

WHITE PAPER

Kick Your Proofing Velocity Into High Gear

Upgrade to ProofHQ Premium



CONTENTS

Introduction	3
① Accelerate proofing and project delivery	4
② Engage reviewers with better communication	7
③ Advance reviews on schedule and at speed	9
④ Secure private proofing comments	11
⑤ Take on rich media proofing with speed and ease	13
Kick up your creative velocity	15





Introduction

You've enjoyed the benefits of work management inside Workfront. Now, it's time to increase your digital proofing and work velocity.

Introducing Workfront + ProofHQ Premium. The upgraded experience your team will love.

With Workfront you've been able to consolidate multiple tools, move away from managing projects with spreadsheets, and improve visibility into all your work.

But chances are you're still running into one major roadblock: the review and approval process.

Whether you're producing marketing assets or a new product, managing the approval process typically involves multiple reviews, long delays, lots of emails, and plenty of printed PDFs with scribbles all over them.

By upgrading to ProofHQ Premium, you can automate that review and approval process, and get your assets or products out the door up to 50 percent faster. Read on to learn how.

① Accelerate proofing and project delivery

An upgrade to ProofHQ Premium lets you:

- Automate multi-stage digital review and approval proofing
- Use existing templates or create workflows from scratch
- Kick-off either sequential or parallel multi-stage reviews
- Automatically move from one stage to another based on reviewer decisions

With ProofHQ Premium inside Workfront, you can upload a document, invite people to review and comment on it, and create workflows that automatically move proofs through multiple review stages with multiple sets of reviewers.

For example, a project manager might need three different groups of stakeholders to review an asset—the creative team, the executive team, and the client. Using a workflow that her team created with a preexisting template in ProofHQ Premium, the project manager can easily kick off of a 3-stage proofing cycle that involves each set of stakeholders.

Once the workflow is kicked off, the creative team will automatically be invited to be the first ones to review the proof. If they approve it, invitations automatically go out to the executive team to review it. Upon their approval, the client receives an invitation to review and approve the proof in the final stage of the process.


Throughout all the stages, the account manager can easily keep her eye on the review's progress without having to constantly send out reminders and requests for updates. The workflow automatically keeps the process moving. One of the ways it does this is by allowing you to specify who should be invited to participate in each of the different stages. You can also specify decision makers and actions within each stage that determines when and if it can move from one stage to another.


Proofing
[Hide options](#)

▼ **Share**


☒ Use Automated Workflow. Select a Workflow template

Creative Review for Customer ▼

 Hide diagram



Name: * **Deadline:**

Creative Director Review  20 Oct 2016 7:00 ▼

Activate stage: *

On proof creation ▼

Deadline calculated from:

Proof creation ▼

Lock stage:

When all decisions are made ▼

Select an automated, 3-stage workflow.

The process might go something like this:

1. After the creative review team receives an invite to proof a brochure, different members comment on it and the art director requests a rework.
2. The designer gets the notice about the rework, fixes the image, and uploads a new version of the proof, resetting the workflow to the beginning of the first stage and asking the reviewers to take another look.
3. This time the art director approves it, and since the workflow only requires her approval, stage 2 of the proof automatically kicks off, inviting members of the executive team to review the brochure proof.
4. One VP immediately approves the proof, but it doesn't move to the next stage until the others approve it too, since this stage requires approval from the entire team. Once they all do, the final review stage goes into motion with the client receiving the invitation to review it and approve it.

Proofing
[Hide options](#)

Creative Director Review
 Account Management
 Client Review

David White	Reviewer & Approver ▼	Daily summary ▼
Jane Kapesky	Reviewer & Approver ▼	All activity ▼
<input type="text" value="Enter a contact name or email address"/>		

Name: * <input type="text" value="Account Management Review"/>	Deadline: <input type="text" value="+1 business day"/> <input type="text" value="7:00"/>
Activate stage: * <input type="text" value="All decisions are made on parent stage"/>	Parent stage: <input type="text" value="Creative Director Review"/>
Deadline calculated from: <input type="text" value="Stage activation"/>	
Lock stage: <input type="text" value="When all decisions are made"/>	
Primary decision maker: <input type="text" value="None"/>	

Specify decision makers and actions within each stage.

Multi-stage reviews keep you in control of the proofing process and eliminate bottlenecks. They facilitate needed changes. You can make sure proof problems get resolved before executives or clients review, saving their valuable time and making your team look better.

You also keep project managers and traffic managers always in the loop, while saving their time too. No more need to constantly send out invites, feedback requests, and reminders. More importantly—it speeds up project delivery, keeping stakeholders happy and giving creatives more time to do what they love most—be creative.

Benefits of ProofHQ Premium multi-stage automated workflows:

- Increase proofing and work velocity
- Eliminate review bottlenecks
- Facilitate proof changes and decisions
- Free up more time for being creative
- Speed up review cycles and project delivery

② Engage reviewers with better communication

With Workfront + ProofHQ Premium, your workflow communications are enhanced. Keep your team better informed and in control of rework and feedback. You can specify how often you receive review updates and what types of updates you receive.

For example, a traffic manager that always wants to know exactly what is going on might want a notice whenever any activity occurs. A project manager might want hourly summary updates. A creative director might want to limit notifications to just when decisions have been made. Each review participant can have a default in place and also customize their individual communication preferences on a proof-by-proof basis.

Plus, while you're reviewing a proof, you can direct comments to specific reviewers. You simply type in an @ sign in your comment and it will pop up the list of reviewers that have access to the proof. Selecting any of those listed reviewers will tag them in your comment, causing the comment to be automatically sent to them. That gives you a very simple, yet powerful way to call certain individuals' attention to comments that might be particularly important to them.

An upgrade to ProofHQ Premium lets you:

- Keep stakeholders in the loop on review progress
- Choose the type and frequency of review updates
- Automatically direct comments to certain reviewers

Share

	Role	Email alerts
Mike Puterbaugh	Reviewer & Approver	All activity
Gosia Kieszowska	Reviewer	Hourly summary
ProofHQ (Company)	Varies	Varies

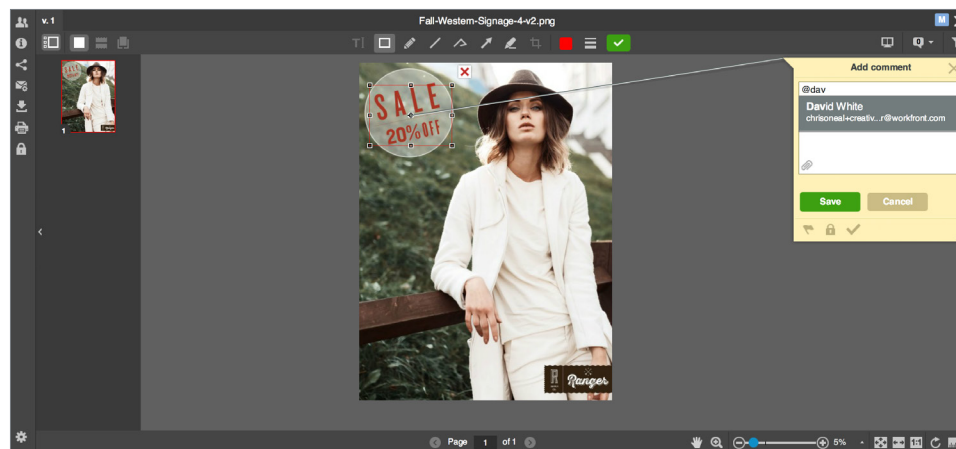
[Set a deadline](#)

☒ Notify people by email - [Add a custom message](#)

Share

Cancel

Specify how often review updates are sent.



Direct comments to specific reviewers. You simply type in an @ sign in your comment and it will pop up the list of reviewers that have access to the proof.

Benefits of ProofHQ Premium communication enhancements:

- Improve reviewer engagement
- Enable faster, more informed decision making
- Minimize notification overload

③ Advance reviews on schedule and at speed

Workflow deadlines in ProofHQ Premium keep reviews moving forward. You can specify in your workflow that once a particular stage starts, participants have a certain amount of time to complete the review, such as one or two business days. Any participants who have yet to make a decision by a set time before that deadline will automatically receive reminder emails.

If one reviewer has yet to make a decision with only two hours left before the deadline—or whatever amount of time you specify—that reviewer will receive an email with a reminder to finish the review.

In addition to helping keep reviews on schedule, automated deadline reminders save your traffic managers a lot of time. No need to waste time hounding reviewers to take action on proofs in review.

An upgrade to ProofHQ Premium lets you:

- Set deadlines that trigger automated reminders
- Customize notifications with your logo
- Automate hand-offs from one stakeholder to the next

Specify in your workflow that once a particular stage starts, participants have a certain amount of time to complete the review, such as one or two business days.

Stage	Reviewer	Status	Decisions
Creative Director Review	Mikael Blomkvist is a Reviewer & Approver	Active	0 of 2
Account Management Review	David White is a Reviewer & Approver	Inactive	0 of 1
Client Review	Emily Stevens is a Reviewer & Approver	Inactive	0 of 1

Reviewers receive emails with a reminder to finish the review.

Benefits of ProofHQ Premium deadlines and customization:

- Keep reviews on schedule
- Reduce time spent reminding reviewers of deadlines
- Build your brand with branded proof notifications

④ Secure private proofing comments

ProofHQ Premium gives you the option to keep comments private within individual stages. With this option set, comments made during a particular stage will only be visible to the stage's participants and other individuals you specify. This gives your reviews a greater level of confidentiality when needed.

For example, when a proof reaches the client review stage, you probably don't need or want the client or specific stakeholders to see your earlier comments. All they need to see is a proof ready for their review and their comments.

Securing comments to specific proof stages can also help de-clutter the review process. You don't need reviewers in stage two getting hung up on comments from the first stage. Rather, you just want them to have a fresh look at the proof.

An upgrade to ProofHQ Premium lets you:

- Keep comments confidential
- Block clients from seeing comments in earlier proofing stages
- Give reviewers in each stage a fresh view of a proof, free of previous comments

Creative Director Review **S O C D** Pending *** More ▾

☒ 20 Oct 2016 07:00 | Deadline calculated from proof creation

Activate stage: On proof creation
Lock stage: When all decisions are made
Decision: ☒ Only one decision required
Privacy: ☒ Private stage

		Role	Email alerts
<input type="checkbox"/> Me [owner]	S O C D Pending	Reviewer & Approv Decisions	...
<input type="checkbox"/> David White	0/0 S O C D Pending	Reviewer & Approv Daily summary	...

Hide comments and people from other reviewers.

Creative Director Review **S O C D** Pending *** More ▾

☒ 20 Oct 2016 07:00 | Deadline calculated from proof creation

Activate stage: On proof creation
Lock stage: When all decisions are made ▾
Decision: Manual
Privacy: Never

		Role	Email alerts
<input type="checkbox"/> Me [owner]	S O C D Pending	Reviewer & Approv Decisions	...
<input type="checkbox"/> David White	0/0 S O C D Pending	Reviewer & Approv Daily summary	...

Ensure reviewers are always on the same page.

Benefits of ProofHQ Premium secured comments:

- Gain flexible control over proofing comments
- Protect confidential communications
- De-clutter the review process

⑤ Take on rich media proofing with speed and ease

An upgrade to ProofHQ Premium lets you:

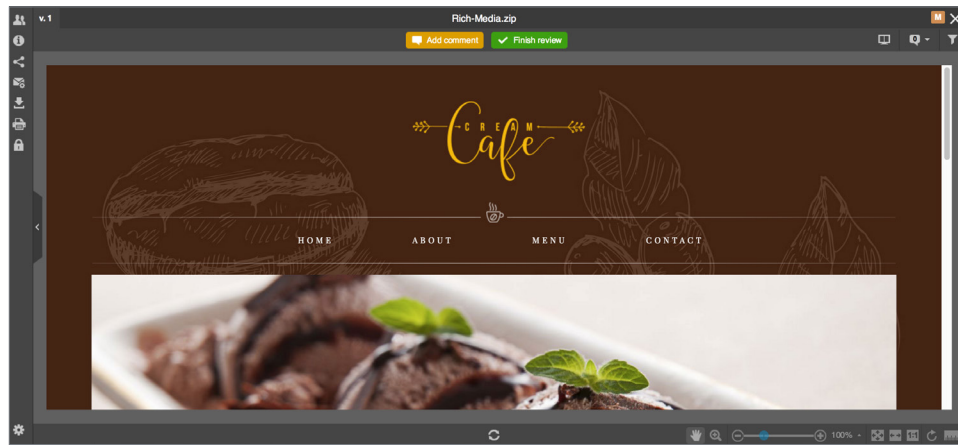
- Proof dynamic interactions on live websites
- Provide point-in-time comments on pop-ups, animations, videos, and banners
- Verify all links work properly
- Proof static URLs
- Upload web source files for pre-URL static or rich media proofing

In addition to the static URL proofing capabilities you get in ProofHQ Premium, you also get interactive rich media proofing. You can scroll up and down on a website to review it. You can click on a banner and comment on its content and actions. You can get precise reviews and feedback on whether all the links and interactions work properly. You can hover over dynamic content, such as pop-ups, animations, or videos, and comment on whatever they're doing at that point in time.

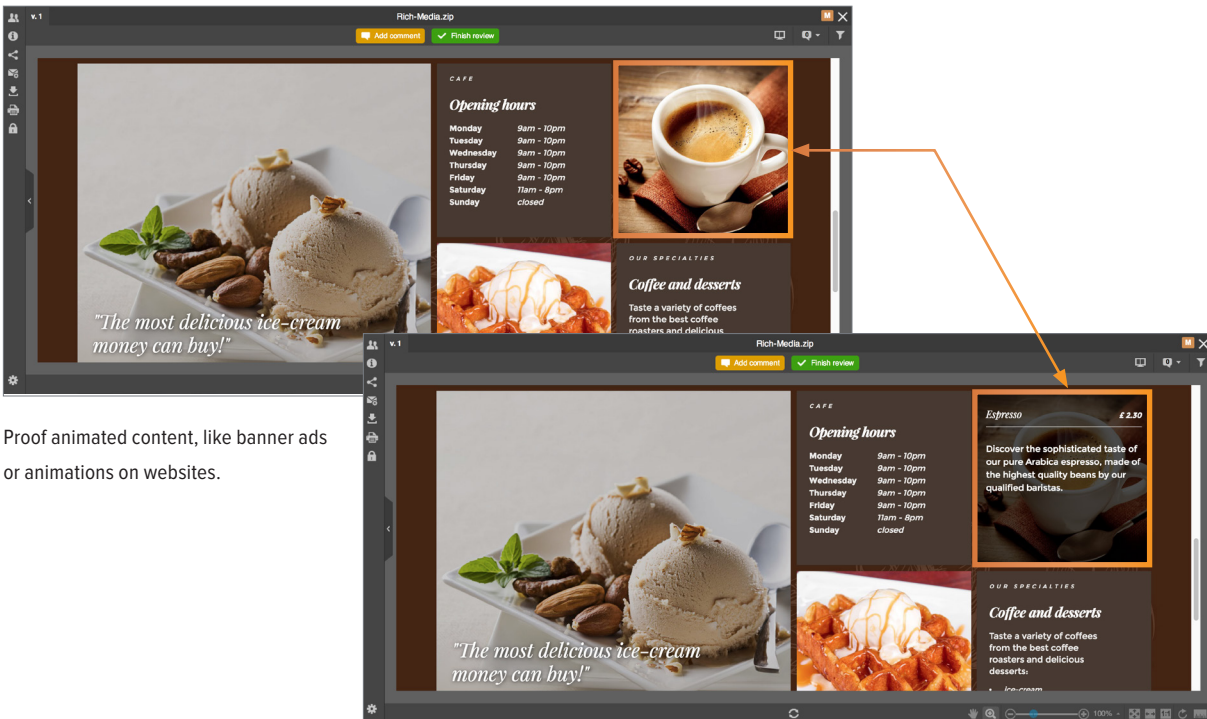
These rich media proofing capabilities are a major jump from the old days of taking a screen shot of a website and sharing that with others to proof. Now you can get a better feel for the customer experience and what their engagement with the website will actually be like. You can more accurately proof and comment on all of the different interactive aspects of a site. It makes it easier than ever before to push new campaigns and content to market faster.

Simply enter a secure, publicly accessible URL and choose whether to review it as an interactive website or static website. From within one seamless environment you can upload, review, and approve HTML5 content, interactive websites, and microsites.

In addition to URL proofing of rich media sites, ProofHQ Premium also makes it easy to work with interactive proofs of rich media sites that don't have a URL yet. You simply zip all the website's HTML5 files, CSS, javascripts, videos, images, and other source files and upload the zip file as a new proof. The site will load directly inside the proofing viewer so you can proof and comment on all of its interactions as if it were already live on the web.



Review, proof, and approve static or live URLs.



Proof animated content, like banner ads or animations on websites.

Benefits of ProofHQ Premium rich media proofing:

- Better predict customer experience and engagement
- Simplify and improve accuracy of rich media proofing
- Accelerate delivery of new campaigns and rich media content

Kick up your creative velocity

Workfront + ProofHQ Premium streamlines the review and approval of creative content and assets, giving marketers a single tool to:

- Accelerate proofing and project delivery
- Engage reviewers with better communication
- Advance reviews on schedule and at speed
- Secure private proofing comments
- Take on rich media proofing with speed and ease

To request a demo, contact your
Workfront account rep or visit us at
workfront.com.



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