STOP KILLING YOUR MARKETING TEAM

workfront

12 ARTICLES THAT WILL MAKE YOUR MARKETING TEAM FASTER, HAPPIER AND MORE PRODUCTIVE

FOREWORD

Marketers have it rough, managing the typical chaos of work and putting in overtime to produce the very best campaigns. Irate clients, insufficient resources, over-abundance of spreadsheets, and other challenges only make things worse. Luckily, there is a way out.

Many creatives and marketers worry that structure will take them away from the creative work they love. But experts are finding that applying just enough structure to keep stakeholders, clients, and team members aware of what's happening can boost productivity. Magically, this approach also gives creatives time to focus on the work they love.

These 12 easy-to-read articles are chock-full of actionable insights that marketers can implement today in their businesses, such as:

- How to gain the ability to say 'no' to requesters
- How to use Agile methodology to get work done faster and let team members exercise their creativity
- How to cut down on the number of meetings and interruptions marketers experience

Enjoy!

TABLE OF CONTENTS

4 WAYS TO MAKE SURE STRUCTURE UNLEASHES CREATIVITY

Creatives worry about organization and process taking away time from creative pursuits. But without enough structure in place, they could be losing even more time for the creativity they crave.

BY BRYAN NIELSON — EVP, STRATEGY, GO-TO-MARKETS & PRODUCT — WORKFRONT

ORIGINALLY PUBLISHED ON MARKETINGPROFS.COM

Myth: "Creativity needs room to blossom."

Marketers, and especially designers, are creative by nature. So there is a tendency to want to remove the restraints of structure or "process" because "creativity needs freedom." Creatives worry that organization and process are constraining and take away time that could be spent creating.

DUCK HUNT

With priorities changing regularly, your creative team members take aim at one target, only to find that they've headed south the next.

24%

SAY THEIR WORK PRIORITIES SHIFT DAILY, RESULTING IN WASTED TIME AND INCREASED STRESS

Image from "Creative Teams Live in a Reality Show"; Source: "Work is Hell Survey," Workfront Inc, 2013.

But without work processes in place, you lose more time than you gain.

Up-front planning, with clear objectives to achieve a strategic goal, doesn't just add "one more thing to do and update." Rather, it helps streamline work and avoid potential errors.

> *"[E]rrors are the true culprit that eats up time that could be better spent on creative endeavors."*

And errors are the true culprit that eats up time that could be better spent on creative endeavors.

Jed Simms, founder and co-creator of Totally Optimized Projects, notes that on average 30-35% of project time is spent on rework, including revising reports, revisiting decisions, redoing work, correcting errors, checking again, and repeating steps. Simms also points out that reducing the need for rework releases 15-20% of project time and effort for more productive work.[1]

With the right structures in place—for example, standardized work requests, templates for repetitive work, complete campaign plans, and a clear approval process—you can save time in various ways. You get the feedback you need at the right time and from the right people, reducing the amount of time you spend waiting on approvals, doing repetitive tasks, and reworking projects, thus giving you more time to spend in the right side of your brain.

In short, structure creates time for creativity.

"Checkpoints slow you down, in a good way" says Todd Henry, CEO of Accidental Creative.[2] By planning ahead and checking on progress as you go, you'll end up with more time and fewer 'uh-ohs.'

Seize the opportunity to add some beneficial structure to your process and discover how you have freed your creativity.

Here are four tips on how to put structures in place before starting your creative work.

❶ DEVELOP A COMPLETE CREATIVE BRIEF

A complete creative brief is square one. It should be used as the basis for communications with clients, employees, shareholders, the media, or any other target group involved in a project; it serves as the agreed-upon focus and expectations for all stakeholders.

A complete creative brief will include strategic items such as the objective of the project, the primary audience and their beliefs, the tone, the key message, and the call to action. It should be used for all creative projects, not just the "big" or "important" ones.

A brief frees up the creative team by providing vision and clarity. That way, there is no wasted energy developing something for the wrong target, for example.

When all key players cooperate, and they are in agreement with the brief (and, remember, briefs should be "brief"), that consensus serves to direct ideas and analysis and helps the best creative method for approaching a project to emerge.

> *"A brief frees up the creative team by providing vision and clarity. That way there is no wasted energy developing something for the wrong target."*

❷ CREATE AND IMPLEMENT A CAMPAIGN EXECUTION PLAN

One of the biggest challenges for marketing managers is the envisioning and development of the right plan for execution of their project or campaign. The execution plan is the vehicle that delivers the correct and necessary information about the deliverable.

Accordingly, you and your team must create a plan that contains specific themes and goals. It should detail the activities regarding when, where, and how a specific marketing message is delivered.

The creative team benefits from such details; the more information, the more colors on the creative canvas. The whens, wheres, and hows, as an integral part of the marketing message, can be woven into the creative work when they are present from the beginning and when they are understood as being part of the plan.

❸ MAP OUT YOUR WORK TO MEET DEADLINES

Whatever your personal belief about deadlines—whether they kill creativity or they motivate it—you will find research supporting your theory. My recommendation here is to identify the intermediate level of time pressure that is the sweet spot for unleashing creativity.

That sweet spot is going to be most easily identifiable when you set your own internal deadlines and map out the details of your project to align with those personal deadlines.

❹ FOLLOW A STANDARDIZED APPROVAL POLICY

When all plans, briefs, and execution are subject to a standardized approval process, a creative team can move forward with confidence and commitment, knowing that their efforts are correctly targeted and that they align with the strategic goals of the business.

That kind of peace of mind fuels freedom for a creative team, because they are not constantly second-guessing the mindset of the stakeholders and their vision.

Creativity is a critical element of every project, and every effort should be made to feed it and sustain it. Having structure and processes in place is important for that very reason. Because it's only then that creativity will flow—and flow down the right path.

GET A CLUE ON MARKETING PRODUCTIVITY

Too few marketing managers know what's happening in their teams. Changes in how teams communicate, however, can eliminate this problem and open the door to greater productivity and efficiency.

BY BRYAN NIELSON – EVP, STRATEGY, GO-TO-MARKETS & PRODUCT – WORKFRONT
ORIGINALLY PUBLISHED ON DIRECT MARKETING NEWS

"I think it was Colonel Mustard in the library with the candlestick."

Too often in the world of marketing work management, managers—and even team members—feel like they don't have a clue about their team's work or productivity. In particular, work requests and statuses become the big mystery everyone is trying to solve: "Um, I think Joe is working on that one campaign and is about 80-percent done. At least that's what I heard from Carla."

Direct marketers are extremely busy, formulating creative campaigns for reaching targeted audiences, and working behind the scenes to pull strategy and materials together—but all too often, the reason marketers are so busy is a mystery to everyone else. Solving the mystery requires communication regarding who's doing what, where, and when. Unfortunately, creating this level of communication is easier said than done.

TRANSPARENT WORK STATUSES

On average, two in five projects do not meet their original goals and business intent, and half of those unsuccessful projects fail from a flaw linked to communication inefficiency, according to a recent report by the Project Management Institute.[3]

Winning the game of marketing work management requires knowing how your team uses its resources and tracking what tasks are behind schedule. That way, you also know how to make the right moves. Here are some ways to start:

- **REDUCE THE RESISTANCE**
  Create a centralized system that lets your team collaborate in a single location. This reduces the disparate communication, eliminating information overload. Standardize what you need to communicate and to whom. Minimize updates and base them on the criteria and frequency already established.

- **MAKE STATUS A VALUE-ADD**
  Allow team members to update their task statuses quickly, review other task statuses, and respond with feedback easily in a central location. Making information easy to access and update empowers the organization's players, and they are more likely to do it.

- **PROVIDE CUSTOMIZED COMMUNICATION**
  Different stakeholders need to know different things at different times. Take the time to learn what your stakeholders' needs are and make sure the information you give them fits the context of their roles.

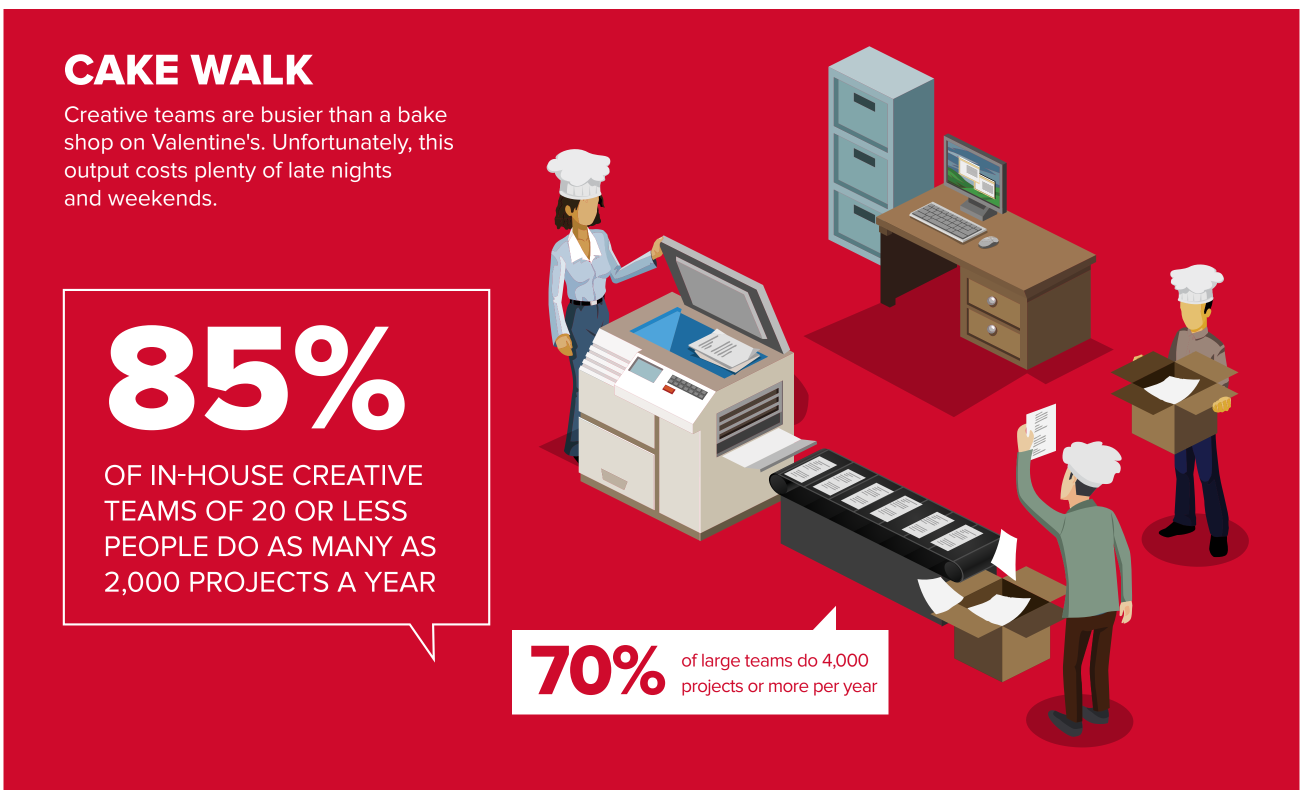


Image from "Creative Teams Live in a Reality Show" infographic; source: "2014 In-house Creative Services Industry Report," The BOSS Group, January 2014.

When you change marketing work management from a suspenseful guessing-game to a game of open communication and transparency, work ceases to be a mystery, and your team will win every time.

STREAMLINED WORK REQUESTS

Another major contributor to guesswork (and resulting chaos) in marketing is the work request. Like in a board game, new requests can send you backward, help you skip ahead, or force you to lose a turn at any moment.

Requests come from every direction—email, meetings, sticky notes, phone calls, text messages, etc. You make spreadsheets. You write lists. But in the constant barrage, you can't keep track of it all. The unpredictability of how many requests you take on, whether or not there will be an "emergency," and how to add the new work to your already overflowing plate often throws a wrench into any workflow management strategy.

But you can change the game—especially with these key strategies that eliminate the chaos of marketing requests—and regain control of the board:

- **CENTRALIZE REQUEST MANAGEMENT**
  Create a set method for receiving and processing work requests, and demand adherence to that process. The penalty for going around the system is that the new request won't be heard.

- **PROVIDE RESOURCE VISIBILITY**
  Before considering any requests, you should check your availability and that of others. Get access to resources, skills, and schedules to better target work availability.

- **ALIGN PROJECTS WITH BUSINESS GOALS**
  Weed out ideas that are cool for the sake of being cool and instead focus your resources on moves that contribute directly to your department and company goals.

- **ENFORCE BUSINESS CASES**
  Vet work requests to ensure they will realize ROI and meet strategic goals. This safeguards priorities from the top of an organization down.

- **UNDERSTAND TRADEOFFS**
  New requests can interrupt work in the pipeline, causing unnecessary delays. It's imperative to understand the tradeoffs and downstream effects of accepting new requests.

- **EMPOWER WORKERS**
  Every team member needs to be able to say "no" when a request doesn't align with strategic objectives, won't turn out acceptable ROI, or will require more resources than are available.

When it comes to marketing, stop guessing and get the facts. Implementing these tactics into your marketing work management strategy will help you change marketing from a game of chance to a game of strategy, so you can win every time.

WHY COMPANIES CAN'T GET ALIGNED AND HOW YOU CAN

Companies that have invested in visibility and the alignment that springs from it enjoy a level of nimbleness, efficiency and morale that other companies can only dream of.

BY ERIC MORGAN — CEO — WORKFRONT
ORIGINALLY PUBLISHED ON INC.COM

Companies don't usually lack goals, objectives or strategies. Getting an entire organization aligned around a strategy and executing effectively is another matter entirely.

Business leaders might conjure up a vision by putting goals and objectives on a slideshow, the equivalent of putting an 'x' on a map and drawing a dotted line to it. But alignment is far more difficult; it's the exhausting work of getting every member of your party walking in the same direction and making the right contributions at the right times to reach that destination.

"Research shows that...95 percent of employees, on average, are unaware of or do not understand their company's strategy."

Shockingly, alignment is a competency that few companies master. Research shows that nine out of ten companies fail to execute their strategic vision and that 95% of employees, on average, are unaware of or do not understand their company's strategy.[5] To say that alignment is rare is an understatement. Indeed, it is a defining element of successful companies.

To understand the real power of alignment, however, you might start by considering what's at stake.

WHEN ALIGNMENT LACKS

Study after study confirms that alignment is an essential ingredient in reaching goals. No big surprise here, but the stats still leave an impression. In organizations that combine excellence in tactical project implementation with alignment to strategy, teams knock out projects successfully 90% of the time. Those that neglect strategic alignment are successful only 34% of the time.[3]

In other words, when alignment is not a primary focus in companies or teams, about two thirds of projects—including the resources invested in those projects—are wasted. Of course, this does not include the inherent opportunity costs of pursuing misaligned projects. With so much at stake, you have to wonder why misalignment persists, even in the world's most notable companies.

KNOW VISIBILITY, KNOW ALIGNMENT

Teams and departments struggle to find visibility with other teams and departments. This lack of visibility makes it nearly impossible for business leaders to get their arms around the work and projects that are being undertaken and prioritized. This makes it more difficult to determine how well- aligned they are to company strategy. Simply put, alignment is rare

Image from "Work Wars" infographic; source "2014 State of Enterprise Work Report," Workfront Inc, October 2014.

because visibility into the actual work being done across teams and departments is lacking. On the other hand, increased visibility across teams and departments makes greater alignment possible.

A recent SAP whitepaper proclaimed, "Companies empowered by increased visibility can align business strategies with execution, so managers can continuously plan and monitor strategic, operational, and tactical goals."[6]

THE REWARDS OF ALIGNMENT

Companies that have invested in visibility and the alignment that springs from it enjoy a level of nimbleness, efficiency and morale that other companies can only dream of. These companies are actually better at capitalizing on opportunities. For instance, a 2013 Marketo study concluded that companies with alignment between Marketing and Sales were 67% better at closing deals and made 209 % more revenue from Marketing.[7]

Organizations aligned around strategy are, by nature, better at optimizing how they use their resources. Instead of departments pulling resources in opposite directions, resources are deployed on projects that will contribute to the same strategic objectives, deriving maximum value and efficiency from their finite headcount.

Finally, strategically aligned companies are just better places to work. Surveys consistently demonstrate that companies with better alignment also display higher employee engagement, lower absenteeism and higher levels of ownership.[8] This may be the most powerful point of leverage for leaders. Employees become energized when they know that their

"Companies empowered by increased visibility can align business strategies with execution, so managers can continuously plan and monitor strategic, operational, and tactical goals." [6]

efforts are contributing to the company's success and moving the vision forward. Discretionary effort follows.

HOW YOUR COMPANY CAN GET ALIGNED

Easier said than done, some managers might say, but a few best practices can bring alignment within reach. For instance, companies with excellent alignment tend to take the time to map out their key strategies. They then clarify these strategies with their entire workforce again and again. Finally, they make strict use of alignment scorecards to make sure all projects undertaken contribute to company strategy.

Another common best practice among well-aligned companies is a near-obsessive fixation with reporting. Significant resources are invested in gathering work data consistently from every team and then, in as close to real time as possible, broadcasting the resulting aggregate data back out to the organization.

When it comes to alignment, those companies that make the effort to ensure that everyone is focused on the activities that will move the strategy forward and provide the needed visibility will be rewarded in spades. Those that don't will find themselves frustrated at every turn.

DOLLARS AND SENSE: 5 WAYS EVERY CREATIVE TEAM CAN OPTIMIZE PRODUCTIVITY AND PROFITS

How can creative teams know where to best focus their money and time? Instead of relying on intuition, creative teams will need to use data to deliver the most bang for clients' bucks.

BY DAVID LESUÉ — DIRECTOR, CREATIVE SERVICES — WORKFRONT

ORIGINALLY PUBLISHED ON BUSINESS2COMMUNITY.COM

Creative teams want nothing more than to spend their days writing, designing, and producing the most creative, engaging content possible. But the reality is that, like any other division of the company, creative teams are accountable for deadlines and budgets. They must be prepared to navigate competing demands on their time, juggle interdependent tasks, and answer to management and clients' changing needs and preferences.

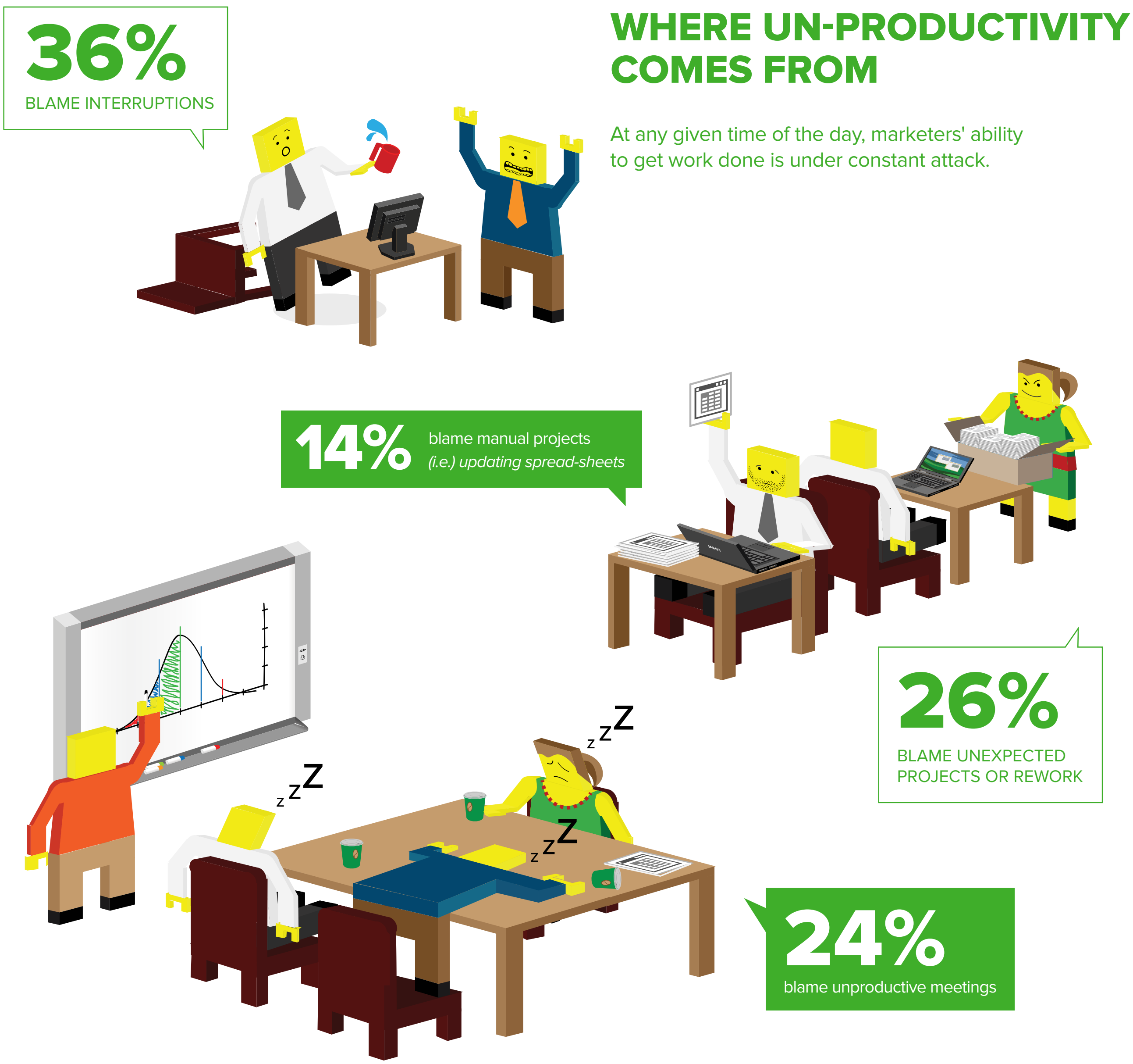


Image from "Day in the Life of a Marketer" infographic; source: "Day in the Life of a Marketer Survey Report," Workfront and MarketingProfs, September 2014.

How do you know where to focus money and time? Instead of relying on intuition, creative teams should use data to help clients get the most bang for their buck. Methodically gathering data and insisting all budget decisions be data-driven will help creative teams prove their value in the bottom-line business world.

But what does it take to get folks who think predominantly with their right brain to think a little more with their left brain? Here are five tips every creative team should know to optimize productivity and profits:

❶ CLEARLY AND COLLABORATIVELY OUTLINE PROJECT STEPS

Every team member needs to be familiar with every step of the project schedule so he will know when to move forward (or wait) and understand how a delay will impact the project's overall timeline. For example, when your graphic designer can see that copy is still awaiting approval, she can hold off on inserting it into the template, saving rework time.

The most effective project outlines are developed long before a project starts, with input and buy-in from every team member. Once the project schedule is developed, it should be shared at an all-team kickoff meeting. Planning should continue to be collaborative throughout the project. If adjustments are made, every team member should have the opportunity to give input.

❷ REVIEW PAST PROJECTS TO ACCURATELY PLAN FUTURE WORK

Creative teams feel pressured to produce cost estimates immediately without taking the time to gain subject-matter expertise and scrutinize past financials and completion times. However, locking a creative team into a hastily assembled budget can prevent contingency for much-needed creativity down the road. The only way around this is to rely on data, lots of data—everything from line-item costs and client chargebacks to supplier contracts, outsourcing lists, and project timelines. The best creative teams develop a comprehensive database that keeps track of these details for every project.

Creative teams also tend to underestimate the time it takes to complete a project. They may forget to factor in wiggle room for budget refinement, or simply forget how long they spent designing their last website or billboard. Human error is always eliminated with hard data.

❸ PUSH BACK AGAINST UNREALISTIC EXPECTATIONS

The most elite creative teams aren't afraid to set realistic—even pessimistic—cost estimates and deadlines. Many creative teams say yes to everything because they want to be viewed as helpful and conciliatory, but it comes at a steep price. The more tasks creative teams agree to juggle, the more likely they are to panic and make poor decisions, such as working on whatever project has the nearest-term deadline or, worse, being persuaded by a nagging client to prioritize a project with a relatively low return on investment.

❹ COMMUNICATE IN REAL TIME

The average team communicates with sticky notes and flurries of back-and-forth emails, or perhaps in spreadsheets that aren't widely disseminated. Some use clunky, management-imposed workflow tracking systems. The solution is real-time communication in which everyone commits to updating their status as they complete tasks—and everyone involved can view those updates in real time.

The best communication system is one where every user can see an assignment or original draft alongside the edited or finished product. The value of being able to visually track progress cannot be overstated. Stakeholders want immediate insight into where something has been, where it's going, and where it needs to be.

❺ DESIGN A WORK MANAGEMENT TEMPLATE THAT WORKS

The average member of a creative team is accountable to use a time-tracking program, a project-tracking program, a collaboration tool, email directives, and instant messaging. It's no surprise this cacophony of work-management platforms has deleterious effects. The best solution is to design a work management template from the ground up. The ideal system will integrate all tools and processes, allow for real-time data sharing, provide for convenient and flexible collaboration, tie directly to management objectives and priorities, and offer management easy-to-follow views of progress.

MORE THAN CREATING

For a creative team's creativity to pay off, the team must do so much more than just create. A well-executed strategy starts with collaboration and hard data to develop a financially sound project outline, followed by a disciplined workflow process that preserves priorities and maintains realistic expectations. Finally, it's crucial to build an all-encompassing system for real-time communication. There's nothing more frustrating than having some data stored in an Excel spreadsheet, others in Word documents, and still others on Google docs. If your creative team is struggling with any of this, don't lose hope. Creative teams around the world are finding better solutions every day, and so will yours.

MAKING YOUR CREATIVITY POP: 4 STEPS

Cryptic phrases like *“make it pop”* and *“I’ll know it when I see it”* are really cries for help from stakeholders who lack the vision to define what they really want. With a little organization, however, creative teams can help them find that vision.

BY JOE STAPLES – CMO – WORKFRONT

ORIGINALLY PUBLISHED ON CHIEFMARKETER.COM

"Can you do something to make it pop?" It's one of the most common questions creatives hear—and it's also one of the most infuriating, blood-boiling, exasperating questions ever asked, making designers, copywriters and creative directors want to scream. In fact, it has even topped the list of most annoying industry buzzwords and clichés reported by marketing and advertising executives.[9]

68%

OF CREATIVE LEADERS SAY THAT CLIENT BEHAVIOR IS THEIR BIGGEST CHALLENGE

DIVA DRAMA

Without a sturdy request management process in place, keeping up with clients' changing demands can make life hell for your team.

Image from "Creative Teams Live in a Reality Show" infographic; source: "2014 In-House Creative Services Industry Report," The BOSS Group, January 2014.

Talk about a backhanded compliment: "Make it pop" and its equally exasperating brethren—"I'll know it when I see it" and "show me some options"—all imply that you intentionally withheld your best effort, or that you have something up your sleeve reserved to spruce up a project when "good enough" doesn't quite cut it. If only you could just add a dash of glitter—or perhaps a few firecrackers—to "make it pop" in the critical eye of the naysayer who dared to utter this foul phrase.

Besides being ambiguous, cryptic and completely useless as feedback, phrases like "make it pop" and "I'll know it when I see it" actually mean "I have no idea what I want." Although they'd never admit it, stakeholders who make these aggravating requests are clearly signaling a lack of concrete strategic direction.

This might not be your problem, but fixing it does fall squarely on your shoulders. Thankfully, with a little preparation, you can help your stakeholders home in on their vision consistently. Here are four steps to "make it pop" every time:

❶ WORK WITH STAKEHOLDERS TO DEFINE A STRATEGY UP FRONT

Identify goals for each project and specify how these map to overall business objectives. By agreeing on the audience, key messages or takeaways, and desired results at the beginning of a project, it's easier to develop a compelling, creative deliverable that hits the mark the first time quite simply because you've defined the mark. For instance, the sales team may request a product sales sheet, but when asked to define exactly what the resulting piece should accomplish, you might realize a sales sheet isn't the best option. Avoid the rework, stress and frustration by starting with the goals up front and then determining the best vehicle and creative treatment to get you there.

❷ USE TEMPLATES TO STREAMLINE THE WORKFLOW

Many organizations already use creative briefs, but they're often barebones and fail to capture the full scope of the project's goals and objectives. Become a creative brief ninja by providing a thorough template that requires precision, accuracy, and focus on the complete strategy, goals, and creative direction as well as typical logistical details and assignment requirements like job specs and quantity. Demanding that stakeholders put their thoughts on paper (literally or digitally) helps tremendously to flesh out the ideas and alleviate misunderstanding and miscommunication during the creation and review process. In fact, well-designed digital templates can accelerate other parts of the process too, like preparing and issuing bid requests for suppliers, purchasing and procurement, and travel expense tracking and reporting.

"Let's assume you finally 'make it pop, and everyone's thrilled. Now, how do you make that magic happen the next time?"

❸ USE INLINE DIGITAL PROOFING TO STOP THE EDITING INSANITY

Submitting proofs for review can be like opening a can of worms—there's lots of wriggling and wrangling, and it's hard to contain. Everyone has his or her own opinion, which leads to 15 marked-up versions in circulation.

Get a handle on the review process by implementing an inline digital proofing solution that enables stakeholders to submit feedback and edits in real time and in a single location so everyone is working on the same version. Each reviewer has visibility into the others' input thoughts/ideas to gain context into change requests, and you can finally stop chasing drafts and spend more time creating.

❹ MEASURE—AND TAKE APPROPRIATE ACTION

Let's assume you finally "make it pop," and everyone's thrilled. Now, how do you make that magic happen the next time? It's virtually impossible to maintain consistent success without taking a continuous pulse on what works—and what doesn't—at each stage of the process. Measuring effectiveness and results at each project phase is crucial to identifying bottlenecks and averting hiccups that can balloon into disaster as your deadline approaches.

But simply knowing where things went wrong is only the first step; you must implement change for continuous improvement to get off the perpetual "make it pop" merry-go-round. Rather than drastically changing the process, harness that incremental data to make smaller changes across the project lifecycle. This subtle approach will ease the transition and reduce friction with new processes among stakeholders, and it will enable your team to still meet production demands without getting hung up on the process itself.

Of course, measuring performance of the creative content once it hits the market is vital, too. Knowing exactly what resonated with the audience to drive the desired behavior is the ultimate intel for figuring out how to "make it pop" the next time.

The bottom line is that cryptic phrases like "make it pop" and "I'll know it when I see it" are really cries for help. When stakeholders lack the vision and strategy to request what they really want, it's impossible for even the most talented team to please their picky palate. Helping them find that vision, define a clear strategy and then use it to guide the entire process is an incredibly valuable service that any creative team can—and should—provide.

When everyone's on the same page, with clearly defined goals, everything "pops," and your team can finally be recognized as the rock stars they truly are.

GET BACK TO A 40-HOUR WORK WEEK: 3 TIPS TO MANAGE YOUR WORKLOAD

If creatives aren't careful in their work management tactics, they can burn out even their best team members. Establishing consistent resource management processes is the only way to keep this from happening.

BY BRYAN NIELSON — EVP, STRATEGY, GO-TO-MARKETS & PRODUCT — WORKFRONT
ORIGINALLY PUBLISHED ON HOWDESIGN.COM

All too often, creative work is compared to working in a circus—usually because of how often it feels like a chaotic, even clown-like work atmosphere. A popular circus act frequently compared specifically to marketing work is called Plate Spinning, where one performer spins flat plates on the top of several tall poles, simultaneously. According to the laws of motion, eventually the plates will slow down and lose their ability to balance on the poles. If the performer isn't there to spin them again, they will crash to the ground. You can imagine, then, what happens when multiple plates start to slow at one time...eventually, they all start to drop, one by one.

If creatives aren't careful in their work management tactics, things start to get overwhelmingly stressful when one person or one team tries to balance too many campaigns or projects at one time—eventually, something is bound to crash to the ground.

Additionally, marketing activities can generate more work than there are hours in a day. There are campaigns and creative briefs, research and advertising—the list goes on. There is always far more work to do than hours and people to do it all.

A 2012 survey by ComPsych shows that 63% of workers have high levels of stress, with extreme fatigue/feeling out of control, and 36% of workers lose an hour or more per day at work due to stress.[10]

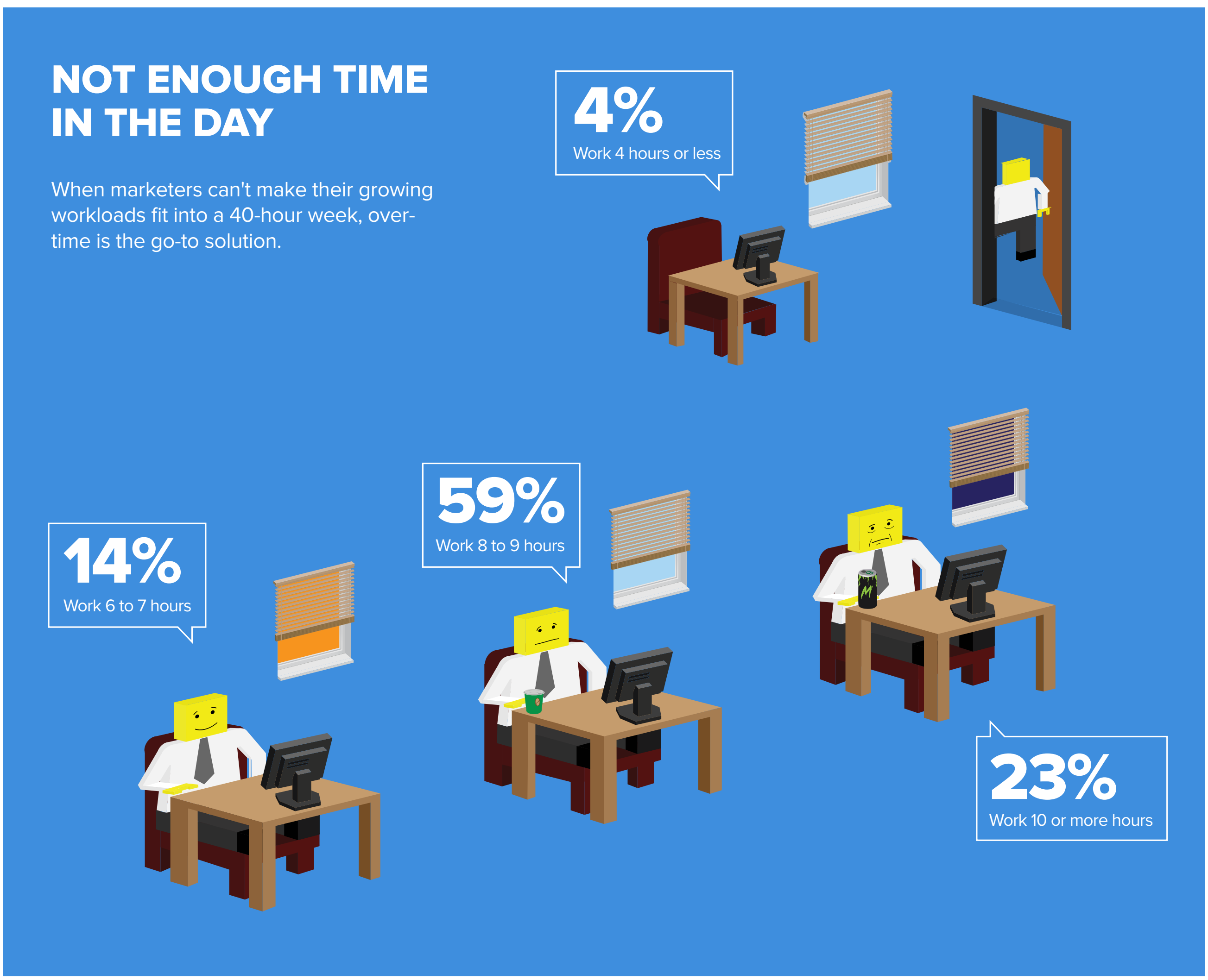


Image from "Day in the Life of a Marketer" infographic; source: "Day in the Life of a Marketer Survey Report," Workfront and MarketingProfs.com September 2014.

The best way to excel here is to develop consistency. That means using a process that ensures every task and every resource is identified the same way every time. Here's how to manage your workload:

GET CONSISTENT

Take the extra time at the start to create a process. This will ensure that work gets done the right way every time. The added benefit is that everyone knows what is expected and can plan their own work more efficiently.

> *"A 2012 survey by ComPsych shows that 63% of workers have high levels of stress, with extreme fatigue/feeling out of control, and 36% of workers lose an hour or more per day at work due to stress."* [10]

DEVELOP STANDARDS

Create standard templates and timelines. Outlining the steps and resources needed will ensure that you haven't missed critical tasks or done them in the wrong order. Once a template contains all the necessary steps, add timeline thresholds needed to complete each step.

REAP REWARDS

By requiring templates and timelines, you can save time by automating repetitive tasks. Additionally, you can more accurately forecast the time needed and be sure nothing gets missed. Be sure to consider holidays, vacations, and company events when planning. Then, roll up each request into a master calendar.

In 2013, organizations with successful work performance measures such as on-time, on-budget and goals met are almost three times more likely to use standardized practices throughout the organization and have better outcomes than organizations with poor work performance.

It all comes down to developing a winning creative strategy. When you change the work process from a random, anxiety-ridden balancing act to a careful work management strategy, you will win every time.

A BEGINNER'S GUIDE TO AGILE FOR MARKETING CREATIVE TEAMS

You shouldn't feel too bad if you can't explain the "next big thing" in marketing. But you can catch up with this handy beginner's guide.

BY DAVID LESUÉ – CREATIVE DIRECTOR – WORKFRONT

ORIGINALLY PUBLISHED ON BUSINESS2COMMUNITY.COM

If you've been halfway tapped into the marketing zeitgeist lately, you've seen this phrase: Agile marketing.

Everybody's talking about it as the "next thing in marketing." It even has its own manifesto.[11] Despite all this hooplah, however, you shouldn't feel too bad if you can't quite put your finger on what Agile marketing is.

Take a look at the Agile marketing groups on sites like LinkedIn, and it becomes clear that more than a few people are a tad confused about it. Is it simply restructuring your marketing and in-house creative teams and their processes to be more nimble? Sort of. Does it just mean streamlining your process and jettisoning any baggage that slows your team down? Kind of.

To give you a nice, clean 20,000-foot explanation of it, Agile is a work management methodology that has been dominating IT work management for the last several years. It has been known to increase teams' flexibility and ability to react to demand while improving productivity. Now that it's proven itself effective, the marketing folks have taken notice.

Agile-driven creative teams have reported that, freed from the endless development cycles that can happen in traditional marketing work management, their creativity has experienced a major boost. Creative teams have seen their productivity explode by 400% and with less fuss.[12] Marketing teams can test and iterate on campaigns faster.

If that last paragraph caught your attention, read on for a crash course on Agile and how you can use it to make your marketing and creative teams as creative and effective as they deserve to be.

WHAT IS AGILE MARKETING?

Where most creative teams produce projects sequentially from step A to step Z, Agile marketing seeks to put your team's resources into creating a minimum viable product as quickly as possible. It's also built not to plod along on a single project for weeks, but to accommodate all of your most important tasks—from multiple projects and even ad hoc requests that can be completed in a short timeline.

To accomplish this, Agile requires that all work be broken down into "stories," which can be chunks of larger projects or small ad hoc requests. Each story tells your team, in a nutshell, what needs to be created. With that information, your team assigns to the story the number of hours they think it will take them to complete the story. Your team divides their time up into periods of time called sprints, which are a week or two weeks. Naturally, every sprint has a set number of hours which will be filled by stories and is intended to be a period of focused creativity that allows ample time for creative team members to explore a number of approaches to a story before moving forward. Again, the stories are chosen for a sprint based on their priority, and the creative team goes to work. Stories are placed on a public burndown chart, where team members and stakeholders alike can see them move from 'incomplete' to 'approval' to 'complete'.

As you can see, Agile is quite different from the traditional workflow most creative teams are used to, but the benefits are undeniable. Agile eliminates the bottlenecks and wasted time found in conventional methodologies and empowers creative teams to collaborate more and make on-the-fly decisions about a project's direction, task order, or priority. Hence the name Agile.

This increased productivity and quality, of course, have a direct impact on the companies that use Agile. In fact, studies show that Agile firms grow revenues up to 37% faster and increase profits as much as 30% more than their non-Agile counterparts.[13]

With this big picture in mind, here are the steps Agile creative teams use to successfully organize their stories and sprints.

ANATOMY OF AGILE MARKETING

There are four essential steps every creative team will need to follow to successfully manage their work in Agile:

1 HAVE A PROCESS TO ACCOMMODATE ALL KINDS OF REQUESTS

Agile is designed to handle all kinds of work, and that means your request management process should, too. Teams need to have a central place where requests can be submitted, including project-based assignments, formal one-off requests, and informal one-off requests.

Regardless of what kind of request is entering your process, it needs to include a creative brief to allow your team to assign a required number of hours to it as a story.

It's worth noting here that, if your team shares work with teams that don't practice Agile marketing, a work solution that can handle mixed methodologies is highly recommended.

"In fact, studies show that Agile firms grow revenues up to 37% faster and increase profits as much as 30% more than their non-Agile counterparts."

BUSINESS NEEDS ARE MET WITH AGILITY

BUSINESS NEEDS

88% of non Agile users say improving speed to market is a priority

91% of non Agile users say being able to switch gears more quickly and effectively is a priority

96% of non Agile users say making their team more productive is a priority

88% of non Agile users say enhanced prioritization of the things that matter is a priority

89% of non Agile users say delivering a better, more relevant end-product is a priority

AGILE RESULTS

93% said adopting Agile helped them to improve speed to market (ideas products or campaigns)

93% said adopting Agile helped them switch gears more quickly and effectively

87% said adopting Agile made their teams more productive

80% said adopting Agile led to an enhanced prioritization of the things that matter

80% said adopting Agile helped them deliver a better, more relevant end-product

Source: "Applying Agile Methodology To Marketing Can Pay Dividends: Survey," Forbes, 2014.

Otherwise, you could find yourself duplicating requests and communication between your tools and their tools, which can suck up a lot of your team's time.

❷ MAINTAIN YOUR BACKLOG

As requests enter your domain, they officially become stories within your backlog, a running collection of all your outstanding stories. Under the advisement of your team, you will assign a number of hours to each story, so that you can easily choose the most important and doable stories when it comes time to organize your sprint. In the event that a story will take up more than six hours, you might want to consider breaking the story into two more bite-sized stories.

Your backlog can be managed in any number of media: whiteboards, bulletin boards, index cards, or work management software. No matter which medium you choose, your backlog should be sorted by priority, whether by deadline, ROI, or by client.

❸ HOLD YOUR SPRINT PLANNING MEETING

With your team's backlog all sorted, you're ready to kick off your sprint—and that means it's time for your sprint planning meeting! During this meeting (which doesn't have to be lengthy) your team will gather to look at your backlog and decide which stories to work on during the upcoming sprint. As stories are moved to the burndown chart, these stories are assigned to individual team members, who also commit to complete their stories within the sprint.

❹ KEEP AN EYE ON YOUR BURNDOWN CHART

As your team works on their stories, they should also move their stories from 'incomplete' to 'in progress' to 'approval' to 'complete' on the burndown chart, so everyone can see their progress in close to realtime. A good burndown chart will also include a graph showing how much has been completed versus what was planned to be completed.

When done right, this very public, very intuitive chart keeps stakeholders updated and provides a little extra motivation for your team members.

❺ WRAP UP WITH A SPRINT RETROSPECTIVE

One of the key principles of Agile Marketing is its focus on continuous improvement and collaboration. Holding a sprint retrospective at the end of your sprint is crucial to your continued success. What worked? What didn't? Which parts of the process need to be changed for the next project?

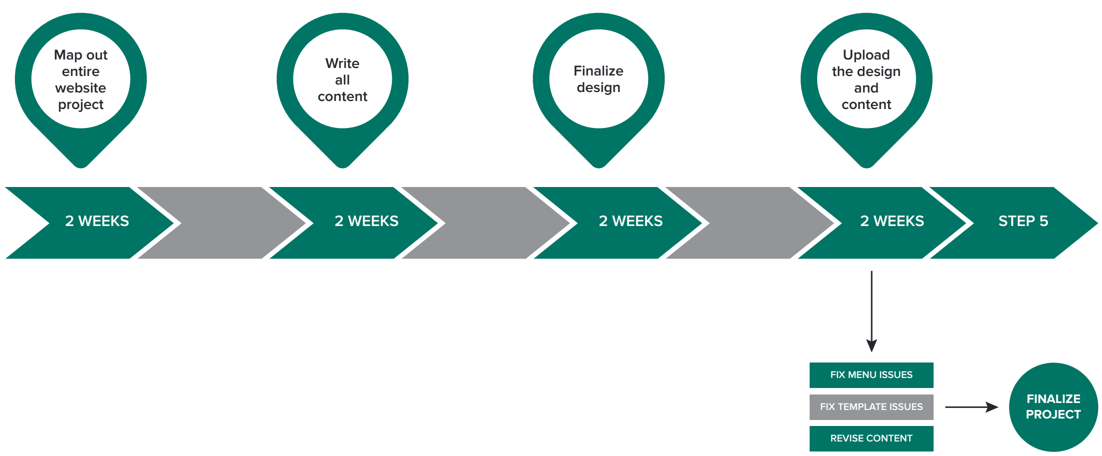
More than just a round of high-fives, this meeting should generate at least one improvement for the next sprint. Then, armed with this new learning, you begin the process all over again...

SEARCHING FOR A SOLUTION

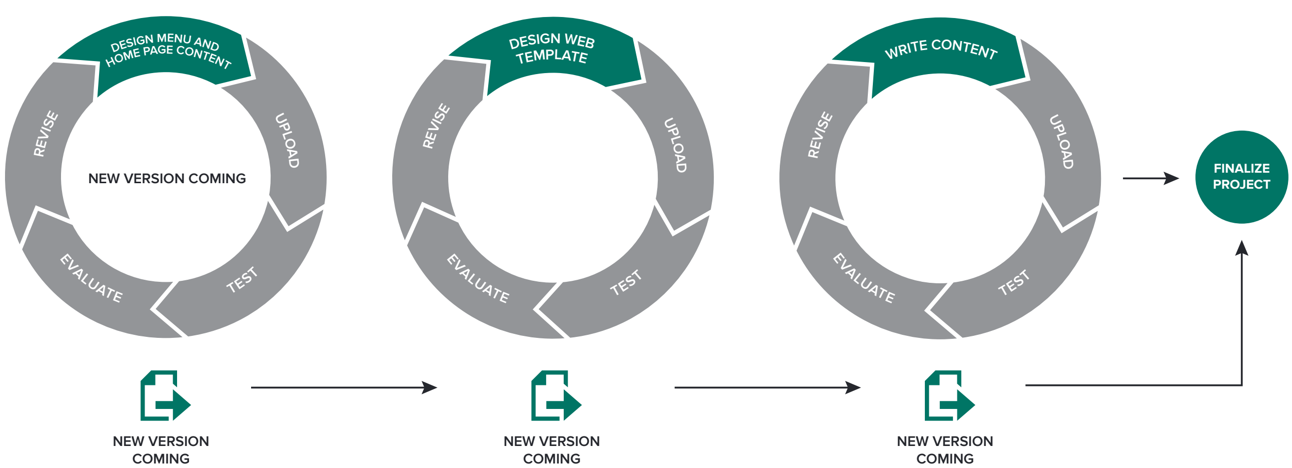
Agile is quickly gaining momentum and popularity in marketing circles. This kind of flexibility speeds up the production and approvals processes, reduces the amount of time spent in meetings, and maximizes the amount of time the creative staff spends on actual creative work. Strangely enough, few marketing work management solutions have caught onto this trend and fewer still can handle both Agile and non-Agile methodologies simultaneously.

If creative teams can find a solution that will help them manage their Agile work process, they will be among the first to reap the benefits of this new and exciting trend.

WATERFALL MARKETING



AGILE MARKETING



4 WAYS TO MAKE COLLABORATION MORE THAN JUST A BUZZWORD

Creatives worry about organization and process taking away time from creative pursuits. But without enough structure in place, they could be losing more time than they gain.

BY BRYAN NIELSON — EVP, STRATEGY, GO-TO-MARKETS & PRODUCT — WORKFRONT
ORIGINALLY PUBLISHED ON BUSINESS2COMMUNITY.COM

In today's creative teams, the traditional command-and-control management structure is declining, in favor of a flatter, more flexible organizational structure. In this brave new world, information silos don't work very well, collaboration rules, and brilliance flows freely. At least they should.

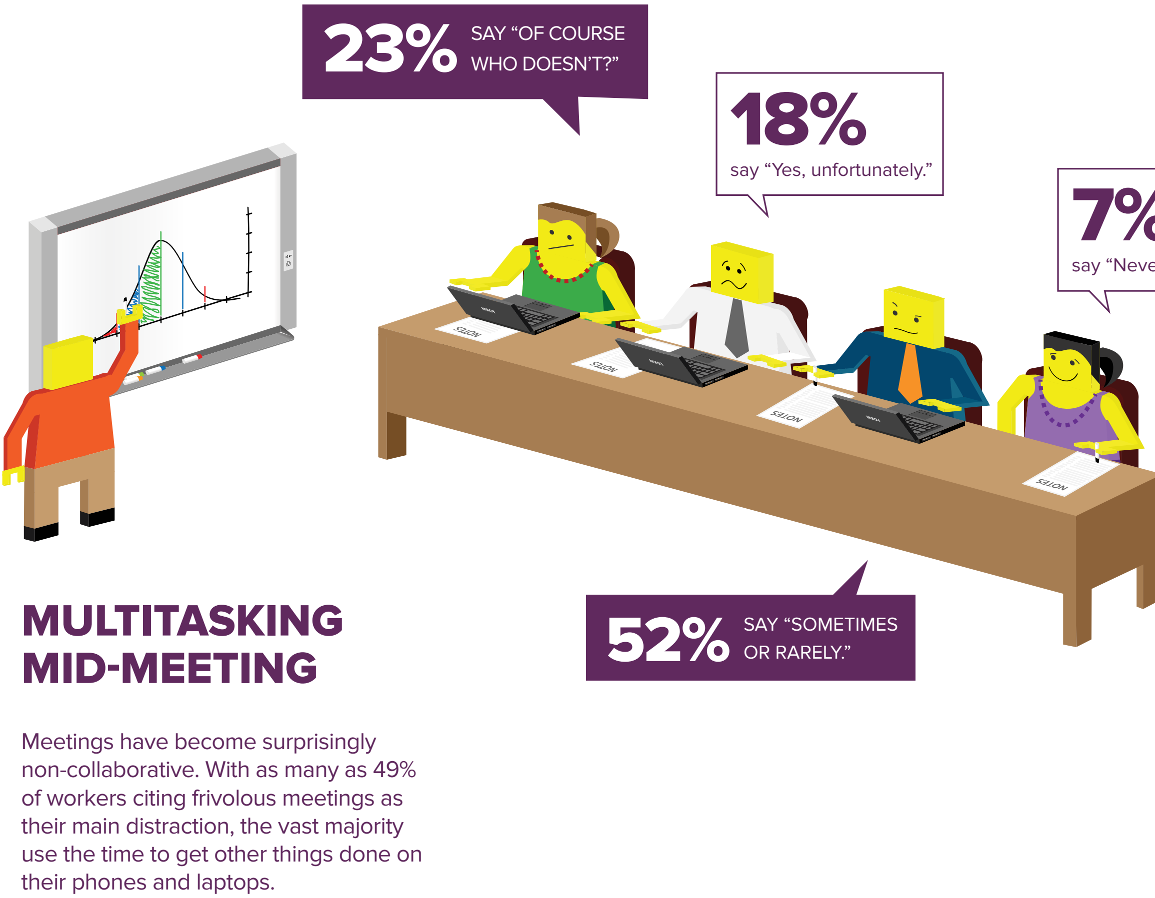


Image from "Day in the Life of a Marketer" infographic; source: "Day in the Life of a Marketer Survey Report," Workfront Inc and MarketingProfs, September 2014.

The truth is, despite all the speechifying about the importance of collaboration, most creative teams are stuck somewhere between the rigid structures of yesteryear and the open, collaborative world of the future. Managers and directors might encourage team members to share their thoughts and ideas openly, but for the most part, the tools and processes that are supposed to support this collaboration fail miserably. As a result, creative teams still hide their information away on separate desktops. Conversations—meaningful as they may be—are still so scattered across email, IM, sticky notes, and whiteboards that they can never be assembled and used in a meaningful way.

'Collaboration', it seems, is bound for the trash heap of once-hip buzzwords, right?

Wrong. Real collaboration is possible for creative teams, if they establish the right processes and tools to support it. Here are four ways creative teams are making collaboration more than just a buzzword (and reaping the benefits):

❶ MAKE MEETINGS COUNT

Team members may consider meetings a four-letter word, often rightfully so. According to one Salary.com survey, 49% of workers consider unfocused meetings to be their biggest workplace time-waster.[14] But even the biggest meeting-haters have to acknowledge that meetings hold an indispensable place in creative teams. The trick is to use them sparingly and then, when they are used, to make them lean.

A collaborative leader won't use meetings for status updates, but for critical issues only—issues that apply to all attendees, so no one's time is wasted. She will use strict agendas to keep the conversation on point and the pace brisk. Then she will limit the time length of the meeting as much as possible. Counter-intuitively, meetings where the clock is allowed to run freely don't produce the highest-quality collaboration. Structured, time-compressed meetings do.

"These teams experience much higher quality collaboration. Why? Because they don't waste time asking, 'What happened? Who's doing what?'"

❷ BREAK DOWN SILOS

Often much of the planning and execution of an integrated marketing campaign is done in silos. Too often, single individuals store their information in documents, spreadsheets, or other tools on their...to which only they have access. These are usually not shared with anyone else. Similarly, team members can be overly guarded about telling anyone what is happening with their projects outside of their personal circles of trust. All of which present a major barrier to collaboration.

When it comes collaboration, sharing is caring. Whenever possible, collaborative creative teams keep their project information in shared drives or in the cloud. They send out regular notifications to managers, team members, and stakeholders on the progress of their projects. Especially, they all share information regarding who is working on what and when those projects are due. Needless to say, these teams experience much higher quality collaboration. Why? Because they don't waste time asking, "What happened? Who's doing what?" Instead, because they already know what's happening, their collaboration gets right down to, "Okay, this is the challenge we're facing. How can we solve it?"

❸ REPORT ABUNDANTLY

Few times can be as nerve-wracking as when a riled-up executive descends on your creative team, demanding to know what happened to Project XYZ. Underlying this unpleasant situation is one single truth: your assailant doesn't know key information about the project in question. And who is responsible for not informing the executive of the project? At this point, your finger is probably pointed at you and your team.

Sharing project information between members of the creative team is good. Making that information accessible to management in frequent, clear-cut reports is better.

Best of all is using solutions that allow management to see, at their own leisure, what is happening at the portfolio and project level in real time. With this kind of reporting constantly streaming information back and forth between you and management, your meetings with them transform from confrontations to collaborations.

❹ CONVERT COMMUNICATION

The majority of today's creative teams know how to create communication, pumping out scores of emails, texts, and social media updates on a daily basis. Much of this communication could be useful. Unfortunately, however, this communication is splintered across so many different tools—email, IM, documents, sticky notes—that the act of capturing these conversations and distilling them into something useful can be like herding kittens. This herding takes a toll, with studies finding that knowledge workers who constantly field emails, text messages, and calls lose 10 IQ points.[15] Creative teams, it would appear, struggle to convert their abundant communication into useful collaboration.

Creative teams can avoid this mental strain and make their communications more collaborative by centralizing and consolidating the tools they use to communicate. The tools they keep should capture and display all communications in chronological fashion so that team members can refer back to them and see who said what and when. This kind of record provides rich fodder at project completion when teams sit down and discuss how the project could've been done better.

Most importantly of all, however, having all that communication captured in one place, in the order that it occurred, then starts meaningful conversation based on a complete view of the situation—not scattered snippets of conversations.

"Knowledge workers who constantly field emails, text messages, and calls lose 10 IQ points."

COLLABORATION CAN BE A REALITY

Yes, collaboration is possible, but it requires more than just talking. It requires real changes to processes and tools. Those creative teams that provide the right structure to support collaboration will find themselves enjoying the benefits of fewer conflicts, richer ideas, and more team buy-in.

4 TIPS TO GET OUT OF THE REVIEW AND APPROVAL TRAFFIC JAM

Never-ending rounds of review, revision, and approval push marketers' projects past deadlines, endangering campaign launch dates, but a healthy dose of standardization, structure, and accountability can restore order.

BY BRYAN NIELSON — EVP, STRATEGY, GO-TO-MARKETS & PRODUCT — WORKFRONT

ORIGINALLY PUBLISHED ON MARKETINGPROFS.COM

When it comes to securing final approval, most marketers face traffic jams of Los Angeles-level proportions.

Consider the common process of sending almost-finished assets out to stakeholders. Some stakeholders respond in a timely manner, some don't. Oblivious to the fast-approaching deadline, a stakeholder can suddenly request drastic changes. Then the changes are made and another round of feedback ensues. Repeat this process several more times, and you have an inkling of what it feels like to be stuck in the review and approval traffic jam. It feels like your project, which once had so much momentum and promise, has stalled at the finish line.

Mixed-up versions, endless rounds of feedback, wasted time assembling everyone's feedback—whatever your biggest gripe in the review and approval process, wishful thinking won't be enough to get things moving. You can't just hope people will provide speedy feedback without any babysitting or follow up. Even bombarding stakeholders with email after email won't produce the desired result. No, unless you start applying some much-needed accountability and structure to this gridlock, tardy projects and headaches are inevitable for the foreseeable future.

To help you get out of the review and approval traffic jam, here are four best practices that are guaranteed to inject your process with some much needed structure and accountability:

❶ IDENTIFY APPROVERS AT EACH STAGE

From request through creative brief, asset development, and production, providing a clear picture of the needed approvals ensures that no one will be forgotten or added to the list at the last minute.

As part of this, every project needs a single Supreme Ruler—that person who bears responsibility for granting that final stamp of approval or settling discrepancies—whether it's the creative director, project manager, or client. Neglecting to identify these decision-makers up front can result in costly rework, missed deadlines, overblown budgets, or inadequate deliverables. This can exhaust resources and revenue faster than almost anything else.

❷ STANDARDIZE REQUEST SUBMISSIONS AND APPROVAL

This is the *Minority Report* approach to review and approval logjam: stop it before it happens. By creating a standardized request approval process, including some robust requirements gathering, you eliminate many of the curveballs that stakeholders tend to throw at you later on. This gives stakeholders the opportunity to tell you exactly what they want and you the ability to record all of their comments just in case they change their tune later on. Non-requester stakeholders (think creative directors or marketing execs) have the chance to preview the project and raise a red flag in case anything doesn't sit well with them.

The best part of this practice is that it all happens before any resource time has been expended. When it works the way it should, it weeds out requests that would never have made it anyway. It also clears the road for those projects that pass muster by securing stakeholder buy-in and cutting out last-minute surprises.

❸ PROOF IN ONE PLACE

Accelerate the review and approval process consolidating your proofing into one place. If you don't have a digital proofing tool, whenever possible, consider having all your stakeholders proof in the same room, so you can get it all at once. Of course, the most effective proofing comes with digital tools that provide a single spot for comparing versions side by side, capturing all comments, and providing feedback directly on the proof.

Giving the asset owner meaningful feedback digitally in the proof increases clarity and accountability, decreases errors, and cuts turnaround times for revisions. Even better, knowing that everyone is working in the right version of the asset eliminates the confusion multiple versions can cause. Stakeholders can consider others' feedback and even give the green light without ever having to arrange a meeting, schedule a phone call, or chase down a file.

Tracking edits in one place also adds up to time savings that marketing teams can't ignore. According to ProofHQ, teams that use digital single-point proofing see a 56% increase in speed to market, a 59% drop in time spent managing proofs, and a 29% reduction in number of revisions.[16]

❹ DEFINE DONE

Too often the finish line will be in sight when one last person swoops in with significant changes that force yet another review cycle. This seems to be a natural side ef-fect of working with multiple stakeholders with varying view-

> *"According to ProofHQ, teams that use digital single-point proofing see a **56%** increase in speed to market, a **59%** drop in time spent managing proofs, and a **29%** reduction in number of revisions."* [16]

points, different needs, and contrasting opinions. However, experience shows that this actually results from a failure to set an agreed-upon threshold for approvals.

When this date is made known to and enforced with all approvers, it holds them accountable and increases the chance that they will give feedback promptly. Perhaps more importantly, it makes approvers think twice before demanding drastic, last-minute changes.

SWITCHING TO THE REVIEW AND APPROVAL FAST LANE

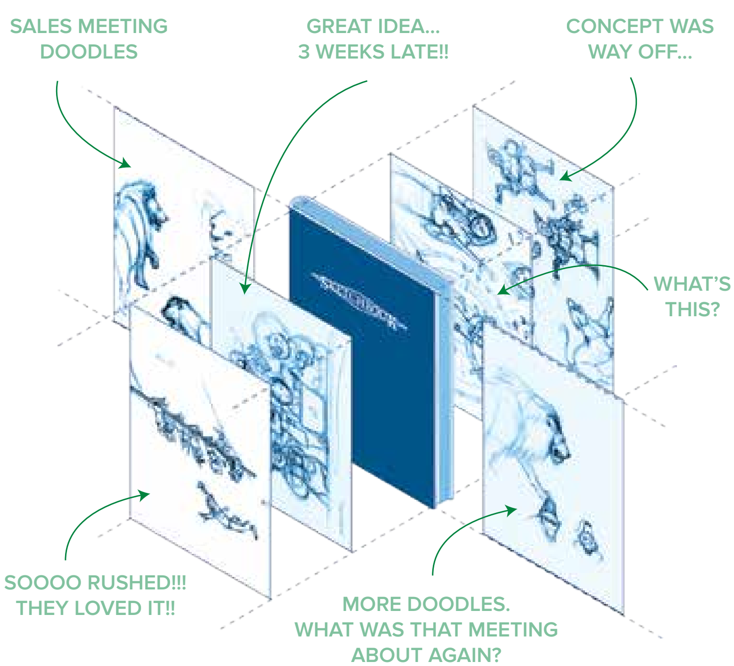
By learning how to better manage their project review and approval processes, marketing teams can avoid the delays and inevitable cascading effect such delays can have on campaigns and other projects. Eliminating these roadblocks, identifying approvers from the beginning, streamlining and standardizing processes, proofing in one electronic place, and setting rigid approval deadlines free marketing teams from the review and approval traffic jam and get them back in the fast lane where they need to be.

Image from "5 Most Dangerous Creative Productivity Myths Busted" infographic; source: "5 Most Dangerous Creative Productivity Myths-Busted Ebook," Workfront Inc, 2014.

REWORK AND APPROVAL MIGRAINE

A lack of structure and accountability in your approval process can keep projects cycling through reviews and rework indefinitely. This can kill campaigns' timeliness, but it can also burn up time and resources.

30-35%
of project time is spent on rework



ONLY 18%
OF CREATIVE TEAMS USE CREATIVE BRIEFS FOR ALL PROJECTS

FROM SERVANTS TO EXPERTS: 6 WAYS TO GAIN RESPECT FROM YOUR CLIENTS

Forty-five percent of in-house creatives say gaining respect from internal clients is one of their greatest challenges. Here are six ways to help change negative perceptions and finally gain the respect your team deserves.

BY JOE STAPLES — CMO — WORKFRONT
ORIGINALLY PUBLISHED ON CIO.COM

In many organizations, internal creative teams are viewed as service providers rather than the strategic experts they truly are. The perception problem often means they lose some of the best, most exciting projects to outside firms, or they're continually asked to churn out fire-drill projects with complete disregard for whatever else they may have going on.

Image from "Work is Hell" infographic; source: "Work is Hell Survey," Workfront Inc, 2013.

Instead of flexing their creative muscle and exploring new technologies, in-house teams are relegated to churning out boring sales slicks, ho-hum brochures, and other run-of-the-mill work while the real creative work gets outsourced to their colleagues at a design agency.

Perpetually under appreciated, creative teams are often the first to go in the event of budget cuts despite the institutional knowledge, brand understanding, cost savings, and many other significant benefits they bring to the organization.[17]

In fact, poor internal perception is such a problem that nearly 45% of in-house creatives say gaining respect from internal clients is one of their greatest challenges, according to The Creative Group. If your team is facing the same image problem, here are six ways to help change that perception and finally gain the respect you deserve.

❶ BE STRATEGIC

Demonstrate that your contribution can be more than just order fulfillment. For example, the client might ask for a one-page sales slick, but if you know an online landing page would be better suited to meeting the strategic goal, recommend it and explain why. Start by working with clients to map all work requests back to strategic objectives for the organization. Don't simply say "yes" to every assignment without first examining the motivation behind it, and back up "no" or pushback with strategic justification.

❷ DOCUMENT THE WORKFLOW

Only 39% of internal teams use documented workflow processes.[18] Without proper documentation and tracking, it's almost impossible to know if things are moving in the right direction. To be perceived as professionals, it's important to use professional-grade tools to keep work, routing, and approvals from falling through the cracks. High-performing teams rely on electronic systems to manage time, projects, and resources.[17] Use thorough creative briefs to gather all necessary data up front (including those all-important strategic objectives), and define a system to track, triage, and assign incoming work requests to keep things organized.

❸ DELIVER ON TIME

More than 40% of creative teams say the majority of overtime goes to meeting deadlines, and nearly 70% say they work more than 40 hours a week.[18] Missing deadlines is bad for business, period. While most of us know that already, the challenge is in solving the problem, especially when there are sometimes forces beyond our control at work.

To earn a higher profile within the company, maximize efficiency by identifying and eliminating time-wasting hurdles. For example, an in-line digital proofing system can speed up a slow and cumbersome review and approval process. Rather than chasing down input from multiple stakeholders or repeatedly reworking due to conflicts between clients, digital proofing allows each client to receive a notification when a proof is ready for their review, and they can see the input from other stakeholders within the context of the proof. It also helps to establish realistic deadlines based on your existing priorities and capacity. Be sure to still build in time for unexpected, 9-1-1 projects that will inevitably happen to prevent them from sabotaging your timelines.

❹ GAIN AND SHARE VISIBILITY

Understanding who's working on what and when can give you tremendous insight into your actual capacity. However, half of internal creative teams do not track time, and of those who do, only 59% charge back those labor hours to the client.[17] Failure to track and report on hours worked, hours billed, resources utilized, and capacity makes it impossible to see where time is spent (or wasted) and to identify opportunities to improve capacity and resource efficiency. Sharing this visibility with internal clients lets them see what's in the queue and where projects fall in strategic priority. With this level of transparency, you can work together to make decisions on timing, workflow, and deadlines to meet everyone's needs.

❺ KEEP UP WITH TRENDS AND TECHNOLOGY

It's a common perception that internal teams are not up on the latest techniques and technology. In fact, one survey found that staying on top of key trends, lacking creative innovation, having a limited skill set, and having limited technical resources were the top four disadvantages to working with an in-house team.[17] While it can be difficult to find time to stay on top of current events with such busy schedules, your team can clear time for continuing education, innovation, and exploration of new trends by improving their efficiency in other activities.

❻ REBRAND TO AN IN-HOUSE AGENCY

Perception is reality—if internal clients perceive they get a better experience in working with an agency, give them one. Operating like an agency, with the tools, staff, structure, and accountability that go along with it, can make a huge difference in how internal teams are perceived by clients. While it may not be the best option in every case—the in-house agency model tends to work best in larger teams of 10 or more full-time employees with a very well-rounded skillset and the capacity to actually do the extra work—adopting the best practices and procedures of an agency-style model can improve the efficiency of any team.[17]

Gaining newfound respect from internal clients will likely not happen overnight. It's an ongoing process to build strategic value, boost credibility, and emphasize the benefits—both creative and financial—that working with your internal group can achieve for the organization. In addition, achieving recognition as experts can certainly help you win more projects and get a crack at the most exciting work to push your creative boundaries.[17] When it comes down to dollars and cents, relying on an internal team as a strategic expert can save any company time and money to help achieve business goals faster and more economically.

BEHIND THE CREATIVE CURTAIN: 4 WAYS CREATIVE SERVICES TEAMS CAN INCREASE THEIR TRANSPARENCY (AND PRODUCTIVITY)

A little transparency goes a long way. Here are four tips to pull back the "creative curtain" and achieve increased transparency in your organization.

BY JOE STAPLES — CMO — WORKFRONT
ORIGINALLY PUBLISHED ON IMEDIACONNECTION

If there's one phrase creative directors and their teams hear again and again, from both internal and external clients, it is this: "Just work your design magic."

Clients often have no idea what the creatives in the organization actually do. To the uninitiated, it seems like new logos can appear at the wave of a Photoshop magic wand, and brilliant new slogans drop out of the ceiling tiles fully formed, right onto writers' desks.

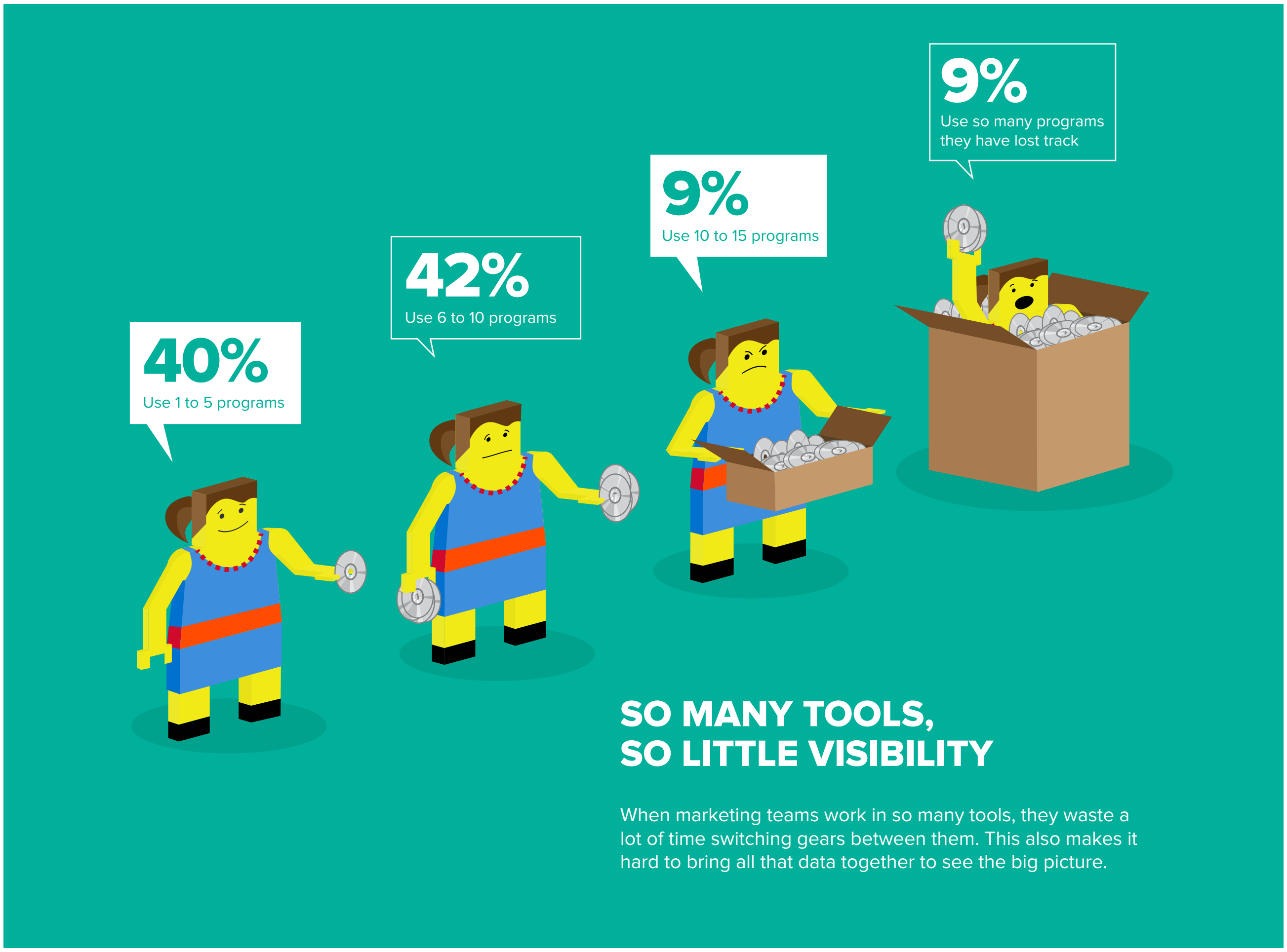


Image from "Day in the Life of a Marketer" infographic; source: "Day in the Life of a Marketer Survey Report," Workfront Inc and MarketingProfs, September 2014.

The creative director is left in an unenviable position. He or she has to simultaneously manage clients, who don't understand what it takes to pull together an integrated, multi-channel marketing campaign, and a team of creatives, who spend more time chasing down proofs and attending status meetings than actually doing creative work. In essence, he's stuck playing the part of the Great and Powerful Oz, perpetuating the "design magic" myth with clients while trying to keep up with what's really happening behind the curtain.

In reality, this is the opposite of the ideal transparency and visibility that would make everyone more productive. You don't have to travel to the other side of the rainbow to live in a world where creative directors actually direct creative work, instead of sitting in meetings and reporting on the status of projects. Where designers and writers spend more time designing and writing—and less time emailing and tracking tasks. Where clients have a clear understanding of where their projects are, so they can stop scheduling status update meetings and sending panicked emails.

Here are four tips to pull back the "creative curtain" and achieve increased transparency in your organization.

1 SEE THE VISIBILITY PROBLEM

When creative directors are managing an overworked, understaffed team, it's tempting to blame inadequate project management tools and skills. The first problem to address, however, is low or no visibility.

Work requests (and revision requests) can come in via email, sticky note, hallway conversation, and printed proofs marked up with that clichéd red pen. Different tracking tools and methodologies are showing up in every corner of the team, from creative director to coordinator. Collaboration is happening in lengthy meetings that don't always include the right people at the right time.

In a nutshell: there's no easy way to see what's going on and who's working on what, without holding another meeting. And if you can't see what the problems are, how can you address them?

WHAT YOU CAN DO TODAY:
Admit you have a visibility problem. Believe that increased transparency is the first step toward increased productivity, and start taking baby steps (er, munchkin steps) to get your team on board.

❷ ESTABLISH CLEAR PROTOCOLS FOR PROJECT REQUESTS

Creative teams have work requests coming in from all different departments, at all hours of the day, in all sorts of ways—most often by email. But, according to a 2014 Workfront survey about workplace inefficiencies, 63% ranked overflowing email inboxes among the top four. The average worker spends 25% of each work day on email-related tasks.[19]

Does that sound like a good place to collect project requests from clients? Not when you want to inspire energy and enthusiasm on the part of your creatives.

WHAT YOU CAN DO TODAY:
Email may be the bane of our existence, but it's still the primary communication and collaboration tool used in offices today. Harness its power by establishing clear, company-wide email protocols. This could include requiring that all requestors submit their requests via one specific email address (Ex: requests@acme.com) and include their deadlines right in the subject line. However you choose to use email, make sure you set strict rules and limits around its usage.

❸ STOP THE SPREADSHEET MADNESS

While 82% of companies use Excel spreadsheets to manage their work, most creative teams have a hate-hate relationship with them.[20] No, the spreadsheet is not a natural habitat for creative types. For accountants, yes. For designers and writers, no.

Spreadsheets are cumbersome and confusing, and they have a tendency to take on a life of their own, growing to the point that they cannot be deciphered without an in-person orientation from someone who knows the secret handshake. You can also never be sure that they're 100% up-to-date. If you have to send an email to determine if the spreadsheet is accurate before you can begin your work, the spreadsheet is not doing its job.

WHAT YOU CAN DO TODAY:
Try some more collaborative applications such as Google Spreadsheets, a more transparent alternative. This cloud-based tool allows multiple people to access and update information simultaneously without having to email back-and-forth. You have the ability to subscribe to certain columns or sections, so you get email notifications when changes are made. You can also add comments for your colleagues in specific cells, which they can reply to and "Resolve" with a click of a button. (A record is kept of all resolved comments.) And the "Revision History" function, while a bit clunky, makes it possible to see who made what changes and when—and even revert to past versions if necessary.

❹ USE DIGITAL PROOFING

If you're still managing feedback or approvals with printed assets in file folders and red pens, you're not alone—44% of in-house creative teams are not taking advantage of digital proofing.[18] But you are making everyone's lives much more difficult than they need to be.

With digital proofing tools, you can collect everyone's feedback in one place. Clients will be able to see what else has been said to minimize duplicated or contradictory comments, and they can all view and provide feedback at the same time. You can also ensure that everyone is proofing the most recent version of an asset, as well as easily compare versions side by side.

What you can do today: Start researching digital proofing solutions to find one that suits your organization's needs—and there are tons of them. Studies show that a single proofing solution can give you 56% faster speed-to-market on your projects, 59% less time spent managing proofs, and a 29% reduction in number of revisions.[16]

MUNCHKIN STEPS

In an ideal world, all communication connected to a single task or project would be collected and visible in one place—including project requests, updates, comments, questions, and even digital proofing. There are cloud-based work-management tools that are capable of all of this and more. Implementing such a tool should meet the ultimate goal of eliminating the challenges we've covered here. Until you get to that point, the small steps outlined here can increase transparency in your organization starting today, freeing both clients and creative types from email overload and spreadsheet prison. No crystal ball required.

HOW TO GET YOUR CREATIVE TEAM'S CREDIBILITY BACK

It's common for creatives to feel like their credibility is constantly under fire, but there is a way to guarantee your deadlines and secure your credibility for good.

BY DAVID LESUÉ — DIRECTOR, CREATIVE SERVICES — WORKFRONT
ORIGINALLY PUBLISHED ON MARKETINGPROFS.COM

"I don't get no respect" is a famous Rodney Dangerfield line. It's also a sentiment that creative professionals can identify with.

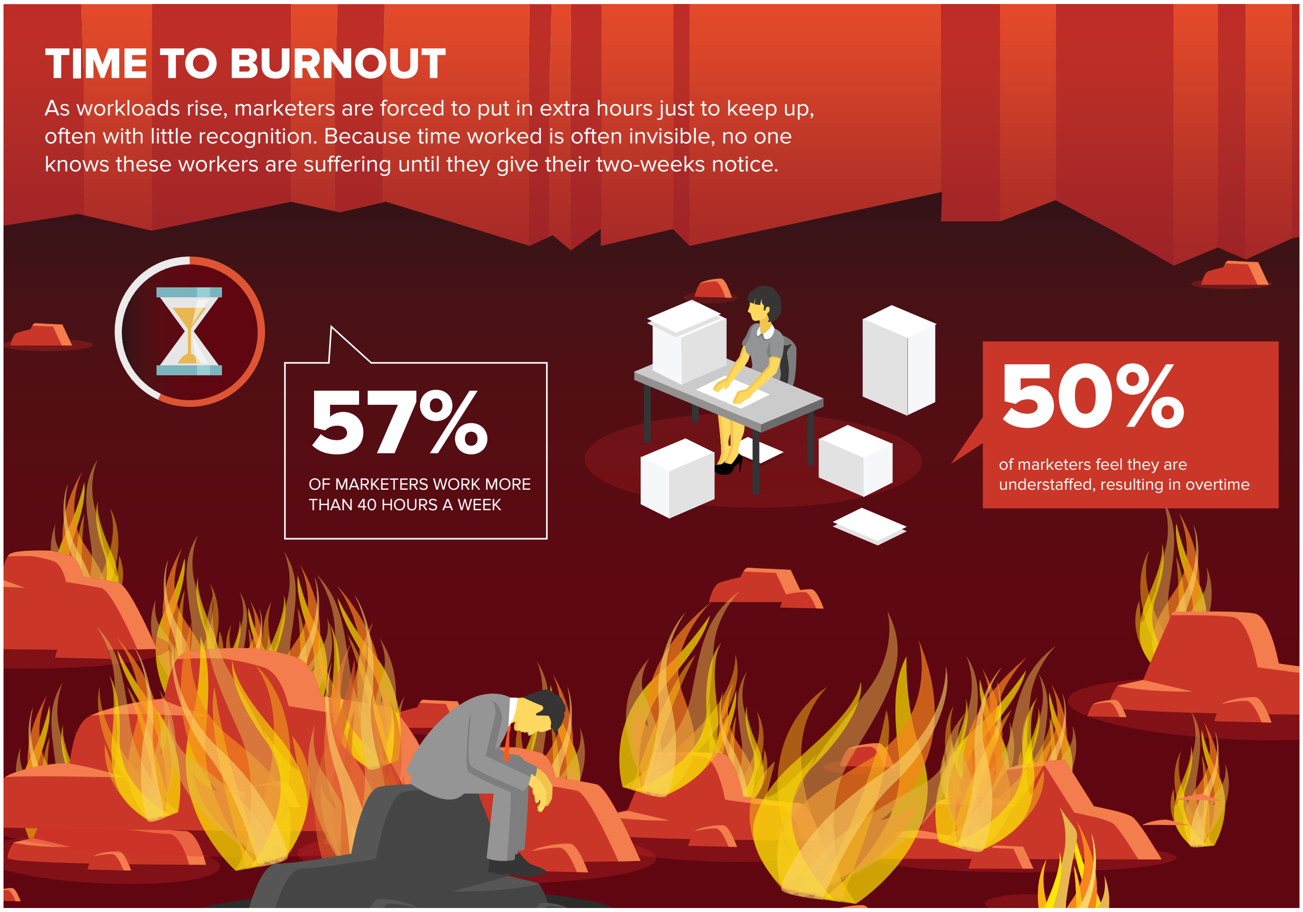


Image from "Work is Hell" infographic; source: "Work is Hell Survey," Workfront Inc, 2013.

They may not have been handed a sweatshirt with a bull's-eye on the back, like the one Dangerfield quips his gun-toting son gave him for Christmas, but for the 44% of in-house professionals claiming that gaining respect from internal clients is the greatest challenge in the near future, it can often feel as if their credibility is under constant fire.[18]

Why? Because with heavy workloads and limited resources, they sometimes miss deadlines. That may not seem like a big deal, but it is. Even one missed deadline may prompt clients to lose confidence that their projects will be delivered as agreed.

And once trust is lost, a downward spiral begins: Clients begin to outsource the "good" jobs more often, and your team gets less strategic or engaging work, which ultimately leads to many in the organization questioning your team's overall value.

Considering that 59% of in-house professionals ranked managing heavier workloads as their biggest challenge, and 74% said they work more than 40 hours per week, it may feel as if there's no good solution to the problem.[18]

> *"Once trust is lost, a downward spiral begins.. which ultimately leads to many in the organization questioning your team's overall value."*

However, even if your team is struggling to keep up with an intense workload, there is a way to guarantee your deadlines and get your team's credibility back: Track all the work.

TRACK YOUR TIME

Almost half of creative teams say they don't use any kind of project tracking software and a quarter say they don't track projects at all. So it's no surprise that deadlines are often missed.

You may know your team is working too many hours, but it is also important to know exactly how those hours are spent.

By tracking planned versus actual hours spent, you'll have the ability to make more accurate estimates and better gauge how long certain tasks take based on previous experience. Rather than blindly agreeing to whatever timeline your client suggests, you can better set deadlines, which your team can then keep without having to work nights and weekends.

TRACK YOUR RESOURCE CAPACITY

In addition to knowing how long things take, you need to know who is working on what and how long individual team members spend on each task.

Visibility into resources is a crucial component of making better estimates, but it's also an area where many organizations struggle. In fact, in a recent benchmark study on resource management, only 5% of organizations were identified as having optimal resource and capacity planning.

Make your team part of the 5% that is doing it right and reap the rewards. To do so, find a tool that allows you to see in real-time what tasks are assigned to each team member, the estimated time for each task, and what percentage of capacity they have left to take on new projects. Make sure to track not just project work but also ad hoc and lights-on work, as well as personal items such as vacation time that will affect overall workload capacity.

> *"Make sure to track not just project work but also ad hoc and lights-on work, as well as personal items such as vacation time that will affect overall workload capacity."*

With the ability to see what's on everyone's plate and to estimate how long they need to get certain things done, you can set realistic deadlines and assign tasks according to each team member's workload capacity. The result will be a team that's as efficient and productive as possible.

TRACK YOUR WORK PROCESSES

The best way to track your work processes is to use creative briefs and templates. Briefs and templates allow you to define what your processes are for specific types of work.

By identifying what steps need to be taken and in what order they need to be taken, you can improve your workflow and help eliminate unnecessary rework that occurs because steps get done in the wrong order. With an average of 30-35% of project time spent on rework, reducing it can save your team a big chunk of time.[21]

Another advantage is that briefs and templates help set clear expectations about who needs to do what and when, so you get the feedback you need at the right time, from the right people.

It's not always easy to get everyone to use creative briefs and templates, but if you can stick to your guns on this one and make it a team habit, you'll find that your team can work more efficiently and effectively—keeping all of you on track to meet deadlines, as promised.

TRACK YOUR TEAM'S ACCOUNTABILITY

When deadlines are missed, there can be a lot of finger-pointing or "he said, she said." But once you start tracking your time and your team's workloads, as well as setting up templates with a clear set of expectations about who is going to do what and when, it gets much harder for your team to engage in laying blame and much easier to hold everyone accountable to their individual and team deadlines.

Though all projects and tasks won't track exactly the same, historical data helps ensure that agreed-upon timelines are in the ballpark. In addition, with the ability to see what's on everyone's plate and allocate work accordingly to adjust if need be, you can feel confident that team members have the capacity to meet the deadlines and everyone can be held accountable for getting the work done on time.

TRACK YOUR COSTS

Now that you're tracking several components of your work, your credibility should be on the rise. But the truth is, you still need some hard numbers to show your real value. The best way to get those numbers is to track your costs.

By tracking what the cost is to complete specific tasks, what a vendor would charge for the same work, and, if applicable, your client chargeback rate, you'll be able to show in real dollars the cost efficiencies you provide. As a bonus, you'll also be able to better justify resources and budgets based on historical data for planned versus actual hours worked.

TRACK WORK THROUGH ITS ENTIRE LIFECYCLE

You may feel that tracking work is an extra step that adds more time and gets you farther behind—it's not. It actually gives you time by offering you visibility into the work and providing clear data to justify your decisions with your clients about what is a reasonable deadline. In addition, tracking all work in one tool will give you even bigger productivity gains than juggling each aspect of work in a different tool.

Ultimately, the information you gain through tracking all the work will not only help you set realistic deadlines and keep workloads under control but also give you the data you need to show just how valuable your team is. And that's the biggest credibility booster of all.

HOW CAN WORKFRONT HELP YOUR MARKETING TEAM?

Workfront is a cloud-based Marketing Work Management solution that helps marketing teams, creative services teams, and agencies conquer the chaos of excessive email, redundant status meetings, constant rework, and tedious approval processes. Unlike other tools, Workfront Marketing Work Cloud is a centralized, easy-to-adopt solution for managing and collaborating on all creative work through the entire work lifecycle, which improves productivity, credibility, and client and executive visibility. Workfront is trusted by agencies like RAPP, SapientNitro, and Covario, and marketing teams at House of Blues, AMC, Trek, and many other top companies.

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