

Which Workflow Support Package Is Right for You?

A 2-Minute Assessment for Higher Ed Marketing Teams

Use the questions below to determine which engagement is the best fit based on your team's current workflow maturity, tool adoption, and execution challenges.

Circle one answer per question and add up your points.

1) Do you currently use a project management tool?

- Yes, and it works well *(1 point)*
- Yes, but we struggle with adoption or efficiency *(2 points)*
- No, we don't have one (or we're dissatisfied with our current tool) *(3 points)*

2) Do you have a dedicated project manager overseeing workflows?

- Yes *(1 point)*
- No, but some team members handle it informally *(2 points)*
- No, responsibilities are scattered across multiple people *(3 points)*

3) How would you describe your current workflow processes?

- We have well-documented processes that mostly work *(1 point)*
- We have some processes, but they are inconsistent or inefficient *(2 points)*
- We don't have clear processes, or they often fail *(3 points)*

4) How often do projects encounter bottlenecks, miscommunication, or delays?

- Rarely — things run smoothly most of the time *(1 point)*
- Occasionally — some issues, but we manage them *(2 points)*
- Frequently — delays, confusion, and inefficiencies are common *(3 points)*

5) How well does your team collaborate and track project progress?

- Very well — roles and responsibilities are clear *(1 point)*
- Somewhat well — we have tools, but accountability is inconsistent *(2 points)*
- Poorly — there's confusion about ownership and project status *(3 points)*

6) How often do projects get completed on time without unnecessary follow-ups or rework?

- Most of the time *(1 point)*
- Sometimes, but delays and rework happen *(2 points)*
- Rarely — things often fall through the cracks *(3 points)*

TOTAL SCORE: _____

Your Results

Score: 6–9 points → The Optimizer (6 Months | \$50K)

Your team has foundational structures in place, but there's room for refinement. This package is ideal for:

- Improving workflow consistency and task ownership
- Streamlining intake, approvals, and routing

- Increasing adoption and efficiency inside your current tools
- Reducing bottlenecks and follow-ups over time

Best for teams who: are functional, but not fully aligned — and want sustainable operational lift.

Score: 10–18 points → The Overwhelmed & Disconnected (12 Months | \$95K)

Your team is dealing with deeper inefficiencies — unclear ownership, inconsistent processes, or tool misalignment. This package provides hands-on support to:

- Conduct a full operational and workflow audit
- Map your current-state workflows and rebuild what's missing
- Implement a scalable system (including Hive setup if needed)
- Guide adoption and long-term behavior change across the team

Best for teams who: need structure built (or rebuilt) from the ground up.

Fast-Track Support

Sometimes the score isn't the whole story — urgency and leadership alignment matter.

VIP Strategy Day (Starting at \$11,500)

Choose this if you need **clarity fast** and want a high-impact working session to:

- Diagnose workflow breakdowns
- Clarify task ownership + decision points
- Leave with a Workflow Strategy Blueprint + execution priorities

Best for teams who: need a reset, alignment, and a plan — quickly.

VIP Strategy Day + Implementation Kickstart (\$22K)

Choose this if you need **a fast reset AND immediate execution support** — not just recommendations.

This option includes:

- VIP Strategy Day (diagnosis + blueprint)
- A short implementation window to help you **start building the system right away** (ex: intake + workflow setup, tool configuration, rollout plan)

Best for teams who: are ready to move now and want expert support to start implementing immediately.

Next Step

If you want help confirming the best fit (and what implementation would look like for your team), schedule a consultation:

Book a consultation: <https://meetings.hubspot.com/joanne-giles>

Email: contact@itsallthingscontent.com