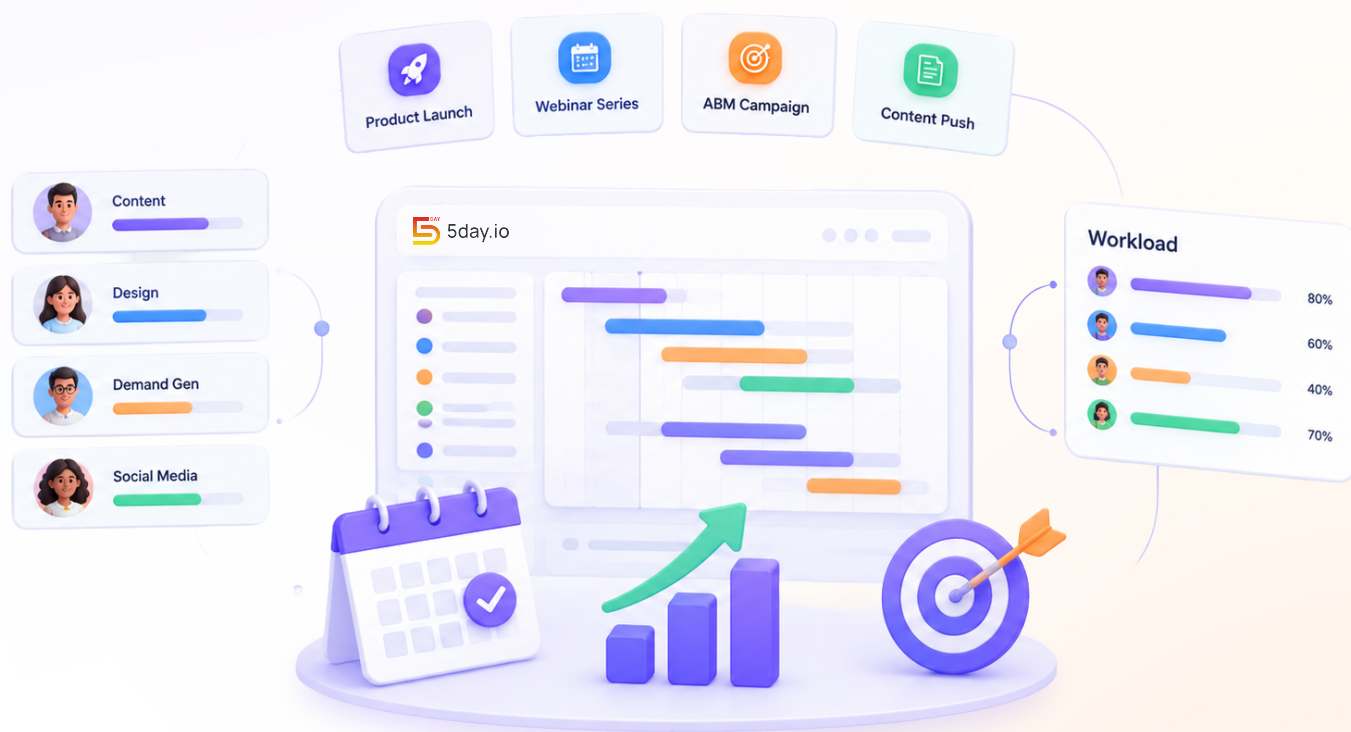


B2B WORKFLOW SOFTWARE · CAMPAIGN MANAGEMENT

How Our Client Runs 12 Campaigns at Once Without Missing a Launch Date

Managing timelines across concurrent campaigns.



INDUSTRY

B2B workflow
software

COMPANY SIZE

9-person in-house
marketing team

RESULT

12 campaigns run in parallel,
~92% deadlines hit

The Problem

The team ran product launches, webinar series, ABM programs, and quarterly content pushes in parallel. Each lived in its own spreadsheet or thread.

Three things kept going wrong:

1

Deadlines slipped because nobody could see who was already at capacity.

2

Work stalled between teams (copy to design, design to demand gen) and no one was notified.

3

Every campaign was planned from scratch, so timelines varied and steps got missed.

Managing multiple campaigns stops being a planning problem and **becomes a visibility problem.**

What They Set Up in 5day.io

Four changes, templates, visibility, automated handoffs, and automated deadline tracking, replaced the spreadsheets and threads.

1

Templatized campaign projects

Planning time dropped from days to under an hour

2

Workload view

Capacity checked before work is assigned, across every campaign

3

Handoff automations

Design and demand gen notified the moment work is ready for them

4

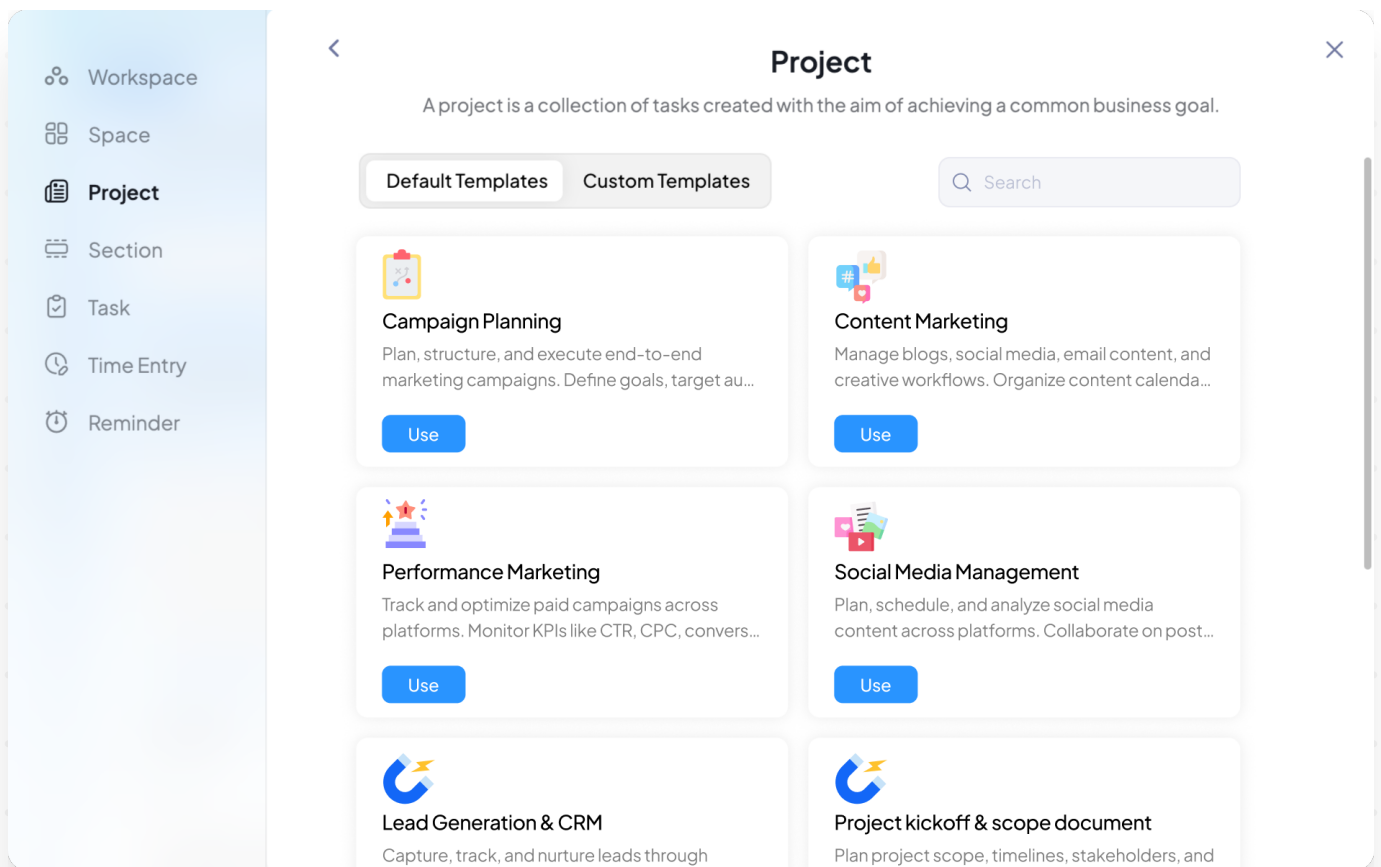
Deadline management with automations

At-risk tasks flag themselves instead of surfacing in a status meeting

1

Templatized campaign projects

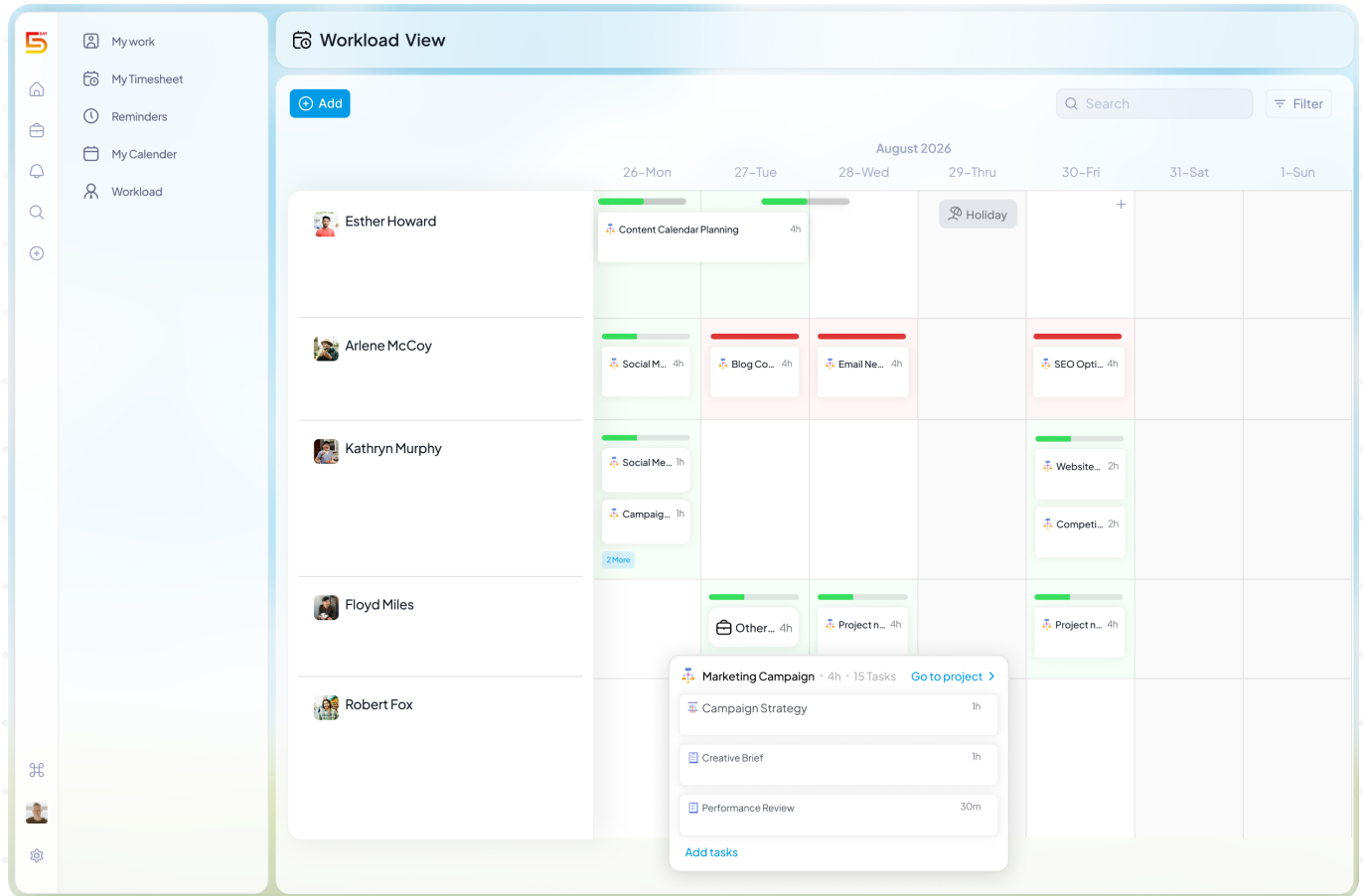
The team built templates for product launches, webinars, series launch launches, and ABM plays, each with standard tasks, dependencies, and default durations. Kicking off a campaign now means choosing a template and setting the launch date. Planning time dropped from days to under an hour.



2

Workload view

Before assigning work, the campaign lead checks each person's load across all active campaigns. When the content lead was over capacity in the same week as two launches, the team reassigned two tasks before the conflict turned into a missed date.



3

Handoff automations

When a draft is marked complete, the design task is assigned and the designer is notified with the brief attached. The same applies from design to demand gen. Time spent waiting on handoffs fell because no one had to send a "it's ready" message.

The screenshot displays a 'Workflow Automation' interface with a header bar containing navigation icons and a user profile. Below the header, a breadcrumb trail shows '< Back' and 'Assign Draft to Editor'. The main workspace is divided into two sections: 'When' (triggers) and 'Do this' (actions).

When (Triggers):

- Task: Status updated from Any Value to Draft Comp...
- AND
- Task Type is Content
- AND
- Tags is blog

Do this (Actions):

- Add Assignee: stuti.shah
- Send an Email: To: stuti.shah@5day.com
- Task Name is sent for editing!
- Task Name is send for editing. Please send the revised draft by Task Due Date
- Thank you!

A green line connects the 'Draft Comp...' trigger to the 'Send an Email' action, indicating the flow of the automation.

4

Deadline management with automations

Automations flag tasks when a due date is at risk, notify the owner and campaign lead, and update dependent task dates. Status meetings became exception reviews rather than round-the-table updates.

The screenshot displays a 'Workflow Automation' interface. The top header shows the 'Workflow Automation' title and an 'Add Members' button. The main area is titled 'Escalate a task that's overdue'. A condition is set: 'When Task is 1 days After Due Date'. A green line connects this condition to an action block. The action block is titled 'Do this' and contains two steps: 'Set Priority' (set to 'High') and 'Send an Email' (to 'stuti.shah@5day.io'). The email body text is: 'Task Name is overdue. Task Name is now 1 day overdue, and its priority has been escalated to High. Please review the task and take action as soon as possible to avoid further delays.'

The impact after implementing 5day.io

5-6 → 12

Concurrent campaigns managed

~65% → ~92%

Deadlines hit

2-3 days → <1 hr

Campaign setup time

90 → 30 min

Weekly status meeting time

This story is a composite drawn from patterns we see across marketing teams using 5day.io. Names, details, and figures are illustrative.

Takeaway

The team let 5day.io do the work. Templates set the plan, workload view protected capacity, and automations kept work moving between people.

The team spends its time **on the campaigns rather than tracking them.**



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