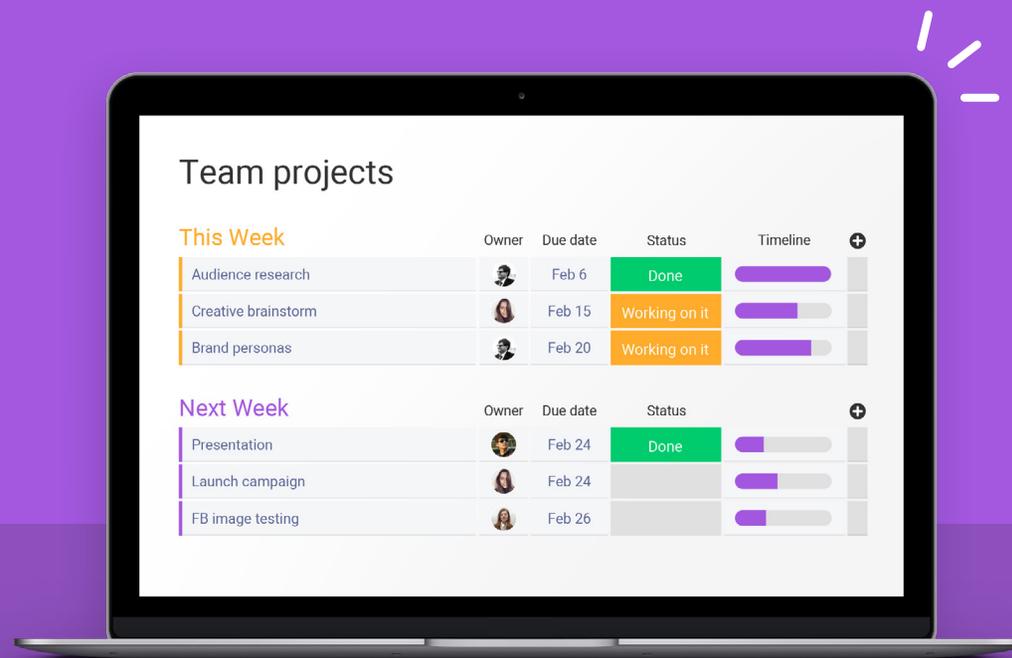


Collaborate and Innovate  
with Digital Work Management:

# 8 Things to Look for in a Solution



# Switching Apps Costs You 10 Minutes Each Time!

Think about the number of tools you use every day. You send files through email. You chat with team members on Slack. You hop on a video conference meeting. You jump into a spreadsheet to check the editorial calendar. Then you dig through a mountain of email looking for a certain message from last Thursday.

**That's a lot of hopping around!  
While you waste time and effort, your  
competitors are gaining on you.**

You thought technology was supposed to make things easier - but it's actually made project management and information sharing more difficult than ever.

All these tech tools make sense at first. They solve specific pain points and serve specific work styles and scenarios. But stacking them together leads to a chaotic workflow. You spend more time digging for information than actually using it. Meanwhile, each tool is typically used by only one or two teams-creating silos and information gaps in your organization. It's clear that as new tools get added to your communication stack, team-based work and collaboration grows more complex.



- 
- **The sales team hops between email, chat and Dropbox to find where their Chief Revenue Officer left the latest updates to the sales deck.**
  - **The Creative Director digs through his email history to make sure he has all CEO feedback on the new brand book.**
  - **The Head of Talent has to make sure that all performance reviews are stored in a secure place where managers and the rest of the HR team can access them.**
- 

No matter the person or the situation, silos, miscommunication, and wasted time wreak havoc on productivity - and your team's sanity. A digital work management solution can address these challenges by creating a single point of truth. All teams and employees have instant access to projects, timelines and tasks, supporting company-wide alignment, cross-functional collaboration and employee accountability.

Digital work management empowers everyone with the tools and information they need to do their best work. **But the truth is, not all solutions are created equal.**

Team projects				
This Week				
	Owner	Due date	Status	Timeline
Audience research		Feb 6	Done	
Creative brainstorm		Feb 15	Working on it	
Brand personas		Feb 20	Working on it	
Next Week				
	Owner	Due date	Status	Timeline
Presentation		Feb 24	Done	
Launch campaign		Feb 24	Working on it	
FB image testing		Feb 26	Working on it	

# Pitfalls to Avoid When Selecting a Digital Work Management Tool

- It's merely a task management app disguised as a more robust solution.
- The solution doesn't integrate with tools you use everyday like email, chat, and calendars.
- It only meets certain communication needs but not others.
- The tech solution actually creates silos because only certain teams are using it, or the tools are function specific which ultimately creates gaps in workflows.



**This is your guide to cutting through the clutter.**

Read on to discover the key features and capabilities to look for so you adopt a best-in-class digital work management solution.

No 1

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# Integrations with key systems

50% of workers say “working where collaboration happens” is a top attribute of an ideal workplace.

*Future of Work Study, Slack*

You know that silos are hurting communication and productivity. Like many other companies, you may be trying to adopt more team-based or project-based work styles. However, the different tools, apps and platforms you're using daily make work a nightmare for your employees. Alleviate the pain by looking for a digital work management solution that integrates with the most critical parts of your collaboration tech stack - whether it's Office 365, G Suite, Slack or others.



## Why should I?

Because employees are losing track of documents, comments and timelines that are dispersed across all of your different systems. Using a digital work management solution, users can ensure that all information is integrated into the specific project folder - even incorporating correspondence in email or chat right into the systems. That means team members can work the way they're used to working, and it's easy for management to track progress and keep everyone working towards their goals. In the end, integration makes processes more efficient and saves everyone time and frustration.



## Prove it.

Imagine an agency that manages 50 clients on a rolling basis. Daily communication is done via Slack; documents are shared through email and ad hoc comments; and feedback is dispersed across digital platforms and personal conversations. Juggling so many projects and feedback loops can get cumbersome. If information gets lost in the shuffle, it could have a significant impact on client satisfaction and trust. With a digital work management solution, however, teams can create dedicated folders for specific projects and integrate all related documents, conversations and timelines into their designated folders. In the end, everyone knows what has been accomplished and what goals they need to tackle in the next day, week or month.

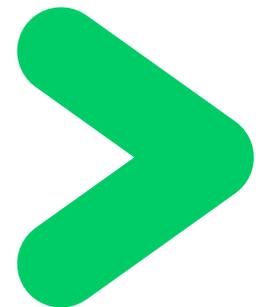
No 2

**Customizable  
visual  
dashboards  
and layouts**

“The human brain processes images 60,000 times faster than text.”

*Persuasion and the Role of Visual  
Presentation Support*

The hardest part about running a business is that every employee works differently - digesting information and prioritizing tasks in their own unique ways. Customizable dashboards and layout capabilities give people the flexibility to look at information in a highly visual, easy-to-digest way. A calendar view, for example, allows workers who are part of several teams to get a high-level glimpse at all upcoming deadlines. A Kanban layout allows people to organize tasks based on their priority and cluster related tasks together. **This is especially helpful for people who must complete several tasks that roll up to a much larger initiative or goal.**



## Why should I?

Let's be real. No one wants to work for a company that doesn't appreciate them. Employees get frustrated when accessing information is confusing or convoluted. That's no way to show your appreciation. And when employees don't feel appreciated, they're more likely to look for another employer. By offering easy-to-understand dashboards and layouts, you're giving employees access to critical information while empowering them to work in their own unique ways. Plus, they manage to get more transparency into what their team members are doing, which also helps boost team collaboration and morale.

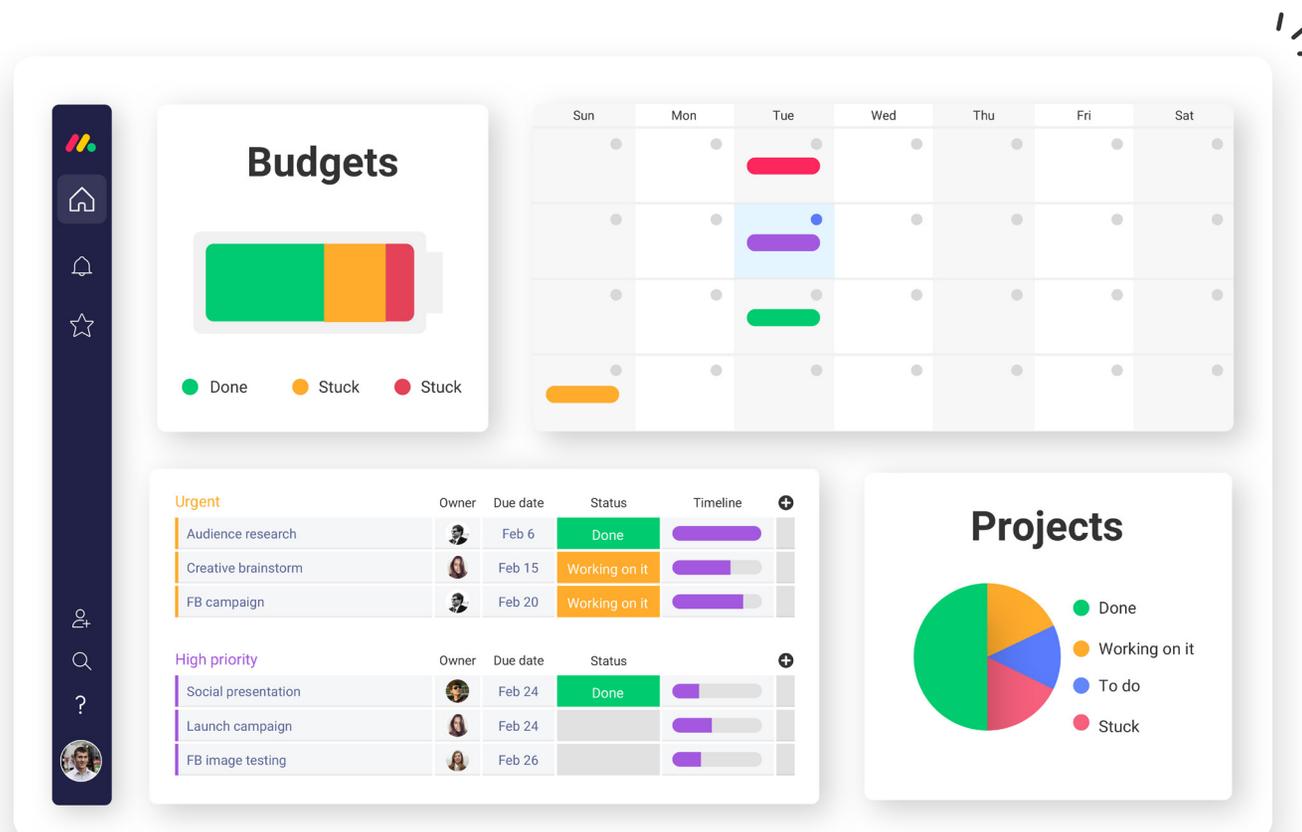
## Prove it.

A managing editor of an online publication is always planning, editing and planning some more. She's thinking about what content to publish over the next week, and what topics will be tackled over the next quarter. That makes it critical to have a comprehensive view of all deadlines. A calendar dashboard makes life a little easier for her. Meanwhile, the social team, who's largely responsible for promoting the latest content across channels, relies on a Kanban layout to cluster relevant content (posts and images) together based on the posting day, channel or the article

being promoted. Bringing both teams together to operate on one digital work management platform helps align their goals and keeps them working the way they're comfortable working. The social team gets a calendar of upcoming editorial content. The editorial team

gets a deep understanding of which content the social team plans to promote each day.

**The best part? They see the same information in a way that resonates with their unique preferences and work styles.**



No 3

**Robust  
communication  
& collaboration  
capabilities**

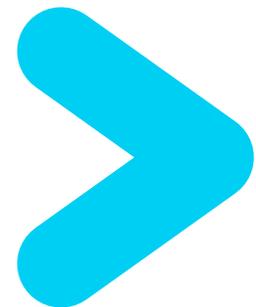
Employees who work in fully enabled digital workplaces say...

“Job satisfaction is good or very good” - 74%

“Work-life balance is good” - 70%

Aruba Networks

**Before you begin researching vendors, it's important to pause and take a step back.** Think through the challenges your employees face communicating and collaborating everyday. Then, consider how you and the executive team can improve cross-functional alignment and transparency. This exercise should help you flesh out a list of a few key capabilities a vendor must have to consider partnering with them. You want to make sure that the digital work management vendor you select doesn't have any limitations that may hinder your specific productivity needs. For example, you want to make sure that employees can upload documents and not just post timelines and tasks.

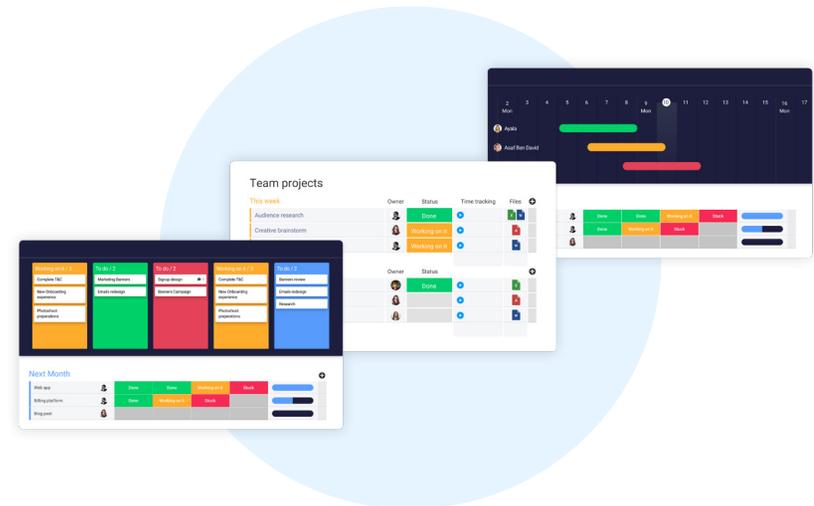


## Why should I?

It all ties back to silos. If your solution doesn't have all critical features and capabilities your employees need to get things done, they won't use it. Before you know it, you've invested in another point solution for your tech stack that makes work more inefficient and frustrating for everyone. You want a digital work management solution that encourages task alignment and transparency, but also allows team members to share feedback and actively participate in group conversations. Within one experience, all users (even the executive team) should be able to get a comprehensive view of active projects, tasks and upcoming deadlines. **Saying goodbye to complicated email threads and wasting your precious time searching in chat tools will be a big plus.**

## Prove it.

Imagine your sales team has a weekly meeting to discuss new qualified leads, closed deals and progress made towards quarterly goals. They can collectively look at rep activities, align them to upcoming campaigns, and leave the discussion with more specific goals and action items for the week ahead.



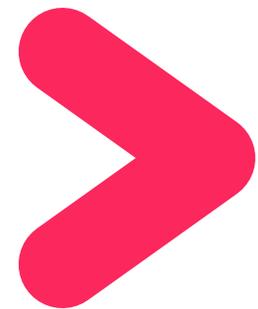
No 4

**A powerful  
mobile  
experience**

73% of internet users  
(that's 3.7 billion people!)  
will only use their smartphones  
to access the web by 2025.

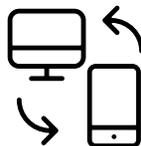
*The World Advertising  
Research Center*

Have you ever gone to a mobile site and got so frustrated pinching and zooming that you wanted to throw your phone out the window? This simply won't do when you're trying to encourage your employees to adopt a new collaboration solution. And it especially won't do in an enterprise setting, where employees are constantly traveling and expect real-time access to information. **That's why your digital work management solution must have a powerful, robust mobile experience.** Today's employees expect the experience to be streamlined for mobile screens, so it's easy to use and navigate.



## Why should I?

Mobile devices are an integral part of our days - whether we're at work, at play or relaxing at home. You want to empower (not punish) employees traveling to conferences, client meetings or just working on the go. The world has gone mobile and your digital work solution needs to be up to the task.



## Prove it.

Imagine a VP of Marketing having an initial planning meeting with his CMO offsite at a coffee shop. He can use his tablet to tap into the platform to walk through high-level progress on campaigns, metrics and marketing's impact on revenue. After the meeting, the CMO can use her mobile app to go back to her customized dashboard to brainstorm on her train ride home. When she's back at her desk, she can get right back to work, developing a comprehensive plan and budget based on their discussion.

No 5

—  
**Best-in-class  
security**

The average total cost of a data breach ranges from \$2.2 million to \$6.9 million.

*Cost of a Data Breach Report, IBM*

Security is a non-negotiable for businesses of all sizes - especially large enterprises brimming with data.

**After all, in the digital economy, data is what powers your business and enables you to keep pace with customer needs and new competitive forces.**

Your business' most critical information is stored across systems and platforms, like:

- Proprietary information
- Financial information
- HR information
- Product roadmaps
- Creative secrets

It's simply too risky to have a digital work management solution that doesn't check all the security boxes. Integrating email, chat and other business-critical communication apps into this solution can't open you up to cyber threats.



## Why should I?

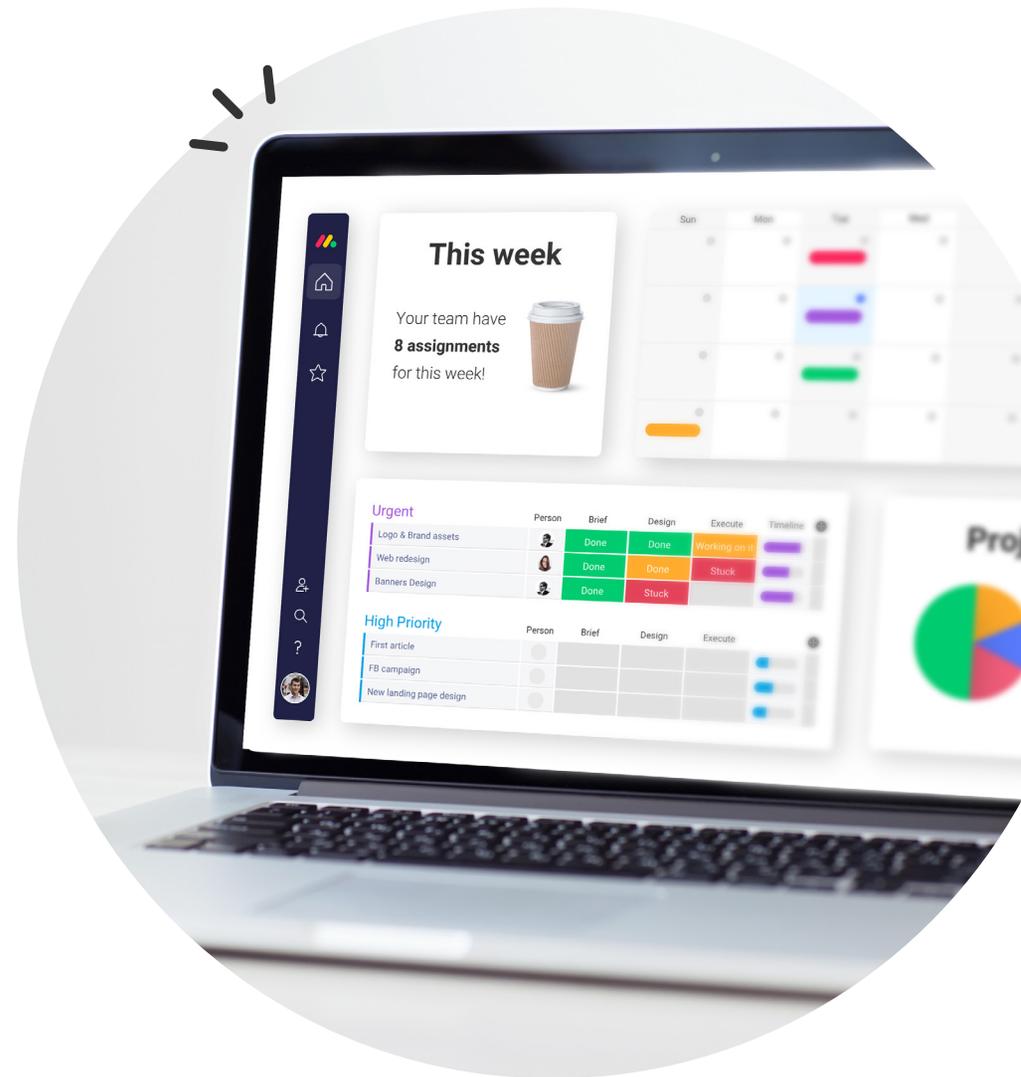
Does the name Target drum up any memories for you? What about Equifax or Uber? These companies were all hit by significant security breaches, hurting brand loyalty and causing PR nightmares. They are great examples that show the implications if you don't prioritize security. It took Target years to fully recover from the bad press and damaged brand perception from its breach. Plus, new privacy regulations are holding businesses more accountable for how they store, share and use data, fining them should they not put the proper systems in place. Not to mention, failing to invest

in cybersecurity is just bad for business in general. You want to give your employees and customers confidence that the information they share with you will stay under lock and key.



## Prove it.

HR is a great example of a business division required to keep data secure. With every new hire comes sensitive personal data such as social security numbers, banking information, pay rates, and so much more. A digital work management solution can streamline the exchange and storage of these documents, but it's your job to ensure the vendor is equipped to secure this information and has the proper certifications in place.



No 6

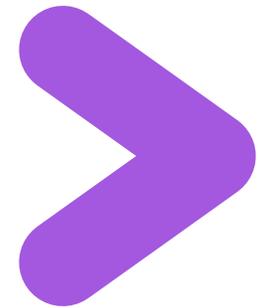
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**Easy  
templates  
for different  
workflows**

When purchasing SaaS applications, 38% of IT professionals care most about ease of use.

*The 2017 State of the SaaS-Powered  
Workplace Report, BetterCloud*

**Everyone can appreciate when technology makes their life easier.**

A best-in-class digital work management solution should offer a variety of different templates, so users have a strong starting point for developing their own workflows and timelines. Users should be able to pick from a library of pre-designed templates - then have the flexibility to further customize it based on their specific project needs.



### Why should I?

Many systems make it extremely difficult and overwhelming to get up-and-running. That can discourage employees from even using them in the first place. Templates allow you to get the most bang for your buck by boosting employee adoption and allowing them to quickly see the value of digital work management. And yes, that even applies to the not-so-tech-savvy ones. **Templates also allow busy managers and leaders to get projects going quickly, which is critical when you always have to run to another meeting.**

### Prove it.

Marketing teams roll out a lot of campaigns throughout a business quarter. Having a set template that the VP or Director of Marketing can simply click and customize gets things rolling quickly and easily. **No more projects stalling out before they start!**

No 7

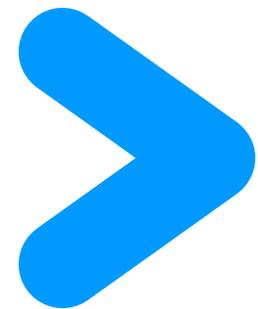
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**Seamless  
adoption  
& ongoing  
training**

34% of employees are motivated to use new technology because they're curious about the promise of better efficiency.

*2018 Technology at Work Study, PwC*

With every new solution you implement, you're essentially taking a gamble that your employees are going to embrace it. Sometimes people are set in their ways, and getting them to adopt a new process is an uphill battle. When picking a digital work management solution, take a close look at the services the vendor provides to ensure a quick and turnkey setup. **Do they offer workshops? Are ongoing training opportunities and resources available so users constantly feel like they're learning new tips and best practices? Are service reps accessible to all users, not just IT?**



## Why should I?

Adoption is a critical metric. After all, you want to make sure that the solutions you implement are being used to their full advantage. In addition, you want to make sure that your vendor isn't just selling you stuff; you want them to be a strategic partner for your business and all your people. **If they offer a variety of onboarding solutions and services that drive employee empowerment, it's clear that they will help you get the most value out of your investment.**

## Prove it.

Getting new hires up-and-running with your systems and processes is never easy. It takes HR and management weeks - sometimes months - to get them up to speed. Imagine all that work falling off their plate so they can focus on their own tasks and priorities. Instead, the vendor plans a digital onboarding bootcamp where they walk through the setup process, features and capabilities, and even sample workflows.

No 8



# A stellar client list and recommendations

When looking at information to make a buying decision for their business, 92% of executives give more credence to peer reviews and user feedback.

*2019 Content Preferences Survey,  
Demand Gen Report*

**When you're researching solutions, look for case studies and testimonials.** Any company can create a pretty website or spotlight a few features. Clients, however, offer real perspectives on their challenges and how the vendor helped them tackle these issues and ultimately see success.



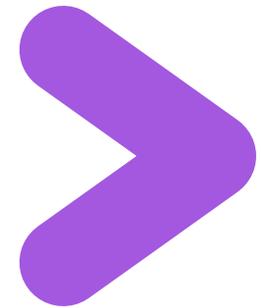
## Why should I?

Enterprise organizations have very specific needs, and their own sets of complex challenges and priorities. You need a digital work management solution provider equipped to support your needs - and client testimonials are a great way to confirm they're the right partner for your business. **Having insight into client case studies and use cases is especially helpful if you need to justify the investment to any stakeholders, such as the CFO or CIO.**



Begin Your Search:  
**10 Questions to Ask Vendors**

As you research digital work management solutions, develop a working list of options that seem to best meet your company's needs. You can determine this by looking at high-level features, benefits and key differentiators they spotlight. Once you have a few promising prospects, you can reach out directly to a representative to receive more specific information. **We recommend you start with the following questions to ensure you get all the details you need to make the best decisions.**



# 10 Questions to Ask Vendors

1. What security protocols do you have in place?
2. What are the most common use cases?
3. What integrations do you have?
4. What level of service and support do you provide to clients?
5. How do you address adoption/challenges with your clients?
6. What mobile capabilities do you provide?
7. What limitations are there in terms of account tiers/number of users?
8. What design layouts and templates do you have available?
9. What customization capabilities do users have access to?
10. What sets you apart from the competition?

**Well, what are you waiting for? Start searching!**

Get Things Done with  **monday.com**

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# Digital work management solutions are designed to help your teams get things done.

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And there are a lot of systems on the market designed to help manage tasks and deadlines. But not every vendor has the power to offer your team the collaborative capabilities, powerful integrations and best-in-class security features that are critical to making your business successful.

Our turnkey solution is built for even the largest enterprises and our team of experts can set everyone up for success. See why monday.com is the right solution for your business... and your people. [Sign up for a demo now!](#)

