

# IN-HOUSE CREATIVE SERVICES INDUSTRY REPORT 2010

## The Who, What, Where & How of In-House Creative Services Operations

PRESENTED BY

**cella.** & **InSource**  
Inhouse. Creative. Connected.

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## About the Report

Creative Services teams are known for getting things done under all circumstances; regardless of the situation, we figure out a way and get the job done. That said, there are often opportunities within our processes for improvement that would contribute to a more effective and efficient operating model.

While this report includes key insights and identifies predominant strategies, leaders need to develop the best solution for their company based on the unique needs of the organization. As ideas are developed, benchmarking can be used to generate potential paths and solutions, but personal, innovative thinking and institutional knowledge should not be eliminated from the process.

## About the Survey

InSource teamed up with Cella to create a series of reports on the state of affairs affecting in-house creative leaders. Both InSource and Cella have missions that set them apart from most other in-house organizations in that they have identified “creative leadership” as their main focus.

This is the first in a series of surveys aimed at benchmarking issues pertinent to leaders charged with running in-house creative businesses, as these issues are often different-in-kind than those of nearly every other “creative” working in-house.

The results of this research will provide valuable insights and best practices for the in-house creative leader and will guide future research efforts, discussions and service offerings that will be aimed at answering some of the most critical questions facing in-house leaders today.

## Survey Respondents

More than 160 leaders from in-house creative departments responded to our survey conducted in 2010. These leaders represent Fortune 500 companies, as well as middle market and other large companies, and span multiple industries including but not limited to retail, government contracting, financial services, pharmaceuticals, higher education, consumer packaged goods and services.

## Perspectives From the Field

We asked in-house creative leaders to share their stories as they relate to their business. Topics cover client management, staff planning, work volume, creative briefs and challenges of creative leaders. More stories like these, as well as a comprehensive article database, can be found at [in-source.org](http://in-source.org).

*The opinions expressed in this report are those of the writers and do not necessarily reflect the views of Cella or InSource.*

## Of Metrics and Subjectivity

For many of us who lead in-house creative teams, our time is split between analyzing the metrics of our business and the subjectivity of design. Our creative training and experience has taught us that analyzing design comes in the form of a critique of color, composition and style that was taught to us in the group setting of classrooms. This method becomes second nature for us creative types and allows us to make gut judgments about what works, or not, based on talent and experience.

But as a business manager, we're not allowed to report what our gut tells us. Our bosses need the facts. And while Jerry McGuire would not have been as popular a movie if the catchphrase had been "Show me the data!" it's usually what we hear when we try to plead our case for more resources—such as people or money—to run our business.

This is perhaps one of the few differences between in-house creative departments and outside agencies. Our days are spent trying to make metrics out of subjectivity. And unless you carefully track things such as utilization, customer satisfaction and turnaround, you're not going to be able to report the information your CFO needs, in order to get the extra resources you need...or even be able to recommend a downsizing because your workload has dropped. Being a good business manager means collecting and analyzing the data needed to make smart decisions. However, because data cannot sufficiently satisfy the gut, we have also asked some of our peers in the field to provide their own insights on points of interest brought to light by the report.

The following pages are the culmination of a year's worth of brainstorming, strategizing, planning and execution by members of InSource and Cella. Together, we have worked towards developing a benchmarking report of issues that are important to running an in-house creative business so we can provide you with metrics that aid you in making smart business-related decisions. It is our intention to deliver year-over-year comparisons annually.

Enjoy!

**Andy Brenits**

President, InSource

**Jackie Schaffer**

Vice President & General Manager, Cella

## PERSPECTIVES FROM THE FIELD

# Managing Your Creative Operations

Being in-house, in many ways, is not too different from managing an external agency. One week you're so slow you wonder how you'll pay the bills, the next week there's so much work, you can't find enough freelancers.

Here are four tips for managing your piece of the business more effectively:

### 1) Proof is in the pudding

Is your team running around with harried expressions crying to anyone who will listen that "we're so busy?" While it may be true, management needs facts to back up the claim. Like an external agency, a disciplined internal agency uses technology to track time and jobs. One such software, Clients and Profits, allows our in-house team to monitor jobs and time quarter over quarter, year over year, by each line of business.

### 2) Offload redundant, templated work

Few, if any designers, like working on projects that simply require taking an existing template and changing a name or address. Today's technology provides very reasonably priced online layout/printing systems. Systems such as Four51, MarComCentral and Ad Giants all allow the end user to key in information in pre-populated templates. Users get quick turnaround. The in-house team is free to devote more time to design-rich projects.

### 3) Think of every hour as billable

Even if your in-house team isn't using a direct chargeback system, treat each hour like a billable hour. That means, jobs are quoted upfront and each person understands how much time they can and should devote to the project. If not, projects can take on a life of their own causing missed deadlines, log jams on other work and frustrations for both the in-house team and internal partners.

### 4) Cross functional teams

You can prepare for fluctuating work volume by ensuring your teams can seamlessly move from one client to another, helping to even out the unsteady flow of work. At one time, our in-house team was structured by line of business. This often resulted in uneven work distribution. Today, teams are cross-functional, which not only helps even out work assignments, but also during times of illness or vacations. Plus it can bring new perspectives to creative design challenges.

## LAURIE BRAMMER

Laurie heads up a 25-person in-house team, providing overall branding, strategy, design, creative, media planning and buying, copy writing, production and account services for the corporate, retail banking, business/commercial banking and wealth management lines of business. Prior to her job as Vice President - Marketing Communications Group at Marshall & Ilsley Corporation, Laurie was with Alexander Marketing Services for 15 years, a leading business-to-business marketing firm in Chicago, where she was General Manager of a 17-person fee-based agency.

# the survey

**The Who, What, Where  
& How of In-House Creative  
Services Operations**

## WHO GETS IT DONE

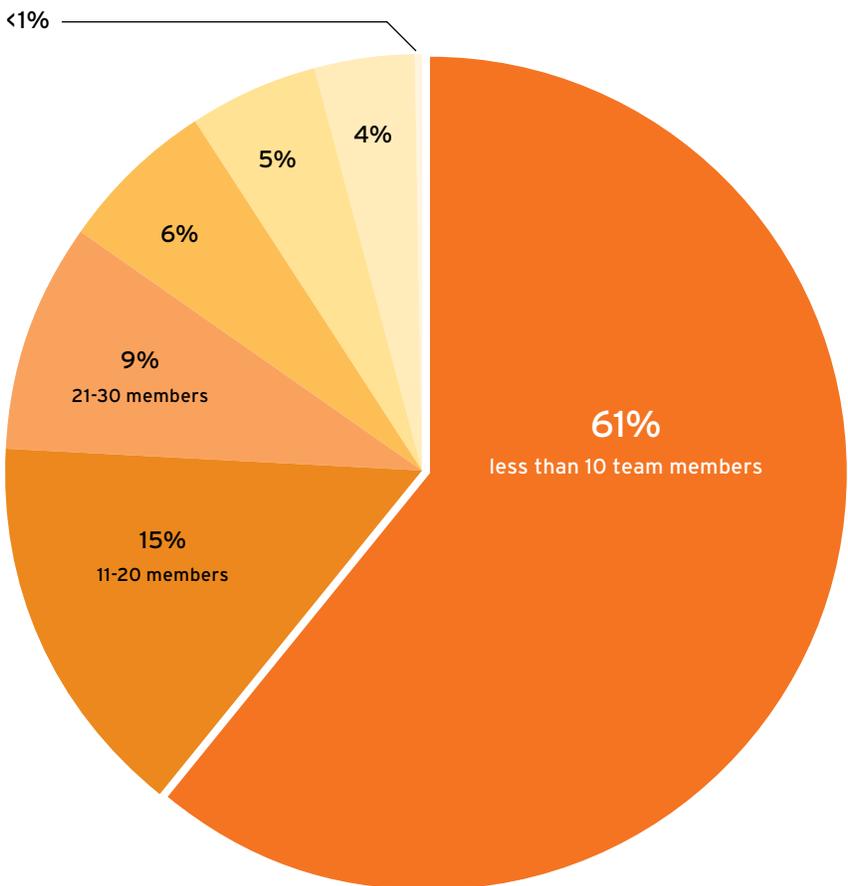


*Creative leaders should only seek additional permanent staff if they can prove a trend of higher demand; otherwise temporary staff is the appropriate augmentation strategy, as it allows for greater flexibility when demand drops or shifts to another work stream.*

### Staff Size

The majority of in-house teams are small with less than 10 team members on staff, 100% of higher education institutions and more than 90% of small-to-medium size corporations reported team sizes of 20 or less, and only large companies reported teams with 51 or more team members.

### QUESTION How large is your creative services team?



6% 31-50 members | 5% 100+ members | 4% 51-75 members | <1% 75-100 members

**WHO GETS IT DONE**

**Staff Size**

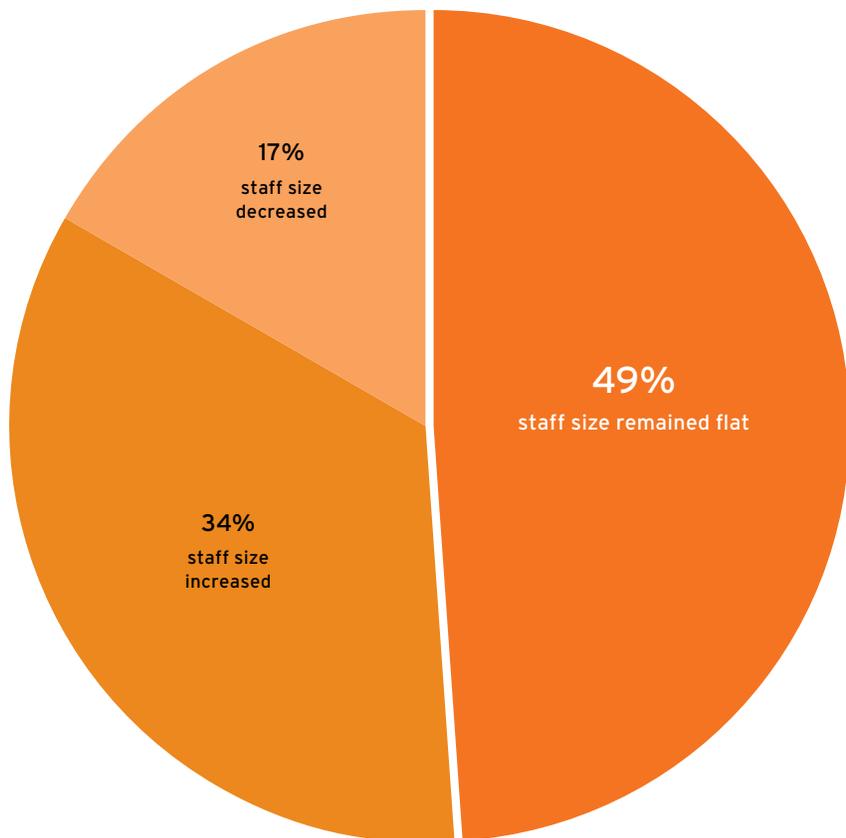


Generally during lean economic times, finance departments are reluctant to increase headcount as this creates a continuous cost in the budget. One-time or short-term costs, such as training and even temporary employees, are more palatable as these budget dollars can be easily reduced or even cut with a far less detrimental effect on staff morale and less effort for the HR and finance departments. Creative leaders should look to invest in their benched staff during times of tight budgets through events and training to impact morale and engagement. In addition, creative leaders should look to supplement staff during peak periods through temporary staff augmentation. A peak-period mixed labor strategy demonstrates fiscal responsibility to finance departments and a commitment to your benched labor.

Almost half of the responding creative organizations' staffs have remained flat in 2010, though more than one third of respondents were able to hire new headcount in 2010. Despite these staff increases and many organizations maintaining a stable headcount, 56% of respondents still feel their teams are understaffed when considering full-time employees and staff augmentation.

While the majority of creative leaders responded that they believed their team was underbudgeted for staffing needs, more than half felt their nonstaffing budget was adequate to support training, team events and other nonpersonnel related costs.

**QUESTION** How has your staff size changed between December 2009 and now?



Between January 2009 and Fall 2010, 25% of responding creative leaders were required to lay off team members.

## WHO GETS IT DONE



*Creative leaders need to market their team's strengths and capabilities to internal stakeholders to counteract the common misperception that external agencies are across-the-board superior to in-house teams. And if "marketing" your team's services is discouraged, consider calling the effort "awareness building."*

### RELATED RESOURCES

*Positioning Your In-House Team as the Vendor of Choice*  
[in-source.org/1730](http://in-source.org/1730)

*Market Your Team as If Your Job Depends on It*  
[creativeexecs.com/?p=725](http://creativeexecs.com/?p=725)

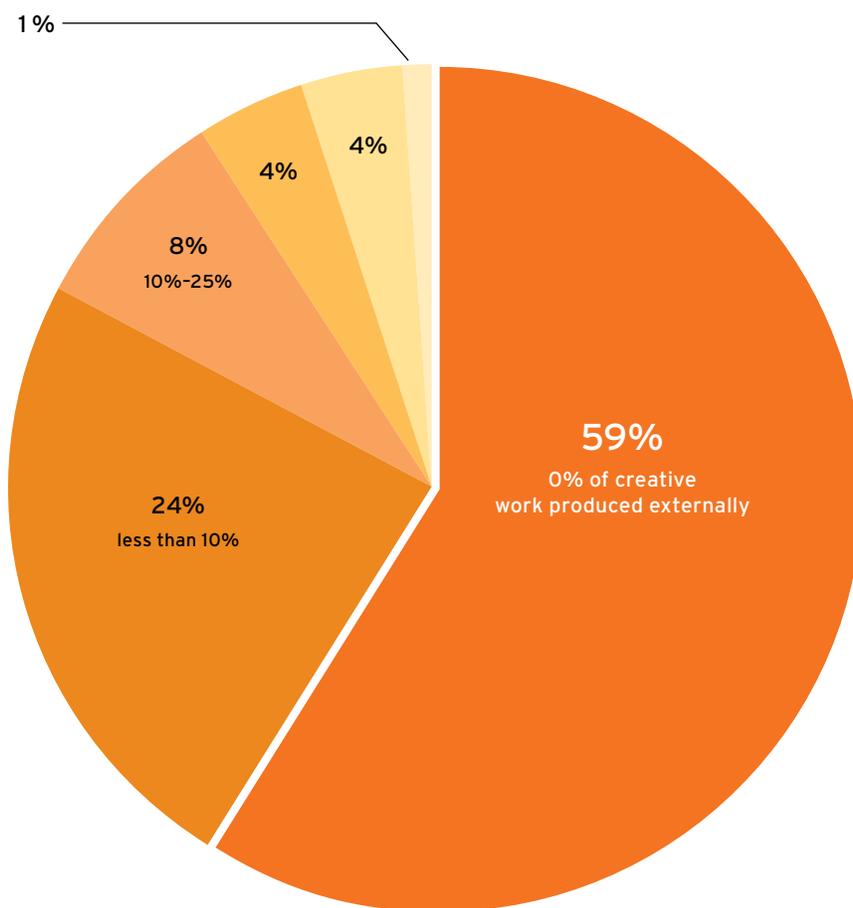
*Include an Awards Strategy in Your 2011 Plan*  
[creativeexecs.com/?p=810](http://creativeexecs.com/?p=810)

### Staffing Strategy

More than half of the survey respondents do not rely on external advertising agencies. Higher education institutions are least likely to use agency services, and most often creative departments at small, medium and large corporations outsource less than 10% of the creative work to advertising agencies.

While most organizations reported a minimal reliance on advertising agencies, it's still a consistent challenge for creative leaders that internal clients feel agencies are "more professional" and provide "higher-end design support" than in-house teams.

**QUESTION** What percentage of your department's/company's creative work is produced by external ad agencies? *(in hours)*



4% 26%-50% | 4% 51%-75% | 0% 76%-99% | 1% 100%

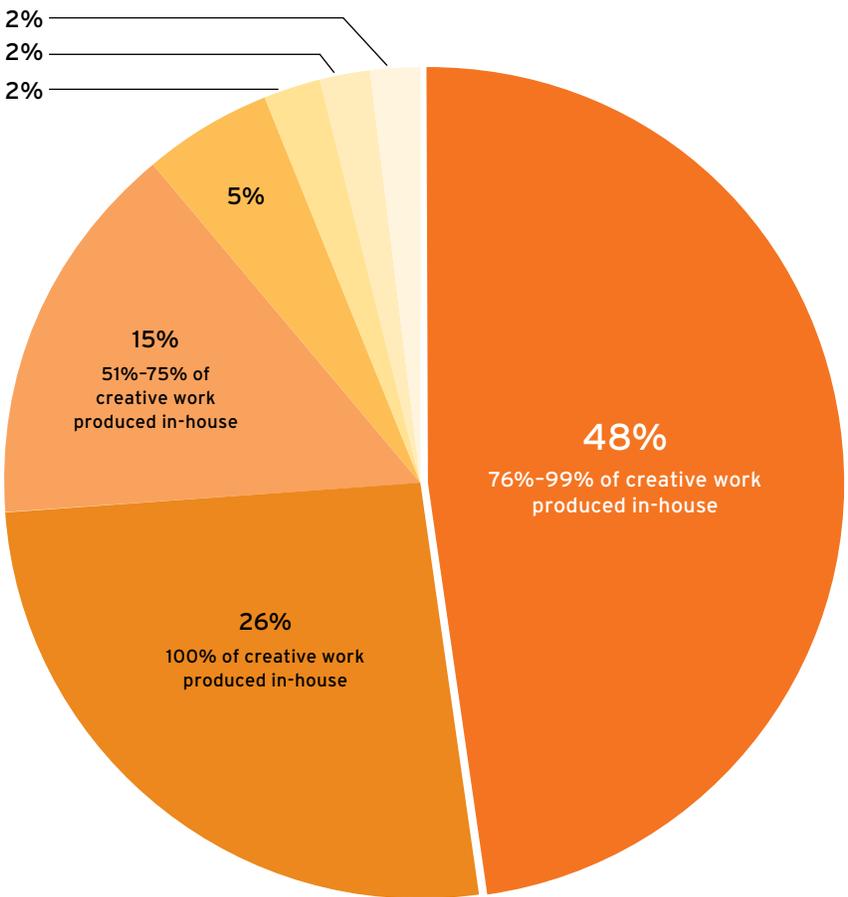
**WHO GETS IT DONE**

**Staffing Strategy**

While 26% of responding departments produce creative materials entirely through the efforts of full-time employees, the remaining 74% employ a mixed labor strategy. On the flip side, 2% do not employ any full-time employees and rely on external providers for all Creative Services needs.

A mixed labor strategy benefits creative departments by providing capacity flexibility, cost savings and creative infusion from new team members. In addition, departments reduce the potential risk of full-time employee (FTE) layoffs by having a flexible staff budget.

**QUESTION** What percentage of your department's/company's creative work is produced by full-time in-house staff? *(in hours)*



Almost half of the respondents produce at least 75% of creative materials through the efforts of full-time employees and supplement the remaining work though a mixed labor strategy. The most popular strategies include direct freelancers, staffing agency temps and ad agencies.

5% 26%-50% produced in-house | 2% 10%-25% produced in-house  
 2% less than 10% produced in-house | 2% 0% of creative work produced in-house

## PERSPECTIVES FROM THE FIELD

## Balancing Personnel Costs and Client Demand

### STEVE BENFIELD

Steve is Senior Creative Director at SAS, a computer software company, where he manages a team of 50 creatives. In 2003 his team at SAS won the American Business Award for Best Creative Organization in the U.S. And SAS was recently named the #1 best company to work for in the U.S. two years running by Fortune Magazine.

At SAS, staff planning for our corporate creative team is a challenge. Just like all other companies, we are balancing expenses against revenue. While we have had the luxury of 34 straight years of revenue growth, because we are a cost center in the marketing organization, our full-time staffing levels have actually declined over the past 6 years. Yet, we continue to provide a full-spectrum of creative services for our organization that rivals the top agencies in the country.

At SAS our creative team comprises two peer creative teams—video communications & new media and marketing creative—both which report to the Chief Marketing Officer. I personally lead the marketing creative function while also providing brand management and creative direction for the company. At the beginning of 2011, our marketing creative staff was 92% regular full-time or part-time staff and 8% contract or freelance. Our desire would be to work toward 5% freelance mark.

But how do we know how to put numbers to this balance? The first step is to gather input, or forecasts, from all the client groups we support—we do this annually in advance of budgeting season. Having a full understanding of their business plans for the year is key to projecting work volume and skills

mix across time. For example, we know that our field marketing teams are wanted to do more online promotions, more promotions through social media channels and begin delivering content to mobile device users. This helps us plan skills mix and training for existing staff and determine if we need to acquire staff with new skills or even outsource. Once we understand our client's plans, we forecast volume of work in hours by service based on historical data and client estimates. In addition to our pre-budgeting forecast meetings with clients, we meet with clients quarterly to confirm or adjust their plans as necessary.

Also from historical data, we can estimate the capacity (in hours) of the existing staff. Then we compare the forecasted volume to the existing capacity of the team—again we cut this data by service to ensure we have the right amount of interactive staff versus editors versus print designers, etc. This gives us view of the staffing needs for the forecasted period.

With this information, we work with our executive team to determine how we're going to staff for our internal clients' demand using a cost-effective model of benched staff and just-in-time labor.

**WHO GETS IT DONE**

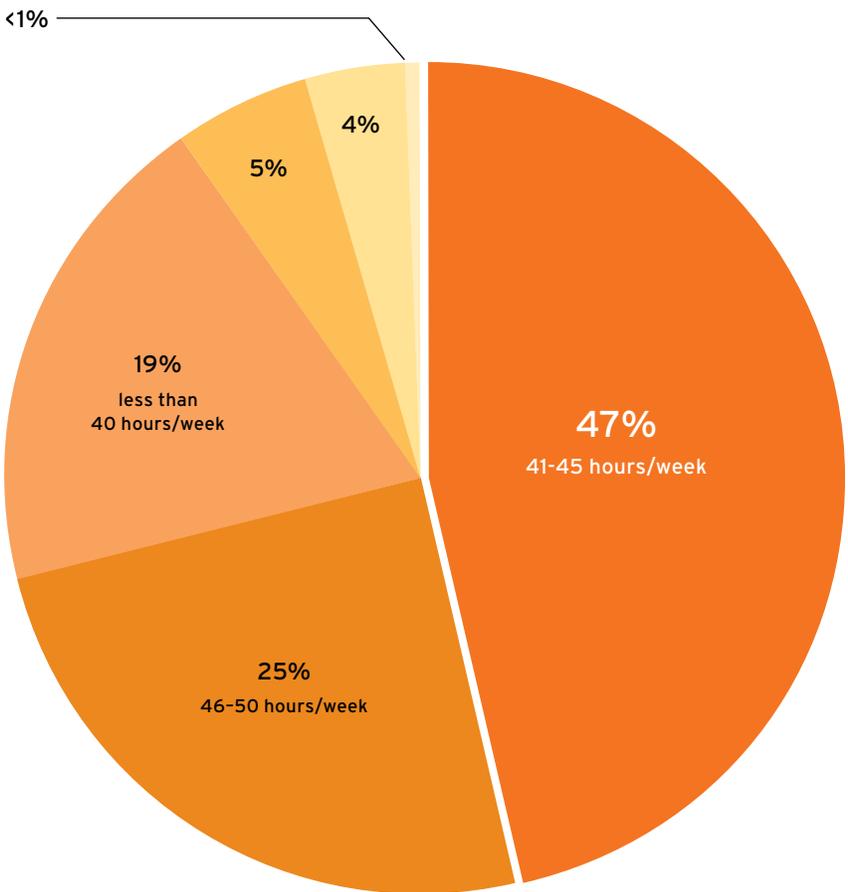
**Overtime**



Typically creative staff understand the nature of the industry and the publishing food chain in that creative is at the end of the process, and our timelines don't get extended by the delays introduced in our clients' processes. But what is challenging for creatives is the lack of control they have over their overtime. While total overtime may be tolerable, the spontaneity of the overtime can cause job dissatisfaction. Creative leaders with this challenge should prioritize teaching creative staff how to better predict when overtime might occur in the project timeline, as well as consider how swing shifts or flexible schedules might support a better work-life balance for their staff.

Getting the work done has never been a 40-hour-per-week job for creatives or their colleagues outside of Creative Services. Almost half of the respondents identified the average workweek for their staff to include 1 to 5 hours of overtime. And while a perfect 40 hours per week would be ideal, most employees would agree that up to 5 hours of overtime is negligible as this may include taking only a 30-minute lunch and arriving 15 minutes early or staying 15 minutes late. But more than one third of respondents indicated their staff puts in 5 hours or more of overtime each week.

**QUESTION** How many hours per week does your staff work on average?



More than one third of teams average more than 5 hours of overtime each week.

Creative leaders attributed deadlines (39%), temporary spikes in data (31%) and insufficient staffing (18%) as the primary causes of overtime for their staff.

5% 51-55 hours/week | 4% 56-60 hours/week | >1% more than 60 hours/week

**WHO GETS IT DONE**

**Attrition**

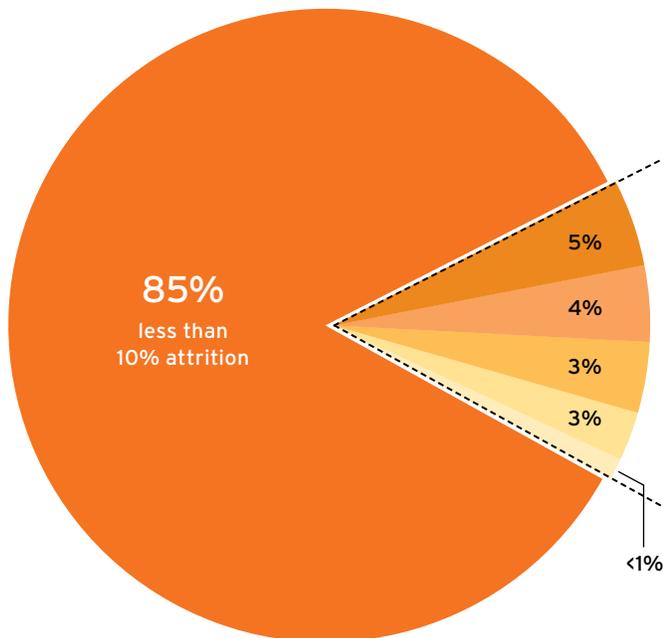


Track your attrition in two categories: *regretted and non-regretted*. *Regretted attrition includes those team members who leave your team and you regret losing—they didn't have to be rock stars, but a team member who left in good standing. Non-regretted includes team members who were managed out and either left on their own or by your request. It is healthy to have non-regretted attrition as it means you are not allowing "dead weight" to linger on your team, but too high of non-regretted attrition could indicate a challenge in your hiring process. In a year with layoffs, consider a third category to capture these folks as it was not your or their choice to depart, but rather a business need.*

For the majority of creative teams, attrition was not a challenge in 2009. For creative teams with consistent year-over-year attrition levels below 10%, this continues to be a strength. But for organizations in which attrition below 10% is an anomaly, they should be hesitant in celebrating this accomplishment too loudly or broadly. While reduced attrition may be reflective of your organization maturing, it may also be related to the economic downturn and high unemployment rates. These leaders need to consider that their staff may be looking for positions, but a lack of attractive positions has kept them from making a move.

The most common cause of attrition resonates with a top challenge identified by survey respondents: limited career paths for creative staff. In addition, competitive compensation and limited "creative" work led to attrition at responding organizations.

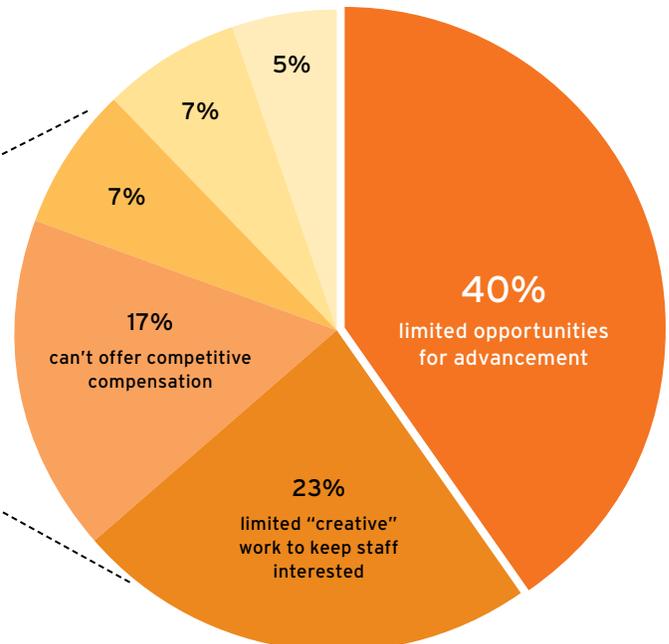
**QUESTION 2009 Attrition Rate** (outside of layoffs)



5% 11%–15% | 4% 20%–25% | 3% 15%–20%  
 3% >30% | <1% 25%–30%

Pie does not add up to 100 due to rounding.

**QUESTION Attrition Causes**



7% staff is burnt out due to insufficient staffing  
 7% other | 5% low morale due to low value recognition

## PERSPECTIVES FROM THE FIELD

## Managing the Volume Through Staffing and Prioritization

One thing I've learned in managing an in-house creative team is it's much better and efficient to be a lean and mean team, staffed with high-level generalists who perform a variety of functions than a large team of specialists with varying skill levels. Our creatives wear many hats—for example, our designers are extremely well versed in marketing messaging, plus they have keen production knowledge, which ensures they can spec their own jobs and generate 100% print-ready files upon job release. Our writers are keyed into how the design supports the copy and vice versa and are expert marketing strategists—frequently doing the “heavy lifting” in terms of formulating marketing approach and strategy—and ensuring a consistent customer experience sometimes even more so than the clients they support.

Our writers and designers work in teams, collaborating on each project, so that we are assured each project is completely on-point from all areas before the client reviews it. Staffing our team with a few really top-notch creatives who are expert technicians, know and understand the business and demonstrate marketing savvy allows us to be more consultative with our clients and therefore be more valuable to senior management as marketing partners. This would not be the case with a large team where everyone works in a vacuum and is only concerned about his/her specific task before it is passed to the next “area.”

Like many creative teams, our staffing capacity rarely satisfies every client's needs in their desired timeframe. One of the most important practices we've put into place to address this challenge is a high-level method of prioritizing projects and identifying best-fit resources for each project based on scope, timing and skill set. To this end, key creative and marketing decision-makers meet biweekly to discuss submitted projects and allocate the most appropriate resources for that project—be they campaign managers (who fulfill the role of Account Executives and act as the liaisons to the business), writers, designers and/or freelancers—and prioritize the work accordingly.

Work is prioritized based on compliance/regulatory requirements, potential return on investment, strategic focus, timing and corporate climate (eg, the needs of executive management). Post-meeting, the project requestors are informed of the prioritization outcomes and, as necessary, alternatives are suggested. This method eliminates many of the superfluous projects that come in that are time-wasters with no strategic value. Staffing highly-skilled generalists and mapping that talent to projects with an agreed-upon priority enables volume to be semi-manageable within the constraints of our organization.

### ADRIENNE BURCAT

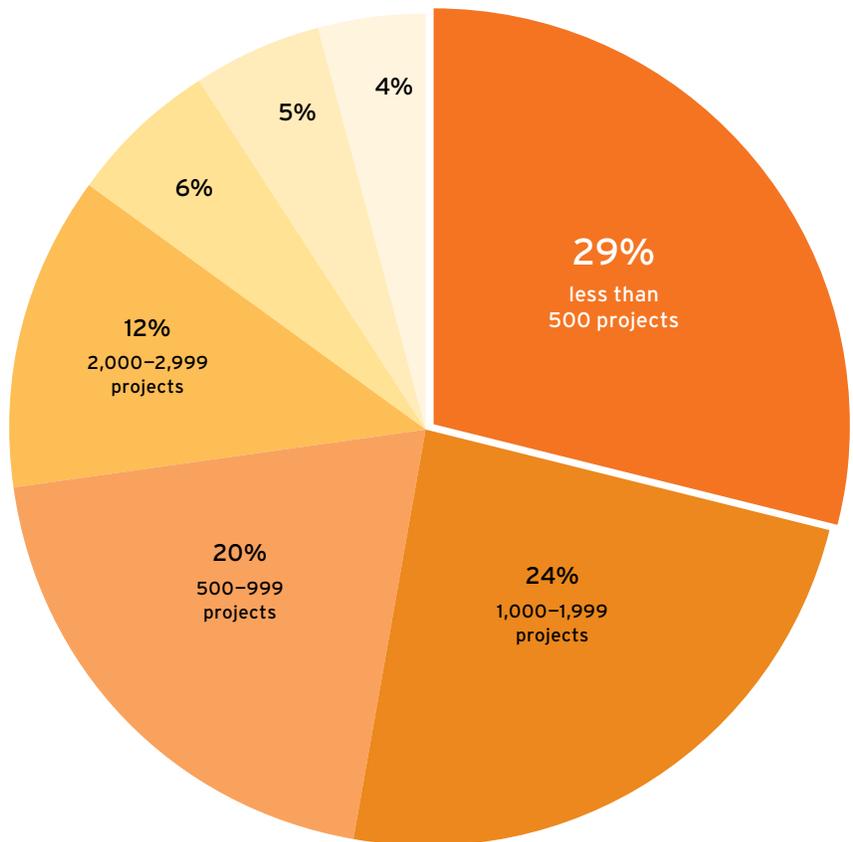
VP, Manager of Creative Services for Wells Fargo Home Mortgage, where she manages both a NJ-based creative team of six, and an IA-based creative team of seven. A designer by trade, with a stint in public relations writing and a degree in Marketing, Adrienne has served in various creative positions at Wells Fargo for the past 18 years.

## WHAT GETS DONE

### Volume

While volume when measured in number of projects is not indicative of staffing requirements, it does provide some insight into project management requirements and asset management. Not surprisingly, survey responses indicated a direct correlation between team size and number of projects but several outliers did exist. For example, a creative team of just 21 to 30 people is creating more than 8,000 projects annually (upwards of 300 projects per person per year), and a team of more than 100 designers is creating just 1,000 to 1,999 projects (somewhere between 10-20 projects per person per year). What this speaks to is the level of complexity and uniqueness of the projects each team is typically creating.

**QUESTION** How many projects did your group complete in 2009?



6% 3,000-3,999 projects | 5% >8,000 projects | 4% 4,000-7,999 projects

## WHAT GETS DONE

### Service Offerings

Almost all 160+ creative leaders are offering graphic design services to their organization, but less than 75% of creative teams are providing digital design services (eg, web and interactive design). In addition, just more than 60% of organizations offer editorial services and social media services. Even though social media is relatively new, supporting services are being provided by almost half of the responding creative teams.

#### RELATED RESOURCES

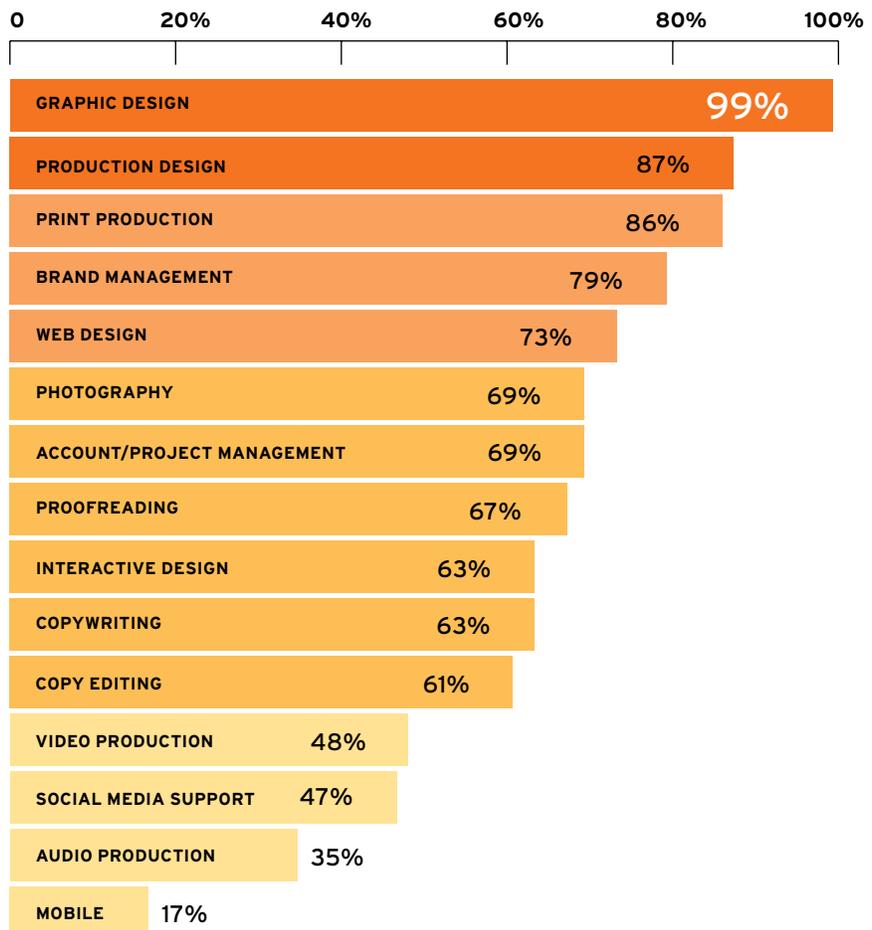
*What Does Social Media Mean for Marketing Infrastructure?*

[in-source.org/1460](http://in-source.org/1460)

*The Art of Socializing and Mobilizing: Best Practices and Talent Solutions for Creative Leaders*

[thebossgroup.com/html/socializingmobilizing.htm](http://thebossgroup.com/html/socializingmobilizing.htm)

**QUESTION** Which of the following services does your department provide? *(select all that apply)*



An additional 41% of respondents indicate they anticipate offering mobile design services in the next 12 months.

## WHAT GETS DONE

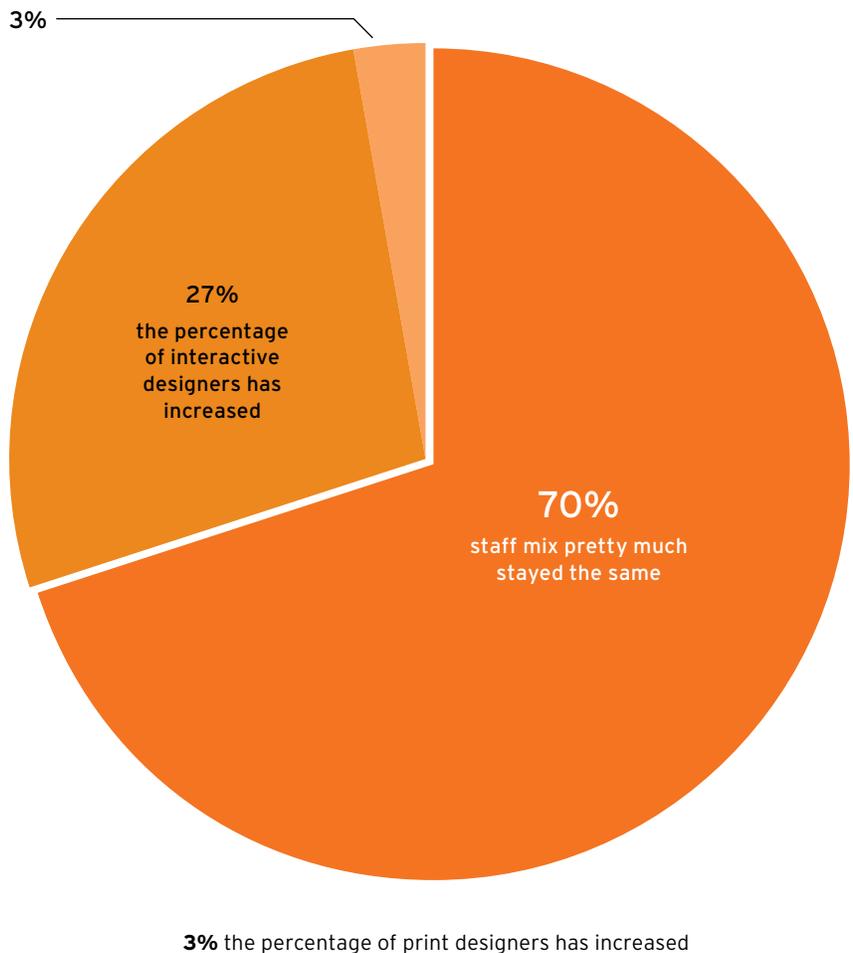


*Providing existing staff with regular training opportunities will raise the quality of their work, as well as increase productivity, minimize turnover and improve work ethic. Cross-training a print designer to do interactive work (and vice versa) is both educational and motivating, helps diversify the talent of your team and assists in evening out volume peaks and valleys across your various services.*

### Service Offerings Impact on Staffing

While a large majority of creative teams have not increased their interactive designers (whether in headcount or at the expense of print designers) in the past year, more than 25% of creative teams did increase the ratio of interactive designers to print designers, and a small minority (less than 3%) have actually decreased interactive designers in favor of print designers.

**QUESTION** How has your staff mix of print design versus interactive design changed across the past year?



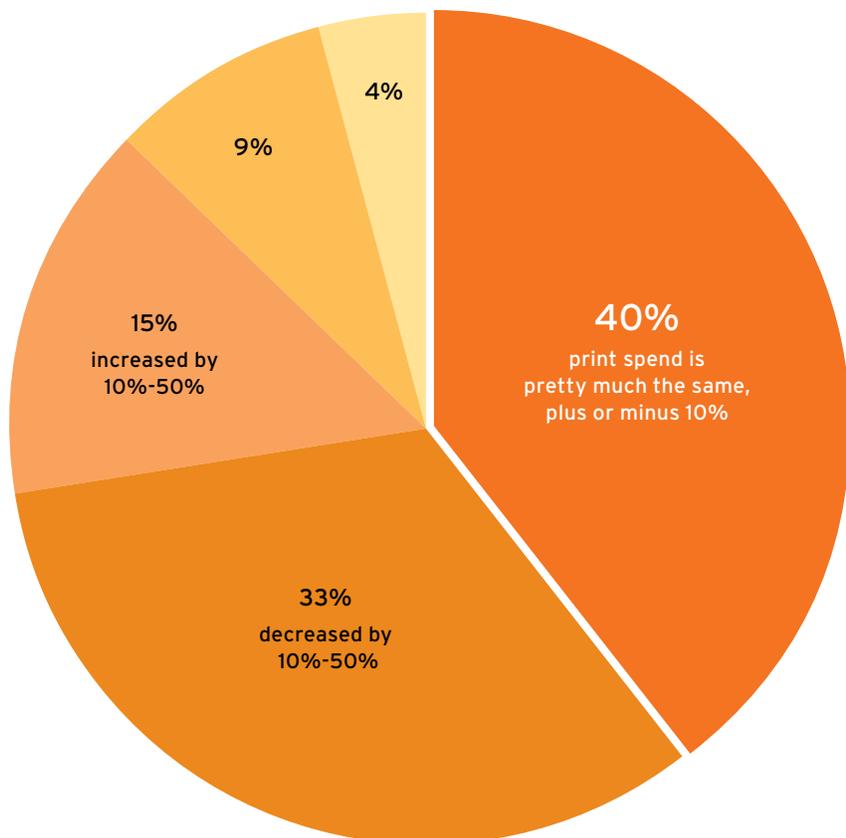
## WHAT GETS DONE

### Service Offerings Impact on Print Spend

As many of us know, the advent of the internet, smart phones and e-readers have lead to a decrease in printing of newspapers, books and our projects. But surprisingly, 15% of responding creative leaders experienced in increase in printing across the last year. However, this is outweighed by the nearly 37% who have experienced a decrease of 10% or more.

In this survey, 45% of respondents indicated that their in-house print options were restricted to standard printers and copiers alone. But more than a third of respondents have access to color digital printers, as well as large format printers. Ten organizations reported having an in-house offset press. The only unifying commonalities of those 10 organizations evident in the survey responses is that eight of the ten were creative organizations within large companies.

**QUESTION** How has your total spend on printing changed in the past year?



9% I'm not privy to this data | 4% decreased by more than 50%

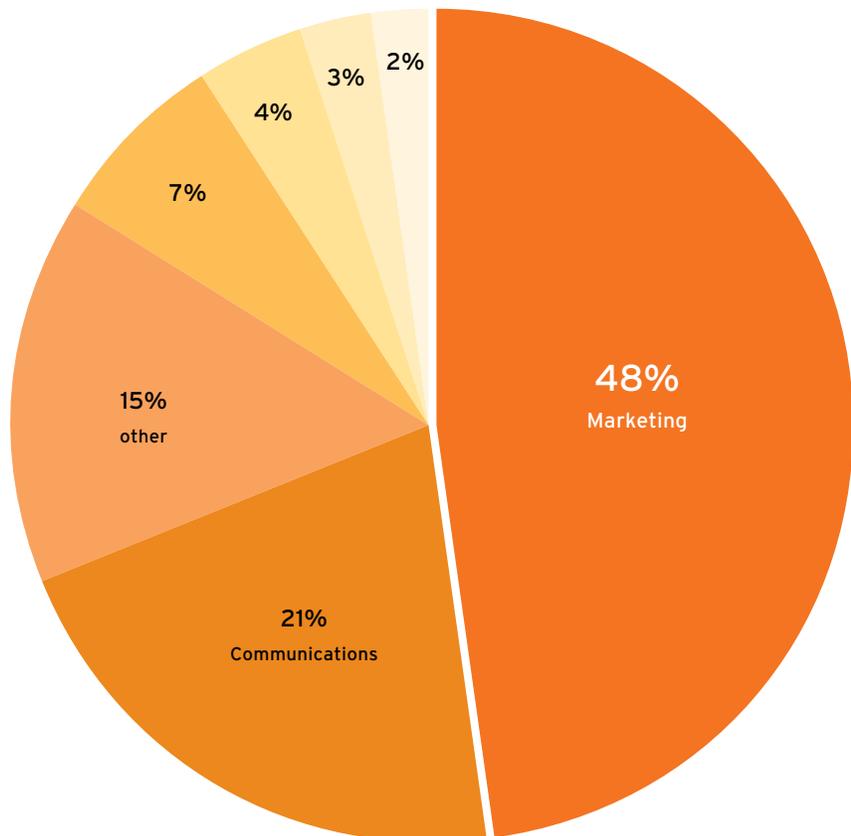
*Pie does not add up to 100 due to rounding.*

## WHERE IT GETS DONE

### Reporting Structure

Almost 70% of responding in-house creative teams report to either the Marketing or Communications departments; this stands true regardless of company and department size. Creative Services teams associated with Marketing and Communications traditionally benefit in the area of value recognition as these groups are seen as value-added departments, whereas Shared Services and IT are seen as transactional and service-based.

**QUESTION** What division does your creative services department report into?



**7%** Operations/Office Services | **4%** all other responses\* | **3%** Sales | **2%** Information Technology

\*Public Affairs (1%), Advertising (<1%), Human Resources (<1%), Print/Production Services (<1%), Packaging (<1%)

## HOW IT GETS DONE



*The selection of a project management solution is mainly dependent on the needs of your specific organization. It is very important to understand your functional requirements, the scope of the solution you intend to implement (both now and in the future) and the technology infrastructure you have at hand. Developing a detailed set of requirements can be a considerable amount of work, but it is well worth the effort when it is time to select (and justify to management) the appropriate solution.*

**RELATED RESOURCES:**

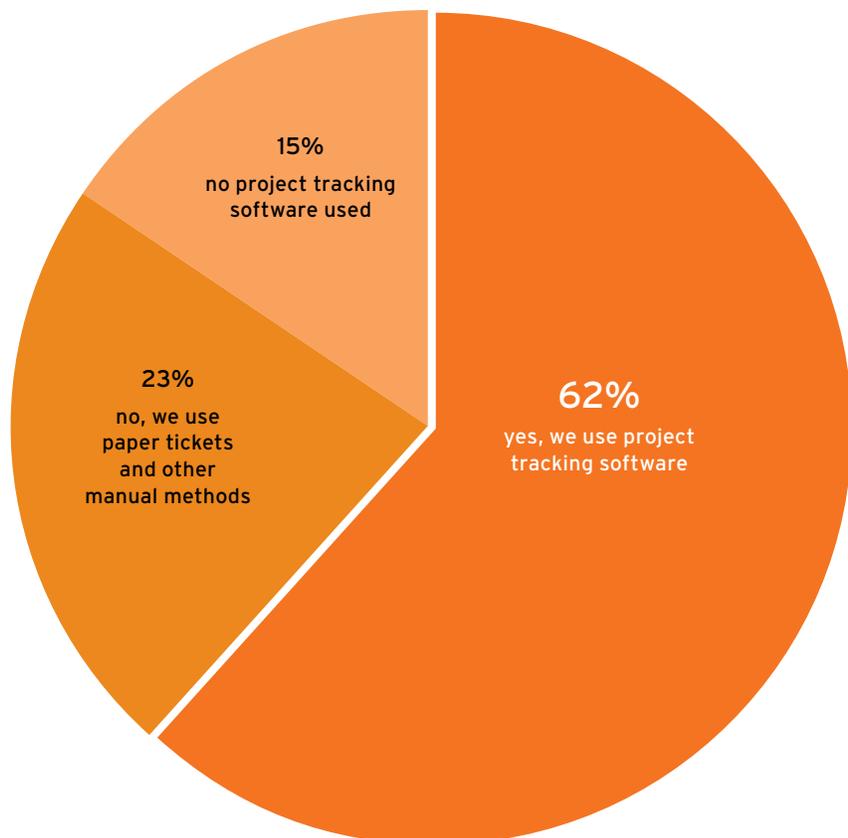
*Automated Workflow Systems—Your Choices*  
[creativeexecs.com/?p=611](http://creativeexecs.com/?p=611)

### Project Tracking

The majority of respondents use project management software to support various aspects of their creative operations. Just 15% of respondents have no project tracking mechanism in place—all but two of those creative organizations were small teams (10 or less team members). But this was not representative of the majority of small teams—almost half of which use project management software. With the exception of small teams, every other team size was more likely to use project management software than not.

Project management software is a must for medium-to-large sized creative teams, multilocation teams and high volume teams. While the upfront cost can be considerable, these costs will be offset by higher utilization of team members when the solution is in place. Solutions vary and are available at multiple price points.

**QUESTION** Does your team use project tracking software?



## HOW IT GETS DONE

### Time Tracking

**RELATED RESOURCES:**

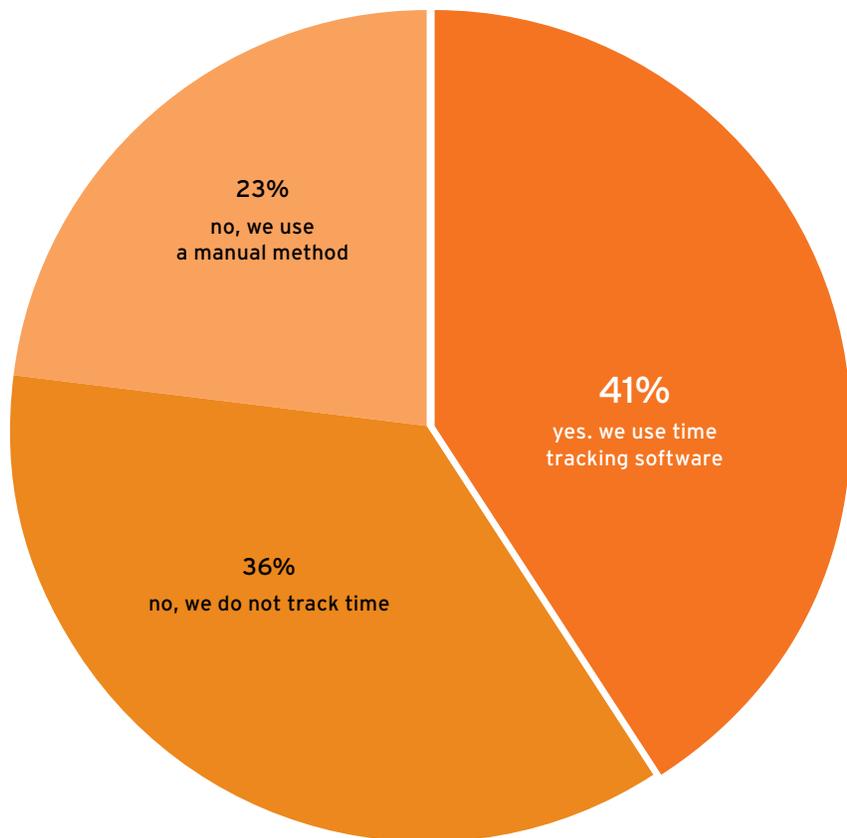
*Tracking Hours Is Not Only for Chargeback Organizations*  
[in-source.org/1596](http://in-source.org/1596)

*Implementing Creative-Friendly Time Tracking*  
[creativeexecs.com/?p=537](http://creativeexecs.com/?p=537)

More than 75% of organizations are tracking time—whether through time tracking software, excel spreadsheets or hard-copy job tickets. Most time tracking organizations use a software program (whether home-grown or an off-the-shelf package) to track time. Using software versus manual efforts increases the accuracy of your data, allows for easier data analysis and saves your department time.

Again, the upfront cost can be considerable, but when coupled with the long-term savings of worker hours, the software pays for itself. For example, one organization was able to convert a full-time admin position into a half-time admin role/half-time junior designer, creating an additional 750 hours of design capacity for the department following implementation of formal time tracking and project management software.

**QUESTION** Does your team use time tracking software?



## HOW IT GETS DONE



*The advantages of time tracking are so great, that it even makes sense for creative services teams who aren't chargeback departments to track project time. Time tracking can support staff justification, resource planning, client process changes, project forecasting models and more. In addition, time tracking provides creative leaders with quantitative data to speak to their manager and CFO in concrete, quantitative terms they understand and require for business decisions.*

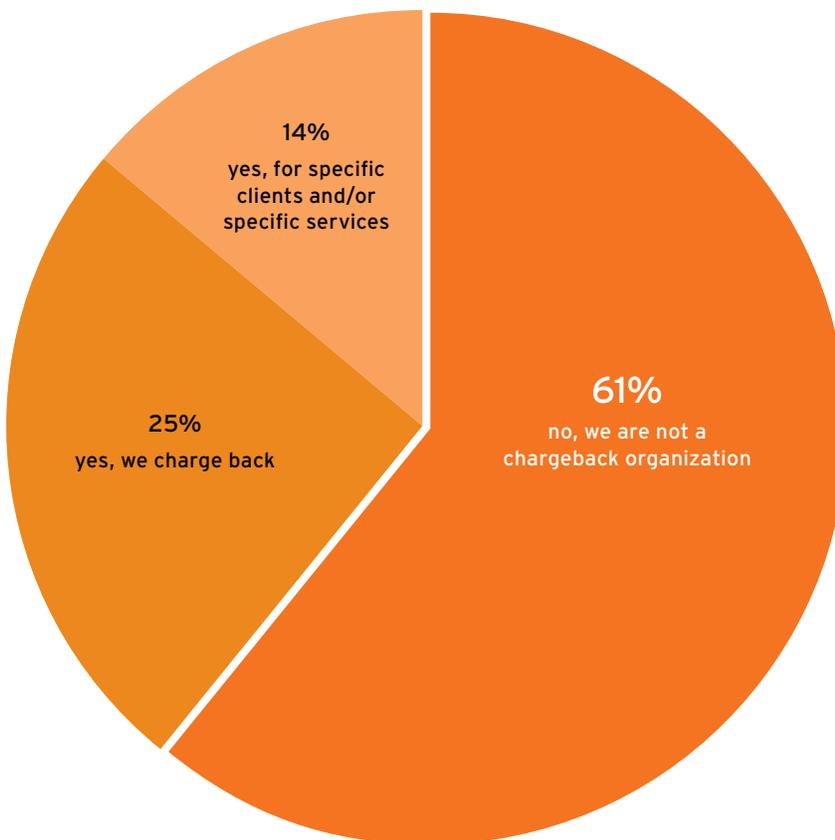
### Chargeback Status

Almost 40% of the survey respondents are chargeback organizations—either for all services or specific services or clients. Small teams (10 or less team members) are the least likely to be organized as a chargeback organization. Removing that demographic from the data increases the percentage of Creative Services departments organized as a chargeback group to 67%, and for the most part it stands true that the larger your creative organization, the more likely the department is funded through a chargeback model. Company/institution size has little bearing on whether groups are funded through chargebacks.

**RELATED RESOURCES:**

*Building a Chargeback Model*  
[in-source.org/1594](http://in-source.org/1594)

**QUESTION** Is your department a chargeback organization?



## Creative Briefs—How We Struggle With Them

Over the years, I have heard creative professionals talk about the creative brief as if in a long-term, unsatisfying relationship. There is the infatuation stage, where we are enamored with writing or utilizing our first brief. Then there is the platonic stage where we simply learn to live with the brief without much compassion, as long as it is comfortable. Then there is the argumentative stage, where we consider everything within the brief to be irritatingly useless and written as if to poke fun and mock. And, finally, the maturation stage, where we have honed the skill of seeing past the literal and fathom the imaginative.

In my twenty-five years as a creative professional, I have led or worked in departments who relied on creative briefs, and others that did not. The creative brief provides the creative team with the outline to accomplish a specific task. It is not meant to stifle creativity by putting the project in a box. It guides the creative team in dreaming, designing, and delivering a concept that has the client saying, “I never thought about it that way. And, I like it!”

A well-written brief provides the inspiration to get the project off the ground and into a conceptual state. While, a poorly written brief may cause the team to go back to the drawing board; frustrating not only the creative team, but also the client, who may begin to question the creative team’s ability.

There are many creative brief templates available today. However, there are some standard elements you should consider when creating your own template, such as:

- Client Name
- Background
- Business Problem
- Objectives
- Agency’s/Creative’s Task
- Brand Proposition
- What do we want to achieve?
- What is one key insight?
- What do we want people to do?
- How should we tell them?

With this information, your creative team can quickly start to conceptualize the outcome and develop a variety of deliverables for your clients to review.

### Best Practices

**Keep it short and simple (K.I.S.S)–** The brief is brief for a reason. Pick the core theme. Stick to it. And, sprinkle it throughout the brief.

**Template–**It’s a template for a reason. If you find yourself expanding boxes to get your point across, edit yourself rather than the template.

**Length–**Keep it to two pages or less, unless it’s a very large project.

**Format–**With all the technology available today, having an online creative brief is a great solution. This allows the document to live and breath in one space. Keeping it online helps ensure everyone has access to the latest version.

### BECKY LIVINGSTON

Becky is a Senior Manager at CPA2Biz, Inc., the exclusive marketing arm for the American Institute of CPA’s products and services, where she heads up a five-person, in-house creative team ranging from online production to search engine optimization and marketing professionals. A blogger, designer, writer, and teacher, Becky keeps her finger on the pulse of the creative profession through social media channels, reading, teaching, and networking.

## HOW IT GETS DONE

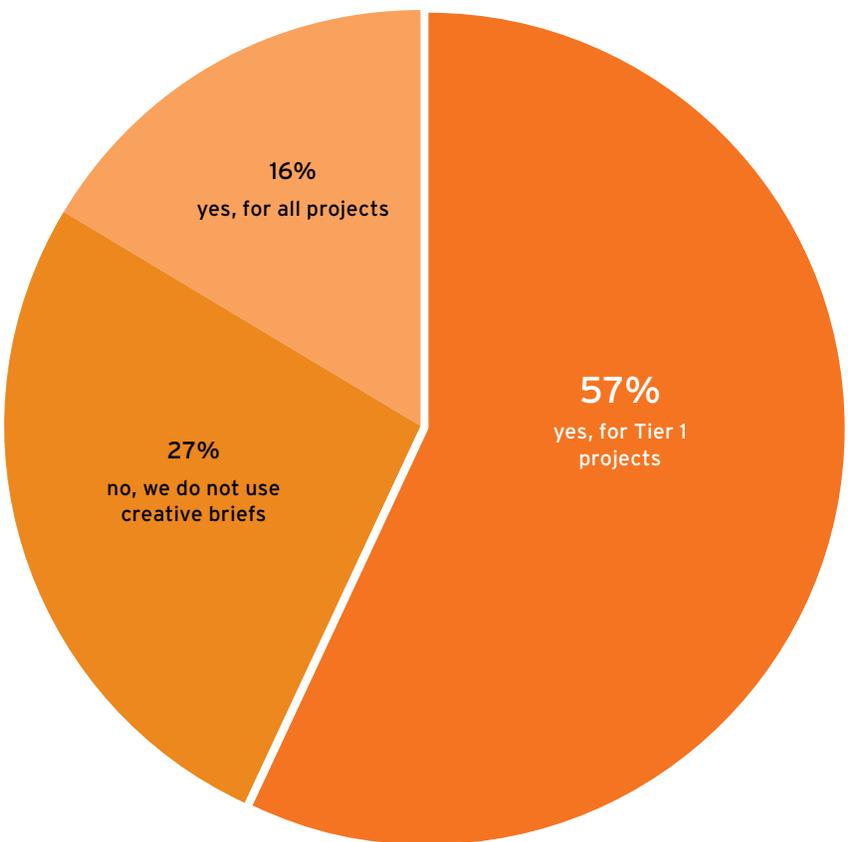


*Use the creative brief to establish a context for internal creative reviews. The creative brief positions the work in the context of specific objectives and provides a tool for measuring the effectiveness of the concepts and creative solutions. Failure to use a creative brief as the basis for reviews will result in work being judged on personal preference or a gut reaction and end with meaningless feedback.*

### Creative Briefs

Eighty-four percent of respondents indicated that their teams use creative briefs for all projects or just for their Tier 1 (nonstandard, nonderivative, highly conceptual) projects. In fact most respondents only use creative briefs for these Tier 1 projects, which is considered a best practice as not all projects require the same level of effort to complete. Creative leaders find greater efficiencies by streamlining the intake process for non-Tier 1 projects. Many use a project brief or mini-Creative Brief for Tier 2 projects and simply use an intake form for Tier 3 projects (highly templated or versioned projects).

#### QUESTION Does your team use creative briefs?



## HOW IT GETS DONE

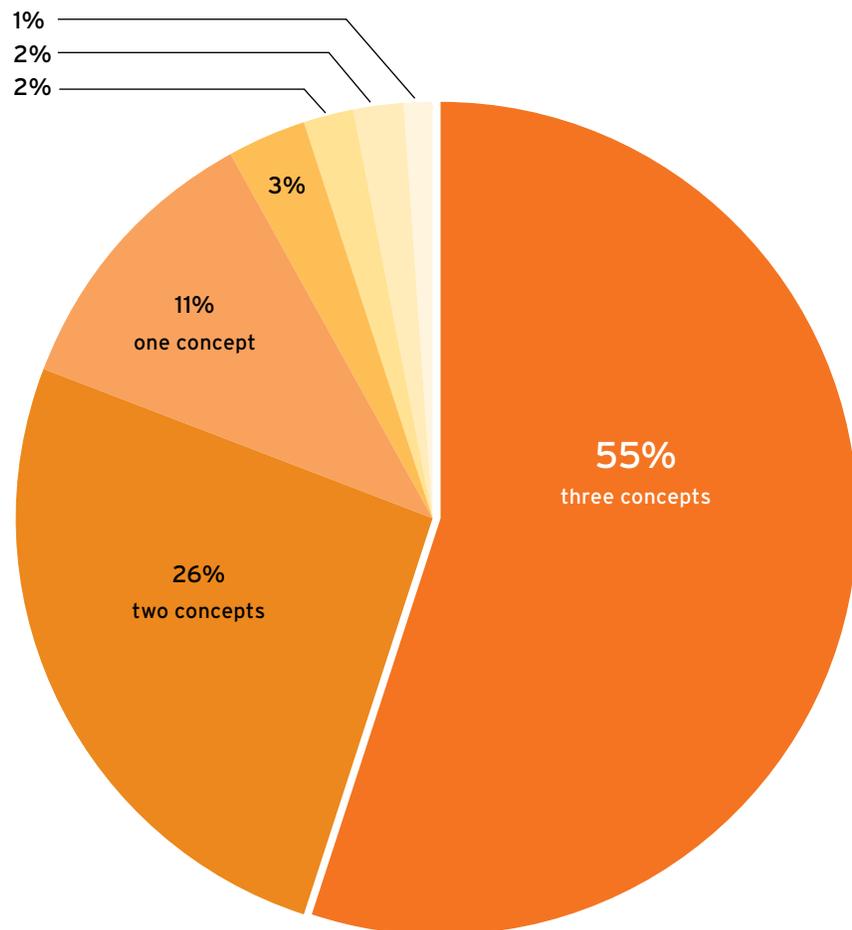
### Concept Reviews

#### RELATED RESOURCES

*Evaluating Creative—  
Critiquing Objectively*  
[creativeexecs.com/?p=758](http://creativeexecs.com/?p=758)

Most creative departments are proposing three concepts to clients following the creative brief stage with one designer responsible for creating those comps, though presenting just two comps and having as many as two designers contribute to the comps was common as well. Many creative leaders speak of creating one comp that will please the client, one comp that pleases the creative department (usually this means it pushes the envelope on brand standards) and one comp that meets in the middle. This generally allows creative departments to move the brand forward at a comfortable pace for internal stakeholders.

#### QUESTION How many concepts do you generally propose?



3% five concepts | 2% more than five concepts | 2% not applicable | 1% four concepts

## HOW IT GETS DONE

### RELATED RESOURCES

*World-Class Creative Services Teams Include Account Management*

[in-source.org/1827](http://in-source.org/1827)

*Account Managers and Project Managers: What's the Difference?*

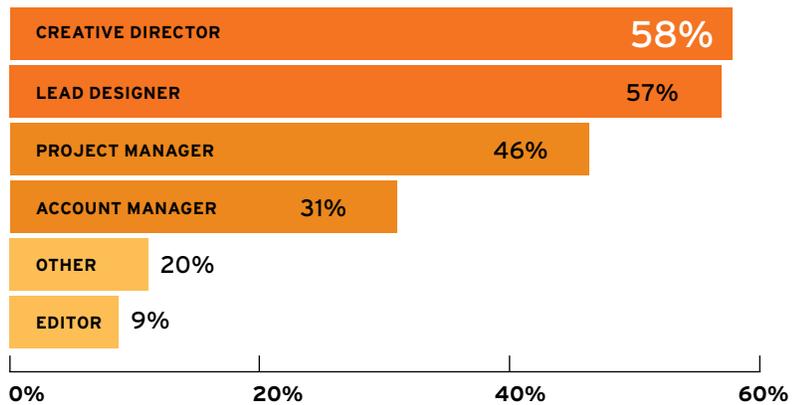
[in-source.org/1827](http://in-source.org/1827)

### Client Interactions

When a formal account management structure exists, it is common for the account manager to manage project intake, as well as review iterations with internal stakeholders. However, for many organizations it is most common for the creative director or lead designer to meet with clients to discuss new projects and the lead designer to manage the iteration review process.

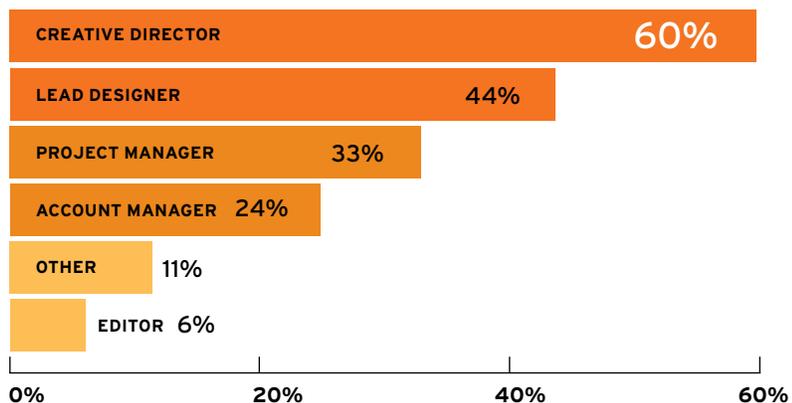
#### QUESTION Who meets with clients to scope a new project?

*As applicable, respondents selected more than one role.*



#### QUESTION Who meets with the client to review iterations?

*As applicable, respondents selected more than one role.*



## PERSPECTIVES FROM THE FIELD

### Close Encounters of the In-House Kind

Life is all about relationships. With your parents, kids, spouse, significant other, boss, co-workers. And if you manage them well, hopefully you'll keep "therapist" off the list. As an in-house creative, one of the most important relationships you'll have is with your internal clients—your stakeholders. You know, those people down the hall, up a floor or in the next cubicle. You're in a unique but challenging position because unlike a design agency, you can't choose your clients, or fire them. Let's face it. You're stuck with them. So make the connection and make it a lasting one.

#### Connect

When I was building my in-house department, one of my primary goals was to connect with our internal stakeholders and capture as much high profile work as possible with the intent of making our services essential to the success of the organization. This was achieved by reaching out to the various internal business units, taking the time to understand their business and determining how my team could support their objective. This didn't happen overnight. These relationships developed over many years, through the implementation of initiatives designed to attract and keep clients. Branding and marketing the department, creating a departmental website and capability brochures, displaying framed samples of our best work, holding open houses and winning design awards all contributed to the effort. My ultimate goal was to position my department as an

indispensable resource center for all design and production work. And I knew making the connection was the first step to getting there.

#### Communicate

Open communication is crucial to the success of any relationship and once you begin the design process it's extremely important to keep your clients in the loop. Periodic project updates will assure that projects stay on track and delivery dates will be met. But beware.

Over-communicating and providing too much information can overwhelm clients and alienate them as well. It's not necessary to provide them with a play-by-play of each and every design decision, but if you give them just enough information that shows you are a design mister smarty pants (which is why you were hired in the first place), they'll eventually learn to respect your choices. I also realized early on that good design skills weren't enough. For the in-house designer, versatility, business acumen and good bedside manner are equally important and will help you better navigate this important relationship. So take the time to develop not only your ability to communicate effectively but your writing and presentation skills as well.

#### Collaborate

These days most companies embrace a collaborative culture and encourage colleagues from various disciplines to team up to innovate and solve problems. So when your clients engage your department for creative support, look beyond the request, dig deeper for a better

#### GLENN JOHN ARNOWITZ

Glenn is Director of Creative Services at Pfizer, a global pharmaceutical company, where he manages an award-winning team of six designers. He is co-founder of InSource, and a writer and speaker who is passionately committed to helping in-house creatives achieve design excellence and recognition within their companies and the business community.

*Close Encounters of the In-House Kind Continued*

**For the in-house designer, versatility, business acumen and good bedside manner are equally important and will help you better navigate this important relationship.**

understanding of their needs and become business partners. Remember, as an in-house creative you have an edge over your agency counterparts because you and your clients are on the same team. You embrace the same values and corporate vision and have an invested interest in the well-being and overall success of your company. Brothers and sisters in arms. Fighting the same fight with shared values, mutual dedication and a common purpose. You both possess an intimate understanding of your company, its history, culture, products and services. Leverage these commonalities to foster close, collaborative partnerships with your stakeholders. Stop being an order taker and partner up!

**Commit**

When a client engages your department you enter into an agreement, and a design brief is the smart way to document the objectives and design strategies for a project. This reference guide will not only keep everyone on track but will ensure that all stakeholders have a clear understanding of the project scope, timeline and business objectives so quality design work can be delivered on time and within budget. Failure to meet project milestones can not only jeopardize the relationship but impact future business from your clients who may seek support externally. Can't get your clients to complete a design brief? Remind them that without one, project objectives may be unclear, design solutions may fall short and deadlines may be missed, wasting valuable time.

**Cultivate**

Remember, just like any other relationship worth keeping, client relationships require constant attention, massaging and TLC. Over time, you may have to realign your services and capabilities to meet the needs of new clients or the changing needs of your existing ones. Periodically schedule time to meet with your clients to reassess their short and long term objectives, as well as to better understand how you can provide effective design support. Determine what additional skills, services, capabilities or technologies are needed to keep your department competitive and eliminate nonessential and redundant services that do not directly support the business. Listening is key. Not only during the life of a project but after it's been put to bed. Solicit feedback from your clients through an online satisfaction survey that will show you where you're winning or falling short, which, in turn, will help you be a better partner.

**Celebrate!**

Attracting clients and keeping them happy is an ongoing process. Be proactive, reach out and touch them. Communicate often, collaborate to maintain mutually beneficial relationships, honor your commitments, cultivate to enrich the bond and finally, celebrate the successful partnerships you've developed. You may actually make a few friends along the way.

## CHALLENGES TO GETTING IT DONE

### RELATED RESOURCES

*Ten Value Propositions for In-House Creative Departments*  
[creativeexecs.com/?p=308](http://creativeexecs.com/?p=308)

*Market Your Team as If Your Job Depends on It*  
[creativeexecs.com/?p=725](http://creativeexecs.com/?p=725)

*Positioning Your In-House Team as the Vendor of Choice*  
[in-source.org/1730](http://in-source.org/1730)

*Supporting the Career Growth of Designers*  
[in-source.org/1727](http://in-source.org/1727)

*Tracking Hours Is Not Only for Chargeback Organizations*  
[in-source.org/1596](http://in-source.org/1596)

### Top Challenges for Creative Leaders

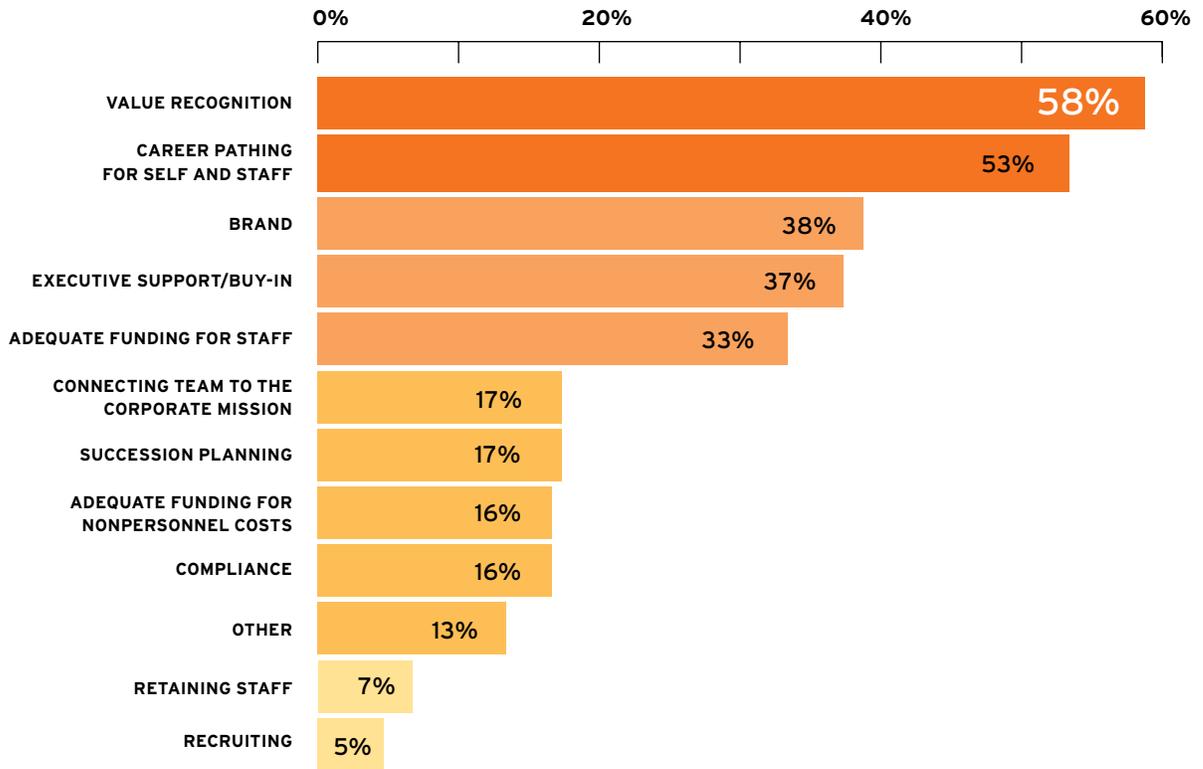
The most significant challenge identified by creative leaders was value recognition. This challenge seems to be evergreen in that it is a constant challenge plaguing in-house creative teams. This is not a one-and-done challenge; in-house groups must prove their worth every day. Awareness campaigns, value demonstration and a marketing roadmap must be included in the strategic goals of the creative leader.

Exploring career paths for the creative leader requires open and honest conversations with senior management. Leaders must ask themselves, “Where do I fit in the company’s succession plan? What opportunities are available to me?” And, like the roles of individual contributors, the next best role for creative leaders may be outside of their current companies.

Leaders are also challenged with identifying career paths for their team, as well as themselves. This common challenge pulls at the heart strings of creative leaders, because they want to pay their people more money and want to provide them with more opportunities, but there isn’t always a business case to support those desires. Seemingly the larger the team, the more opportunities that exist for advancement. But typically the percentage of opportunities is similar, only the frequency of opportunities is higher.

Identifying career opportunities both within the Creative Services organization and throughout the larger organization is an important responsibility of a creative leader. A best practice is to document the opportunities available within your department and the paths to reach those roles.

**QUESTION** Which of the below topics provide the greatest challenge for you as a creative leader? (select top three)



**Other Challenges Identified by Creative Leaders**

- Lack of creative opportunities
- Staying creatively inspired within our brand
- Project prioritization
- Account management
- Decentralization of design into business units and to administrative staff
- Unreasonable deadlines
- Keeping pace with evolving technology
- Corporate politics

## Promoting Your Team's Value

Don't let it be said: "The Cobbler's son has no shoes" or "The Creative Director's son has no Mac."

All internal creative organizations, from large full service in-house agencies to small design teams, have a common challenge: demonstrating value to their clients. Truth be told, external agencies face the same challenge. But unlike external agencies who have long recognized that marketing themselves is critical to staying in business, many internal creative teams do not make promoting themselves a priority.

In my opinion, not having an effective self-promotion program is one of the biggest mistakes an in-house agency can make.

Self-promotion is precisely what most in-house agencies need to ensure that the importance and impact of their work is fully understood—and valued—within the corporations they support.

So, the question shouldn't be: should I do it? The question should be: how best to do it?

Whether you find yourself competing with external agencies (as we do) or you are the sole provider of all creative services for your company, three critical activities are necessary for successful self-promotion:

### **Articulate your central purpose**

What is the unique value proposition that your in-house group provides? You can't be all things to all people. Define who you are—what you're best at—and get it written down on paper. Make sure everyone on your team understands it and is an advocate.

### **Track and report your time**

The old expression "you get what you pay for" will work against you if you don't charge for your services or don't have a way of putting a monetary value against your efforts.

### **Package your story**

Doing great work, isn't enough. You've got to tell your own story... to your people, to your clients, to your management. You should develop a capabilities presentation that tells the story of your in-house agency—your functional expertise, creative achievements and business contributions. Use it as an internal training tool to educate new clients and staff as well as a "road-show" to share across your company.

Clients, and at the end of the day that's who we deal with, want to be sold. Do yourself—and them—a favor by promoting your internal agency with as much creativity as you use in your work to sell their goods and services.

### **MARK SHAFER**

Mark is the former Executive Director of Enterprise Creative Solutions at Bank of America, where he managed a creative team of 280. In addition, Mark is the Chairman of the Board of Directors of IHAF (In-house Agency Forum), an association dedicated to supporting the in-house agency industry.

## cella.

### Optimizing the Business Side of Creative

Leading a creative team requires two somewhat opposing skill sets: right-brained creative expertise and left-brained business management acumen. And regardless of where individual strengths lie, each creative executive must bring both skills to the table by executing strong creative while running an effective and efficient business unit.

Cella helps creative executives marry the two skill sets by providing them and their teams with consulting, training and coaching services for their creative operations, which includes strategic planning, process improvement, organizational design, financial and business management, technology selection and implementation and personnel development.

Learn more about Cella at  
[cellaconsulting.com](http://cellaconsulting.com)

## InSource

Inhouse. Creative. Connected.

InSource is a nonprofit, volunteer-run, organization established to motivate creative thinking, promote best practices and enhance the understanding of in-house design within the corporate environment.

Committed to design excellence and effective design management, InSource provides in-house creative managers and leaders with the resources and networking opportunities needed to manage their business and maximize the impact and value they provide to their organization.

Learn more about InSource at  
[in-source.org](http://in-source.org)