

## AT&T streamlines marketing review and approval

AT&T has successfully used ProofHQ to improve the way that it manages complex brand and regulatory approval on marketing campaigns. Using ProofHQ has resulted in big time savings for the whole team and faster time to market.

### Background

AT&T is a household brand. The company's services reach millions of consumers worldwide.

In the core US market AT&T works with its key agencies to deliver thousands of pieces of marketing communications projects each year. This marketing activity targets new and existing customers in states across the country. The content and offers made in a single piece can vary by customer segment and region. Most pieces are subject to both state and Federal regulation. In addition, many offers are made in conjunction with partners who also need to provide sign-off. Each piece can be subject to several rounds of revision as feedback is made.

The result is that each one of these marketing projects requires strict brand, partner and legal approval before they can be released for production. Each piece of feedback and each approval needs to be tracked and recorded for audit purposes. Accountability drives the whole workflow.

Adding to this complexity is the varied location of team members. The review process is managed in Plano, TX, but reviewers are based in offices across the country. This requires an additional level



of management to ensure that people know what they have to approve and by when.

### The Problem

AT&T has traditionally used email to manage this process. Email, plus a huge amount of staff time. However, despite the dedication

---

Email was a huge hassle... and did not provide a practical audit trail should there be a question about a campaign.

and effort of the team email did not provide the workflow, tracking and auditing required to manage the process.

Individual inboxes would get blocked by large PDF attachments. Reviewers had to wait for large attachments to download. Each person had an individual copy of a marketing document in their inbox with no ability to see what others were saying. Reviewers would respond in various ways, including email and marked-up PDFs, and these responses would have to be collated and recirculated.

According to Tabitha Mapes, Senior Marketing Manager, managing the proofing process using email attachments had become an administrative nightmare, especially as campaigns grew to involve multiple advertising agencies, various legal counsel, and a multitude of reviewers in diverse locations.

"We needed a more streamlined solution. Our teams have become more virtual so we needed something that anyone could access no matter where they were located," explains Mapes. "Using e-mail often would keep us from getting proofs to people in a timely

fashion, especially since folks were already challenged managing their email. We needed something that would bring about a more immediate level of attention."

AT&T also needed the ability to track and audit the process. "We do a great deal of marketing and direct mail, and as a result we have a number of legal regulations that we need to comply with. Email simply does not provide a practical audit trail. We wanted a central system where the various proofs and approvals can be stored, handled and managed."

### ProofHQ Solution

One of the main requirements was for the solution to be easy to setup and easy to use. AT&T did not have the time or budget to deploy an overly complex system. "A big

---

ProofHQ caught my eye because of how easy it is to mark up the proofs within the system, how quick it is to add different users at different points in time, and the way the system sends review notifications

factor was how much time it was going to take to learn to use any new solution. We are all very busy, so we did not want to take a huge amount of time adjusting to a new way of working."

So how does the AT&T process work within ProofHQ?

1. The original creative master is uploaded

to ProofHQ by the agency responsible for that project and circulated to marketing managers. Those marketing managers in turn add the product, brand and legal reviewers, plus any partners who need to sign off on the master. Sometimes the product team will review a piece before it is sent to legal, and at other times everyone reviews the piece at the same time.

2. Each reviewer gets an email with a simple link to the proof. A click of that link takes the reviewer to the proof in their browser. This eliminates the need to download large graphics files or send multiple attachments to multiple reviewers. Everything is centralized and everything is easy to use.
3. The reviewers have a simple set of tools to markup the proof and add their comments. All reviewers see the other reviewers' comments so everyone's feedback is immediate and transparent. After adding comments, the reviewer then makes a simple decision with just one click, for example, "Approved" or "Changes required". This triggers an email to the marketing manager and the agency telling them that the review is complete.
4. The marketing managers keep track of feedback and decisions using their ProofHQ dashboard and email notifications. They can chase people who are late and make sure that no individual holds up a project.
5. When all the feedback has been received the marketing manager reviews the feedback. If the creative requires revision then the agency uploads a new version which can be circulated to the same team. The team can view the old and new version side by side to make sure that the changes requested have been made.
6. When the creative master is approved the agency produces the regional variations and uploads them as new versions to ProofHQ. The marketing managers add the reviewers for these versions and the

process is repeated. Once final approval is made the agency starts production.

7. All versions, comments and decisions are archived in ProofHQ for future reference.

## The Results

AT&T has been using ProofHQ for over a year and Mapes is delighted with how the system

---

"I don't see where there would be another product that would beat ProofHQ."

has accelerated approval times. "It truly does streamline our ability to get proofs across to those that need to approve them. We get them back quicker and can manage the process more easily that we could before," says Mapes.

ProofHQ has also made auditing and reporting easier. "I absolutely love ProofHQ," says Mapes. "On a scale of 1 to 10...I would say a 10. Our review and approval process has been greatly improved, plus, it keeps an audit of activity so you really minimize the room for error. We can quickly verify that we have gone through all the proper accountability steps, and I can easily go to an individual proof and review everything associated with that proof."

According to Mapes, the jobs of the individual project managers is now much more straightforward than it was before, trying to referee feedback by email. "The biggest win, and where we've cut a lot of time using this tool, is the fact that you can send proofs simultaneously and everyone can do a side-by-side comparison," say Mapes, "whereas before most of the time was spent emailing back and forth acting as a bridge between the various reviewers."

Mapes also points out that quality in the

finished product has improved because of better collaboration. "ProofHQ bridges us and keeps us on the same page. Getting to that quality end product is made easier, not only within AT&T, but with our agencies and partners as well."

### The Future

AT&T is so pleased with ProofHQ that they have mandated that supporting ad agencies adopt the tool as part of the process of working together. "I definitely recommend ProofHQ. There are a whole number of reasons why, but the biggest ones are more effective collaboration and a better audit trail."

ProofHQ is an online proofing system that streamlines the process of managing document reviews, proofing and approvals. Sending proofs with ProofHQ is as easy as using email, but with much better tracking and follow-up. ProofHQ reduces the time and cost of managing proofing and approvals for everyone involved. ProofHQ can be used by brands, graphic designers, web designers, ad agencies, marketing departments, industrial designers, printers, pre-press companies, public relations, photographers and more.

[www.proofhq.com](http://www.proofhq.com)