Be a More Strategic Partner: 6 Ways for Creative Teams to Win the Respect They Deserve

workfront

Introduction

Everyone wants to be taken seriously, valued for their contributions, and have a real voice for how to best solve problems or achieve business goals. However, gaining this type of respect has proved difficult for in-house creative services teams. In fact, nearly 45 percent of in-house creative teams report that gaining respect from internal clients is one of their greatest challenges.[1]

It's all about perception. The internal clients of in-house creative teams often tend to view them as merely, "service providers," rather than strategic partners, based on several incorrect perceptions that in-house teams lack the talent and skills that an external agency can provide. This perception is one of the largest roadblocks creative professionals face in altering client attitudes and gaining respect. As Bob Calvano, director of Merck's Global Creative Studios notes, "A lot of the juicy, high-profile projects go out to agencies because folks think that the agencies have better talent….In many cases, the in-house team is the best agency for the project, but a huge shift needs to take place in order for this to happen."[2]

This white paper offers the following six tips creative teams can use to position themselves as valued, strategic partners and receive more respect from the rest of the company:

①   Act like an agency

②   Use numbers and data to prove your worth

③   Guarantee on-time delivery

④   Be strategic about how you manage your work

⑤   Establish the creative team as your company's brand authority

⑥   Focus on improving the client experience

45%
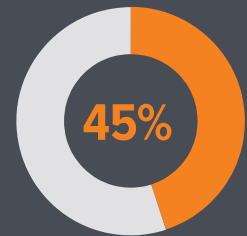
NEARLY 45% OF IN-HOUSE CREATIVE PROFESSIONALS REPORT THAT GAINING RESPECT FROM INTERNAL CLIENTS IS ONE OF THEIR GREATEST CHALLENGES.[1]

What does being a strategic partner look like?

The term, strategic partner, denotes an element of strategy and a relationship of equality. In the case of a creative team, being a strategic partner means strategically influencing the direction of the company as an equal partner with other teams. This is different than simply being a "service provider" that follows orders. Rather than a creative team being *reactive* to the strategies and plans someone else determines they can be *active* and even *proactive* in developing strategies and plans with other teams.

CREATIVE TEAM AS A STRATEGIC PARTNER	CREATIVE TEAM AS A SERVICE PROVIDER
Executives respect, endorse, and praise the team's work.	Executives see the team as an in-house commodity and ultimately dispensable.
Clients turn to the creative team for expertise, ideas, and knowledge of best practices.	Clients dictate to the team, piling them with high expectations and high volumes of work.
The company respects the creative team as the brand managers, turning to them for all branded creative needs, including integrated campaigns.	The company only approaches the creative team for one-off projects like swag or flyers for HR.
Clients value the creative team's work more than outsourced work.	Clients turn to external agencies often, expecting higher quality work.

It might sound too ideal, but a number of creative teams have established themselves as strategic partners in their companies. Here's what three creative teams have achieved:

> *"Our internal clients trust us as brand stewards of the Marriott family of brands and experts in supporting their brand marketing efforts. They appreciate our flexibility and ability to turn things around quickly; our close proximity to them; the cost efficiencies we bring, and most importantly, the high-level of creative deliverables we produce. It's all in the family and we're working toward the same goal of creative brand excellence and marketing results."*
> Marriott

> *"We've established ourselves as the experts to reclaim management of our brand, despite decentralization of content development with various agencies in the mix."*
> FM Global

> *"Our in-house agency has the full support of Putnam's CEO who endorses the work and is a champion for the role Marketing/Communications plays in building the brand."*
> Putnam Investments[3]

Being a strategic partner takes work. And it won't happen overnight. But if your creative team can make the right strategic changes, you will see your internal clients' perceptions and treatment of your team change over time.

① Act like an agency

One of the biggest risks of not being valued as a strategic partner is losing work to agencies. Internal clients frequently view agencies as more "hip," with more talented resources. But these views are often mistakenly based on the perception that higher costs, more creative awards, or specialization in a certain area of expertise makes an agency more capable of doing quality work than the in-house team. One way to combat these perceptions is to begin to think and act like an agency.

Over the past five years, the number of internal creative services teams restructuring and rebranding as in-house agencies has grown 16 percent.[4] Among those that have made the shift, more than half say they've successfully taken business away from external providers.[5] Mature in-house agencies, in particular, have the potential to match the high-quality work of external agencies but at a lower cost, with more flexibility, and in less time. By rebranding as an in-house agency, creative teams can reposition themselves as strategic partners rather than drive-thru services that merely take orders and execute requests.

But the transition to an in-house agency must be done correctly. If you simply put a new name on the same old system, your clients won't treat you any differently. The conversion from creative services team to mature in-house agency is no small task, and it requires a number of changes. Here are some of the biggest changes needed to become a mature in-house agency:

- **Create a new brand.** To distinguish your team from its previous identity, create a new brand for your in-house agency. Choose a look, logo, and a name that still reflects the overall company brand but that demands respect from the company and instills pride in your team. For example, the in-house agency at Best Buy branded itself as Yellow Tag Productions.

- **Reorganize your team to function like an agency.** Adopt a structure similar to an external agency where account or project managers, and even traffic managers act as liaisons between the internal client and the creatives, thus helping to protect the time and resources of the creative team. With this structure writers and designers only receive relevant and strategic work, allowing them more time to focus on creative execution.
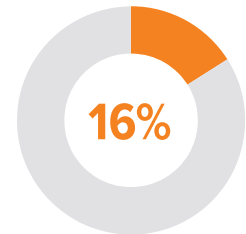
16%

OVER THE PAST FIVE YEARS, THE NUMBER OF INTERNAL CREATIVE SERVICES TEAMS RESTRUCTURING AND REBRANDING AS IN-HOUSE AGENCIES HAS GROWN 16 PERCENT.[4]

- **Standardize the work intake process.** Just as an agency requires clients to follow a work request process with creatives briefs and statements of work, in-house agencies should require clients to submit all work requests to one location where the traffic manager can sort through any random and ad hoc requests that might distract and interrupt team members from their prioritized creative work. A formalized work intake process will communicate the value of your team's time.

- **Determine KPIs.** Determine key performance indicators (KPIs) that not only measure your team's efficiency but that also prove your team's impact on the company, such as planned vs. actual costs, on-time delivery rates, or number of projects completed. This builds credibility with clients and proves your value to executives.

- **Implement chargeback billing.** Demand respect and prove the monetary worth of your team's work by charging internal clients, either partially or entirely, for the work your team produces. This requires teams to track time and develop a billing system. Chargeback billing creates more client accountability and increases your team's efficiency by making them more aware of how they're using their time and resources.

- **Showcase your work.** To increase internal awareness of what your team does, showcase your work. For example, you can build an online portfolio page and share the link, create a "direct mail" piece to distribute to all potential in-house clients that highlights some of your recent work, or hold an open house and invite potential internal customers to attend.

- **Get the right tools.** Most agencies use cloud-based tools such as project management, digital proofing, or time tracking to coordinate their work and execute it as efficiently as possible. To reach the same agency-like efficiency, consider finding a work management tool that addresses all or nearly all of your team's workflow, including request management, digital proofing, digital asset management, time reporting, and billing. By supporting your new workflow with efficient technology, your team can simplify their work and improve the client experience, creating even more value in the client's eyes.

Restructuring to a full-service in-house agency may not be for everyone, especially for smaller creative teams that are unable to handle the increased workload or the cost of additional headcount. But even if your team is small, you can still adopt any number of the above principles to act more like an agency and improve your ability to work and be perceived as a strategic partner.

MORE THAN HALF OF NEWLY MINTED IN-HOUSE AGENCIES SAY THEY'VE SUCCESSFULLY TAKEN BUSINESS AWAY FROM EXTERNAL PROVIDERS.[5]

② Use numbers and data to prove your worth

Most creatives are right-brained, abstract-thinkers who would prefer to think about ideas and designs rather than analyze data and crunch numbers. But in today's data-driven world, where 73 percent of CEOs say marketing and creative teams lack business credibility because they can't prove that they generate business growth,[6] gathering metrics to prove value is a must.

Executives want to see numbers. They are typically the opposite of creatives—left-brained, analytical, and goal-driven. They want to know what the return on investment is on projects and how your in-house creative team affects the company's bottom line. In order to show executives—and the rest of your company—the true value your team brings to the table, you have to start measuring the right key performance indicators (KPIs).

Here are four KPIs to get you started, but keep in mind that your company might value certain data points more than others, so tailor your KPIs to work for your circumstances:

- **Lead time per project.** Lead time refers to how much time a project takes from request to final delivery. Tracking lead time means you can see how efficiently your workflows and individual employees are working. Creative directors can use this measurement to make adjustments to the creative process and to give feedback to individual employees.

- **Estimated vs. actual project time.** Estimated vs. actual project time takes efficiency-tracking further by comparing what the team said they would do to what they actually did. After tracking this KPI for a while, your team should be able to give fairly accurate estimates to clients on how long to expect for certain projects.

- **Estimated vs. actual project budget.** You have to be able to show that your team can produce good work within budget or you risk the work getting outsourced. You'll also earn more trust and respect from the rest of the company, especially from upper management, when you stay on budget. If you have a chargeback billing model at your company, this KPI is even more important because departments are responsible for costs incurred by the creative team.
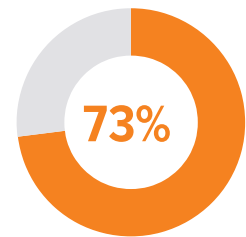
73%

73 PERCENT OF CEOS SAY MARKETING AND CREATIVE TEAMS LACK BUSINESS CREDIBILITY BECAUSE THEY CAN'T PROVE THAT THEY GENERATE BUSINESS GROWTH.[6]

- **Client Satisfaction Ratings.** Measure client satisfaction ratings with regular, short post-project surveys. Ask about overall satisfaction with your team, how your team could improve their service, and if the asset or deliverable met expected outcomes. Knowing your internal clients' feedback will help your creative team benchmark and improve.

Internal clients need to see you as a strategic partner and as a better option than outsourcing. Your KPIs will help identify areas for improvement so you can prove your worth.

How does an executive perceive the creative team?

"In most cases, marketing strategy is dry and boring. What takes it from dry and boring to fresh and exciting is the interesting content and assets provided by the creative services team. They have the unique ability to infuse life into strategy and give it the wings it needs to drive real value for clients and therefore our organization."

Greg Shuey, Co-Founder, Stryde

③ Guarantee on-time delivery

There's no faster way to lose trust than to make a promise and not deliver. Yet, many creative services teams struggle to meet deadlines. In a recent survey, more than one-third of respondents said their work is late twice a week or more because of slow approval processes.[7] While you shouldn't compromise quality to respond to deadline pressure, you should set realistic timelines with clients and improve your team's efficiency for faster turnaround times. To increase on-time delivery rates:

- **Use digital proofing software.** An online proofing tool can measurably speed up project delivery and reduce management and revision time. All feedback and comments are made directly on digital proofs so reviewers can see each other's comments in real time, making it easy to implement change requests quickly.

- **Automate approvals.** Use a workflow management tool that keeps your projects on track by triggering review and approval tasks according to your project plan. At very least, create project templates for your frequent project types and add in tasks for approvals to keep the process organized.

- **Track how long different projects take.** When you track your time in relation to the work being done, you develop a solid understanding of how long projects generally take your team. This information will allow you to develop more informed estimates on future projects and will help you earn trust from your internal clients.

Putting processes into place that allow you to work more efficiently and with more visibility makes it easier for your team to deliver quality work on time. And when you deliver on time, your clients will view you as a dependable partner.

IN A RECENT SURVEY, MORE THAN ONE-THIRD OF RESPONDENTS SAID THEIR WORK IS LATE TWICE A WEEK OR MORE BECAUSE OF SLOW APPROVAL PROCESSES.[7]

④ Be strategic about your work

Creative teams work in inherently chaotic environments, where work requests might come from anywhere, in any form, at any moment. It's no surprise, then, that 64 percent of creative teams say there is often confusion at their company about who is doing what.[8] In this common scenario, not only are random, unorganized work requests easily lost or forgotten, but also team members aren't necessarily seeing or working on the most important work. Here are some best practices for prioritizing creative work and staying aligned with your department and company's strategic goals:

- **Appoint a gatekeeper for your team.** Designate a gatekeeper to handle all incoming requests. Depending on the size of your organization and the amount of requests, the gatekeeper may be a project or account manager, a creative team member, or an administrative assistant. To help prioritize each request against the company's strategic initiatives, the gatekeeper can create a customized scorecard to weigh requests according to company priorities. Consider assigning points based on deadlines, requestor importance, project complexity, or budget.

- **Have a single location for clients to submit requests.** Whether it's an email address such as requests@yourcompany.com, an online form that auto-populates to a spreadsheet, or an integrated request management tool, require that all work requests be submitted to a central location. With request management centralized, there's more visibility into the work, eliminating misplaced work or confusion over who is doing what.

- **Use creative briefs.** Develop standard creative briefs for *all* the common types of work your team does, regardless of the project's level of complexity. A good brief will provide a clear understanding of the goals and objectives of the work and eliminate confusion and rework.

- **Enforce your work intake process.** When you've established a standardized request intake process, you then need to enforce those processes. If a work request is not submitted according to your requirements or lacks an accompanying brief, politely kick it back to the requester and ask them to submit it the right way so it can be incorporated into the work queue.

To be strategic, you need to make sure you're doing strategic work. Your work should always align with company goals. As a general rule of thumb, if you can't tie a request or a project to company goals, you should ask why you're doing it.
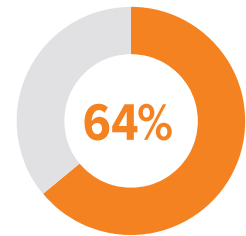
64%

64 PERCENT OF CREATIVE TEAMS SAY THERE IS OFTEN CONFUSION AT THEIR COMPANY ABOUT WHO IS DOING WHAT.[8]

Prioritizing your team's work with a creative brief

Creative briefs can be the difference between a smooth sailing project with happy creatives and satisfied clients, and a project drowned by frustration and unmet expectations. Only 17 percent of in-house creative teams use creative briefs for all projects; 23 percent say they never use them; and 60 percent say they use them only on non-standard, non-iterative work.[9]

Effective creative briefs rely on good questions to clarify all aspects of the project. Here are the main sections every creative brief should include:

- **Project context**
  Understand the why of the project. What's the pain? What's the opportunity or challenge?

- **Target audience/market**
  Make sure you know the "who" of the project. How old are they? What's their average salary? What are their interests?

- **Description of the deliverable**
  Know your client's expectations. Make sure you get enough details that you feel confident you understand their vision and expected outcomes.

- **Key messages**
  Boil down the deliverable to a few key messages. What is the big idea you need to convey?

- **Expected accountability**
  Address the when. When is the start date? When is the final version due? What are the milestones?

- **Stakeholders**
  Understand "who" from the working side. Who on the creative team will work on the project? Who are the client's decision makers?

As an alternative to developing your own briefs, you can use a Marketing Work Management system with customizable, built-in briefs where, during initial request, the client is required to provide certain information for the team. Even in this scenario, as a best practice, take the time to meet with the client and review the brief to ensure everyone is on the same page before production begins.

Creative Brief

Context

THE "WHY": BACKGROUND/CHALLENGE
What is the primary objective, problem, or opportunity for this project?

THE "WHO": TARGET AUDIENCE/MARKET
What is the target audience for this project—demographic, psychographic, and self-interests?

Deliverable

THE "WHAT" (PART 1): DESCRIPTION/SUMMARY
What is the client's vision for the deliverable?

THE "WHAT" (PART 2): KEY MESSAGES
What are the primary and secondary messages of the project?

THE "HOW": BRAND/CAMPAIGN DETAILS
What are the brand/campaign guidelines, color, tone, size, form (digital, magazine, poster, billboard, etc.)?

Accountability

THE "WHEN": DEADLINES
When will the project be delivered, published, or go "live," including draft deadlines, iteration timelines, etc.?

THE "WHO": STAKEHOLDERS
Which creative team members will work on the project? Who are the client's decision makers?

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⑤ Establish the creative team as your company's brand authority

Creatives often work with two types of clients: the clients who give no vision or detail to a project but expect the creatives to produce a masterpiece; and the clients who are convinced they know how to do the creatives' job better than the creatives.
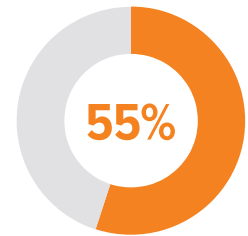
Neither client is much fun to work with. According to a recent Workfront survey, 55 percent of marketers say they dread work because they have to prove value to people who don't understand them, and 42 percent say they dread their job because of people who think they have great marketing ideas, but don't.[10] So how do you kindly—but definitely—reassure the client that, with their shared vision, you can produce the best deliverable to complement their strategy?

## Embrace your role as the company's brand authority

Clients consider an in-house creative team's brand expertise, historical knowledge of deliverables, and shared vision as the greatest values provided by the team, according to a creative services survey.[11] Establishing your team as the brand authority is a natural extension of what clients already believe you do best and allows clients to see your team in a more consultative and authoritative light rather than just as an order-taker.

To confidently claim your team is the brand authority of the company, review the "Brand Authority Checklist" on the following page. Chances are you can already check all these off, but if not, do what it takes to get there.

55%

55% OF MARKETERS SAY THEY DREAD WORK BECAUSE THEY HAVE TO PROVE VALUE TO PEOPLE WHO DON'T UNDERSTAND THEM.

42%
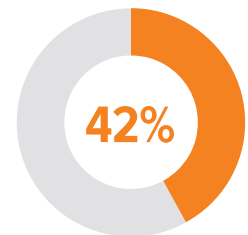
42% SAY THEY DREAD THEIR JOB BECAUSE OF PEOPLE WHO THINK THEY HAVE GREAT MARKETING IDEAS BUT DON'T.[10]

BRAND AUTHORITY CHECKLIST
☐ **Brand knowledge** Your team knows the brand inside and out; you work with the CMO to strategize what your brand looks like, sounds like, and how and where it is displayed.
☐ **Historical knowledge of products and deliverables** Your team knows where the company has been and where it plans to go. You know the processes that accompany changes in products and you know your role in these changes.
☐ **Creative expertise** Your team has years of experience and education in your field. You know what you're doing when you put more white space on a web page. In a lot of ways, your team isn't just the brand authority of the company, but the creative authority too.
☐ **Marketing experience** Your team knows what connects with your target markets and what doesn't in terms of brand voice and image.
☐ **Knowledge of current trends** Your team is very aware of what's on the rise, and you know how your brand can appropriately react to and embrace trends.

Make Your Role Clear

Once you've established your role as the brand authority, you then need to ensure that the company acknowledges your role. Here's how:

- Communicate your team's role as the company's brand authority. Whether or not you decide to actually use the term "brand authority" when describing your role to the company, make sure that's the expectation that is communicated.

- Establish a culture where all public-facing deliverables go through creative services. Either you produce them or you manage the outsourcing of them.

- Develop a brand guide that can help the brand stay consistent. Share this with internal clients, vendors, and partners. You may even want to appoint someone on your team as the "brand manager"—the point-person for enforcing the brand and answering questions on proper brand guidelines.

How important is it to creative leaders that their team be the company's brand authority?

"I think it's vital to the success of a company. You can't have 15 (or whatever your headcount looks like) "brand ambassadors" going out on social media, on blogs, in presentations, etc. and not portraying the same message, look and feel. When that happens, it causes confusion within the organization as well as in the market place."

Greg Shuey, Co-Founder, Stryde

⑥ Focus on the client experience

When clients use an outside agency, they expect to be treated as if their business matters. To maintain your competitive edge, you need to provide the same kind of customer service by making the experience as smooth and simple as possible. Here are some ways you can improve the client experience:

- **Assign an account manager.** An account manager helps maintain a healthy client relationship and should always be looking to educate the client, share knowledge, and build trust. They should also ensure that communication protocols and project processes are clear between the client and the creative execution team.

- **Offer more transparency.** An account portal provides a secure, private way for clients to access project information. Clients get more transparency into their projects and can see their status at a glimpse, which builds trust and helps eliminate communication mishaps. For example, a cloud-based proofing tool allows creative teams to upload digital versions of assets and collaborate with clients from anywhere in the world at any time. Important feedback doesn't get lost in email threads, clients feel confident that their suggestions are addressed, and the creative team can view any suggested edits in real time. A digital asset management (DAM) solution is another great tool for increasing client transparency and communication. With a DAM solution teams can easily manage their files and control all access and usage, while keeping a curated collection of finished assets for clients. Bonus points if you can use all of these tools in an integrated way.

- **Measure client satisfaction.** Use short surveys after every project to find out where you're succeeding and where you can improve the client experience. You can then make changes based on these surveys to better meet your clients' needs. Consider including questions that address overall satisfaction, strategic contributions of the creative team, and satisfaction with project workflow. Remember to keep these surveys short and simple. If you feel like you're not getting useful information from them, tweak the surveys until you're getting the information you want.

By making the client experience an integral part of your work process, your clients will see your team as not simply executers of the work, but partners who are willing and able to help them achieve their strategic goals.

Become a more strategic partner with Workfront

Proving you're truly a strategic partner and not just an order-taker means doing more than just putting a label on your team. It requires your team to have the right processes in place to earn the trust of your clients and the ability to prove value through hard data. Workfront Marketing Work Cloud provides a single source of truth, helping you develop the right processes and track the right metrics to prove your worth. With Workfront you can:

- Build credibility and client satisfaction

- Increase visibility into your team's work

- Track your workflow and measure KPIs

- Increase your efficiency and improve on-time delivery rates

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Endnotes

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