The Creative WORKFLOW WORKBOOK



Your guide to producing better work together.

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The creative workflow process is turbulent at too many organizations. We've heard stories of a single PDF document going through 14 rounds of revisions, a team member spending the majority of their time consolidating creative feedback given through email chains, and creative work being routed for review by walking it through the office.



> **"I had to literally babysit jobs using file folders and printouts of artwork, running them around to proof. I couldn't go on vacation, because if I stop doing that, all jobs would stop."**
>
> *- Latrisha Eilers, production design supervisor at Spectrum Brands on her department's previous process*

Just because other brands look good on the outside doesn't mean their teams aren't hard pressed to make it all happen. It's ok. You're not alone.

Creative and marketing departments can work better together, but it's not going to happen overnight. You can't fix the creative process by just giving everyone a username and password to a new tool. Fixing the process requires open dialogue, a willingness to change, and a process that considers all involved.

This workbook is intended to help you start the dialogue with your teams to figure out what's going on with your current creative workflows and how your teams can start producing better work together.

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Your current workflow

We've found that creative content production at most organizations falls into five core steps: strategic planning, tactical planning, creation, deployment, and assessment.

Strategic planning: Set organizational priorities and make decisions on how to achieve goals.

Tactical planning: Research and define messaging, project scope, teams, and success metrics to execute the ideas of the plan.

Creation: Develop creative content.

Deployment: Launch the campaign to its intended audiences and capture metrics.

Assessment: Evaluate the success of the campaign and report findings.

Map your current process.

It's time to get out your pencil and draw what your current process looks like. It doesn't have to be pretty.

Spoiler: We're going to help you map out an ideal process at the end of this book. Then you can compare them.

Tips:

- Start by thinking about your own work and the order in which you do things.
- Then, think about what had to happen before you were able to start your work.
- Finally, think about what happens after your work is done. Who do you pass the baton to?

Who's involved?

One of the complexities of creative work is the number of people involved throughout the different stages of the process. Each group has a different skill set and a different view of the process. Marketing teams who request projects often view them as input-output scenarios.

Marketing teams request projects and are often left in the dark on the status of their request. Their request will eventually be filled or not. Creative teams need to understand what to prioritize and what's actually being asked for so they can spend more time creating and less time redoing work.

A successful workflow comes from your ability to identify and listen to those involved in the creative process. Information you gather from everyone in the process will make it better for all. By listening to and considering feedback from those involved, you have a better chance at getting buy-in for change.

Identify the goals and roles of those involved in the creative process, from ideation through approval and distribution.

 Department / team	 Number of people	 Goals	 Roles
Graphic design	*5*	*Produce visual designs and layouts, maintain consistency in fonts, colors, and iconography*	*Designer, Design Manager, Senior Designer*

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Take the groups of people you've identified and mark the parts of the process they're included in. When evaluating your process, it's extremely beneficial to have in-person interviews with team members to gain different perspectives.

Department / team	Strategic plan	Tactical plan	Create	Deploy	Access
Graphic Design		*X*	*X*		

Sample team evaluation survey

You can use the sample questions below to survey your team and get them thinking about their process. This will help you to gain insights into their work.

Name: _____

Job Title: _____

Department: _____

1. From your point of view, what makes a project complex?

2. On a scale of 1 (very low) to 5 (very high), how complex are your projects? (Complex equals many changes and comments on each version, many deliverables, multiple stakeholders, multiple stages, and large documents.)

   1 2 3 4 5

3. How many creative content production projects are you involved with in an average month?

4. On a scale of 1 (very low) to 5 (very high), how would you describe the volume of your project work?

   1 2 3 4 5

5. How many projects do you currently have in progress?

6. How many projects did you complete in the last week?

7. How many projects did you start in the last week?

8. On average, how long does it take to get from a project request to a completed project?

9. On average, how many rounds of review do your deliverables go through?

10. On average, how many people do you need to get review / approval from on a deliverable?

What's being created?

What kind of content do your teams create?



Digital

Example: _____

Example: _____

Example: _____



Print

Example: _____

Example: _____

Example: _____



Single deliverable for a project

Example: _____

Example: _____

Example: _____



Multiple deliverables in one project

Example: _____

Example: _____

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The Tools

Do you and your colleagues currently use any software to manage your content production processes? List them in the table below.

As you're listing tools you use, think about these questions: How is work requested? How is work prioritized and assigned? How are teams notified of requests, work in progress, updates, changes, and finished projects? How is content distributed once it's done?

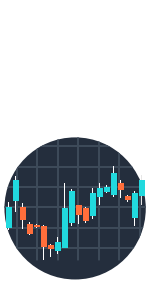
Tool name	Tool function(s) for your organization	Teams that use it	Tool owner
Trello	*Progress tracking*	*Graphic design, web team, product management*	*Head of graphic design*

Note: List what the tool does for your organization, not how it was marketed to you.

Do you see redundancies? Mark them as potential consolidation opportunities. Is a tool's function unclear? Mark it for discussion with your teams to understand if and why it's needed.

Evaluate

Once you've gathered information from your teams, you can start evaluating your current workflows. One framework to evaluate your workflows is to compare the volume and complexity of your projects identified by your teams. This information is collected in the second and fourth questions of the sample team evaluation survey above.



Low volume

- Few concurrent projects
- Few projects over time



High volume

- Many conncurrent projects
- Many projects over time

Low volume

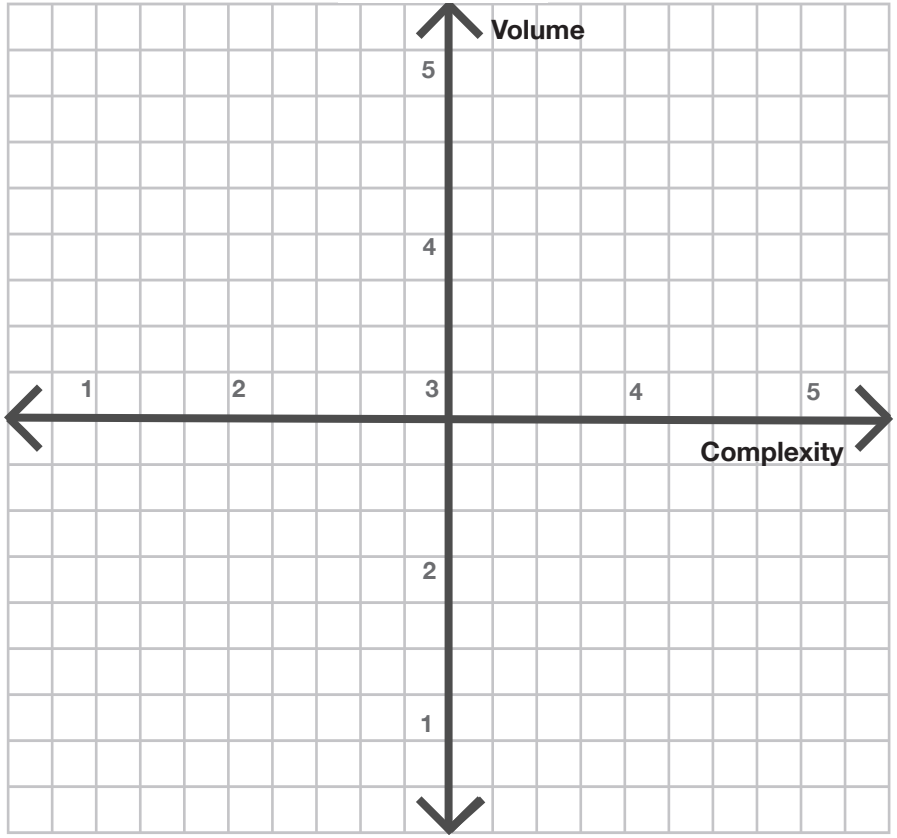
- Few changes and comments on each version
- One or few deliverables
- Few stakeholders in close proximity
- One or few stages
- Small documents (length of docs)

High volume

- Many changes and comments on each version
- Many deliverables
- Mutiple stakeholders
- Mutiple stages
- Large documents

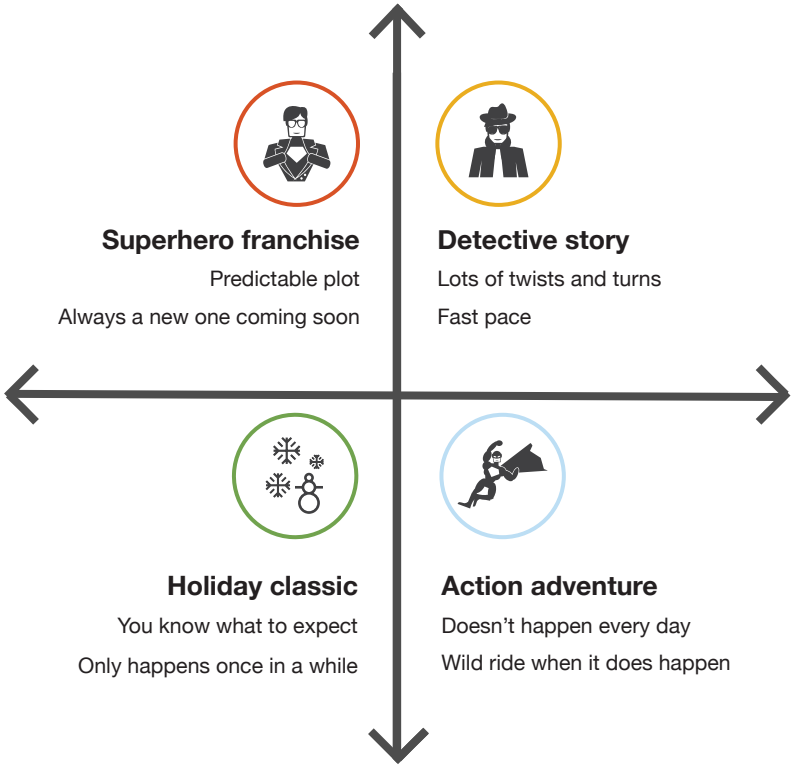
After you've gotten responses to survey questions, take the results and plot them in a quadrant like the one below.

Tip: Use a different symbol to represent your different teams to identify any discrepancies between the teams' responses. For example, plot Team A as plus signs and Team B as circles.



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We've given each quadrant a movie metaphor to illustrate your team's style of work. The graphic below describes what it's like to work in each quadrant.



Collaboration | Enable teams to communicate and collaborate smoothly by removing guesswork and frustration.

The flexibility in communication tools is part of what makes collaboration so confusing and frustrating. It's incredibly simple to provide feedback at any time, which can lead to people giving feedback at the wrong time.

The planned three rounds of revisions becomes twenty-seven chat messages, four emails, and an in-person meeting over the course of a week. Instead of time being spent on creative solutions to design challenges, designers are chasing down answers to questions, trying to read minds, and managing multiple communication streams.

How's a designer supposed to keep all the feedback straight, let alone get work done with constant interruptions?

Opportunities

Reduce the number of people involved. Communication between team members creates a lag between feedback and action.

Trust the individuals on your teams. Instead of a project needing three different copy reviewers, can there be just one or two?

Cut out nonessential stages. Is the time invested in each stage justified by the value it adds? Look for redundancies and low value-added stages as opportunities to simplify and streamline your workflow.

Identify the communication channel. Then stick to it. The most universally used tool — we're looking at you, email — doesn't mean it's the best for your process. You may find a workflow or project management tool to be the central source for any communication. To help individuals cater to their preferences, they can set up notifications in the tool or with connector tools like Zapier and IFTTT.

Superhero franchise and Detective story: Eliminating redundant tasks and lag between feedback and action can have a large impact on your team's work due to the high volume of projects your teams are working on.

Detective story and Action adventure: Reducing the number of people involved in your process will help your teams make decisions faster and reduce the amount of back-and-forth time spent on complex projects.

Visibility | Take the guesswork out of the creative process and illuminate information such as workload, bottlenecks, and project status.

A lack of visibility leads to guesses and assumptions across the organization. There's typically a disconnect between a project requester's expectations and reality. Other people's work is out of sight, out of mind. Designers aren't magicians. They can't complete a well laid out marketing poster with a flick of the wrist, and that project isn't usually the only thing in their queue.

On the other end of the project, requesters often feel like their message was sent into a black hole. They receive no confirmation, no timeline is communicated, there are no updates on status, and then eventually the deliverable emerges from that black hole.

The review and approval process requires visibility. Is the work under review? Who's reviewed it? What are the approved decisions? Who communicated the feedback and how do I get in touch with them to clarify?

Strive for a holistic and zoomed-in detail level view of each project.

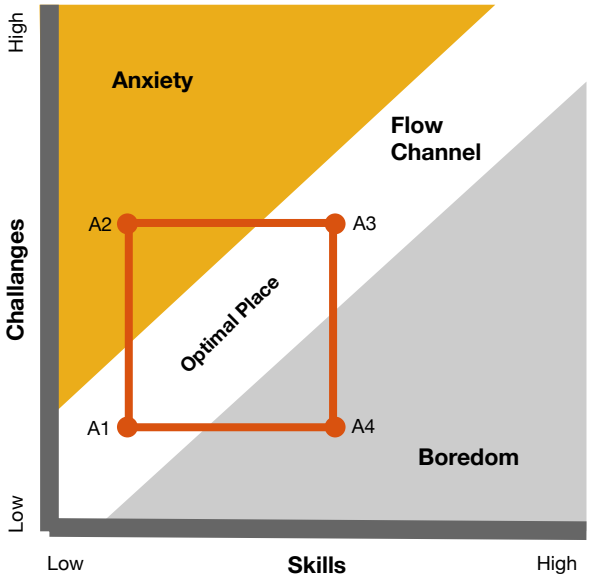
Opportunities

Plan out work on a calendar. Help your team understand the timeline of a project and its expectations.

Set up automatic notifications. Eliminate some human error in communicating status updates. Set up notifications for next steps. Make it clear when action is required on a project, along with the project's timeline.

Track team workloads. There's an endless number of projects to support the business. Effective teams are able to prioritize and focus on key projects. Without a project manager having real-time visibility into their team's workload, they lack the hard numbers to prove either they need more staff to take additional work or they need to reduce the number of projects

Mihaly Csikszentmihalyi is a psychologist whose research focuses on creativity and innovation. He introduced the concept of flow, a highly focused mental state. The next graph illustrates where the ideal balance of challenge and skill is located. If the challenges exceed the skills, that can lead to anxiety. If the skills are greater than the challenges, that leads to boredom. Keeping a team member in either of those states for too long will lead to burnout, employee turnover, and uninspired work.



With visibility into your team's current and past workloads, you can better set your teams up for success.

Superhero franchise and Detective story: Visibility into the team's workloads will help project managers understand when the high volume of projects is leading to burnout. Automatic notifications can also help manage the frequency of communication.

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Action adventure and Detective Story: Visibility into the status of more complex projects will help your teams understand when to contribute throughout the process.

Holiday classic: With the low volume and complexity of projects, visibility will help keep your teams informed of new work and hold them accountable.

Consistency | Get the team on the same page by establishing repeatable processes that can be reused and tweaked when necessary.

Decisions take time. What's the next step in the process? How do I hand the project off to the next person? How will I know that status of the project? These are questions that don't necessarily add value to the creativity or execution of the project. So why have your team spend time wondering about the process?

Every project isn't completely new and unique. Take advantage of your team's past work to eliminate unbeneficial uncertainty. If there's a project your teams work on every year, keep the documentation on what was done, why decisions were made, the execution process, and examples of the deliverables.

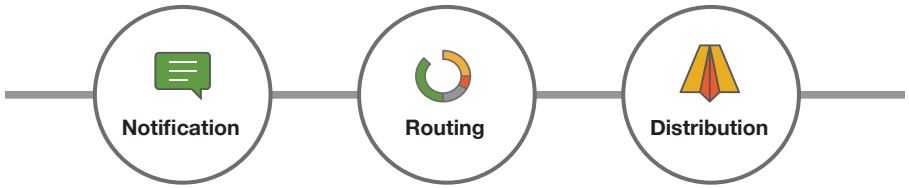
Opportunities

Creative brief: A creative brief helps the project requester think critically about what they are asking for and helps creators and reviewers understand the purpose of the project. Include this information on creative briefs:

- Project title
- Project date
- Project owner
- Team members
- Objectives (What are the goals of this piece? What problem is it trying to solve?)
- Audience (Who is the primary audience(s) for this piece? What do they think, feel, and do now about this topic?)
- Key messages (What are the most important things this piece needs to communicate to this audience?)
- Related materials (Previous versions of this piece, examples from the competition, or other examples to reference that can help you complete this project.)
- Deliverables (What piece or pieces are being produced?)
- Timeline

Note: You may have more than one creative brief if your teams create a wide variety of projects. If you have more than one, make sure it's clear when to use which creative brief.

Repeatable process: If your teams are producing similar projects or working in a repeatable process, look for opportunities to automate those. Templates with the following information in workflow tools can help reduce the amount of time spent on management of the projects.



Detective story and Superhero franchise: Taking the time to set up automation features in your tools will pay off due to the high volume of work.

Action adventure and Detective story: Centralizing the communication and identifying roles at each stage will help your teams navigate complex projects instead of leaving them wondering what's next.

Map your ideal workflows.

Take the information you've gathered and the opportunities you've identified and map out an ideal workflow for a project your team frequently creates. After you're done, compare it to the current process you mapped out at the start of this workbook.

 **Strategic planning**

 **Tactical planning**

 **Creation**

 **Deployment**

 **Assessment**

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Conclusion

Once you've mapped the people and processes for your ideal workflows, you can start looking at tools that will help your teams work the way they want to.

Resources

Is email slowing down your review and approval process?
Widen Consulting Services
Widen Workflow and online proofing
Collaboration overload is a symptom of a deeper organizational problem

If you found this workbook useful, please share it with your teams or with your social networks! If you have feedback or want to share your completed workbook with us, we'd love to hear from you! Contact us at marketing@widen.com or tweet @WidenEnterprise.

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