Marketing: 5 keys to managing incoming requests in project mode

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The breakdown

1 Take back control of your demands, from emails to the desk

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For greater efficiency, centralize your tasks!

In theory, there are as many request channels as there are points of contact in your organization. If nothing is done, everyone will contact your team in whatever way suits them best (and rightly so!): by email, chat, phone, or directly at your desk.

The thing is, this combination of channels can quickly become unmanageable. The best solution is therefore to take the lead by creating **a single space where you can centralize all your requests**, simplifying both your work and your requesters'.

79%

of internal company communication is divided among email (36%), online chat (26%), and project management tools (17%).

(Project.co, 2025)

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What can be done?

- **Identify the most appropriate channel** for centralizing all your incoming requests. You can ask the marketing team for feedback via a quick survey or have them vote for their preferred channel on a Klaxoon whiteboard.
- **Create standardized briefs** and centralize them in this channel, on a whiteboard, or in another visual medium that is shared with the teams. To increase efficiency, organize a 30-minute workshop to present your new process.
- In the meantime, **document the steps for using your channel or workspace in writing** as much as possible, so that other teams can refer back to this information in case of doubt.

Tip

Use a ready-to-use template, such as "Team Task List" to help you organize your space and take action more easily.

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2 Set clear priorities (even when everything is urgent)

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Is this a Tier 1 or Tier 3 priority?

When everything is "urgent," it's hard to know where to start. Requests are handled in the order they arrive, based on gut feeling or who follows up with the team the most, so truly strategic issues are constantly postponed.

To gain clarity, **define shared priority rules**, including criteria, realistic deadlines, and the order of processing in case of conflict. Making these rules visible to everyone reduces tension and allows you to focus your energy on the issues that generate the most value.

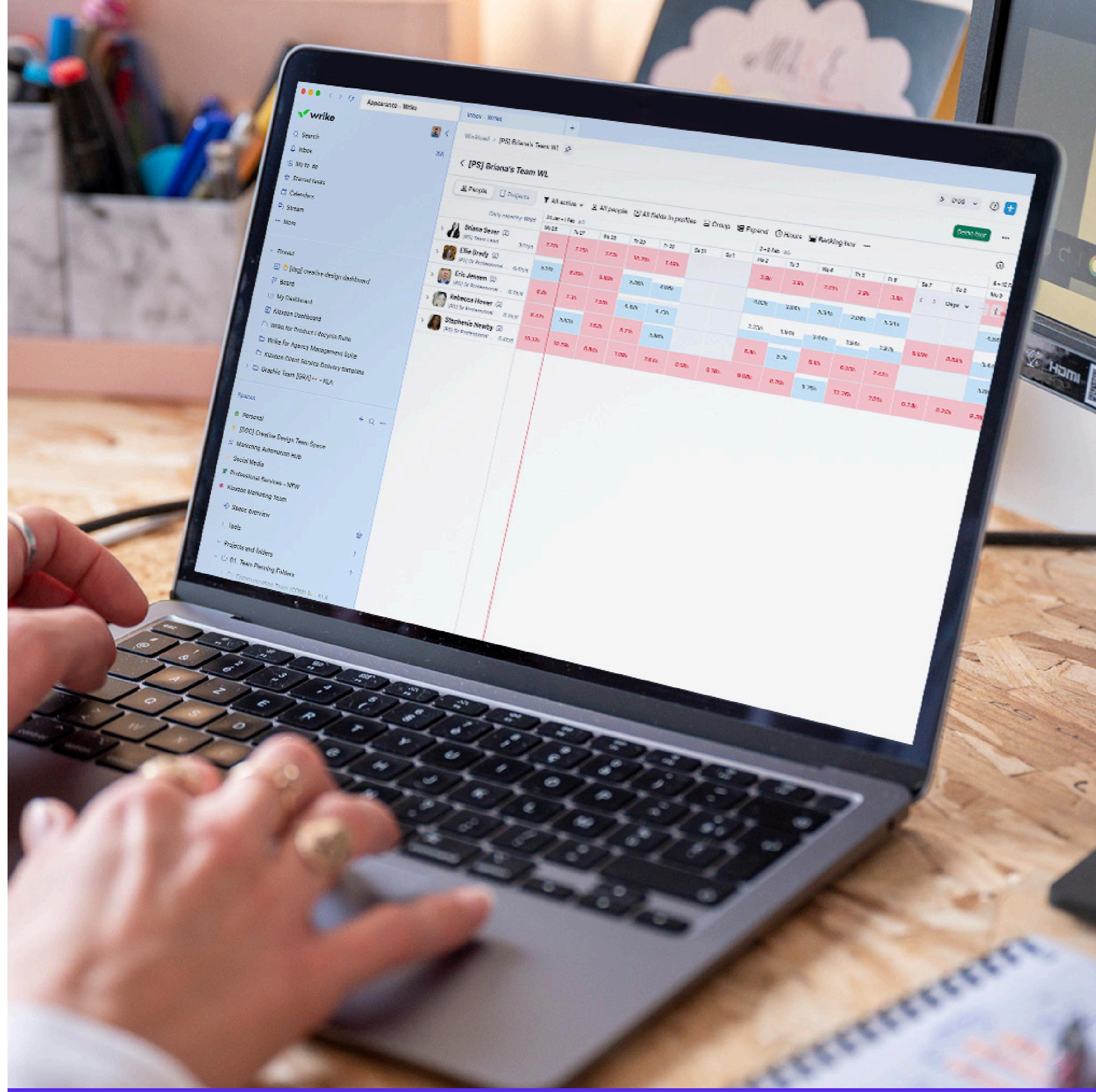
40%

of employees report being asked to do more work in the same amount of time.

(My Hours, 2025)

What can be done?

- During the briefing phase, **include a selection of priority levels**, with a maximum of three or four. Explain each level to the requester as objectively as possible. For example, "Critical Priority" means "major direct impact on customers or revenue."
- **Create a tracking board** to clearly visualize your priorities. For instance, you can compile your requests in a Kanban table and use color-coding to indicate their level of priority.
- **As a team, regularly review your priorities.** For example, holding a 30-minute sprint meeting every week can help you maintain an overview and identify urgent issues that need to be addressed.



Tip

If you use a work management platform like Wrike, create a capacity calendar directly linked to your projects to give your requesters a clear view of your availability.

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3 Ensure alignment from the outset

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Would you rather spend 30 minutes on alignment or 3 weeks on adjustments?

If alignment isn't done at the beginning, it will happen later, at the worst possible time. The day before delivery, the requester will start having doubts and asking questions, going, "Can we review this once more?" This can result in major (and urgent) last-minute corrections.

Your team will then spend hours catching up, reformulating requirements, or modifying deliverables that are already well underway. **Clear alignment from the beginning avoids this spiral of follow-ups**, doubts, and feedback.

56%

of teams believe that they should discuss their strategic alignment more than once a month.

(HBR, 2026)

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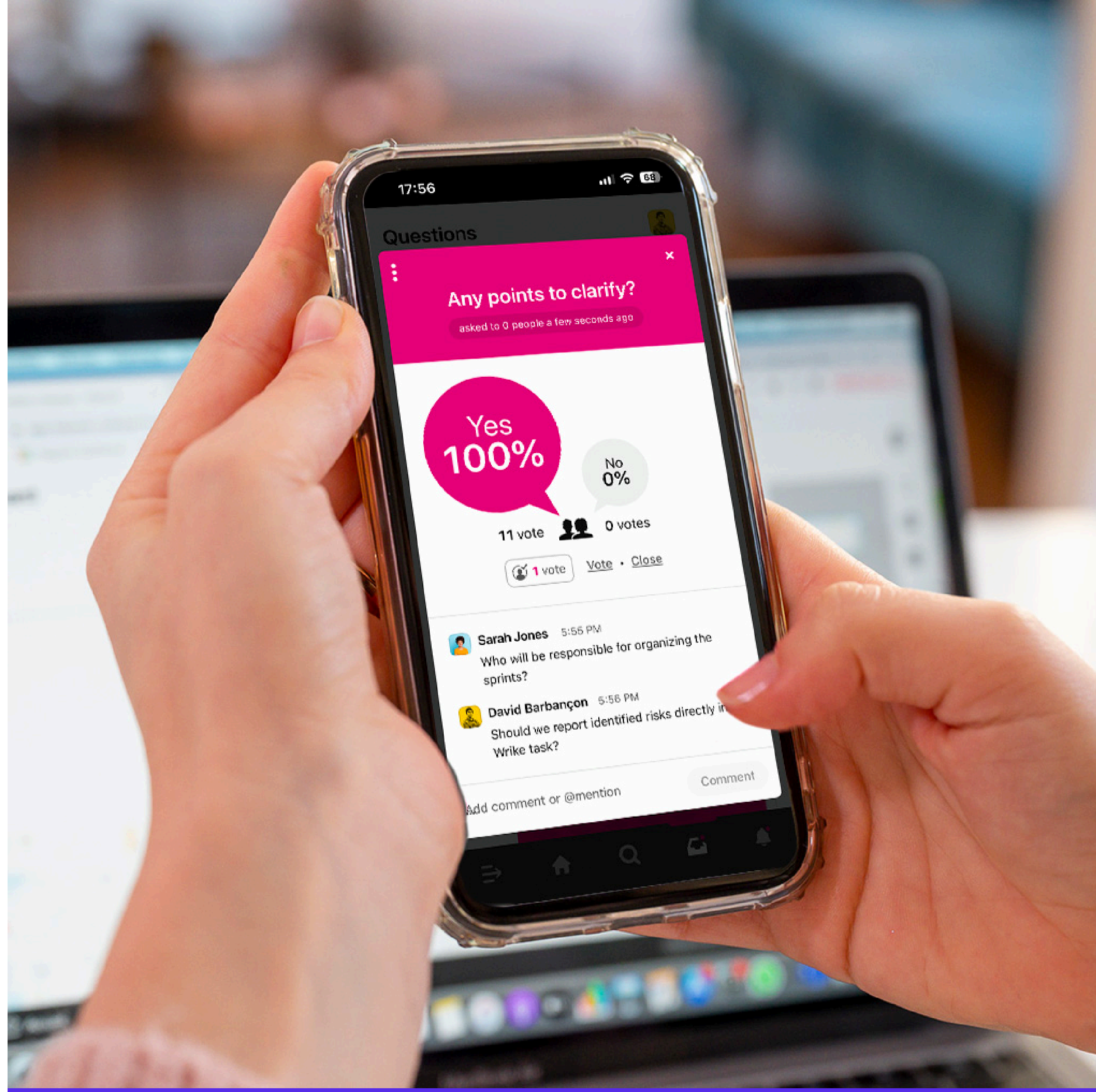
What can be done?

- **Save time on formatting.** At this stage, using a structured method such as RACI allows you to spend less time preparing for discussions. This lets you focus entirely on validating the strategic aspects together.
- **Formalize your decisions in writing** to maintain the best possible overview of the project (choices made, constraints, objectives, excluded elements, etc.). Ask for as much context as possible during the briefing stage.
- **Plan for a real launch for new projects.** If a project appears complex, plan a quick kickoff meeting with the requester to set expectations. Depending on the project's scope, plan brief interim check-ins (no more than 15 minutes) to verify alignment without waiting for the final version.



Tip

Use Klaxoon's interactive questions to encourage your requestors to share their concerns, questions, and expectations from the beginning of the project.

4 Say goodbye to “How's the project going?”

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More visibility, less friction!

Without a designated place to track the project, the same questions will keep coming up: “Where are we at?” “Do you have an ETA?” “Can you send me the latest version?” These constant reminders interfere with your concentration and reduce your productive work time.

The solution? Giving everyone the ability to **track the progress of their requests in real time** so they don't have to constantly ask you for updates. This drastically reduces interruptions and allows you to focus fully on production.

23 min

This is the time needed to fully regain our concentration after being interrupted while performing a task.

(University of California, Irvine, 2022)

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What can be done?

- **Automate your workflows** to save time when updating your projects. With Wrike, for example, you can automatically assign the right people for review or approval at each new stage.
- **Use comments to track decisions.** For example, when working in a Google Doc or a visual whiteboard, comment on the progress of a topic after completing a step.
- **Set aside time in your shared calendar for focused work** and promote asynchronous work to minimize interruptions.

Tip

Improve visibility for your requesters and enable real-time updates by importing Wrike widgets to display your project progress data directly in your Klaxoon Board.

5 Stop reinventing the wheel with each campaign

"We've already done a project like that, right?"

When each campaign is managed manually, with briefs, tasks, and schedules recreated from scratch, the mental load increases significantly. Your team ends up spending more time structuring the form than thinking about the content.

The challenge is not to freeze everything but **to build on what already exists**: campaign templates, lessons learned from past projects, and AI databases. The more standardized your recurring formats are, the more time and energy you free up for new topics, creative thinking, and strategic issues.

5h

Marketing teams can save more than five hours of work per week by using AI tools trained on their existing data.

(CoSchedule, 2025)

What can be done?

- **Train your internal AI tools** using your existing content, such as briefs, messages, and successful campaigns, to provide a solid foundation for new projects. Ideally, create AI agents dedicated to your recurring projects, such as webinars and newsletters.
- **Maximize the effectiveness of your interactions.** For instance, during brainstorming sessions, collaborate with your team on a Klaxoon Board to generate ideas, and then use AI-based features to create a comprehensive action plan.
- **Create blueprints for your recurring projects.** List the creation steps and useful resources in a visual, shared process that can easily be automated and reused to meet future needs.

Tip

Use Klaxoon's visual retrospective template with your team to identify the best practices and insights from past projects that can be reused in current ones.

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Key points checklist

1. **Centralize your incoming requests** in a shared, always-accessible space with clear rules for everyone.
2. **Prioritize objectively:** define shared priority criteria to ensure clear decision-making regarding urgent requests.
3. **Get aligned from the outset:** clarify the key points of the project as much as possible before they generate critical issues.
4. **Make your progress visible:** give everyone real-time visibility into their progress to reduce follow-ups during the project.
5. **Standardize what can be standardized.** Capitalize on past topics so that you don't have to start from scratch with every project.

Learn how to handle your day-to-day marketing requests more effectively and hassle-free!

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