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# INTRODUCTION: FROM PRODUCTION SHOP TO STRATEGIC PARTNER

Internal creative organizations need leadership and vision in equal or greater amounts than creative talent. The fact that you're reading this shows that you're considering this challenge, if not living and addressing it, everyday. But how do you build an internal creative agency and raise it from being a production shop ("Print me some flyers!") to a strategic partner for the entire organization ("Tell us how we can communicate our brand to millennials!")?

This ebook is a tool for you to identify how you can grow and enhance your organization with an internal creative agency and what kind of support you'll need to get there.

### WHO SHOULD READ THIS?

The Definitive Guide to Building a World-Class Internal Creative Agency is for the internal creative director looking to elevate his or her organization by increasing its talent, improving its work, and contributing to the organization's purpose.

#### WHY SHOULD YOU READ THIS?

By now, you're well aware of the need to attract and retain talented creatives by offering them meaningful work alongside the more tactical production work that can often consume a team. You've watched some great talent that you've nurtured leave for external agencies or to start their own shops. You've been subject to the endless conversations about your team's role in the wider organization and the requests to prove your value to the bottom line.

This guide is aimed at defining that journey and providing you with actionable steps.

Through our research, our experience providing work management software to creative teams, and our conversations with creative leaders just like you, we've developed a unique perspective on what we all know and want - meaningful creative work, in an organization that recognizes your value and maximizes it.

The following sections give you the keys to developing a world-class internal creative agency.



# I: BUILD YOUR TEAM

You're a leader as much as a designer. But the design skills that got you to this point are not the skills that will help you develop an in-house creative team. To succeed going forward, you will need strong leadership skills and efficient processes. If you maintain a focus on your team, you're already halfway there. After all, in any creative enterprise, the people are the product.

BUT HOW EXACTLY DO YOU FIND AND ATTRACT A KILLER TEAM?

# A. LOOK FOR THE RIGHT SKILLS AND ATTITUDE

A lot of creative heads we've spoken to say that you shouldn't be looking for the next Monet or Faulkner. What you need to look for is a person with great creative skills who understands business process enough to shepherd the work through the system. But most importantly, you need someone with a "can-do" attitude. After all, you won't always be painting the Sistine Chapel. Most days, the job will be creating signage for a trade show based on last year's booth, or writing ad headlines that fit in fewer than 120 characters.

Internal creative agencies tend to arise out of necessity. They often begin with a creative director's inbox overflowing with a laundry list of content and asset production requests that are far too time sensitive and often too mundane — to send to an outside agency.

So you need people creative enough to make your brand voice sing, yet humble enough to roll up their sleeves and get the mundane, everyday work done. Humility and a can-do spirit are the key components of the attitude you need to hire for. Make sure this is your focus in all of your interviews.

## **BUT FIRST, KNOW YOUR WORK**

One of the top reasons people leave their roles within the first year is a misunderstanding of the job description and the expectations for their role. You can't afford the time, money, or lost productivity this kind of mismatch of expectations and reality causes in a growing team.

If you're building a new organization, it's great to sell people on your vision an internal agency providing the creative prowess of an independent agency with the business knowledge and expertise of a businessperson. But this vision won't materialize overnight and to imply that it will is unfair to candidates. You must be honest about what daily life will be like. But how can you be honest if you don't know?

First, you must know the type of work coming through your pipeline. Is it mostly web design? Copywriting? Print? Video production? Also, you need to know how much of it is an iteration on existing assets and messaging, and how much of it is blue sky creative. If you're starting out, it will likely be the former. The best way to know this is through sustained tracking efforts and deep understanding of the pipeline.

We also know that work is changing. Internal creative agencies are increasingly being required to support campaigns spanning channels and disciplines. You won't be successful if you only hire designers with narrow skill sets. Consider a designer's ability to crossover from brand work to direct marketing efforts. You will need a print production person willing to learn web design and vice versa. How else will you keep up with the growing demands from your organization?



#### HIRE FOR SKILL AND THE "GET IT DONE" ATTITUDE

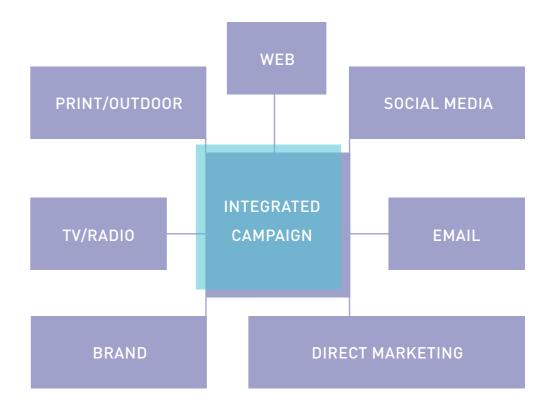
One creative director at a leading game development company says, "I'm looking for people who want to work and be part of an evolving team, not just the guy with the best drawings." He says this because he's spent countless hours tracking projects from intake to in-market and knows the effort involved and the type of personality that can do the work, day in and day out. When these people are successful at their work, the internal creative agency earns a seat at the table, and gets more exciting projects. That's the goal – hire people willing to do the work and grow with your team.

"I'm looking for people who want to work and be part of an evolving team, not just the guy with the best drawings."

- Creative Director at Leading Game Developer

A Senior Brand Leader at Capital One explains why some internal creative designers are more successful than others, "The more successful creatives brought fresh thinking to the business challenge and took time to understand the business' priorities." She added that they were ultimately better able to participate in conversations about shifting priorities and needs and they had better relationships with marketing managers. Capital One has one of the most extensive internal creative groups in the banking industry, specifically to support their strong brand voice and their need for timely growth.

### **MULTIMEDIA CAMPAIGN**



Creative teams play a central role in the delivery of integrated marketing campaigns, making efficient operations and communication critical.







Alex Calicchia, a leading consultant whose experience in creative teams spans both agency and client side says, "Often promotions for internal creatives involve work management and project management more than design skills. People willing to constantly re-examine the way that work is accomplished and look for ways to more efficiently deliver are the ones who will sustain the team in the long term."

Of course, this presupposes that the leadership has a clear understanding of the workflow and that they are in a position to help the team manage the tasks given to them, so that they can get back to their creative work.

"Often promotions for internal creatives involve work management and project management more than design skills."

- Alex Calicchia, Founder & President, Hive Partners

## **TAKEAWAYS** Tips for building the right creative team:

- **Know the patterns of work:** Where is work coming from? What's the timing and seasonality?
- Analyze the types of work: What projects tend to run over schedule? Which require more creative thinking? Which are repeatable?
- **Be transparent:** Tell a candidate what he will likely do on day one to avoid confusion and dissatisfaction.
- Find people willing to grow with the team: Pick those who aim to elevate the team to excellence within the larger organization.
- Hire people willing to do the mundane work: Attitude counts just as much as skill.
- Make sure your new hires care about the overarching business: They will
  be far more effective with clients and become more valued partners
  in the long run.







# **B.** PRIORITIZE PEOPLE DEVELOPMENT AND CAREER GROWTH

The 2014 Boss Group In-House Creative Industry Report suggests that time is a key challenge for creative leaders building a successful internal agency. The challenge is so severe that of the respondents surveyed, 65% claim that they do not have adequate time to develop their staff. An ADDITIONAL 11% claim they have no time at all to devote to staff development<sup>1</sup>.

Alex Calicchia says, "I think that's a cop-out. A leader's job is to create the time to develop the team —to better support themselves and solve their challenges. Everyone eats. Have a working lunch if you need to." Our interviews with other successful internal creative leaders fully support his point of view. Once you're leading an internal agency, you are more than a creative director, you become leader, productivity coach, and executive liaison, and to top it all off, you have a responsibility to help your team develop as creatives and as people.

#### **USE DATA TO CREATE CAREER PATHS**

The truth is: your team won't develop simply doing lower level production work. When the time comes to elevate a creative leader, use the workflow and traffic management data to guide you. Parsing work across channels, skillsets, and geographies may all be viable approaches.

If you choose not to challenge them, you run the risk of losing them. We find that in internal creative agencies with higher levels of turnover, lower levels of staff tenure, and higher levels of freelance talent, leaders are largely unable to develop career paths. Creatives become dissatisfied with Tier 2 production work, causing them to leave.

Or, the work can simply become overwhelming. Once a team falls behind, the internal clients become dissatisfied and a culture of collaboration can devolve into a culture of order-taking. The Boss Group report states that more than half of creative leaders cite challenges developing career paths within their teams<sup>2</sup>.

"A leader's job is to create time to develop the team to better support themselves and solve their own challenges."

- Alex Calicchia, Founder & President, Hive Partners



#### CREATE WORK CLUSTERS BASED ON WORKFLOWS

One cure for low team morale and engagement is to use information about your team's workflows to identify work clusters, and organize teams around these clusters.

At a leading game development company, creative directors used work management software to identify trends in project flow. Rather than simply using channel, game-type, or discipline (web vs. print) to create artificial teams, they examined data from a year of work throughput.

They created one team based on geography supporting Latin America, another supporting event marketing, and a third specifically devoted to Web. Then the creative directors promoted the most seasoned and likely-to-be-successful designers into team leads. Result: leadership now spends less time in the weeds of project work and focuses on securing resources to support the teams' growth. Without data and a clear view into the work coming through the agency, leadership would never have thought to create three teams that on the surface seem to be wholly unrelated and non-parallel.

More importantly, because team leaders were focusing on team development, the creative directors were able to ensure there was adequate staffing during peak times. For example: a key client group announced three new launches, requesting funds and staff for the business unit. If they

didn't have a thorough understanding of how much creative effort a launch required, creative leadership would have been denied their request to hire additional people. With workflow data highlighting the team's efforts, creative directors easily made the case for increasing capacity.

## **IDENTIFY POTENTIAL LEADERS**

Once you have work clusters set, you can identify team members with the highest potential for development. Take note: just because a creative is a brilliant writer or designer doesn't mean they are ready to lead a team. Effective coaching involves teaching the disciplines of management, including process development, improvement, and evaluation. Once high potential team members show competency with the work management process, they are ready for success in an elevated role. Also, they are less likely to become dissatisfied and leave the organization.

Giving your creatives new types of projects creates learning opportunities as well. If you know how long projects take and you're managing the workflow properly, you can use these projects as development and cross-training opportunities. If you know a web design project takes an experienced designer 20 hours, double the time you allot for a person doing a type of project that's new to them to avoid bottlenecks and deliverable delays.



## No career-pathing, coaching, or support can take place without a good understanding of the creative pipeline.

If you don't understand the details of each person's current work mix or the time and effort required for each kind of project, it will be harder to plan these cross-training opportunities for team members. Alternatively, you won't notice when someone is burning out by exclusively working on production jobs. Using a work management tool, a leader saw that a team member was almost 100% devoted to production work for two months in a row. To keep her from burning out, the leader found a project on another team where she could shadow another designer in the third month and learn a new skill without sacrificing the pipeline. Then, the leader shifted the next month's production assignments to a freelancer.

This constant shuffling is necessary not only to ensure that the team's bench strength increases, but also to keep seasoned team members with you long enough to be able to compete with outside agencies. Team members need track records. In this case, at the end of the year, the leader was able to quantify the hours of external agency time saved at the company and also the team's value to the bottom line.

#### CAREER-PATHING: UNDERSTAND THE CREATIVE PIPELINE

They key takeaway is that no career-pathing, coaching, or support can take place without a good understanding of the creative pipeline.

Internal creative is no longer a function that can be managed effectively on spreadsheets and email. Yet, only 44% of teams have dedicated work management software. Even fewer have project management systems spanning multiple disciplines within marketing or the larger enterprise<sup>3</sup>. If teams don't invest in work management tools, they won't have the infrastructure to elevate themselves.

## DEVELOP THE RIGHT MANAGEMENT COACHING APPROACH

After identifying your potential leaders, you have to invest the time to coach them. Besides leveling up creatives' development skill set, coaching means teaching management skills. Effective workflow and process management create a people-centric environment for your potential leaders and culture.

Without adequate time to work and without enough detailed feedback, designers and creatives won't be able to improve the quality of their work and the conditions under which the work occurs. While this is certainly not news to any leader, research suggests that the demands of internal clients have overwhelmed internal agencies to the point where almost no







time is spent on professional development. A full 75% of creative leaders surveyed cited not having enough time to develop team members4.

If one of the goals of an internal agency is to serve as a strategic advantage and offer new voices for marketing and product development, this is a place where many teams fall short.

Research suggests that the demands of internal clients have overwhelmed internal agencies to the point where almost no time is spent on professional development.

Creative leadership must push the message of people development. Most successful large companies in a variety of industries have formal development opportunities for training and development. They expect managers to be coaching regularly - weekly, through one-on-ones, and at ALL times - through short interactions.

A Senior Brand Leader at Capital One reiterates that because people

development is a core value of the overall enterprise, the internal creative agency is no different. "It's ingrained in the Capital One culture that people are here to grow and develop - all people. Training opportunities are respected from leadership on down."

"Training opportunities are respected from leadership on down." - Sr. Brand Leader at Capital One

If this isn't part of the overarching culture of the organization it is unlikely that coaching and development for an internal creative agency will receive any support from marketing leadership. Consider how devoted your company is to people development. If it's not, you have much more work ahead of you. You'll need the data to validate the cost-efficacy and productivity improvements that training creates for your team. Savings can include better employee retention and reduced dependence on outside agencies. Productivity improvements can include faster and greater throughput.



## WHAT DOES AN EFFECTIVE COACHING SESSION WITH A DESIGNER LOOK LIKE?

To coach effectively, ask for solutions rather than prescribing them. Calicchia mentions many cases where he's encouraged designers to examine their own workflow and approach time management as a business problem. He wants them to find ways to reduce the team's stress levels and carve out more time for the real work of creating.

The most important benefit of successful coaching is the improvement in communication between creatives and the client line of business. According to the Sr. Brand Leader at Capital One, the best ideas come from creative team members early in the campaign development. Because they receive adequate coaching and development to understand the overall business goals and objectives, they are able to apply divergent thinking to a messaging problem. They challenge the business to think more deeply about ways to achieve growth goals. Also, when creatives are better prepared to have these conversations with business partners, they are able to approach changes in client prioritization and direction with more empathy. Antagonism between the creative team and the client line of business should be avoided if possible.

## **TAKEAWAYS** Tips for creating career paths and maximizing the strengths of your team members:

- Use workflow data to create work clusters: This may be geographic, product-line driven, channel driven or a combination of all three.
- Promote potential leaders to lead clusters: The accountability and visibility will increase their career satisfaction while increasing your leverage.
- Shift work between team members regularly: Make sure people are not receiving only one type of work.
- Devote your time to strategy and leadership: Let your team leads manage the tactical, so you can secure resources and better projects for the team.
- Make the time to coach and mentor: No organization can survive or thrive when little time is devoted to people development
- Engage with the enterprise's development focus: Large organizations have talent development programs and teams. Look to these as business partners to help you create a development plan for each member of your team



# II: TAKE YOUR PLACE IN THE ORGANIZATION

## A. MANAGE CLIENT EXPECTATIONS

One of the largest challenges internal teams face is managing internal clients. Often, the team isn't experienced in the account management side of the agency business.

Seventy percent of creative leaders suggest that "client behavior" (a euphemism for the marketing manager who stands over a designer's desk tapping her toe) is a challenge to team AND client satisfaction. According to The Boss Group, only 51% of the same population of creative leaders has dedicated account managers or project managers<sup>5</sup>. That means, essentially, designers are often also de facto account managers. Account management skills are not the same as design skills. They need to be taught.

Designers are often also de facto account managers.

## TRANSPARENCY HELPS TO MANAGE CLIENTS

Account management at an agency exists for a reason: so designers and copywriters can be creative. Account managers lead traffic flows and provide transparency for the client while providing a cushion for the creatives.

So in a world where this role doesn't exist, how do you manage transparency without having creatives answering emails and attending meetings all day? Live updates in your work management software. The team needs a work management tool that not only moves the work through the creative department but also through to marketing and production.

If a client can log into a live system and see that their deliverable is 3<sup>rd</sup> in the gueue, tracking towards completion, and is only one of 70 other projects, then they won't call or "drive by" for updates. In fact, this will help them see the rest of the work the creative team is doing for the larger organization. Nothing drives empathy like transparency. It saves your clients and your creatives time.

Nothing drives empathy like transparency [into a creative workflow].



### **ENGAGE EARLY AND OFTEN**

A Senior Brand Leader at Capital One suggests using creative process management to engage with clients early on: "This helps creatives to empathize with clients as they understand the broader business pressures and priorities. Furthermore, the most successful creatives engage with divergent thinking and viewpoints, often making a project way better than it would be otherwise. The in-house creative becomes strategic partner rather than production vendor."

A major ingredient in this process is the creative brief. It's a document that clients must complete in order to communicate their needs to the creative team. Apart from ensuring alignment between creative deliverables and business goals, the creative brief also helps define the scope of the project, since it is where any changes to the scope are documented. It also shows internal clients that the creative team isn't just there to execute plans, they're strategic partners. Make sure your briefs are integrated into your workflow process and that they are not simply a series of checkboxes. You can't expect the Mona Lisa if all the creative brief requests is "a picture of a smiling lady."

And isn't that what you're looking for, to build an internal agency with strategic relevance and the ability to get the best work for your team?

"The in-house creative becomes strategic partner rather than production vendor."
- Sr. Brand Leader, Capital One

### **IDENTIFY CHALLENGING CLIENTS**

Use data to understand traffic flow and identify challenging clients. A clear view of the workflow helps leaders identify bottlenecks and delays in real time. This allows leaders to offer assistance before a challenge becomes a full-blown fire drill. Furthermore, leaders are able to walk clients through workflow processes visually in order to eliminate unmet or misaligned expectations. Take this data to challenging clients to have fact-based conversations and build processes surrounding desired outcomes, rather than activity.

Alex Calicchia says, "I once came in to rebuild a marketing and creative team. Some of the leaders insisted that the work and the client were unmanageable. That was not an acceptable answer. On my teams, it's incumbent upon the leader to fully understand the demands on the team and to make better agreements with the clients to make sure the work is done and done well."



Waving a white flag and saying, "No more!" isn't the solution; data and a thorough understanding of the client's needs is. Sometimes that means realigning expectations, other times it means fundamentally re-engineering the workflow and the processes we use to get our work done. You need to engage in conversations about how work gets done and what the nature of your work is in order to achieve success in an internal creative team where resources will always be in short supply. Calicchia coached his team to show the client the number of their requests and their change process. The client and the creatives worked together to increase self-service tools for the client.

"On my teams, it's incumbent upon the leader to fully understand the demands on the team and to make better agreements with the clients to make sure the work is done and done well."

- Alex Calicchia, Founder & President, Hive Partners

### **USE WORKFLOW DATA TO COMMUNICATE PROGRESS**

It's crucial that the company's leaders understand how the internal creative agency's progress aligns with larger business objectives. Leaders may find themselves in staff meetings with the CMO and other leaders who aren't familiar with the ins and outs of agency management. Having their goals in mind when you provide updates is a great start.

When senior leadership asks for a progress update, cite the end goal vs. the position of the project. For example, "We're in green status for the product launch in three days," communicates a better and more impactful message than, "We're in the third review phase."

It's even better when you have a dashboard to show progress. Leaders care about when they will start earning revenue and Return On Investment (ROI), the ultimate goal of any creative endeavor.

Once again, when we think about project milestones, development, or production, we are thinking about transparency. Automated solutions that tie projects to key milestones such as in-market dates, mail drops, product launches, and events help non-creatives better understand the creative process. Without an automated view, this level of detailed, transparent reporting is virtually impossible. Email and spreadsheets cannot deliver when a team has over 50 projects.



#### 4 KEYS TO COMMUNICATING PROGRESS AND MILESTONES:

#### Progress relative to a goal illustrates impact rather than activity:

Use your workflow data to show that a project is on track.

This is what stakeholders care about.

**Milestones keep client conversations fact-based:** Focus on outcomes rather than activity.

You may need to re-engineer your processes and realign
expectations: How you get the work done is as important as getting
it completed.

**Transparency requires a system:** When 50 projects are flowing through a creative pipeline, neither Excel nor email are viable tracking tools to keep clients informed.

## **TAKEAWAYS** To better manage client expectations:

- Improve communication with clients: Encourage team members to be clear and timely in verbal and written interactions with clients.
- Engage early in development: Have a systemized view into the work on its way through the pipeline, and challenge business partners and internal clients to consider new approaches to marketing.
- Manage internal clients: Teams without account managers need to develop communication and leadership skills in addition to design prowess.
- Transparency improves relationships: When clients can see where their work is in the queue it saves everyone time and stress.



# **B.** PROMOTE THE WORK YOU ALREADY DO

Saying, "The team had a great quarter — lots of great work coming through," is not the same as saying, "The team had a great guarter — we supported 25% more campaigns and the launch of our new revenue-generating product." The former gets a nod from the CMO, while the latter gets your team invited to the CMO's next strategic planning session.

Successful leaders know how to shine the most favorable light on the work their teams do. We know of a team where the product manager requested more people in the annual planning process. He wanted to increase the new product launch pipeline by 15%. The Creative Director leaned over to the CMO and said, "That will increase my team's workload by 25%. Here, look." He opened his work management software on his desktop and showed the launch work his team did for that product manager in the previous year. He was also able to show how the team was already at capacity. The CMO easily argued in favor of expanding the Creative Team's staff.

### HARNESS WORKFLOW DATA TO PROMOTE YOUR WORK

Without an idea of the volume coming through the pipeline, there is no way to protect your creative team from increases in work. Success begets more work. As your team becomes more efficient, your team will earn a great reputation within the larger organization. As you communicate your success, more and better work will come. Without the data from an efficient work and process management tool, promoting the work your team does is virtually impossible.

Without a pulse on the volume coming through the pipeline, there is no way to protect your creative team from increases in work. Success begets more work.

#### HARNESS WORKFLOW DATA TO PROMOTE YOUR WORK

Using data from your work management system also allows you to shine as a leader. Successfully implementing a set of dashboards and key reports will demonstrate your ability to plan and set goals for the team, identify opportunities, and show the ROI of your work.

Research by the IHAF shows that in 2014, 97% of in-house creative teams had some corporate metrics to evaluate their effectiveness. 55% said that metric was ROI.

Leaders cannot begin to consider measuring their ROI without detailed views into the work the team produces and the time and cost of outsourcing all of that work to an external agency. These metrics will help you pitch for better projects because you can approach the discussion not only from a creative standpoint, but also from a financial and business standpoint.

"Research by the IHAF shows that in 2014, 97% of in-house creative teams had some corporate metrics to evaluate their effectiveness. 55% said the metric was ROI."

## **TAKEAWAYS** How to more effectively promote your current work:

- Treat projects as data for your planning conversations: Use quantifiable metrics to show how your team has changed, and how much volume you must deal with.
- Make growth a "no-brainer:" If you have data that shows your team is working at full capacity, asking for additional people is easier.
- You can't do it without data: Unless you can quantify your team's impact, you won't be able to keep up with the increased demands on your team's resources. Data about the project pipeline from a centralized, automated system is the only way to support your growth.
- Automate measurement with dashboards: Once you've determined the RIGHT metrics, use software to generate dashboards. Use ROI when pitching work: Once you can calculate ROI, or proxy ROI, your internal pitches become even more powerful.



# C. CELEBRATE SUCCESS

When your team can show how many projects they deliver on time and within budget, they can prove how they've reduced time to market. Reduced time to market means increased or accelerated sales — that's success a CFO can understand. Use your data to show how your internal creative agency is driving down cost or accelerating revenue. Nothing makes a team more valuable that a quantified impact on the company's bottom line.

When you have the right data, you have more opportunities to celebrate with your team. A work management system should have the capability to quickly track and broadcast successes across the team via @mentions or live updates to all team members. Use that information to have coffee delivered, hand out certificates, or offer your heartfelt thanks in person. Appreciation that is genuine and specific is a great motivator.

In addition, when you celebrate your success, other people within the organization notice. This is a significant motivator for the team and builds confidence with your team's internal clients and stakeholders.

In the same way that you promote your work more effectively, you can celebrate successes. Use that information to have coffee delivered, hand out certificates or offer your heartfelt thanks in person.

## **TAKEAWAYS** 3 ways to celebrate success with your team:

- Reward team members based on data: You don't need to wait for major presentations and annual reviews to reward employees.
- Use your work management system to thank team members: An @mention function isn't just for assigning work or comments.
- Give non-traditional rewards and small tokens: Engage team members while the work is happening instead of months after your work management system helps you find reasons.







# III: SUSTAINING YOUR SUCCESS & LEADING FOR GROWTH

NOW THAT YOU'RE SHOWING THE VALUE OF YOUR TEAM ACROSS THE ORGANIZATION. HOW DO YOU MAINTAIN MOMENTUM?

# A. LEARN FROM MISTAKES SYSTEMATICALLY

Review comment streams and project archives to find the causes of miscommunication. Develop feedback loops to teach the team how to prevent future misunderstandings.

One creative leader we spoke with told us he recently had a project come out incorrectly. But because he kept all review notes and other projects in a single system, he was able to scan for comments and review the stakeholder dialogue for the project.

He noticed something surprising; his team had been directed to replicate another project. However, the project mentioned wasn't the correct asset. He saw exactly where in the process the communication breakdown occurred, re-educated the stakeholders, and devised a new check to ensure that project replications are validated by the requestor. How many Moleskine notebooks from previous employees are returned when they leave? How many meeting notes are captured but never placed in a central location? You can't learn in the 21st century with 16th-century note-taking.



#### UNLOCK LEARNING POWER USING ROOT CAUSE ANALYSIS

Mistakes are learning opportunities when the root cause can be identified. This can only occur if project documentation is complete, up-to-date and easy to locate. For this, a system is required. Without centralized documentation and process understanding, locating root causes becomes an exercise in "he said, she said." Instead of learning from them, mistakes create a scenario that strains even the strongest relationships. To keep the team moving forward, robust, clear documentation must be built into the process in an easy-to-identify and seamless way. Remember, the root cause is never, "Mr. X misunderstood Miss Y's instructions about font size." A root cause is, "Our system lacked a step for validating instructions to the web-design team regarding font size and color specifications." You know you have root cause when the solution is about creating the infrastructure to reduce human error (something you can never fully eliminate), and not about reprimands.

### **TAKEAWAYS** 2 Tips for Systematic Learning:

- Real-time comment repositories preserve information, paper does not: Keeping comments in threads and on accessible systems can identify issues that notebooks simply cannot.
- Root cause analysis leads to systematic improvement: Too often, feedback for creatives can devolve into finger pointing. Using systems to identify root causes allows for growth. Improving systems and processes prevents future issues while acknowledging human error.



# **B.** Prepare for growth in work and complexity

While drowning in requests could be considered a great problem to have, it can quickly destroy your culture and your chances at greater success if you don't have a way to manage growth. Once you've gained your seat at the table, you must be ready for more volume, more variety, and hopefully, better quality projects. Use your work management data to identify needs for additional headcount and funds early, before your team becomes overwhelmed.

## **AUGMENT YOUR CAPABILITIES WITH FREELANCERS** AND OUTSIDE AGENCIES

Creative teams usually need outside support. Sometimes, that help is specifically for web design or mobile platforms, sometimes it's a brand voice project.

We see creatives crossing disciplines and building increasingly complex multi-channel campaigns. In reality, 97% of internal creative teams will use freelancers or outside agencies over the course of a year. Successfully integrating external resources requires additional management skills. You'll need a system to track time, effort, resources, and projects. In this case, you (as the client) and the external agency need full access to the tracking system while maintaining privacy and the integrity of separate projects. Clear communication in a centralized system saves time, rework, and agency hours that translates directly into billable hours.





In reality, 97% of internal creative teams will use freelancers or outside agencies over the course of a year.

- IAHF

Calicchia mentioned a situation where he was leading a team that was chronically overwhelmed and unable to manage increasing — and competing — client demands. Outside help was the only way to clear the backlog of requests. However, this led to the internal team overseeing another function: vendor management.

"You need to make it clear that the work on the table is an agreement between design and the internal client. When the workflow appears unmanageable, your clients will become dissatisfied. You need the data to make decisions about prioritization and optimization." - Alex Calicchia, Founder & President, Hive Partners

## **TAKEAWAYS** 2 Tips for Working with Freelancers and Outside Agencies:

- Outside agencies and freelancers are a reality for most internal creative teams: 97% need help to meet peak demand times, but not all do so effectively.
- Teams without vendor management skills must develop the capability: Systems are the only way to reduce the extra effort required to direct outside help.



# **C.** SET REMOTE WORKERS UP FOR SUCCESS

As your team grows, many creative workers and teams will be spread across floors, buildings, towns, and countries.

These remote workers will need connection and transparency.

Embrace tech solutions to close this gap and integrate them fully into the team.

Recent research into introvert and extrovert theory has deep implications for anyone looking to develop a creative team. In Susan Cain's book, Quiet, she advocates for creative people who thrive in quiet workspaces with doors and limited distractions. Many design floors can be loud, fun, and collaborative places better suited to extroverts. We've seen floors where many designers work in headphone-created isolation. We've also seen organizations where a flexible remote work policy can be a boon to an introvert on a deadline.

While the option for remote work is perfect for some, without the proper tools and expectations, the drawbacks can quickly outweigh the benefits for leaders. Without a system, corralling a team across geographies takes so much time and effort that you're not able to fully tap into the creative skills that made you hire these particular people.

90% of leaders reported using freelancers. And across remote locations, the most common form of file sharing is email, at greater than 70%. The resulting amount of time spent searching through inboxes and leaving design programs to check new messages, plus the limited storage allowances in email programs, creates productivity headaches for teams. When teams operate in multiple sites, a real-time collaboration tool is critical to success. They need the ability to track an asset or campaign throughout development, just as much as they need to centralize all feedback and responses in order to ensure thoroughness.

"The most common form of file sharing across remote locations is email, at greater than 70%.10 The amount of time spent searching email programs, leaving design programs to check email, and the limited storage allowances in email, create productivity headaches for teams."

- The Boss Group



To be clear, keeping teams co-located has distinct advantages. Numerous studies suggest that ideation is improved when teams are co-located. Additionally, opportunities to cross-train abound when all members of the team can sit side by side. At the game development company, one leader focused on physically moving people around between teams to give them the opportunity to build news skills working with different development and production teams. This co-located experience just isn't always possible.

### SPECIAL CONSIDERATIONS FOR REMOTE CREATIVES

- 1. Ensure you have meaningful interactions: Some teams find it helpful to require certain days in the office. One leader at HSBC allows people to work remotely on any day except Tuesday and Thursday. By ensuring that people are present on the same days, face-to-face meetings can be held without the problems of conference call multitasking, bad connections, spotty wifi, and other technology failures. Managers are also encouraged to hold one-on-ones and team meetings on these days.
- 2. Live workflow tools and messaging platforms are critical:

When teams are separated, those wonderful, serendipitous hallway collaborations can't happen. Having a virtual collaboration tool where people are logged in during work hours is critical. Make sure that the platform where work is occurring integrates well and supports live collaboration. If you're relying on someone to answer email and leave their workflow throughout the day, delays will compound.





# **CONCLUSION: PUTTING IT ALL TOGETHER**

## A. BUILD A GREAT TEAM

Your team will determine the success of your internal creative agency. Don't forget to hire people who are skilled enough to get the job done, but who are also willing to try new roles on the team and grow with you. Once you find those people, create opportunities for them to improve their skillset and move up into leadership. Coaching and people development will only work if you have a solid handle on the work coming through your pipeline, and you make people development a key priority. Team members will only stay as long as they feel that they have meaningful work to do and are appreciated for it. Unless you know how to articulate their efforts, you can't lead effectively.

# **B.** BECOME A STRATEGIC PARTNER

When the time comes for the rest of the organization to decide whether to go "in-house" or "outside agency" remember that what influences this decision is how well you've articulated the work your team does, as well as its value to the bottom line. It's not enough to have great output; you must articulate this in terms of ROI. In addition, your team needs to be a beacon of creative thinking in the organization. Without a record-keeping system, information about the savings your team generates will be challenging to acquire and communicate to senior leadership on a timely basis.



# C. DEEPEN YOUR SUCCESS

Once you're known for the great work and leadership your internal creative agency offers, be prepared for more and better work. Going from twenty to two hundred or even two thousand projects per year doesn't happen overnight. It happens after mistakes are made and learned from, and often with the help of outside vendors and freelancers. Develop and deploy tools that make it easy to track the team's work and communicate with remote members.

# D. YOU NEED A SYSTEM

By now you're realizing that managing an internal creative agency is as much about leadership and management as it is about delivering killer creative work. All management disciplines rely on some type of Management Information System to measure outcomes and track progress. In-house creative agencies are no different.

However, only 56% of internal creative agencies are using project management systems.

A full 20% have literally 0 processes documented. 11

The only way to start leading and managing better is with an easy-to-implement, scalable system that effectively manages and automates workflow. It also provides real-time updates on project statuses, and supports commenting and collaboration. **And that system is Wrike.** 

#### IT'S TIME TO TAKE YOUR INTERNAL CREATIVE AGENCY TO THE NEXT LEVEL.

Click here to start a free trial of Wrike.



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