Wrike

Execution is Everything:

How to Transform Your Creative Team into a Real Powerhouse
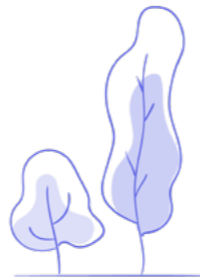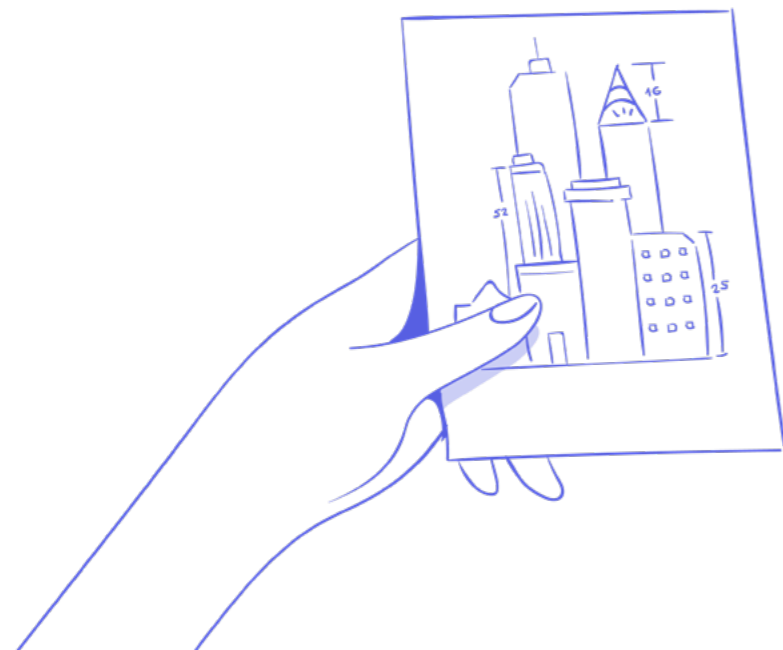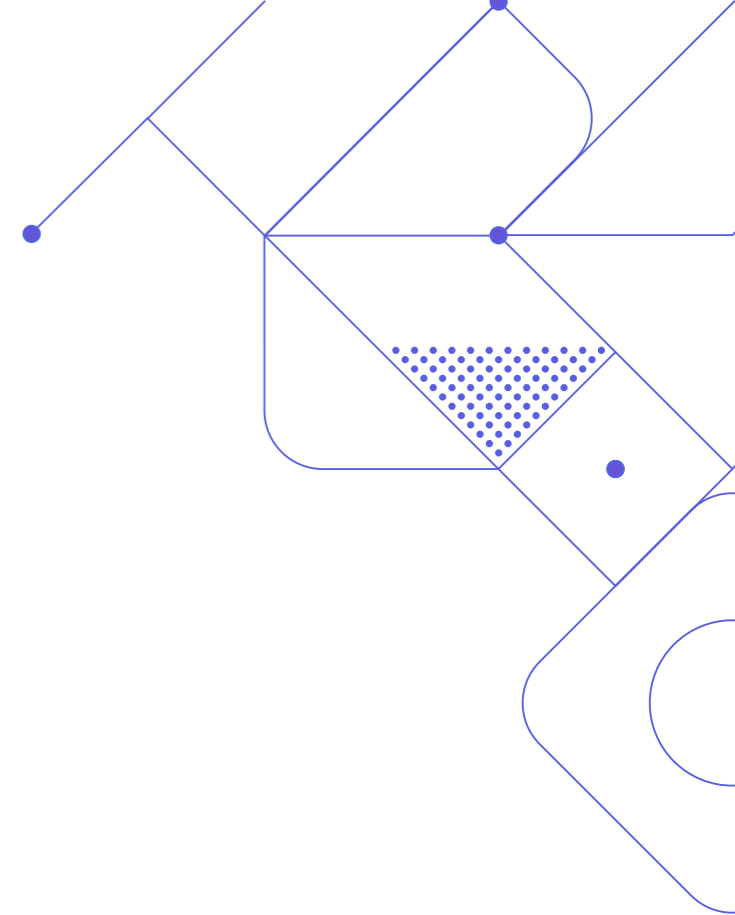
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The best laid plans of mice and men often go awry, as the old adage goes. But it doesn't have to be that way.

Picture this: A creative brief requesting visuals for a new campaign comes in. Everything your team needs to get started is there, from target audience to deadlines to mood boards.

The project moves swiftly. Goals are decided. Everyone understands their role. Work is organized and easily accessible, everything working together like a well-oiled machine. Stakeholder feedback is seamlessly captured and addressed.

The campaign is delivered on time and the client is blown away by the quality of the work. Relevant project information is stored in a single place, allowing you to ensure all objectives were met, and even identify areas for future improvement.

Some creatives may call this a miracle, but we here at Wrike call this level of organization, efficiency, and execution **Operational Excellence**. We've seen it time after time with our more than 15,000 clients who have chosen Wrike as their collaborative work management system.

According to recent [research published in the Harvard Business Review](#), Operational Excellence is overtaking strategy as the most critical component of successful companies. It is the ability to plan, complete, and manage projects at the highest level possible. Execution is flawless across the team and organization, from scoping and ideation to collaboration and final delivery. The end result is excellent for the team, for the company, and most importantly for the customers.

> Teams operating at the highest levels of excellence can achieve a [75% increase in productivity and 25% increase in profitability](#).

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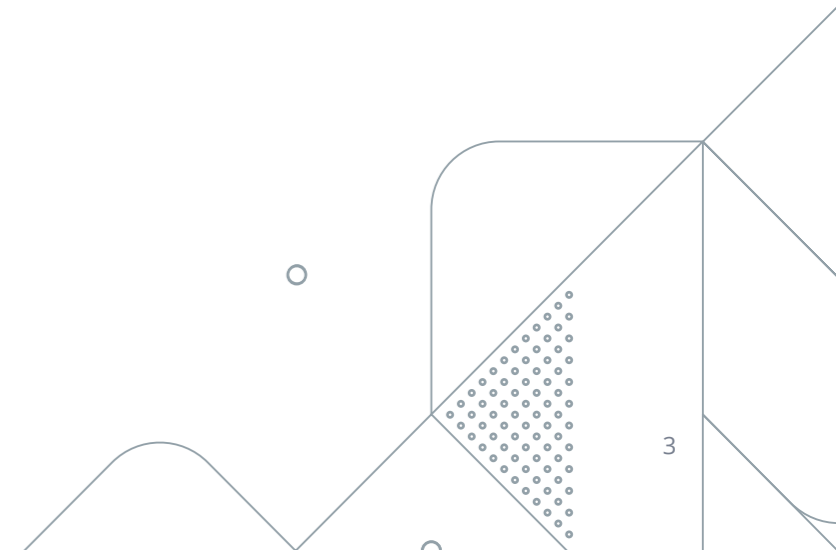
While achieving Operational Excellence is possible, it's difficult to attain without the right team, tactics, and tools in place. It requires significant investment from all parts of the organization. Commitment is particularly vital from mid-level managers, who are primarily responsible for driving improved execution within their team and throughout their organization.

It's clear that the results for those willing to invest in Operational Excellence are transformative. In fact, a 15-year study of more than 12,000 companies in 34 countries shows that teams operating at the highest levels of excellence can achieve a 75% increase in productivity and 25% increase in profitability.

The stakes for achieving Operational Excellence are especially high for larger teams of 20 or more who do work that extends across other groups. The bigger the team, the bigger the challenge. With every person you add to a project, you increase the chance of confusion and miscommunication. Then, there is the added pressure to deliver amazing results on a large volume and variety of projects.

This guide is meant to help growing creative teams avoid these breakdowns and become insanely productive. We've worked with thousands of successful creative teams who have scaled without sacrificing consistency or quality. And we've distilled their insights into best practices that'll guide you on your steps toward Operational Excellence.
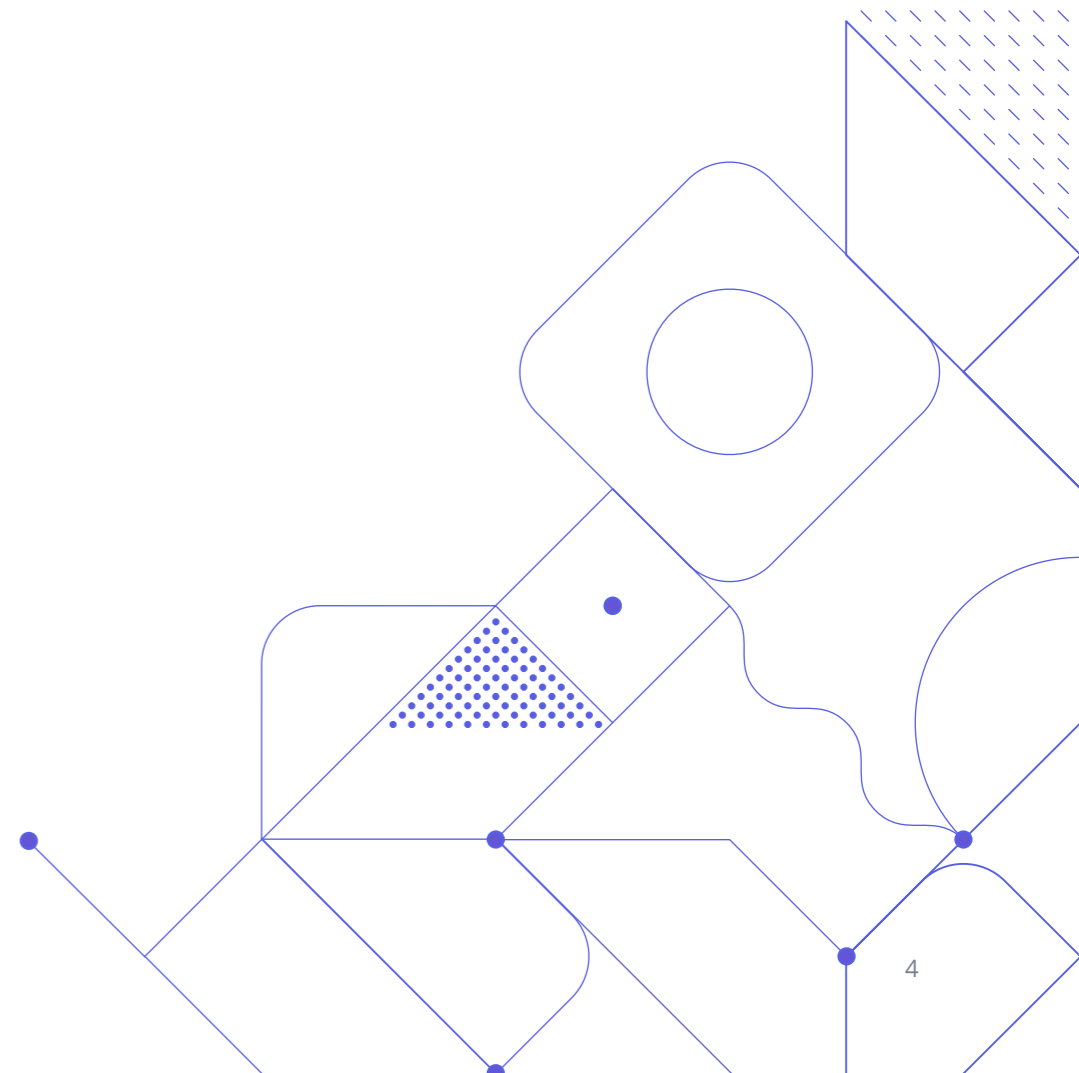
Mapping the Journey to Operational Excellence
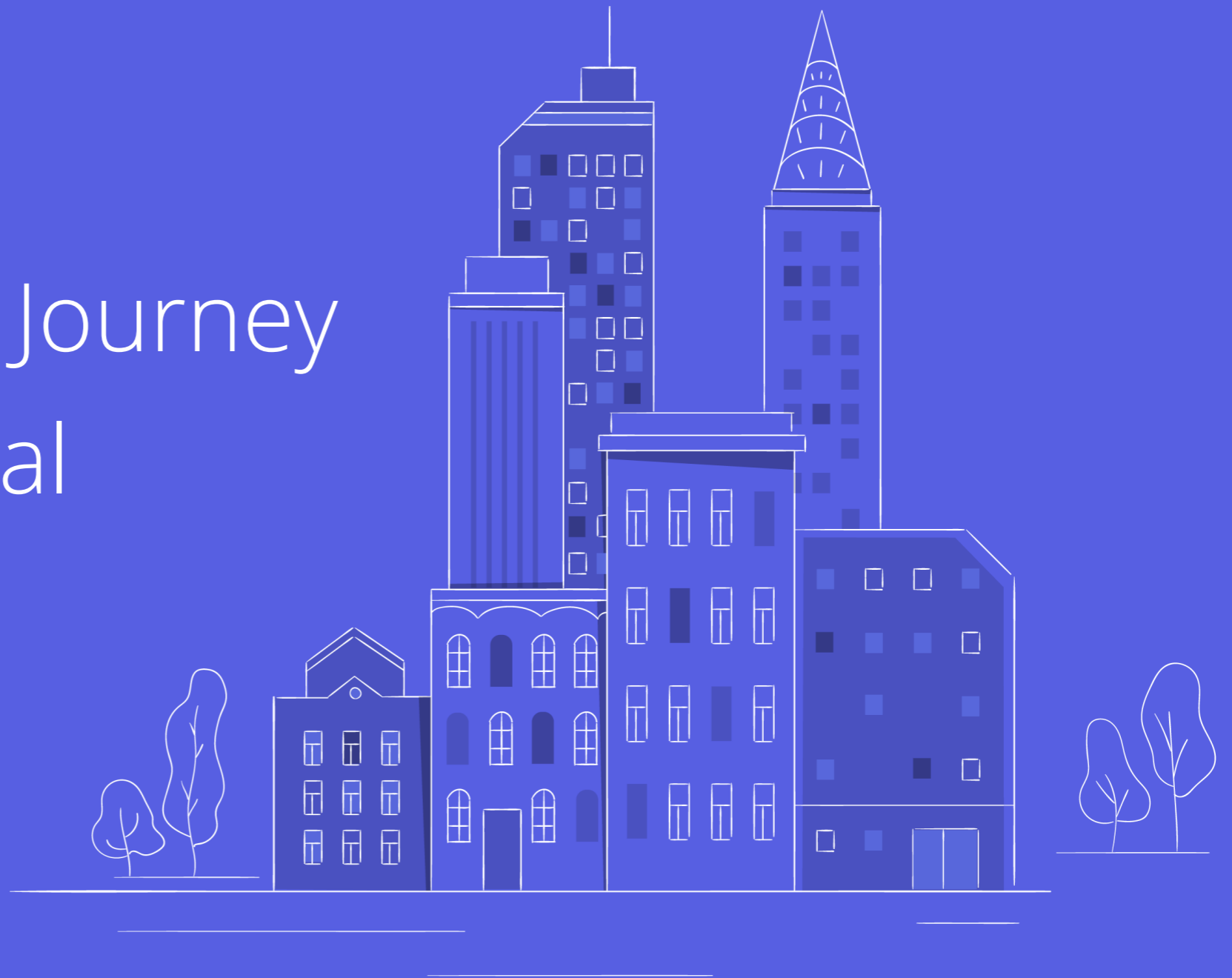
Operational Excellence is not a destination—it's a journey. It isn't something that can simply be instituted. It must be cultivated within an organization, and the continuous addition of new people, projects, and procedures requires ongoing evaluation and iteration in pursuit of this goal.

Optimize

Scale

Organize

React
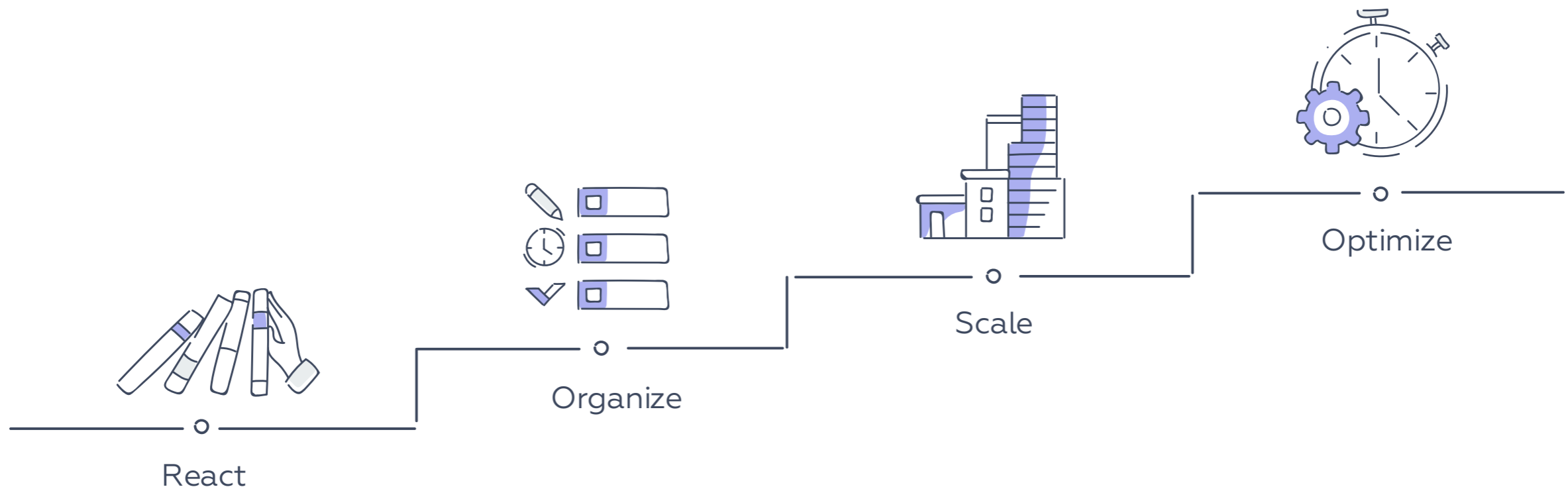
We've developed a maturity model that helps creative teams understand where they currently stand in their Operational Excellence journey and where they need to go next. Ultimately, this model can be broken down into four stages, as shown in the graphic above.

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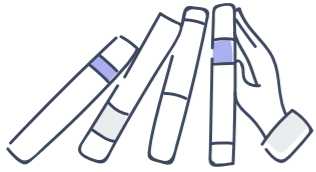
React:

In this stage, work is very unstructured, siloed and ad hoc. That's because teams have very few, if any, structured processes in place. Projects are typically managed via email and spreadsheets, causing information to get lost easily and resulting in duplicate or re work. Team roles and responsibilities are not defined, so it's hard to know who is doing what or where bottlenecks are coming from.

Reaction in Action: You get a a new project request in your email. Key details are missing and then later captured in a s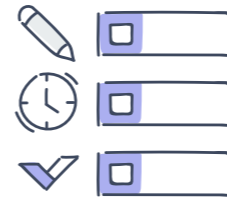preadsheet, which is uploaded to a group chat. No one knows who is doing what. Two separate team members take on the same task and, unbeknownst to one another, both produce the same deliverable… three days late.

Organize:

A single source of truth—think a living, breathing repository for all information on a project—is established at this stage. Basic workflows are outlined for larger or more common projects. Communication is contained within this centralized workspace, and roles and responsibilities are clearly defined. This makes it easier to dig into outcomes and progress with basic reporting and dashboards.

Organized in Action: A request for a new logo is made. All the details are kept within the team's shared workspace. Tasks are assigned to team members based on their unique roles. All communication takes place within the workspace, facilitating seamless handoffs and collaboration. The entire team maintains visibility into the overarching process and tracks progress using a shared dashboard.

Scale:

A team now has long-established and clearly defined processes. Everything is managed within the designated workspace. To increase velocity and quality, recurring projects are automated and templatized. Collaboration is extended outside of the immediate team to include other key stakeholders and teams within the organization. Reports are used to help balance workload and achieve set objectives.

Scaling in Action: A recurring request for a customer-facing guide comes in using a creative brief tailored to capture all of the information necessary for this specific project type. It is kicked off using a pre-existing template with the precise process steps in place to complete the guide. Since reporting reveals that a particular team member is short on bandwidth, another is assigned the project. Stakeholders on the customer success team are able to easily track the progress of the guide and provide feedback in real-time.

Optimize:

At this final stage, your team adopts a Culture of Excellence that eventually spreads throughout the company. Process improvements are an ongoing venture. More and more workers join the centralized workspace, which now incorporates standardized, cross-functional workflows. Key applications are integrated with your workspace to further streamline work and information exchanges. Past performance data is used to estimate outcomes, create predictability in your timeline, and drive coaching efforts.

Optimization in Action: Think back to the example at the opening of this guide. This is the perfect example of a team that has reached the Optimize stage on its journey to Operational Excellence!

Paving the Way to Excellence

By now you're probably thinking, "This all sounds great, but where the heck do I start and how do I actually make Operational Excellence happen for my growing team?"

Based on the work that Wrike has done with 15,000+ operationally excellent companies like Airbnb, Umpqua Bank, and L'Oreal, we have determined there are four key disciplines that help companies achieve Operational Excellence:

1. **Planning**
2. **Process**
3. **Collaboration**
4. **Visibility**

Think of a city. There are roads, rivers, skyscrapers, bridges, and sidewalks. If the city's architects, electricians, plumbers, and construction teams don't execute well, people's garbage won't get picked up.

They must follow a blueprint (planning). Plumbing comes before laying concrete (process). Civil engineering informs construction (collaboration). Problems must be spotted before structures are built (visibility).

Let's dig into each of these elements in more detail and explore some actionable tactics that creative teams can implement to move the needle. As you read, keep in mind that each of these key disciplines feeds into and builds upon one another, so rather than being viewed linearly, they should be worked on in unison.
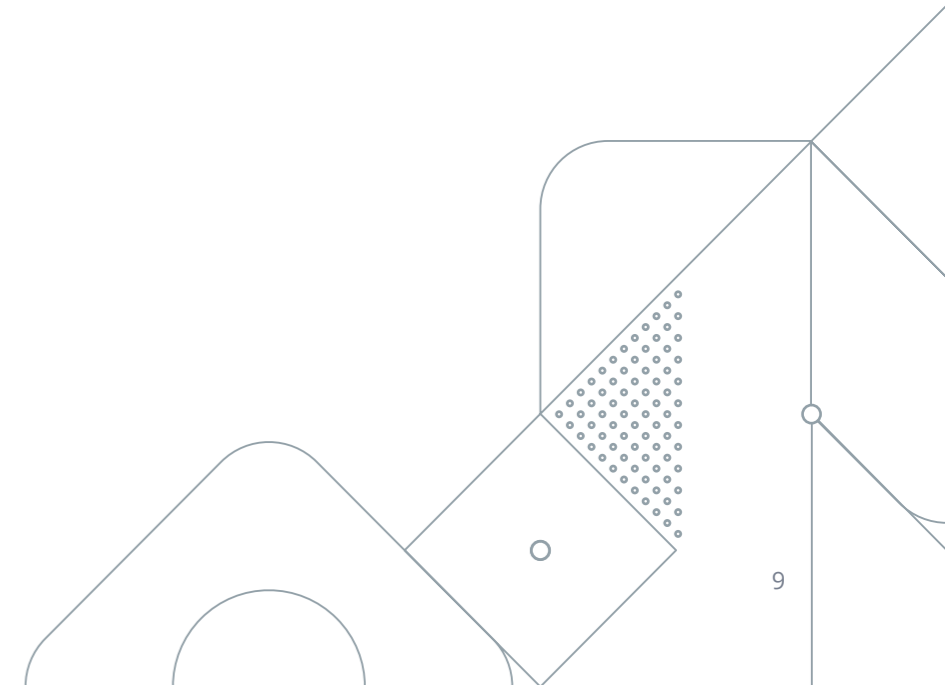
Planning for Excellence

Small creative teams with a handful of clients and projects often deal with ambiguity, shifting priorities, and last-minute deliverables. But when you manage a team of 20-plus and juggle dozens of high-profile projects each week, these types of fire drills quickly become full-fledged infernos.

Soon your team's performance, deadlines, customer relationships, and work/life balance are in danger. 73% of in-house creative staffs work more than 40 hours per week, while 21% work upwards of 46 hours per week, according to a 2017 In-House Creative Industry Report surveying 375 leaders from in-house creative departments.

Poor planning can have a domino effect. That's why predictability is the bedrock of high-functioning teams.

When planning with accelerating production in mind, it's helpful to think of **The Four W's: Who, What, When and Why**.

Identify WHO Should Be Involved

Know WHAT You Need

Visualize WHEN Projects Are Due

Understand WHY Things Are Being Done
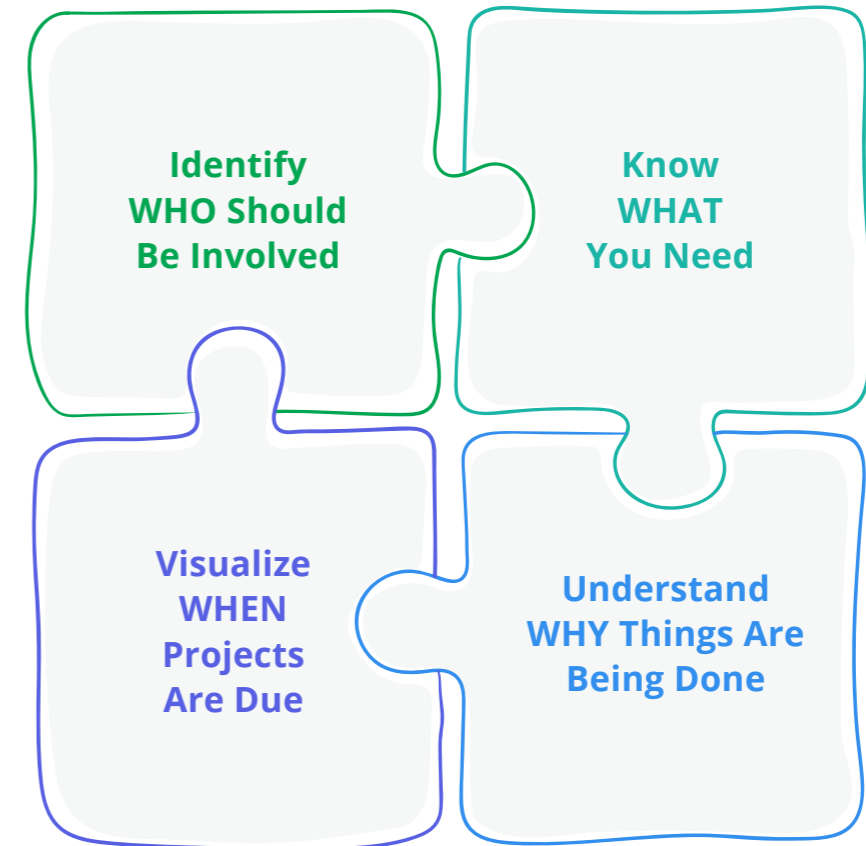
1. Identify WHO Should Be Involved

While most creatives recognize the importance of planning **within** individual projects, growing teams must also realize the importance of planning **across** projects. That's why more operationally excellent teams are hiring a designated traffic or production manager who coordinates work across projects and teams.

A good traffic or production manager ensures projects are scoped and prioritized correctly and workload is balanced across team members. Handoffs occur seamlessly and deadlines are consistently met. Since high-complexity, high-value projects require greater collaboration and oversight, this role can be helpful for managing dependencies and key stakeholders.

Each contributor on the creative team needs to have a clearly defined role and set of responsibilities to effectively balance workload and avoid duplicate work. Who owns illustrations versus motion graphics? Who is the lead designer for sales team decks, or a certain client account? Clearly establishing who does what is key to effectually distributing and scheduling projects.

For example, digital marketing services provider Blue Magnet Interactive relies on account managers to delegate creative tasks across specialized teams like Digital Advertising and Website Design. Projects can last up to 12 months, so resource planning needs to account for spikes in delivery across various client campaigns. With the help of Wrike's collaborative work management solution, account managers are able to balance and prioritize work across teams and projects ahead of time. This has helped improve on-time project delivery by 20%!

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2. Know WHAT You Need

The most fundamental roadblock for any project is a lack of information. The more requests you field, the harder it is to chase down these missing pieces. That's why, as your team scales, it makes sense to templatize requests for your most frequent types of projects.

Using a templated approach to your planning will help you better understand objectives and hit the ground running faster. For creatives, this means utilizing a standardized creative brief that effectively lays out all of the information needed to complete a project.

"I always encourage my clients to create templated creative briefs for each of their project types, like ad campaigns, eBooks, videos, etc.," says Roberto Wantland, operations expert and Strategic Customer Success Manager at Wrike. "Some work management tools like Wrike even make it possible to build out conditional request templates, where the questions dynamically change based on the information the requester provides as they fill out the brief. This allows you to ask the right questions that are most relevant to that specific client or project type."

Creative Brief Questions

While there is no "one-size-fits-all" creative brief, here are some key questions every creative brief should help answer:

- What are the parameters of the project? (i.e. timeline, budget, format, dimensions, etc.)

- Who is the audience for this project? (i.e. demographics, concerns, desires, etc.)

- What is the main message or tone that the requester wants to get across? What feeling do they want the audience to get from the finished product?

- Are there any examples of visuals that inspire the requester? Is there a certain style they want to convey?

- Who is the competition? Do they have similar assets? How should this be different?

- What is the goal of this project? Is there a specific action that the requester wants the end-user to take? (i.e. request a demo, make a purchase, watch a video, etc.)

- Is there a particular metric that will be used to gauge the success of this initiative? (i.e. sales, clicks, downloads, etc.)

- Who is responsible for approving this project? Is anyone else's input required?

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> Most [creative people] will tend to agree that if a brief
> is informative, well argued, and insightful, then their
> chances of creating better advertising are increased
> and the process of doing so is made considerably easier.
>
> — *Jon Steel, Advertising Pioneer, Strategist, & Author*
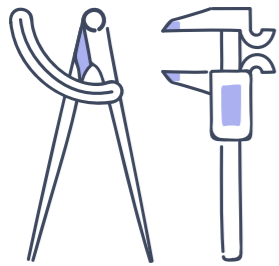
Advanced Technique:

As planning scales, it's extremely important
to make sure everyone speaks the same language
to avoid confusion and enable accurate reporting.
Do you refer to PDFs as "white papers" or "guides"? Are deadlines
written out month/day/year or day/month/year? For companies
using a collaborative work management system, creating custom
fields is a great way to ensure that information is captured
and communicated in a consistent and uniform fashion.

3. Visualize WHEN Projects Are Due

Deadlines are nothing new for creatives. But juggling competing
due dates with multiple dependencies and limited headcount may

be a fresh exercise for growing teams. Track projects in a timeline
or calendar view to visualize which initiatives are in flight and coming
down the pike. This helps your team more effectively prioritize, assign,
and schedule tasks.
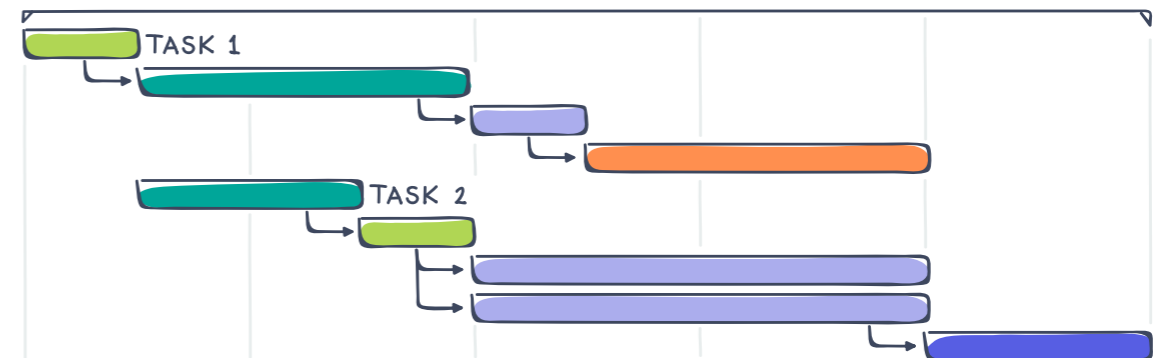
A calendar or timeline view is also beneficial when reviewing finished
projects. As your team completes work, you'll learn how long it takes
to produce specific types of projects, and which team members work
faster than others. You can then use this information when budgeting
time, allocating resources, and committing to deadlines in the future.

4. Understand WHY Things Are Being Done

Copy and design is so much more than form—it's also function. If you
don't know the purpose of your work, you will likely miss the target.

As mentioned earlier, be sure your creative briefs leave room for requesters to provide desired outcomes and success metrics.

For project-based teams, creative briefs can also be rolled up into a statement of work (SOW) that clearly outlines your project deliverables. SOWs essentially serve as your team's commitment to your customer, and therefore can be very helpful in understanding why certain milestones must be met.

Ultimately, knowing "the why" behind each of your requests empowers your team to prove the success of its work. Capturing data around projects' key performance indicators (KPIs) will help everyone measure the achievement not just of client satisfaction, but also of business outcomes. This information is invaluable when planning future projects. We will discuss this technique in greater detail later on in the Visibility section of this guide.

Planning for the Unplanned

Ready for a curveball? An important part of planning is actually leaving space for the unplanned. The dynamic nature of work, creativity, and relationships requires you to expect the unexpected.

Here are some best practices to help you master the art of planning for the unplanned:

- **Never finalize your plan.** Instead, view it as a work in progress. This is as much psychological as it is practical, as it will prevent you from becoming overly attached and resisting necessary change.

- **Revisit your plan frequently.** In fact, depending on the type of work you do, you should plan to replan every few weeks. Some businesses even replan every few days! Being intentional about revisiting your plan will help your team keep its eyes on the ultimate prize of achieving Operational Excellence.

- **Make sure you have a "replanning" agreement upfront with stakeholders.** Set the expectation with stakeholders that things may change. This will make your replanning much more effective. Replanning without having sufficient buy-in from your clients or executives will only lead to frustration.

- **Keep everything up to date.** Whatever tool or system you put in place to help manage your plan, make sure that it is easy to update and adapt in real-time as your plan evolves.

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Adhering to a Process

It's no secret many creatives view process as a roadblock to creativity. But the reality is that inconsistent, ineffective processes cause missed deadlines, confusion, and redundancies. These issues ultimately detract from your team's ability to be creative. In fact, according to a 2013 iStock–commissioned survey of 400 creatives across the US and UK, about 25% of creatives spend less than two hours a day actually doing creative work!

Process, like planning, becomes increasingly critical as teams grow. Manually managing hundreds of projects from dozens of requesters gets very messy, very quickly. For high-performance teams with cyclical work, having a well-thought-out process that is clearly documented unlocks massive opportunity.

Think of your process like the old "Gold Master LPs." These were the metal records from which thousands, sometimes millions, of vinyl records were created. Once you have a solid "mold," you can crank out many projects much more quickly and efficiently than if you had to continuously start from scratch.

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> For many years, we never focused on operations. As a creative team, we thought that making things look pretty was good enough, but this in fact wasn't the case. We needed to take a hard look at our systems and processes .... By improving our processes not only did our team's morale increase, but we now produce more beautiful and higher quality end products.
>
> — *Chee Wei, Art/Creative Department Executive Director @ Hobby Lobby*

First Things First: Documenting Your Creative Process

Before you start refining your processes or put new ones in place, you must have a solid understanding of your team's current workflows and what is and isn't working. That's why it's extremely important to begin with documenting your existing processes.

If you're thinking that your team doesn't have any processes, think again! A lack of process is essentially its own (disorganized) process.

Input (What is being done?)	Action (Who is responsible?)	Output (What is the outcome?)
Request submitted via email	Stakeholder	Creative brief created
Assign a designer	Traffic manager	N/A
Comp is created using Sketch	Designer	Design draft uploaded to Box
Design is reviewed	Design manager/Stakeholder	Revisions provided

There are two effective ways to document your existing process(es):

1. **Input/Action/Output Chart**: This technique works for teams with fewer, more linear, and moderately complex processes. It will help you better understand your team's activities, how each task is linked to the next, and who is involved in each step. Above is an example of a partially filled out input/action/output chart.

2. **Process Mapping:** For teams with a greater volume and complexity of projects, it's not enough to understand each step within a process or who is responsible. They must also prioritize these projects while coordinating with other teams and their interests.

   Process mapping is an advanced technique that can help. Teams start with an inventory of their current projects and deliverables. Next, these items are prioritized according to impact. From there, processes are outlined by identifying their triggers (starting points) and deliverables (end points). Specific steps are then listed to connect the dots between these triggers and deliverables.

This exercise helps you visualize how information flows across your team and organization. It shines a spotlight on roadblocks and inefficiencies like duplicated efforts, poor communication, ineffective feedback loops, and so much more.

For more information on Process Mapping, check out this helpful blog post.

1. Inventory current processes, projects and deliverables
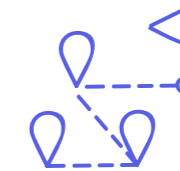
3. Identify triggers (starting points) and deliverables (end points)

2. Prioritize your activities according to impact

4. List the steps that are needed to get from trigger to deliverable

Pro Tip: If you find yourself struggling to document your process using either of the above techniques, try working backwards. Start with the project deliverable, and reverse engineer your process to see how you got there.

Once you've documented your existing process(es), consider the following key areas for improvement.

Choosing a Single Source of Truth

How are project requests coming in? Where does information live? Where are relevant files stored? If you're like most creative teams, your answers probably range from email to Excel to Dropbox. A whopping 80% of business leaders agree that problems arise because they use different systems and applications that don't "talk to one another."

The more projects you have, the harder it is to manage information, assets, and versioning across these various platforms. This is why you must identify a single source of truth for your team before you

can tackle any process roadblocks. This usually involves saying goodbye to email and Excel and choosing some sort of collaborative workspace to collect all of your project-related information and assets.

Online hospitality marketplace Airbnb realized the importance of using a single source of truth for work, but was struggling to make it happen in a shared spreadsheet.

"It was constantly crashing," recalls Airbnb Creative Production Manager Hoon Kim. "People ended up creating duplicates of the doc to deal with their own small world of data, which quickly became outdated since they weren't connected to the original doc. There were massive amounts of confusion."

Wrike allowed Airbnb to place both its production teams and processes inside a single ecosystem. This has accelerated project delivery by helping to eliminate lag time between production handoffs, streamline collaboration among the team, and provide greater transparency across projects. "For the people dealing with it day and day out, the process has gotten a lot easier," says Kim.

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Advanced Technique:

The best work management solutions further streamline information flow, thanks to integration with tools the team already uses, like Gmail, Adobe Creative Suite, Box, and Slack. This means that while the work management solution ultimately serves as the team's single source of truth, information can also be accessed and entered using these existing tools.

Transitioning from "To Do" to "How To"

Process is all about execution. So while you may know **what** you need to achieve thanks to proper planning, now is the time to think about **how** to do it. The best way to get started is to group individual tasks into "chunks" of work needed to complete a project or achieve a goal.
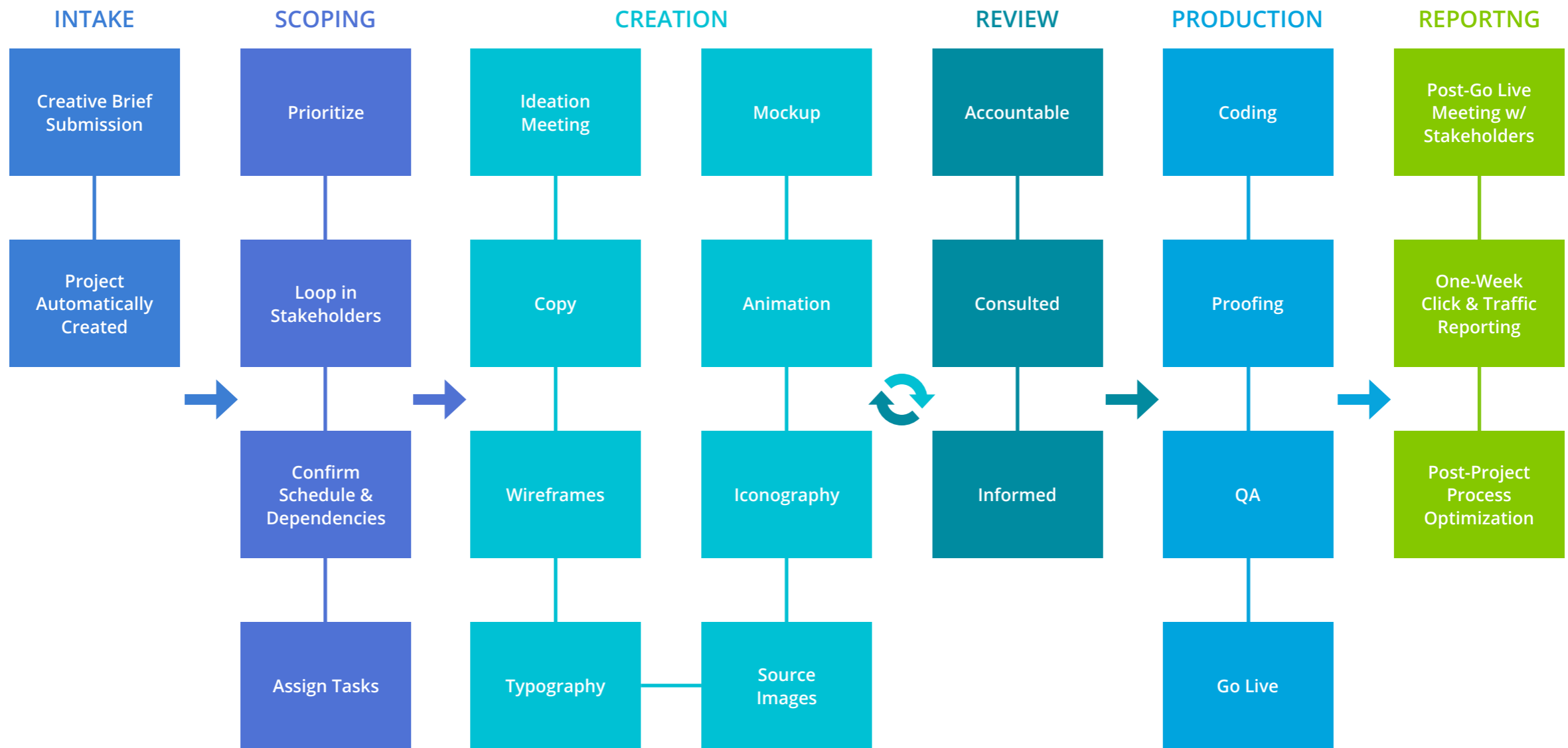
After establishing Wrike as its single source of truth, Airbnb tailored its teams' workspace to help them focus on relevant, high-priority tasks, instead of the entire massive project.

"It really helps when you're looking for information, to streamline where to look, and then who to communicate with," says Kim. "It makes that 800-item task list a lot more manageable when you're focusing on smaller chunks."

While every team's processes are comprised of different tasks and subtasks, here are some units of work that function as key elements in most creative processes:

- Request intake/Creative brief
- Scoping of project or deliverable
- Creative exploration
- Proofing and approvals
- Production
- Reporting

These chunks of work can be built out based on your team's unique structure, clients, and deliverables. One of the most common and beneficial ways to structure your processes is by project type, such as video, email campaign, or web design. Check out the process example for a web page design on the next page.

| INTAKE	SCOPING	CREATION		REVIEW	PRODUCTION	REPORTNG
Creative Brief Submission	Prioritize	Ideation Meeting	Mockup	Accountable	Coding	Post-Go Live Meeting w/ Stakeholders
Project Automatically Created	Loop in Stakeholders	Copy	Animation	Consulted	Proofing	One-Week Click & Traffic Reporting
	Confirm Schedule & Dependencies	Wireframes	Iconography	Informed	QA	Post-Project Process Optimization
	Assign Tasks	Typography	Source Images		Go Live	

WORKFLOW

New → Scheduled → In Progress → In Review → Approved → Complete → On Hold

Note that the units of work in this process are marked by a particular workflow with task statuses such as "New," "In Progress," or "Approved." Defining these statuses in a way that makes sense for your projects is an instrumental piece of the process. They help keep everyone on the same page and signify when it's time to move on to the next task or "chunk."

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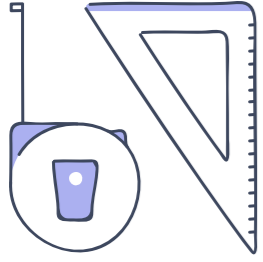
Advanced Technique: Templatizing

As you can see, solid creative processes can get very detailed. That's why advanced teams often choose to look at their work less as discrete projects and more as ongoing sets of repetitive tasks and workflows.

Saving processes (like the web page design example above) as templates within your work management platform enables you to simply clone them each time you start a new project. Rather than having to start from scratch, key components like dependencies, task duration, assignees, and reports are simply copied over.

Templatized processes save high-performance teams a ton of time, freeing resources for more complex or custom projects. They also make it easier to measure and improve performance over time, driving repeatable wins for your team.
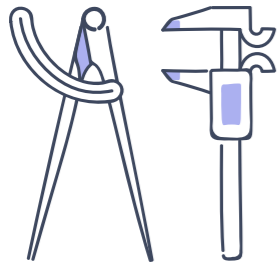
Advanced Technique: Automation

Another way that operationally excellent teams streamline their processes is through automation. This includes automatic project creation when a creative brief is submitted, intelligent routing to the right person based on project requirements, and the receipt of real-time work notifications.

For example, to help scale creative production across 50 cities worldwide, Kim's team at Airbnb has automated its processes as much as possible. Project requests are created in Salesforce, which integrates with middleware platform Azuqua. Once a request is received, Azuqua sends an automated project request to Wrike and automatically attaches relevant information and the proper assignees to tasks.

The Importance of Iteration

Much like the journey to Operational Excellence, a great process is never "finished." Rather, it is continuously refined and optimized based on new projects, people, and discoveries. As operations expert and Wrike customer advocate Adler Chan explains, "The need to iterate and optimize your processes points back to the importance of having a single source of truth for all of your initiatives. Only then is it possible to look back and accurately analyze and improve existing processes based on past performance."

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Breaking Down Silos

Collaboration is a must for creatives. The exercise breeds new ideas and inspires fresh perspective. It's especially vital to the budding Millennial worker segment, which has grown up with the luxury of real-time communication thanks to mobile, social, and the cloud.

Creative teams are no longer composed of Jack-of-all-trade designers. There are videographers, photographers, web designers, UX designers, and other specialized roles that must work together. Also, creatives must communicate with their internal teams, as well as collaborate with their clients.

You'll notice an even greater need to work together as your team scales. Complex, high-stakes initiatives require greater alignment and oversight than ever before. Collaboration brings disparate teams together, breaking down silos and building trust.

Without it, things can quickly erode. A Fierce, Inc. survey of more than 1,400 corporate executives, employers, and educators found 97% of workers believe that lack of alignment within a team impacts the outcome of a task or project. Similarly, 86% actually point to lack of collaboration when it comes to workplace failures.

Yet the more your team grows, the more difficult collaboration becomes. Gone are the days when shouting across desks could

effectively convey a message. The explosion of projects and a growing remote workforce have made regular face-to-face meetings a thing of the past.

Before you know it, collaboration has gone from inspiring to burdensome, consuming your workday and leaving little time for actual creativity. A study of more than 300 businesses published in the Harvard Business Review claims that employee time spent answering emails, attending meetings, and doing other collaborative activities has ballooned to more than 50% of the total workday!

According to a Gallup News survey of more than 15,000 professionals, 43% of employed Americans spent at least some time working remotely in 2016. This increased four percentage points since Gallup's 2013 survey.

To overcome this Catch-22, operationally excellent creative teams are using proven tactics and technologies that facilitate seamless, real-time collaboration across their team, key stakeholders, and the entire organization.

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Define Roles & Responsibilities

You've probably heard the phrase "too many cooks in the kitchen." That's why the first step to effective collaboration is defining who should be doing what. This will eliminate a lot of the confusion and back-and-forth that comes with too many contributors.

Here are a few popular frameworks that you can use to make this happen:

RACI:

The letters in this model stand for Responsible, Accountable, Consulted, and Informed. Team members designated as "responsible" are those in charge of doing the actual work to complete the task at hand. The "accountable" role oversees and ultimately approves the task. "Consulted" team members provide input and help ensure the successful completion of the task, while those in the "Informed" bucket are merely kept in the loop, with no work required.

DACI:

DACI stands for Driver, Approver, Contributor, and Informed. Only one person can be the "driver"—the key stakeholder and ultimate decision maker. The "approver" provides feedback and oversees the success of the project, while "contributors" do the majority of the hands-on work. Finally, the "informed" role is the same as in the RACI and CAIRO frameworks.

CAIRO:

The CAIRO framework is an expanded and restructured version of RACI. The additional letter "O" stands for "omitted," to help define those with zero project involvement and clearly differentiate them from the "informed."

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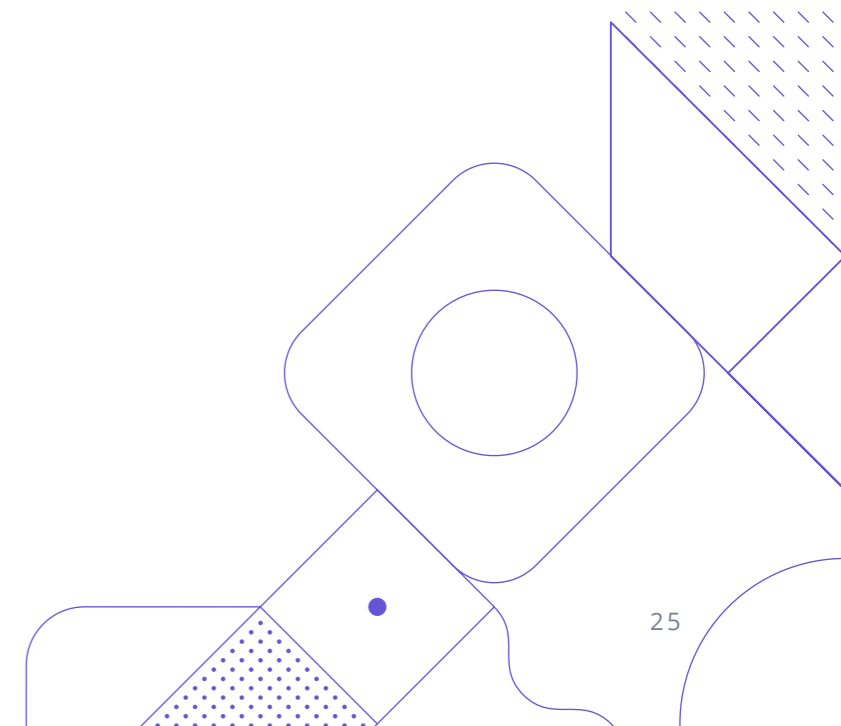
Say Goodbye to Email

Without the ability to consistently meet in person, growing teams often rely heavily on email. While this strategy may work for a team of five or six, larger groups will find themselves lost in a sea of lengthy, convoluted email threads. This gets especially crazy with outside partners or clients who may not always CC the right person. The other downside: while it's no snail mail, email is a far cry from real-time!

59% of in-house creative teams use email to share files between locations.

New collaboration tools exist that power real-time interaction and aide in organizing feedback. The ability to assign tasks, specify reviewers and approvers, and @mention folks are a few examples of how a work management platform can help ensure feedback is given at the right time, in the right order.

For instance, the creative team at Umpqua Bank used email for communication and collaboration for many years. However, as the team doubled in size and project volume quadrupled, this quickly led to forgotten emails, lost revisions, and wasted time. Transitioning communication to Wrike's centralized work space improved collaboration between vendors, stakeholders, and team members.

"I'm able to tap them into jobs at the beginning of a project so they have a heads up that something is coming down the pipeline," explains Natasha Jones, Creative Services Production Manager at Umpqua Bank. "We can collaborate in the beginning, and we can troubleshoot before things go off rails."

Consolidate Feedback

When multiple people comment on a project, feedback collects across notebooks, inboxes, and spreadsheets. Consolidating all of this input can quickly become a full-time job. This is why all project feedback should reside in a single repository that everyone can access—AKA the single source of truth we discussed earlier in the guide (see Planning). Insight into others' comments also leads to discussions that resolve conflicting opinions in real-time.

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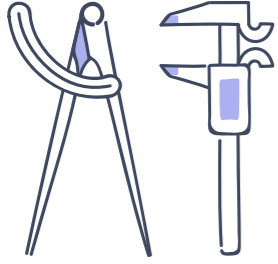
Advanced Technique:

To help make this possible, particularly when dealing with stakeholders and contributors outside your team or company, choose a collaborative platform that integrates with popular communication tools like Slack and Gmail. The ability of these tools to "talk to one another" effectively centralizes communication.
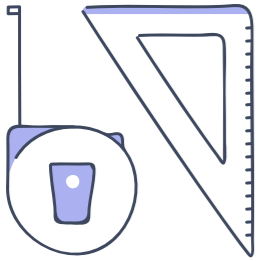
Advanced Technique:

Companies in the early phases of Operational Excellence may collaborate only around project deliverables and capture task details in their workspace. As you progress further in your journey, start recording ideation, meeting outcomes, and postmortems to facilitate collaboration at every stage of your processes.

Give Them Some Space

Collaboration is paramount, but no team (or employee, for that matter!) works exactly the same. Whatever collaborative platform you choose should be flexible enough to allow teams and individual contributors to work the way they want. This will encourage client and cross-departmental collaboration within your platform of choice.

A few features to search for include:

- **Multiple views of the same project**. Not everyone organizes their work in lists. Some prefer timelines, while others relate better to tables.

- **Personal project spaces**. Team members are far more likely to adopt a work management solution if they can also track and manage their own personal projects there.

- **Custom workflows and templates**. While "in revision" is a perfectly sensible project status for creative teams, it doesn't necessarily work for technical teams.

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Create a How to Guide

Regardless of the tools or tactics you choose to foster collaboration across your team, organization, and clients, it's important to clearly define and document protocols for working within these systems. Make sure this how-to guide is readily available. Refer to it often as a way to set expectations and keep collaborators on track. Use it to also decrease ramp time for new employees and customers.

While the specifics will vary based on your team, here are some general questions that your guide should answer:

- What responsibility framework do you use (RACI, etc.), and what does each of the roles entail?

- Is there a certain amount of time your team needs to respond to requests? What are your average project turnaround times?

- Do different teams or customers have different workflows and project statuses? If so, what are they?

- Are there any integrations available?

- Are there any specific guardrails for work? Guardrails can be time and/or budget constraints or other metrics/milestones that allow you to operate without checking back in with stakeholders.

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Section 5

Bringing Visibility
to Performance

When managing a few people or projects, it's easy to keep all the details in your head. Project details are practically absorbed through osmosis as you attend team meetings and overhear office conversation. But once teams reach the 20+ threshold, visibility must be actively sought out to be achieved.

If you're going to ferret out issues and resolve them quickly, you must have visibility into your work. This allows your team to continually improve and optimize your processes. Teams that master the discipline of Visibility can actually anticipate problems before they happen.

The single source of truth we've advocated for throughout this guide is the first and most important step toward having visibility. It's impossible to see where things lie when projects, deadlines, feedback, and files are scattered across platforms. Another helpful element to creating visibility is defining and capturing all your project requirements—roles and responsibilities, deadlines, goals, dependencies, target audience, etc.

Once you have visibility into these key areas, you can create dashboards, reports, and metrics to gain actionable insight into your performance.

Measure Progress

Start with evaluating the progress of your projects. If you've built even a basic process with corresponding workflow statuses, this should be fairly easy. According to operations expert and Wrike Strategic Customer Success Manager Roberto Wantland, one of the best ways to maintain visibility into work progress is through dashboards.

"One of the first things I do to help my clients maintain visibility into their work is to set up a shared dashboard that shows the status of all active project tasks and when they are due," he explains. "This helps managers assess progress and identify any red flags in a single glance, and works to keep contributors on pace."

Forecast Resources & Timeline

Once you have a clear view of progress, determine exactly how much time your team is spending on work. Measure how long your team takes to complete different types of projects (i.e. digital ad versus print), as well as how much time they spend working on requests from specific clients or departments.

This enables you to more accurately estimate delivery time and

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define the complexity of particular types of requests. This leads to improved capacity planning and load balancing, and also empowers managers to make the case for additional headcount when necessary.

Assess Quality & Prove Value

Establishing and recording goals at the outset of projects allows creative teams to reflect on the success of their work. Were these goals achieved? To what extent? What can you do better next time? To make sure this evaluation takes place, record "postmortem" notes directly in your work management solution. In addition, bake a review step into your process.

When projects are successful, teams can use this data as proof of value. This is especially key for creative teams, which are typically viewed as cost centers. For example, Premier Sotheby's International Realty's marketing team manages its projects and processes in Wrike. This allows them a review process where they can revisit a project, demonstrate their department's hard work, and justify decisions.

"When you're working with 900 individual personalities and independent contractors, being able to prove your value is crucial,"

says Christina Anstett, Sotheby's Direct Marketing Specialist. "Pulling a report and showing them how many jobs were completed on their behalf during a certain time frame is very, very powerful for us."

Value recognition and executive support buy-in are among the top 5 challenges for in-house creative leaders.
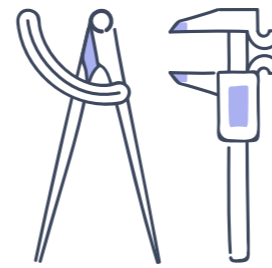
Advanced Technique: Identify Bottlenecks

If you're using a workspace that effectively captures all the metadata around your projects and processes, you should be able to run a report for projects with missed deadlines or unmet objectives. Next, look for any commonalities between these initiatives. Did they involve a particular asset type or creative brief? Are projects getting stuck in the same process step? Are certain team members always involved?

Answering these questions allows you to spot and address any bottlenecks negatively impacting performance. Identifying issues related to specific team members also presents the opportunity for valuable coaching around skills like time management, organization, and communication.

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Establishing a Culture of Excellence

Operational Excellence isn't a quick fix for teams struggling with collaboration or process. It isn't a Band-Aid for poor planning and performance, or something that can be achieved with a new software or service. It's a way of life. A lens through which all work must be continuously scrutinized. A movement that requires a cultural shift within your company.

You can't come to the office Monday morning and demand your team be operationally excellent. Instead, you must commit to nurturing this way of thinking as your team and projects scale.

Everyone on the team must be bought in. It takes work. But once everyone understands his or her contribution to the larger picture, the result is truly transformational.

Here are a few steps you can take to cultivate a culture of excellence at your company:

1. **Mandate for change**. Achieving Operational Excellence is impossible without conviction. Elect (or be!) a champion committed to shepherding and encouraging the team along this journey. Ideally, this champion will have executive support and a clear mandate to improve operational efficiencies. Having buy-in from the top of the organization can make the difference between long-term success or fast failure.

2. **Get buy-in from below**. Despite buy-in from above, those on the front lines of the business can be resistant to change. Helping team members see the personal value of Operational Excellence is much more effective than any mandate from on-high. Thankfully, this shouldn't be hard. The data from HBR's recent report on operational effectiveness is clear: Teams that achieve Operational Excellence are happier, produce higher quality work, and have better work/life balance.

3. **Make it a habit**. Transformation requires creating new habits. Establish a weekly planning and review meeting where everyone looks at a single source of truth for work. Discuss what works and what doesn't. Start optimizing smaller daily tasks and weekly processes. This ritual provides an invaluable forum to nurture the cultural habits and transformational change you want. It teaches team members to become stewards of Operational Excellence.

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Creating a culture committed to embracing continuous improvement breeds lasting, meaningful change for your team and the organization at large.

The speed and quality of your work increases. Communication and trust between teammates strengthens. And most importantly, your customers' experiences improve.

You've taken the first steps to Operational Excellence by reading this guide. Now is the time to put one foot in front of the other and make your way from React, to Organize, to Scale, to Optimize. Focus on planning, process, collaboration, and visibility to illuminate your path.
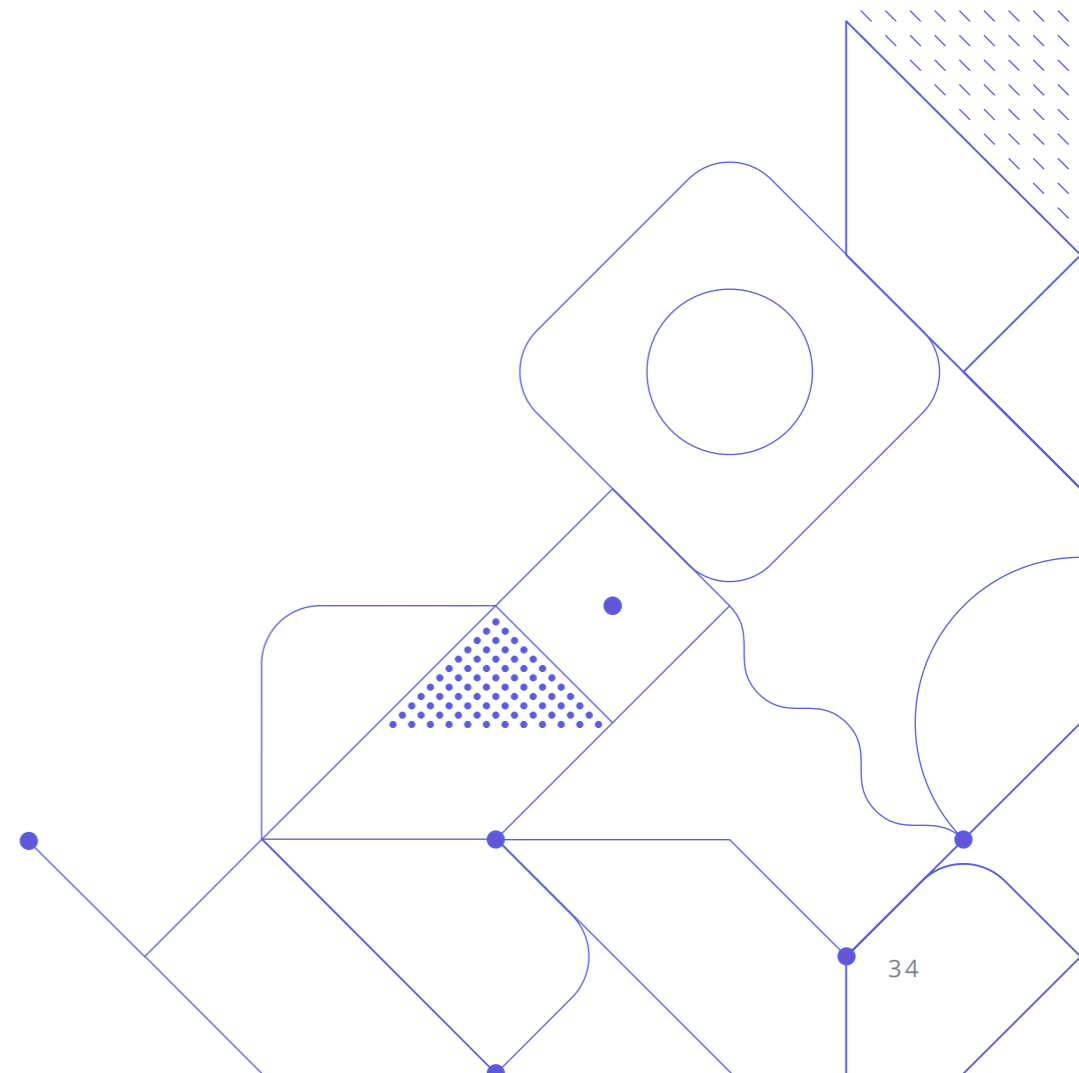
Wrike has helped companies like Stitch Fix, Premier Sotheby's International Realty, and Hootsuite achieve Operational Excellence, and we can help you too.

With Wrike, creative teams can:

- Minimize fire drills, missed deadlines, and unmet objectives
- Increase creative output while improving quality and consistency
- Establish a single source of truth for all project materials
- Communicate and share feedback in real-time
- Discover opportunities to improve the creative process

To learn more or ask a question, visit Wrike.com or contact us. Or, to get started with Wrike right away, sign up for a free trial!

Get started *for free*