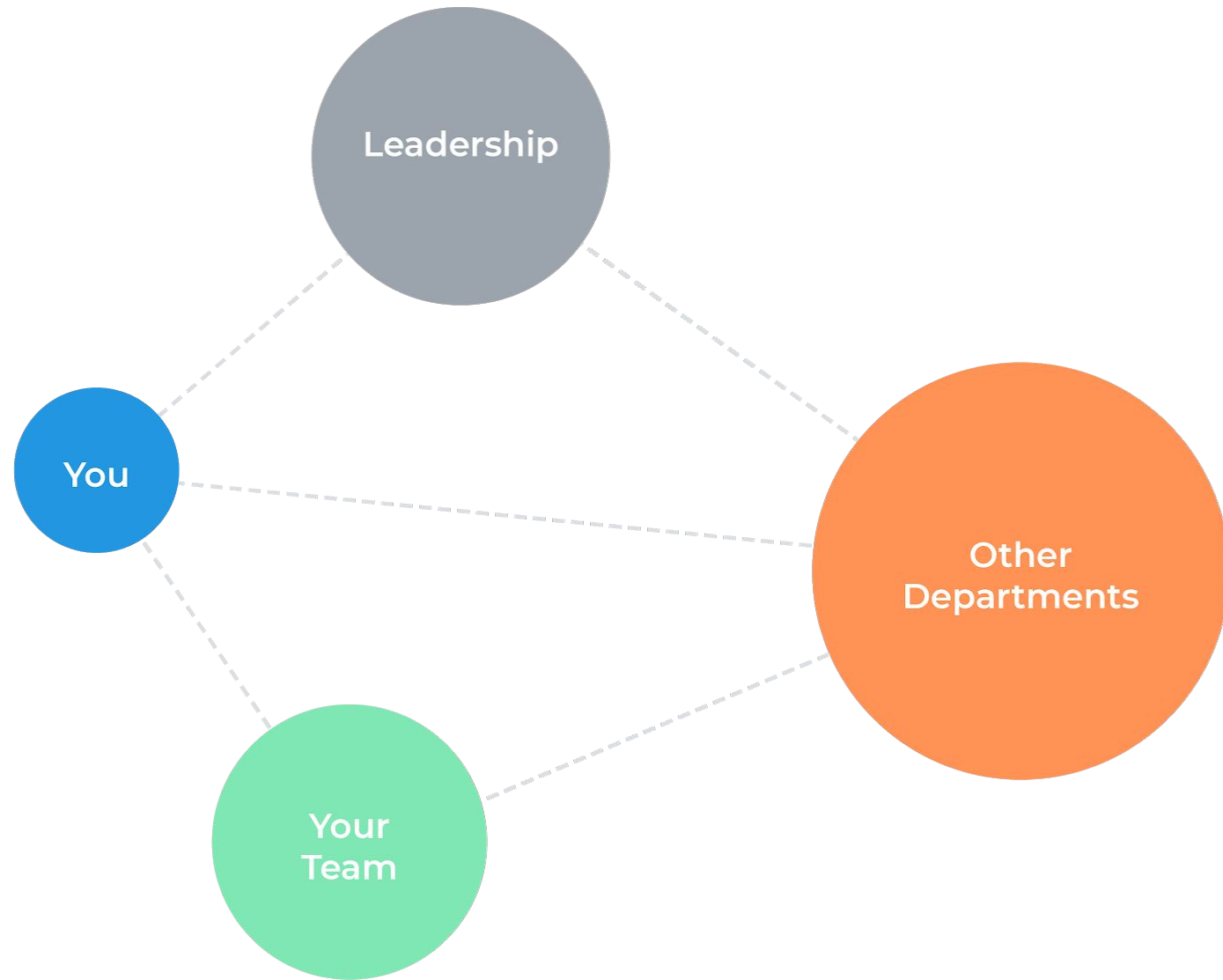
Are you currently spending the
dollars you've been allocated
effectively?

The data you
need to **make**
your case

1. Number of projects requested
2. Time spent on projects
3. Hours allocated based on
employee compensation vs.
hours worked

The data you
need to **make**
your case

1. **Number of projects requested**
2. Time spent on projects
3. Hours allocated based on
employee compensation vs.
hours worked



Project Request Forms

New Project Request

GENERAL INFO

Request date: May 5, 2019

Project type: Business Cards (2 weeks)

Name: *

Email Address: *

PROJECT INFO

Please complete the information to help us correctly complete the project in a timely manner. Business Cards are expected to take two weeks.

Project title (for referencing project) *

When do you need this? *

Please note that the minimum lead time for Business Cards is 10 working days from your request date. Minimum lead times are set to allow us enough time to complete your project to the best of our abilities. If you have any concerns, please contact Belia Salas at belia.salas@tstc.edu. Thank you for your cooperation and understanding, we look forward to helping you with your project.

Minimum lead time for this type of project is 10 working days

GL (budget) Account Number for billing. *

New Project Request

GENERAL INFO

Request date: May 5, 2019

Project type: Website Changes/Updates (7 days)

Name: *

Email Address: *

PROJECT INFO

Project title (for referencing project) *

When do you need this? *

Please note that the minimum lead time for Website Changes/Updates is 7 working days from your request date. Minimum lead times are set to allow us enough time to complete your project to the best of our abilities. If you have any concerns, please contact Ron Case at ron.case@tstc.edu. Thank you for your cooperation and understanding, we look forward to helping you with your project.

Minimum lead time for this type of project is 7 working days

Is this a change or addition to the website? *

☐ Correction ☐ Addition

If change, what is the URL for the page that needs changing? *

Fields to help you **collect data**

New Project Request

GENERAL INFO

Request date: May 5, 2019

Project type: Business Cards (2 weeks)

Name: *

Email Address: *

PROJECT INFO

Please complete the information to help us correctly complete the project in a timely manner. Business Cards are expected to take two weeks.

Project title (for referencing project) *

When do you need this? *

Please note that the minimum lead time for Business Cards is 10 working days from your request date. Minimum lead times are set to allow us enough time to complete your project to the best of our abilities. If you have any concerns, please contact Belia Salas at belia.salas@tstc.edu. Thank you for your cooperation and understanding, we look forward to helping you with your project.

Minimum lead time for this type of project is 10 working days

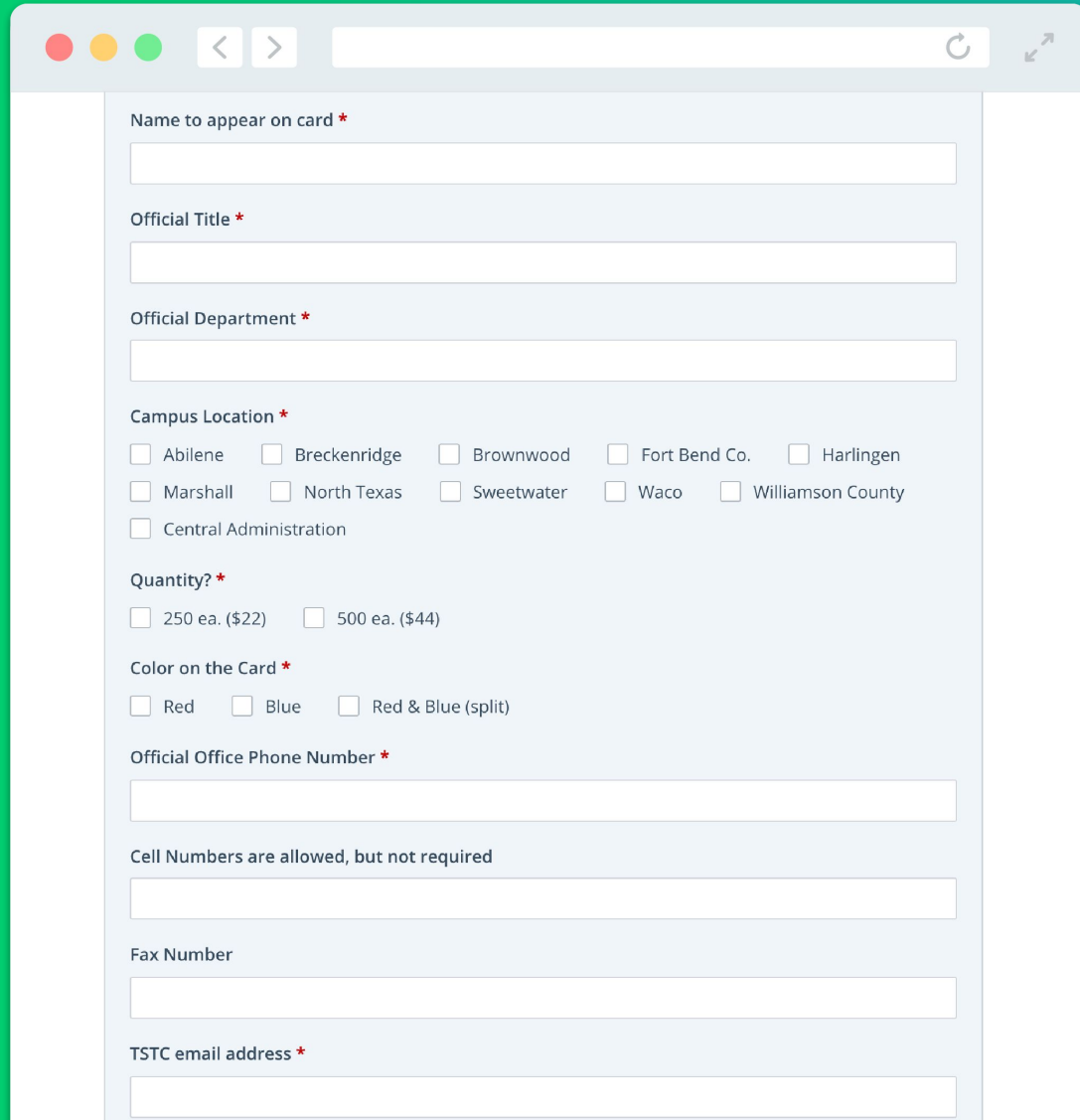
GL (budget) Account Number for billing. *

Example: 315-31170 This number should begin with 3x5, 4x5 or 6x5 with the "x" being the campus number. The final 5 digits are the unit number where your printing costs were budgeted.

Name to appear on card *

1. Project type
2. Contact info
3. Project title (use this to reference later)
4. Deadline (be specific about lead time)
5. Accounting details

Fields to help you **collect data**



A screenshot of a web browser displaying a data collection form. The form is titled "Fields to help you collect data" and contains several sections with input fields and checkboxes. The sections are: "Name to appear on card" (text input), "Official Title" (text input), "Official Department" (text input), "Campus Location" (checkboxes for Abilene, Breckenridge, Brownwood, Fort Bend Co., Harlingen, Marshall, North Texas, Sweetwater, Waco, Williamson County, and Central Administration), "Quantity?" (checkboxes for 250 ea. (\$22) and 500 ea. (\$44)), "Color on the Card" (checkboxes for Red, Blue, and Red & Blue (split)), "Official Office Phone Number" (text input), "Cell Numbers are allowed, but not required" (text input), "Fax Number" (text input), and "TSTC email address" (text input). The form is styled with a light blue background and white text.

Name to appear on card *

Official Title *

Official Department *

Campus Location *

☐ Abilene ☐ Breckenridge ☐ Brownwood ☐ Fort Bend Co. ☐ Harlingen
☐ Marshall ☐ North Texas ☐ Sweetwater ☐ Waco ☐ Williamson County
☐ Central Administration

Quantity? *

☐ 250 ea. (\$22) ☐ 500 ea. (\$44)

Color on the Card *

☐ Red ☐ Blue ☐ Red & Blue (split)

Official Office Phone Number *

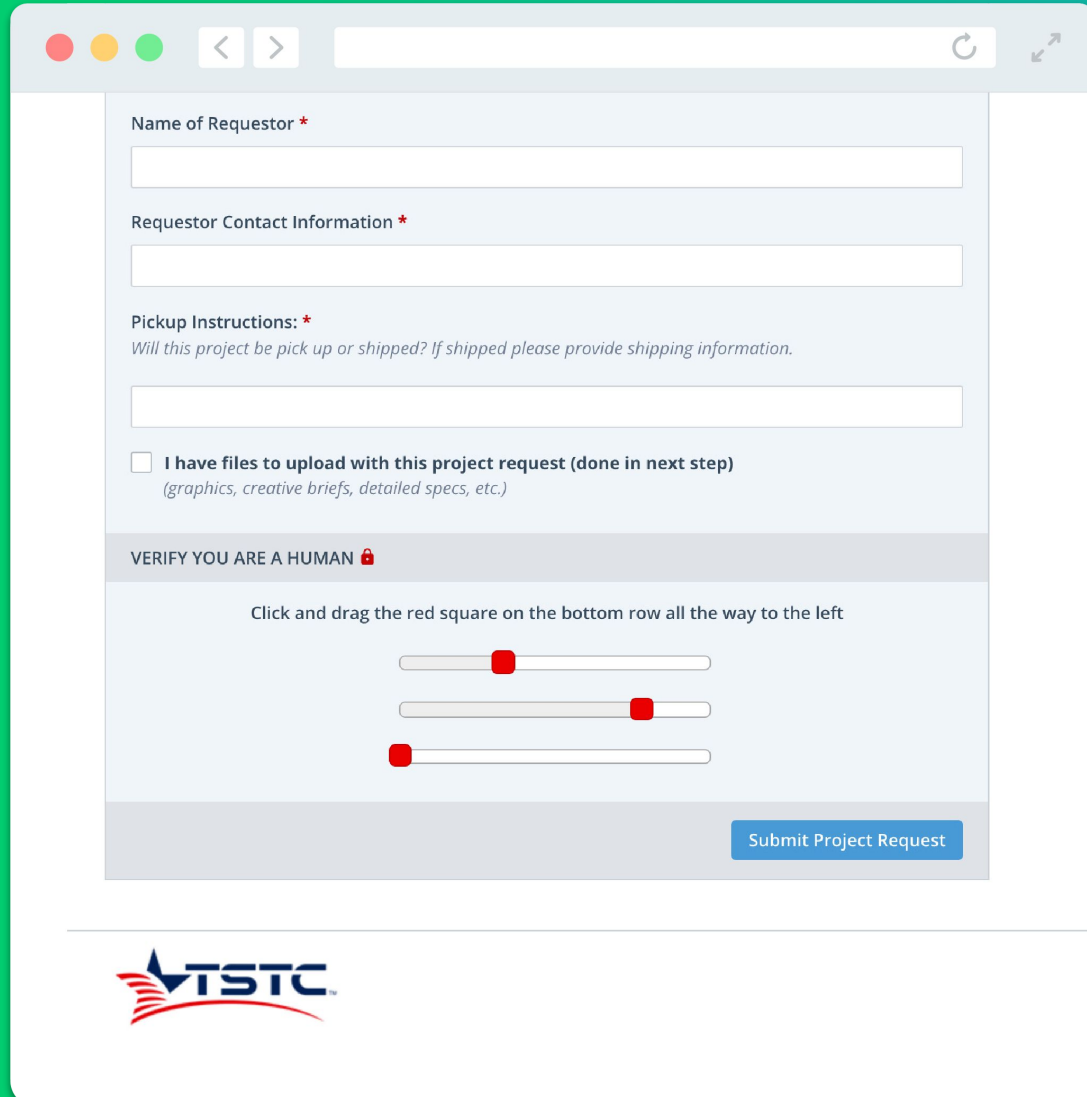
Cell Numbers are allowed, but not required

Fax Number

TSTC email address *

1. Project type
2. Contact info
3. Project title (use this to reference later)
4. Deadline (be specific about lead time)
5. Accounting details
6. Campaign specifics

Fields to help you **collect data**



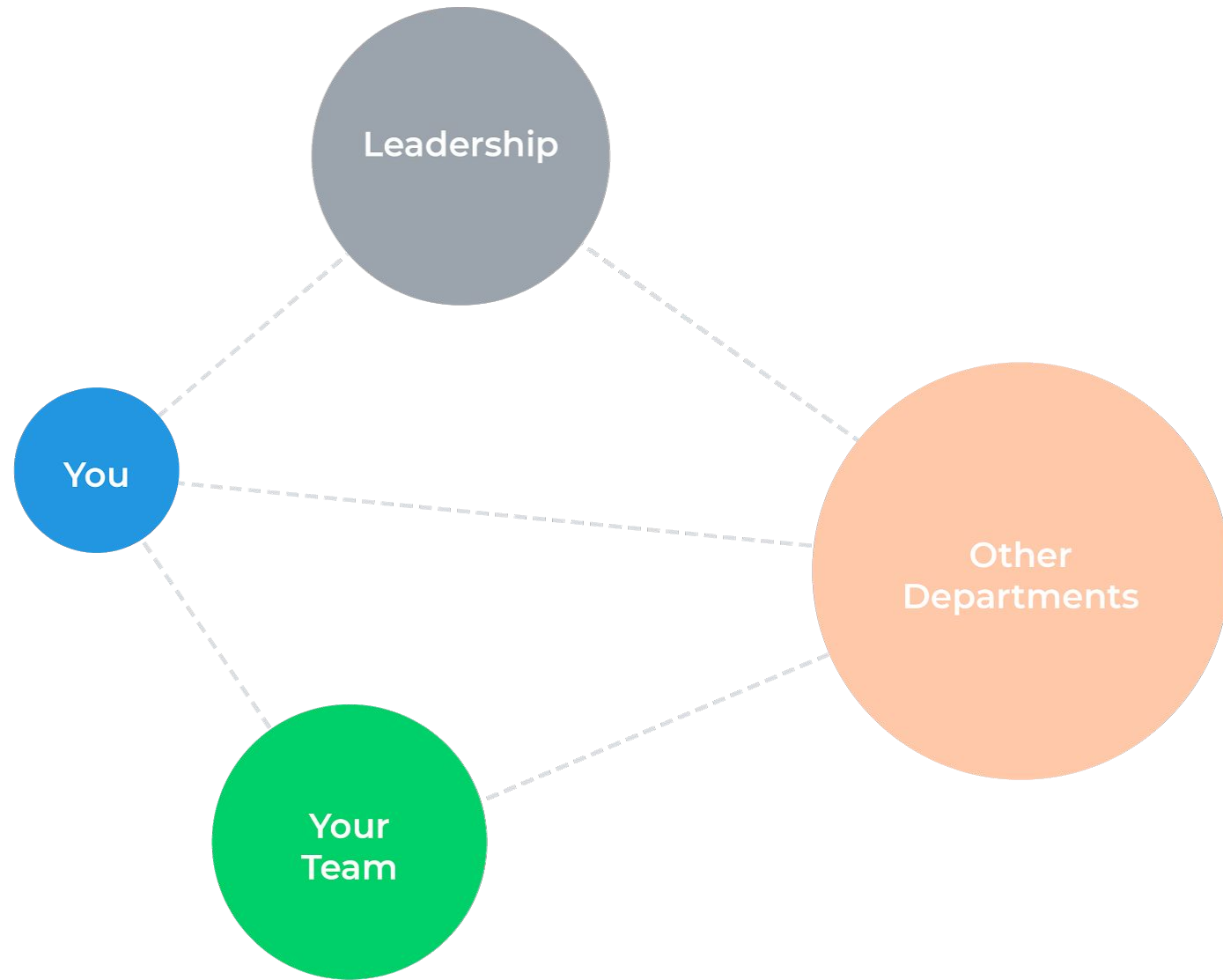
The screenshot shows a web browser window with a form titled "Submit Project Request". The form contains the following fields and sections:

- Name of Requestor ***: A text input field.
- Requestor Contact Information ***: A text input field.
- Pickup Instructions: ***: A text input field with the placeholder text "Will this project be pick up or shipped? If shipped please provide shipping information."
- ☐ **I have files to upload with this project request (done in next step)**
(graphics, creative briefs, detailed specs, etc.)
- VERIFY YOU ARE A HUMAN** with a lock icon and a CAPTCHA instruction: "Click and drag the red square on the bottom row all the way to the left". The CAPTCHA consists of three horizontal bars with red squares at different positions.
- Submit Project Request**: A blue button.

The TSTC logo is visible in the bottom left corner of the browser window.

1. Project type
2. Contact info
3. Project title (use this to reference later)
4. Deadline (be specific about lead time)
5. Accounting details
6. Campaign specifics
7. Additional requester details

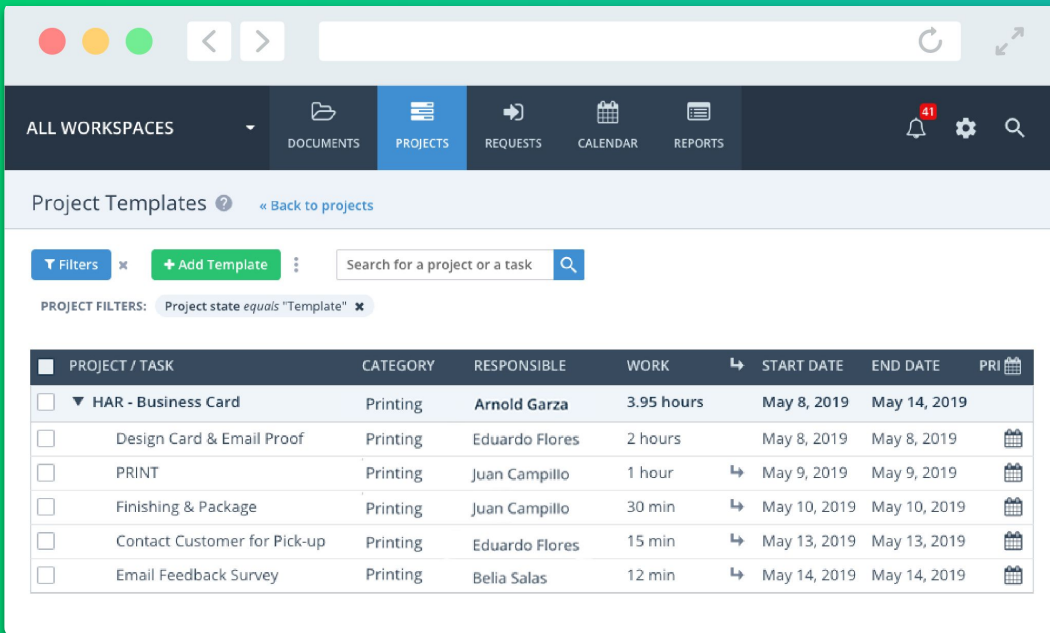
How do you create a culture
where knows they need to **use**
the form?



The data you
need to **make**
your case

1. Number of projects requested
2. **Time spent on projects**
3. Hours allocated based on
employee compensation vs.
hours worked

Calculating **time spent**



The screenshot shows the Workzone web application interface. At the top, there's a navigation bar with tabs for ALL WORKSPACES, DOCUMENTS, PROJECTS (selected), REQUESTS, CALENDAR, and REPORTS. Below the navigation bar, there's a header for 'Project Templates' with a 'Back to projects' link. A search bar and a filter button are present. The main content area displays a table of project templates. The table has columns for PROJECT / TASK, CATEGORY, RESPONSIBLE, WORK, START DATE, END DATE, and PRI. The data rows show various tasks under the 'HAR - Business Card' project, including 'Design Card & Email Proof', 'PRINT', 'Finishing & Package', 'Contact Customer for Pick-up', and 'Email Feedback Survey', each with assigned responsible persons and time estimates.

PROJECT / TASK	CATEGORY	RESPONSIBLE	WORK	START DATE	END DATE	PRI
▼ HAR - Business Card	Printing	Arnold Garza	3.95 hours	May 8, 2019	May 14, 2019	
Design Card & Email Proof	Printing	Eduardo Flores	2 hours	May 8, 2019	May 8, 2019	
PRINT	Printing	Juan Campillo	1 hour	May 9, 2019	May 9, 2019	
Finishing & Package	Printing	Juan Campillo	30 min	May 10, 2019	May 10, 2019	
Contact Customer for Pick-up	Printing	Eduardo Flores	15 min	May 13, 2019	May 13, 2019	
Email Feedback Survey	Printing	Belia Salas	12 min	May 14, 2019	May 14, 2019	

1. Estimating hours based on project type and tasks
2. Time tracking

How have project request forms
helped you **calculate time**
spent?

Estimating time using project templates

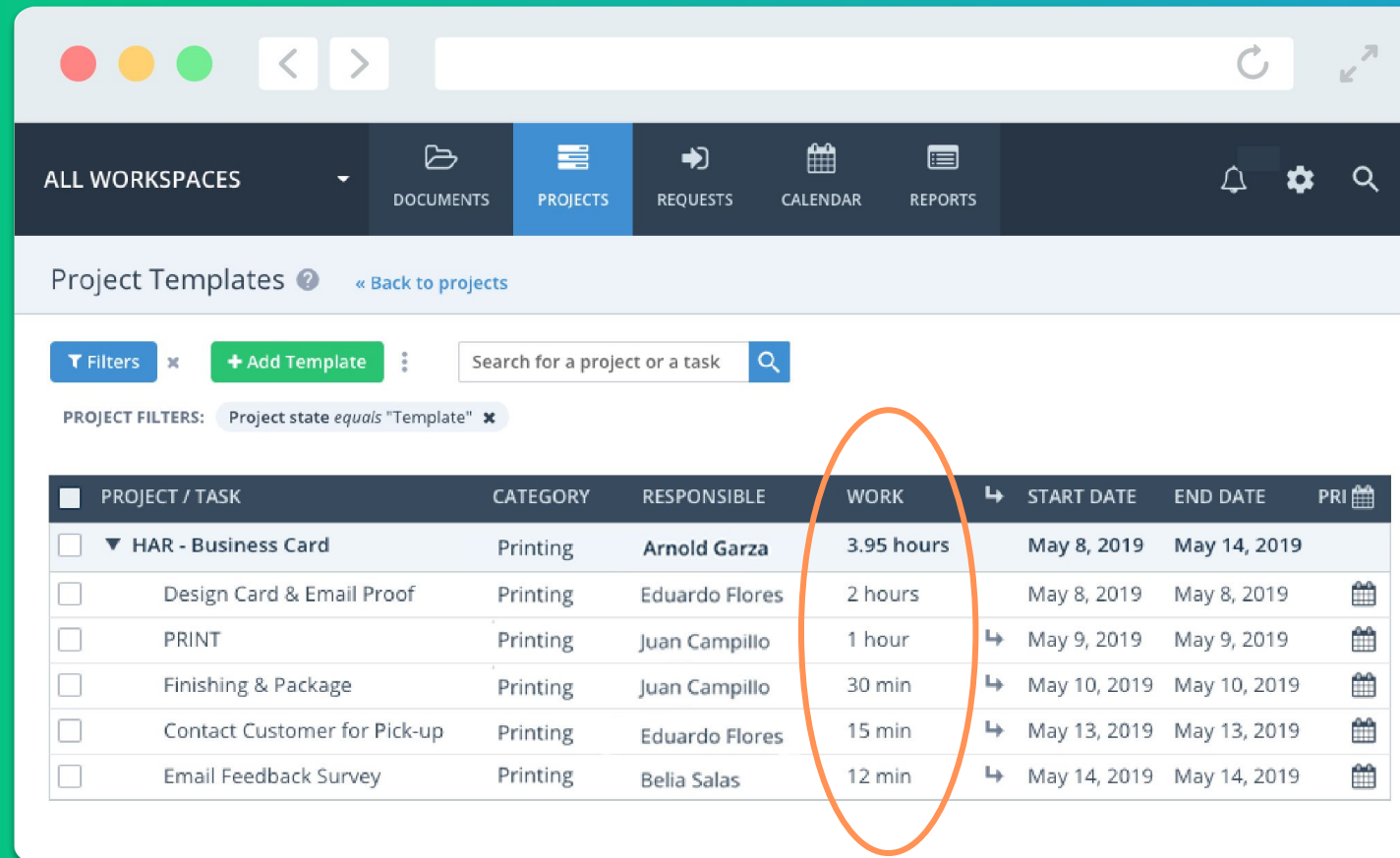
The screenshot displays the Workzone Project Templates interface. At the top, there's a navigation bar with tabs for ALL WORKSPACES, DOCUMENTS, PROJECTS (selected), REQUESTS, CALENDAR, and REPORTS. Below the navigation bar, the page title is "Project Templates" with a help icon and a link to "Back to projects".

Below the title, there's a section for filters and a search bar. The filters section includes a "Filters" button, an "Add Template" button, and a search bar with the text "Search for a project or a task". Below the search bar, there's a filter applied: "PROJECT FILTERS: Project state equals 'Template'".

The main content area shows a table of project tasks. The table has columns for PROJECT / TASK, CATEGORY, RESPONSIBLE, WORK, START DATE, END DATE, and PRI. The tasks listed are:

PROJECT / TASK	CATEGORY	RESPONSIBLE	WORK	START DATE	END DATE	PRI
▼ HAR - Business Card	Printing	Arnold Garza	3.95 hours	May 8, 2019	May 14, 2019	
Design Card & Email Proof	Printing	Eduardo Flores	2 hours	May 8, 2019	May 8, 2019	
PRINT	Printing	Juan Campillo	1 hour	May 9, 2019	May 9, 2019	
Finishing & Package	Printing	Juan Campillo	30 min	May 10, 2019	May 10, 2019	
Contact Customer for Pick-up	Printing	Eduardo Flores	15 min	May 13, 2019	May 13, 2019	
Email Feedback Survey	Printing	Belia Salas	12 min	May 14, 2019	May 14, 2019	

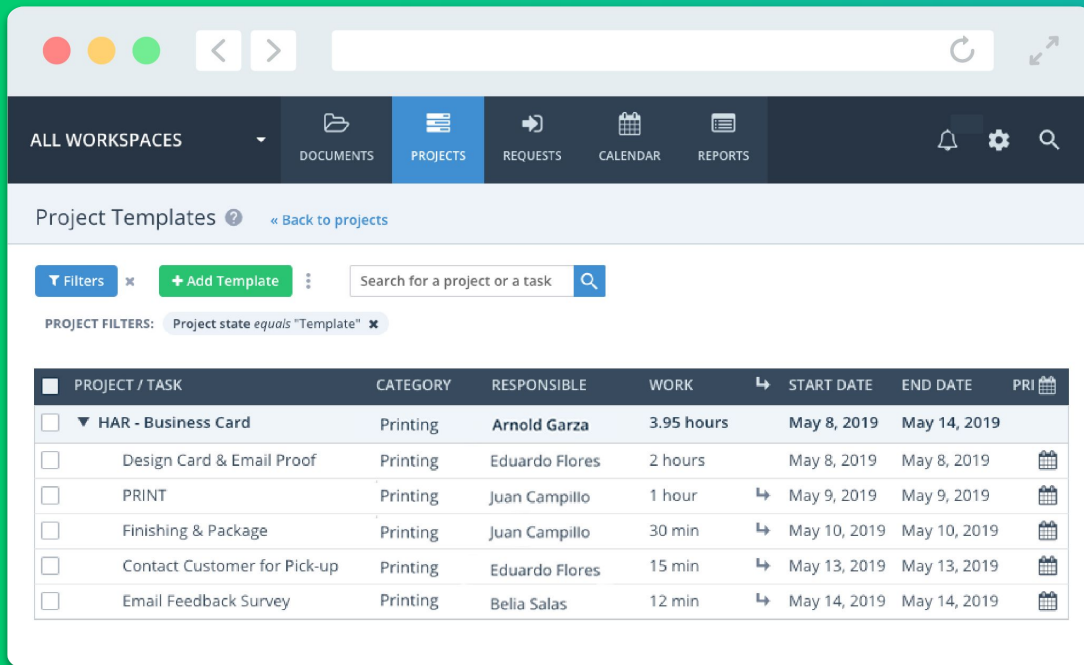
Estimating time using project templates



The screenshot shows the 'Project Templates' page in the Workzone application. The interface includes a top navigation bar with tabs for 'ALL WORKSPACES', 'DOCUMENTS', 'PROJECTS' (selected), 'REQUESTS', 'CALENDAR', and 'REPORTS'. Below the navigation bar, the page title is 'Project Templates' with a help icon and a link to '« Back to projects'. A filter bar contains a 'Filters' button, an 'Add Template' button, and a search input. The 'PROJECT FILTERS' section shows 'Project state equals "Template"'. The main content is a table with columns: PROJECT / TASK, CATEGORY, RESPONSIBLE, WORK, START DATE, END DATE, and PRI. The 'WORK' column is highlighted with an orange oval. The table lists several tasks under the 'HAR - Business Card' project, including 'Design Card & Email Proof', 'PRINT', 'Finishing & Package', 'Contact Customer for Pick-up', and 'Email Feedback Survey', each with associated time estimates and dates.

<input type="checkbox"/>	PROJECT / TASK	CATEGORY	RESPONSIBLE	WORK	START DATE	END DATE	PRI
<input type="checkbox"/>	▼ HAR - Business Card	Printing	Arnold Garza	3.95 hours	May 8, 2019	May 14, 2019	
<input type="checkbox"/>	Design Card & Email Proof	Printing	Eduardo Flores	2 hours	May 8, 2019	May 8, 2019	
<input type="checkbox"/>	PRINT	Printing	Juan Campillo	1 hour	May 9, 2019	May 9, 2019	
<input type="checkbox"/>	Finishing & Package	Printing	Juan Campillo	30 min	May 10, 2019	May 10, 2019	
<input type="checkbox"/>	Contact Customer for Pick-up	Printing	Eduardo Flores	15 min	May 13, 2019	May 13, 2019	
<input type="checkbox"/>	Email Feedback Survey	Printing	Belia Salas	12 min	May 14, 2019	May 14, 2019	

Estimating time using project templates



The screenshot shows the 'Project Templates' page in the Workzone application. The interface includes a navigation bar with tabs for 'ALL WORKSPACES', 'DOCUMENTS', 'PROJECTS', 'REQUESTS', 'CALENDAR', and 'REPORTS'. Below the navigation bar, there's a search bar and a filter button. The main content area displays a table of project templates. The table has columns for 'PROJECT / TASK', 'CATEGORY', 'RESPONSIBLE', 'WORK', 'START DATE', 'END DATE', and 'PRI'. The first row is expanded, showing a list of tasks under the 'HAR - Business Card' project.

PROJECT / TASK	CATEGORY	RESPONSIBLE	WORK	START DATE	END DATE	PRI
<input type="checkbox"/> ▼ HAR - Business Card	Printing	Arnold Garza	3.95 hours	May 8, 2019	May 14, 2019	
<input type="checkbox"/> Design Card & Email Proof	Printing	Eduardo Flores	2 hours	May 8, 2019	May 8, 2019	
<input type="checkbox"/> PRINT	Printing	Juan Campillo	1 hour	May 9, 2019	May 9, 2019	
<input type="checkbox"/> Finishing & Package	Printing	Juan Campillo	30 min	May 10, 2019	May 10, 2019	
<input type="checkbox"/> Contact Customer for Pick-up	Printing	Eduardo Flores	15 min	May 13, 2019	May 13, 2019	
<input type="checkbox"/> Email Feedback Survey	Printing	Belia Salas	12 min	May 14, 2019	May 14, 2019	

3.95 hours per request
x 18 requests per month
x 12 months

853.2 hours per year

What are the **limitations** of the estimation method?

Estimating time vs. **time tracking**

The screenshot shows the 'Project Templates' section of the Workzone application. The top navigation bar includes 'ALL WORKSPACES', 'DOCUMENTS', 'PROJECTS' (selected), 'REQUESTS', 'CALENDAR', and 'REPORTS'. Below the navigation bar, there's a 'Project Templates' header with a 'Back to projects' link. A search bar and a '+ Add Template' button are present. A filter is applied: 'Project state equals "Template"'. The main table lists project templates with columns for PROJECT / TASK, CATEGORY, RESPONSIBLE, WORK, START DATE, END DATE, and PRI.

PROJECT / TASK	CATEGORY	RESPONSIBLE	WORK	START DATE	END DATE	PRI
▼ HAR - Business Card	Printing	Arnold Garza	3.95 hours	May 8, 2019	May 14, 2019	
Design Card & Email Proof	Printing	Eduardo Flores	2 hours	May 8, 2019	May 8, 2019	
PRINT	Printing	Juan Campillo	1 hour	May 9, 2019	May 9, 2019	
Finishing & Package	Printing	Juan Campillo	30 min	May 10, 2019	May 10, 2019	
Contact Customer for Pick-up	Printing	Eduardo Flores	15 min	May 13, 2019	May 13, 2019	
Email Feedback Survey	Printing	Belia Salas	12 min	May 14, 2019	May 14, 2019	

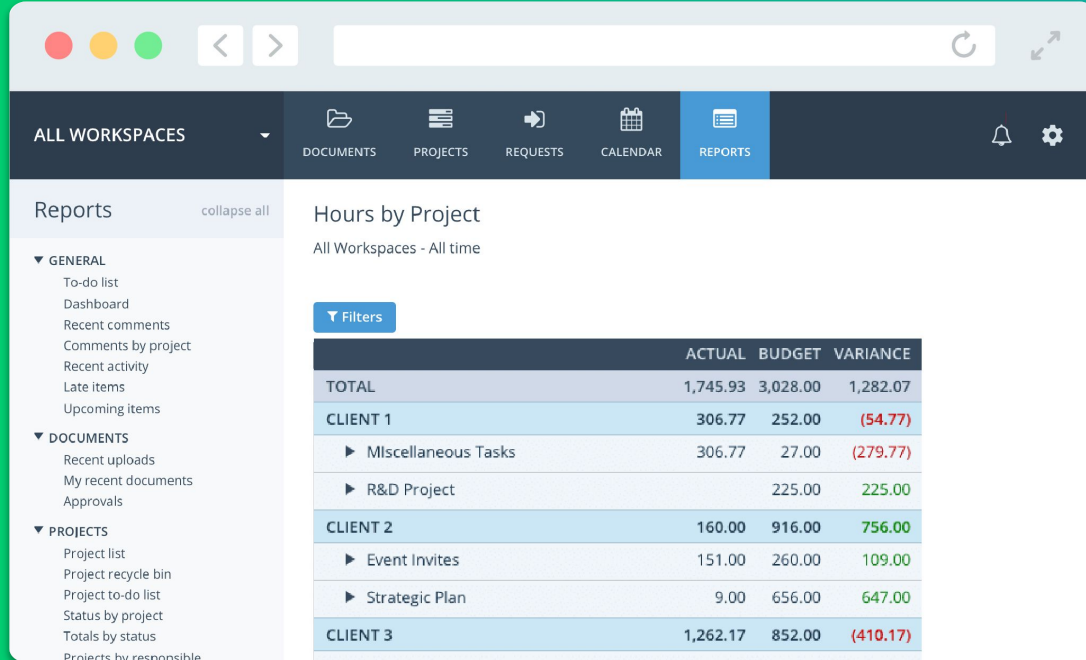
The screenshot shows the 'Reports' section of the Workzone application. The top navigation bar is the same as the previous screenshot. The 'Reports' header is visible, along with a 'collapse all' link. A sidebar on the left lists various report categories: GENERAL, DOCUMENTS, and PROJECTS. The main content area is titled 'Hours by Project' and shows a table with columns for ACTUAL, BUDGET, and VARIANCE. The table is filtered by 'All Workspaces - All time'.

	ACTUAL	BUDGET	VARIANCE
TOTAL	1,745.93	3,028.00	1,282.07
CLIENT 1	306.77	252.00	(54.77)
► Miscellaneous Tasks	306.77	27.00	(279.77)
► R&D Project		225.00	225.00
CLIENT 2	160.00	916.00	756.00
► Event Invites	151.00	260.00	109.00
► Strategic Plan	9.00	656.00	647.00
CLIENT 3	1,262.17	852.00	(410.17)

Is it necessary to put every
one of these processes in place
immediately ?

What will **time tracking data**
allow you to do do?

Time tracking can help you



The screenshot shows the Workzone interface with the 'REPORTS' tab selected. The main content area displays a table titled 'Hours by Project' for 'All Workspaces - All time'. The table has columns for 'ACTUAL', 'BUDGET', and 'VARIANCE'. The left sidebar contains a 'Reports' section with a 'collapse all' link and a list of navigation items under 'GENERAL', 'DOCUMENTS', and 'PROJECTS'.

	ACTUAL	BUDGET	VARIANCE
TOTAL	1,745.93	3,028.00	1,282.07
CLIENT 1	306.77	252.00	(54.77)
▶ Miscellaneous Tasks	306.77	27.00	(279.77)
▶ R&D Project		225.00	225.00
CLIENT 2	160.00	916.00	756.00
▶ Event Invites	151.00	260.00	109.00
▶ Strategic Plan	9.00	656.00	647.00
CLIENT 3	1,262.17	852.00	(410.17)

1. Manage your team more effectively
2. Tie compensation to effort
3. Make a case for additional resources!

The data you
need to **make**
your case

1. Number of projects requested
2. Time spent on projects
3. **Hours allocated based on
employee compensation vs.
hours worked**

Calculating Hourly Rate

Calculation 1: Total Compensation

Current Salary \$40,000

Benefits, Sick Leave,
Vacation, etc. + \$12,000
Estimate 30% of salary

Total Compensation \$52,000

Calculation 2: Target Billable Hours

Hours per Week 40

Weeks per Year x 49

Total Billable Hours 1960

Calculation 3: Hourly Rate

Salary \$52,000

Billable Hours / 1960

Hourly Rate \$26.53

Calculating Additional Value

Calculation 4: Actual Billable Hours

Hours per Week 60

Weeks per Year x 49

Total Billable Hours 2940

Calculation 5: Market Salary

Hourly Rate \$26.53

Hours Worked x 2940

Market Salary \$77,998.20

Calculation 6: Additional Value

Market Salary \$77,998.20

Total Compensation - \$52,000

Additional Value \$25,998.20

How have these processes
helped you to **create a**
culture of accountability?

Key Reports

The screenshot displays the Workzone application interface. The top navigation bar includes 'ALL WORKSPACES' and icons for DOCUMENTS, PROJECTS, REQUESTS, CALENDAR, and REPORTS. The left sidebar lists various report categories: GENERAL, DOCUMENTS, PROJECTS, REQUESTS, WORKLOAD, EXPENSES, and USAGE. The 'PROJECTS' category is expanded, and 'Totals by status' is selected. The main content area shows the 'Projects: Totals by Status' report for 'All Workspaces - May 8, 2019'. The report is a table with columns for WORKSPACE, ON TRACK, AT RISK, LATE, TOTAL, COMPLETED, INACTIVE, ARCHIVED, and TOTAL. The table lists various project categories and their corresponding counts across different status categories.

WORKSPACE	ACTIVE				COMPLETED	INACTIVE	ARCHIVED	TOTAL
	ON TRACK	AT RISK	LATE	TOTAL				
TOTAL	137	33	29	199	9112	103	11338	20752
Advertising - External Print & Digital	5	0	1	6	80	1	48	135
Apparel Design	0	0	0	0	23	0	61	84
Banners	0	0	0	0	7	1	0	8
Booklets - Instructional	1	2	0	3	139	0	0	142
Brochures & Publications	3	1	3	7	164	5	503	679
Campaigns	4	3	0	7	50	0	56	113
Certificates & Awards	0	0	0	0	32	0	79	111
Digital Ads	2	0	0	2	23	0	0	25
Digital Signage - TSTC Internal	1	0	0	1	116	0	31	148
Emblem Design & Creation	2	1	0	3	66	1	51	121
Event & Meeting Materials	7	2	1	10	142	1	168	321
Give-away Artwork	0	0	0	0	3	0	0	3
Large Scale Design	0	0	0	0	7	1	5	13
News/Media/Press Release	25	7	6	38	769	31	688	1526
Non-Profit & Outside	1	1	3	5	403	1	190	599
OneTSTC / Campus-Wide Email	16	0	1	17	6	0	0	23
Photography	0	1	1	2	43	3	17	65
Portal Updates/Changes	8	0	0	8	1649	1	718	2376
Postcards & Mailers	3	1	2	6	161	0	84	251
Posters & Flyers	17	6	2	25	460	4	859	1348
PowerPoint & Multimedia	2	0	2	4	13	0	8	25
Printing Projects	19	5	7	31	2477	37	5260	7805
Promotional Item Logos	0	0	0	0	0	1	14	15
Stationary & Business Cards	12	1	0	13	1298	8	1503	2822
Videography/Commercials	2	0	0	2	28	6	99	135
Website Updates/Changes	5	2	0	7	949	0	896	1852
Window Wrap	2	0	0	2	4	1	0	7
TOTAL	137	33	29	199	9112	103	11338	20752

1. Totals by status
2. Workload by responsible party

How have you **influenced**
adoption of this process change?

What do you recommend
as **next steps?**

Users rate Workzone #1 in Project Management



★ 97% Overall Rating



★ 98% Value for Money



★ 100% Customer Service

Workzone Customers Succeed



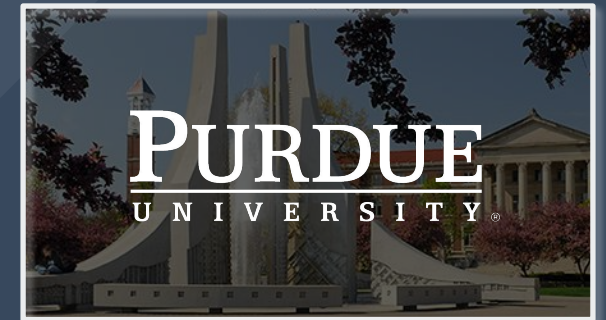
90

hours per month
savings



225%

increase in email
campaigns



"consistently above
average project surveys"

Thank you!

Eric Welch

eric@workzone.com

484.443.4162



...and share your
business card to receive
this free guide!