ADSUBCULTURE

wrangling creative chaos

PEOPLE IDEAS CULTURE
PROCESS

AD AGENCY PROCESS & ROADMAP

by Ed Burgoyne

HOW THE AGENCY WORKS 2.0

Every place needs a road map.
Use this guide to build your own model.

This workflow model is for an agency that has shared project management, where project managers work together with account managers and producers to complete projects.

Other models (such as integrated production) can be found on the adsubculture.com website.

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HOW YOU SHOULD WORK.

This is only one guide,
and shows just one path for completing work.

Process means nothing, if it prevents the creation of great work.
Learn to follow the key steps, but also learn when and where to adapt them (even on a project-by-project basis) to ensure that your team creates and produces the best work possible.
It's more important to set and establish the rules and expectations for how the work gets done, then the way it gets done.
It's ok to be out of your comfort zone, that's where great ideas can form and develop.

PRACTICE ISN'T ALWAYS PERFECT.

At the core of the creative agency is an understanding that you make stuff. Sometimes its out of the box, sometimes its the norm.

At the core of the creative agency is an understanding that you make stuff, you get your hands dirty, and you step out of your comfort zone in order to make things happen. This document may look tidy, and for the most part you should follow the proper steps. However, that doesn't mean you shouldn't collaborate with others or add/lose steps to accomplish a task. Creating great work requires the whole team to work together.

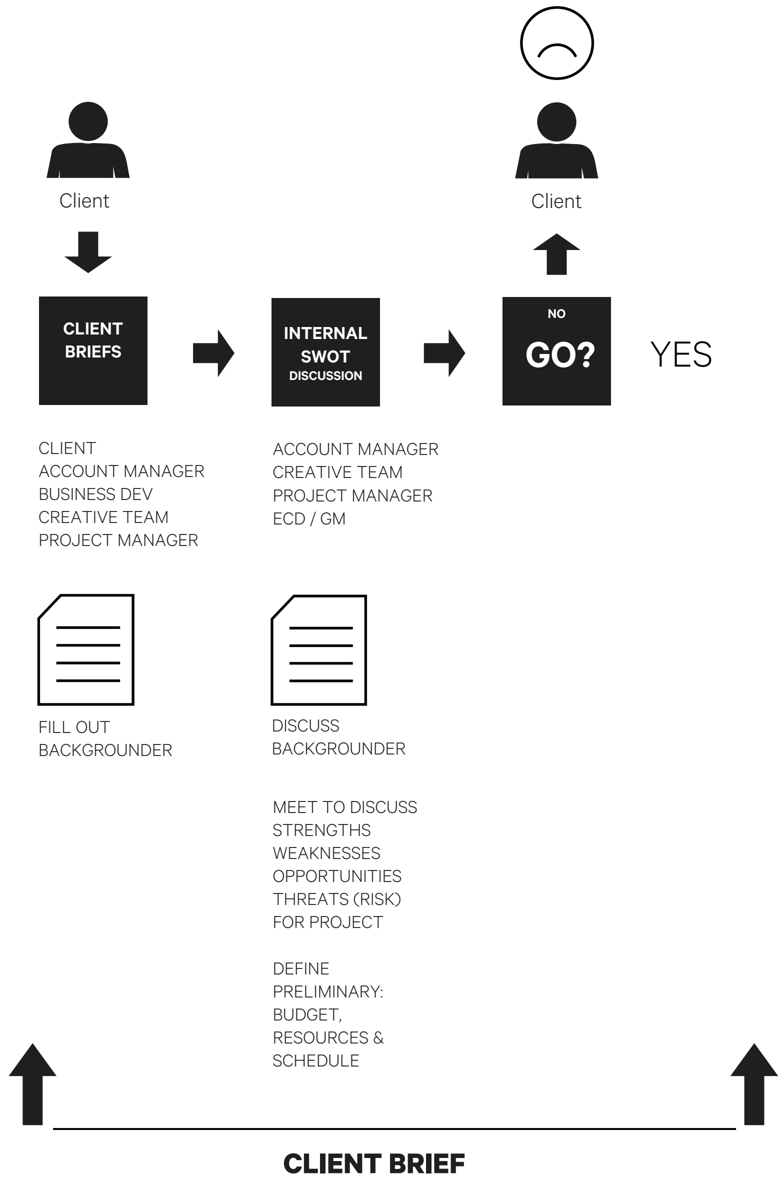
Remember, creating art isn't always a linear process (it can be very iterative at times). Following a path helps you to check off the boxes – helping to make sure that when things go off track you are still headed in the right direction.

BEFORE YOU BEGIN: ASSESSING IF A PROJECT IS RIGHT FOR THE AGENCY.

Not every job is going to be right for your agency. Rinse and repeat, and say it again. Not every job is going to be right for your agency.

While every project is worthy of having a client brief the agency on a potential project, it's up to the team to decide if the project is a good fit for the agency. To help make a decision, use a "Project Backgrounder," that lists out all of the questions needed to determine the SWOT risks of a particular project. A group in the agency should then reviews the risks to determine if the project is right. Discuss the strengths, weakness, opportunities and potential risks of the project. Once the group decides if the project is a go, you then inform the client – but be strategic about it. Your job is to be a partner, as well as a strategic guide to your client.

ASSESSING THE ASK -
EVALUATING THE CLIENT BRIEF / RFP / RFI



STEP 1:
DEFINING THE PROJECT & ESTIMATING COSTS.

…and the job still might not be right for the agency.
Defining a project and how much it's going to cost is an important step in the process.

Ok, so the project is worthy of the agency.

This is now the time where you assess available resources (who's going to work on the project internally and externally), how long it's going to take, and how much things are going to cost.

You may find yourselves coming up short and still passing on the project, you may also decide at this point to take on the project if it makes sense from a relationship or agency new business standpoint.

So who's the lead in this case? Well it depends. For most if not all projects, the lead is the assigned project manager. If it's for a new client, new business or something beyond the norm, an account team member may take the lead.

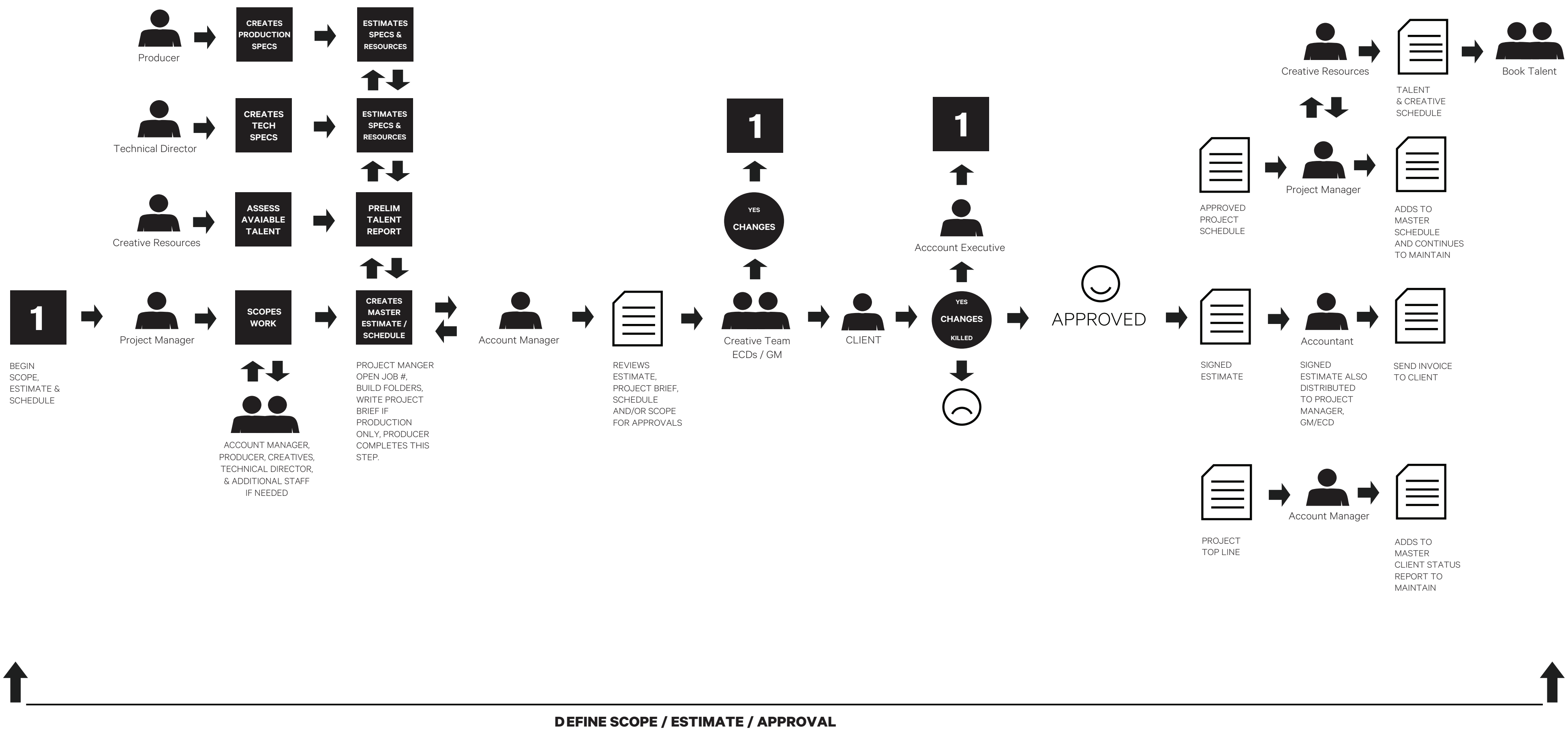
The team lead connects with, the technical director (if needed on interactive projects) who helps to scope out development projects, the creative resources manager who will define the creative needs and the producer who will define the production resources, such as the production team or outside resources / services required for the project.

The team lead will also build out a schedule and create an internal cost worksheet that will be used to estimate the project.

Both the schedule and estimate is then routed and approved by the account lead, assigned creative lead and upper management for approval to send to the client.

Once the project is approved by the client, the assigned project manager or producer will set up folders on the server, schedule the work, inform accounting of billing requirements and set a time for the project kick-off.

STEP 1:
SCOPE & ESTIMATE



STEP 2:
THE CREATIVE BRIEF:
BEGINNING THE STORY.

Have we started yet?
Seems like a lot of steps just to get to this place, but trust me, those steps were worth it.

Clarity is very important. At a creative shop, what you are going to be-tasked to do is, well is kind of vast. Having some direction will save you from spinning your wheels on an assignment. A clear creative brief spells out the challenges, but also places some limitations so you don't burn through all of the budget before completing the assignment.

For creative or strategic assigments it will fall to the assigned account manager, or your internal strategist to generate a brief. In both cases, the brief gets approved by the client before work begins.

At this point if you are asking yourself, I just got a brief from the client, can't I just run with that?

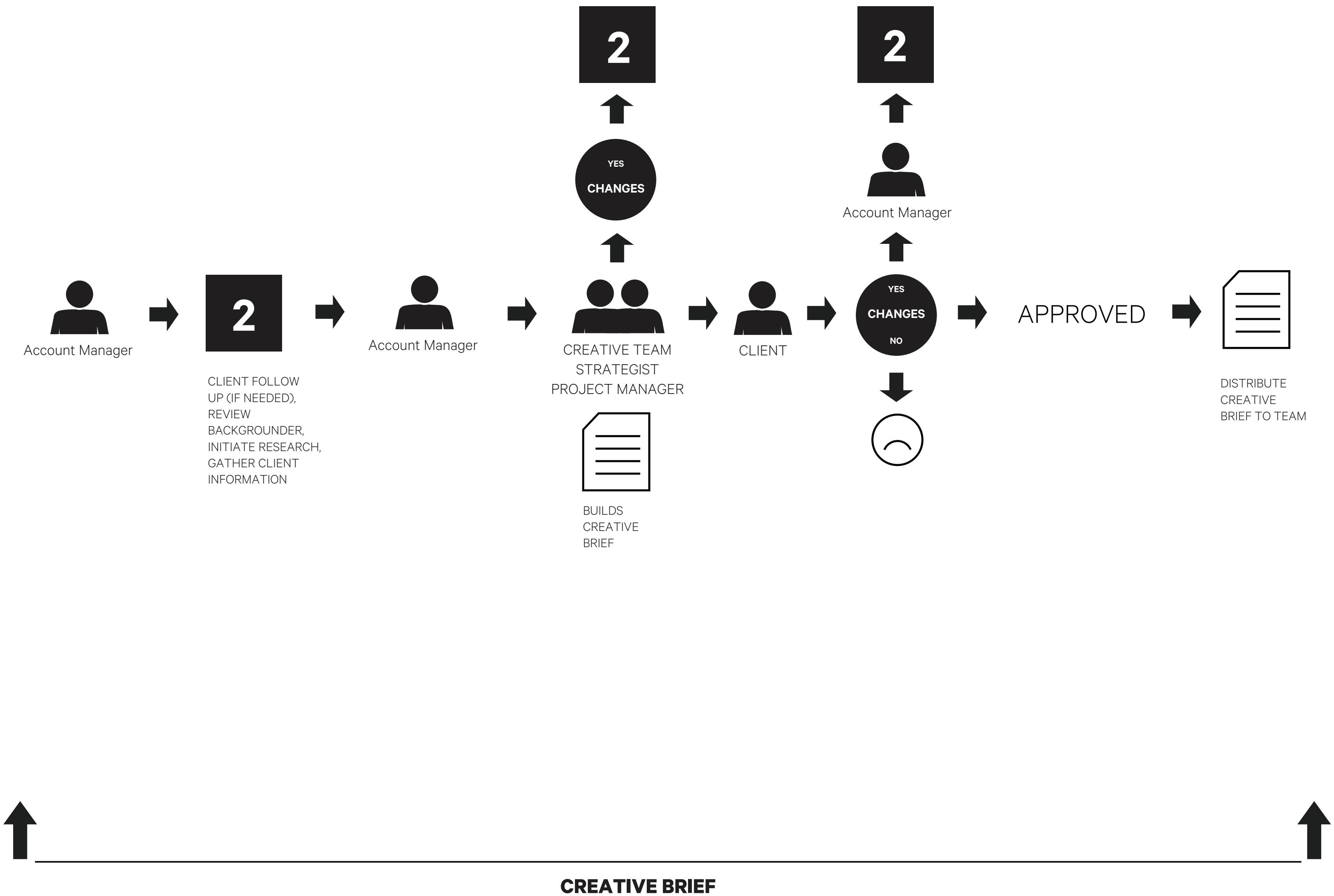
Nope.

In an agency a brief needs to be augmented in a few ways. There may be a whole strategic excercise that either was completed or needs to be completed in as part of the creative assignment. You need to add your timing, and your budget information. But more importantly, you need to question the brief itself. Is it the true ask? Or, has the client forget something?

Complete the brief and get the client to sign off. Have them approve it, just like you make them approve original scopes of work. This helps to prevent scope creep and helps sets expectations.

Remember, you are not only storytellers, you are storybuilders. And as storybuilders, its up to you to work from a strong foundation. It's up to you to make sure the agency has a brief that makes sense and the agency can build from.

STEP 2:
THE CREATIVE BRIEF.



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STEPS 3&4:
YES, YOU CAN START NOW.

Kicking off on the right foot.
Before you fall flat on your face.

By now, I hope you are forming the idea that there seem to be two types of projects the agency handles, ones that falls under the larger “creative strategy” umbrella and ones that are more production oriented.

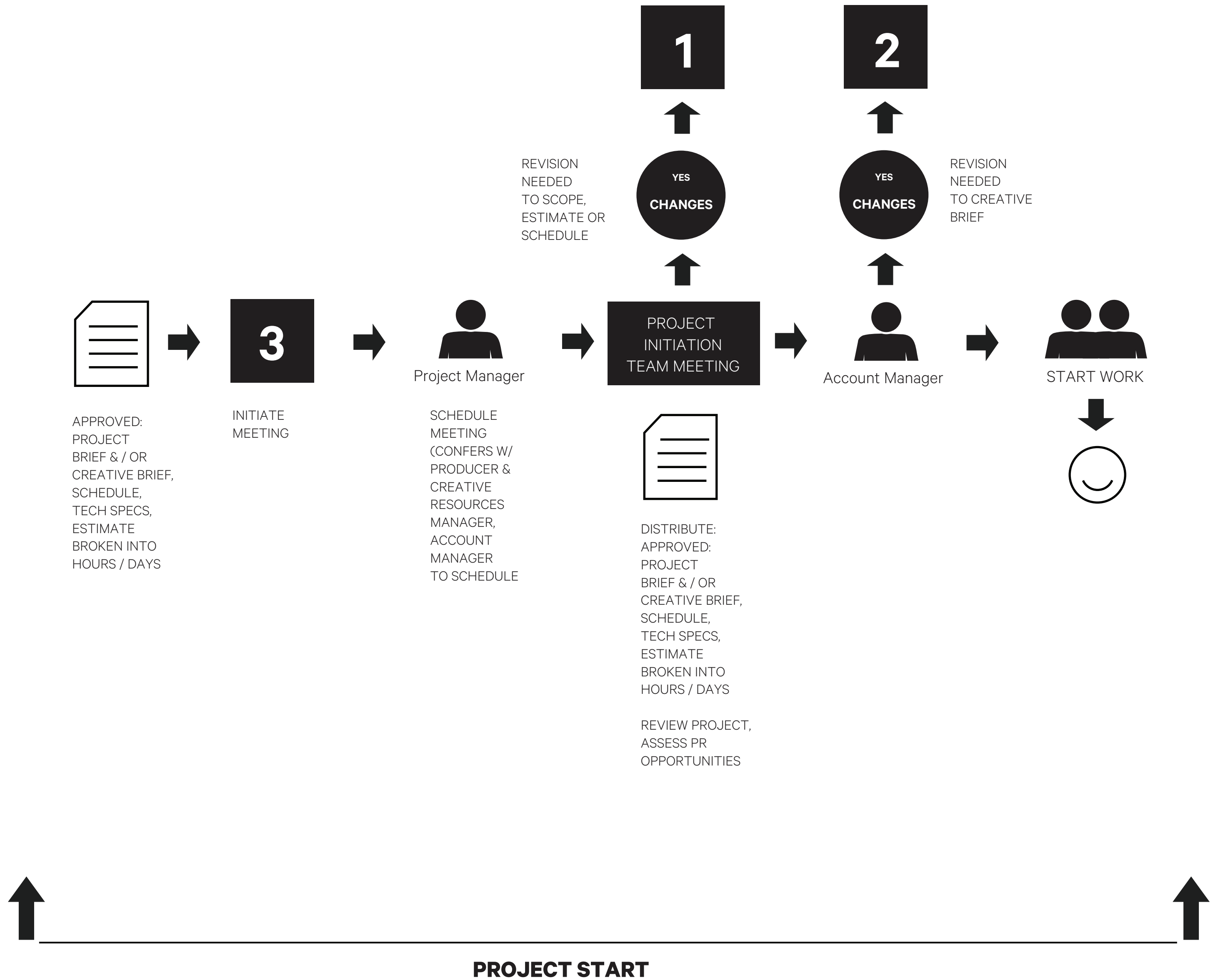
Either type of project requires a start up meeting.

For main creative or strategic assigments it will fall to the assigned account manager to set up a meeting with the client. The project manager will set up the meeting with the team internally.

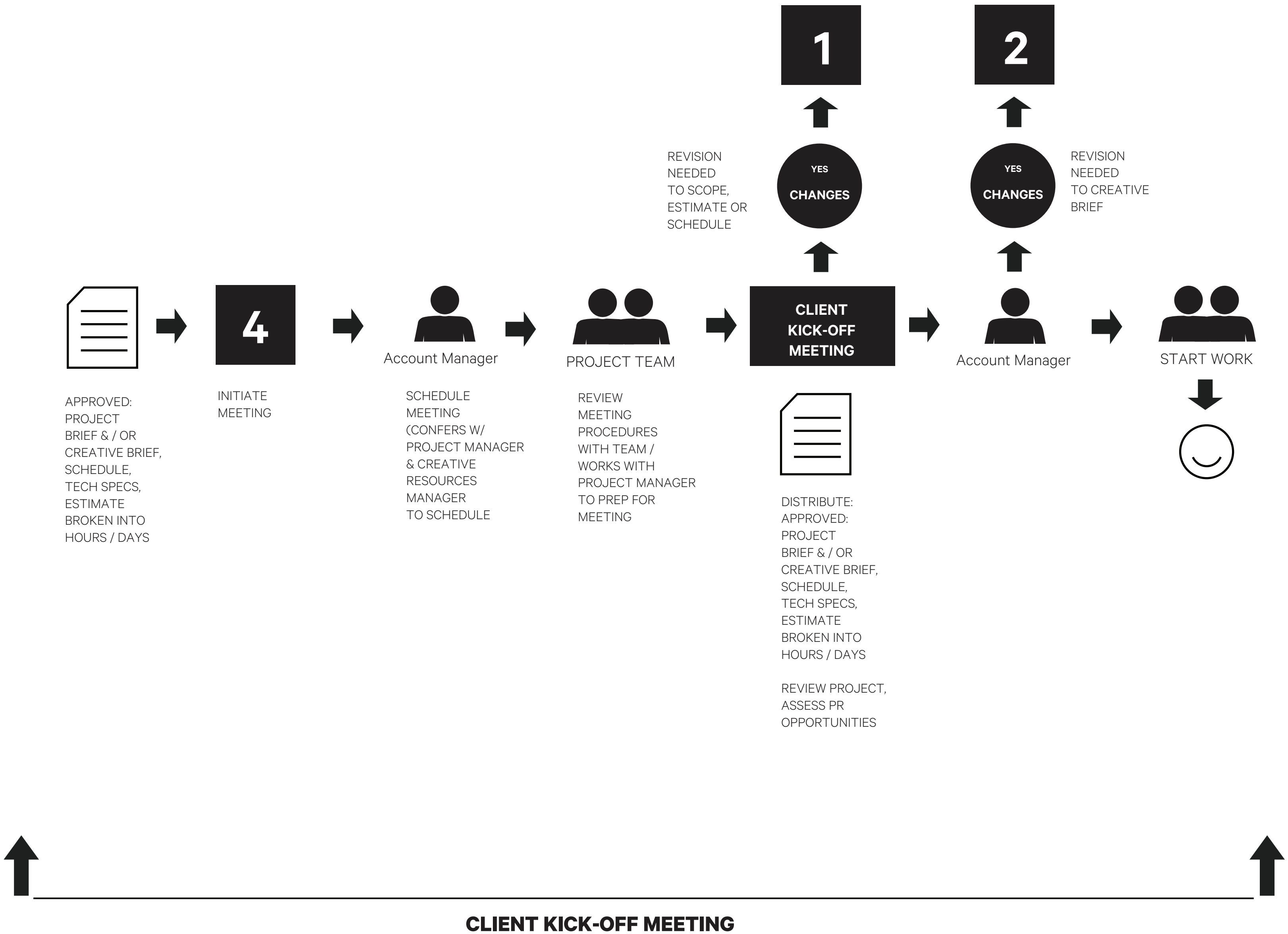
For production job starts, the project manager will be the main lead is initiating and holding the job start meeting.

In either case, the team manager is then responsible for following up with the client or the team with a recap of the meeting, next steps, and will be tasked with following up with the client in regards to any outstanding issues.

STEP 3:
PROJECT START.



STEP 4:
KICK-OFF MEETING.



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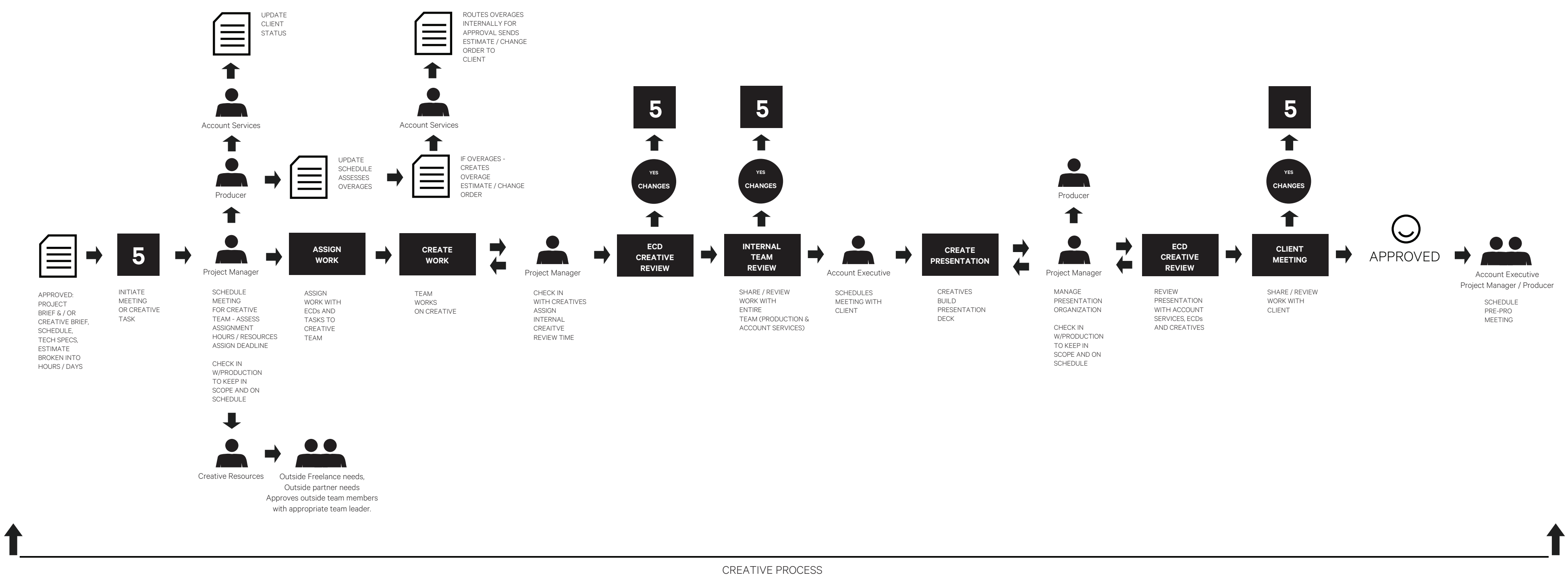
THE "WE GET TO COME UP WITH COOL STUFF & GET PAID FOR IT" STAGE.

At your agency you should treat every project as a creative assignment.

Once the project initiation or job start meeting happens, its off to the races. It's important during the creative phase that everyone works as a team and checks in with each other at this stage. The biggest risk is blowing schedules or budgets. This is why you depend on each other to keep the entire project on track.

Team leadership happens this way during the creative process, the **project manager** keeps the team on task, keeps track of the master schedule and overall resource costs, if needed, consults with the **producer** to keep the production team prepped, on task, keep track of the prodution schedule and potential resource costs and need changes, **the account manager** keeps the client informed and happy.

STEP 5:
THE CREATIVE PROCESS.



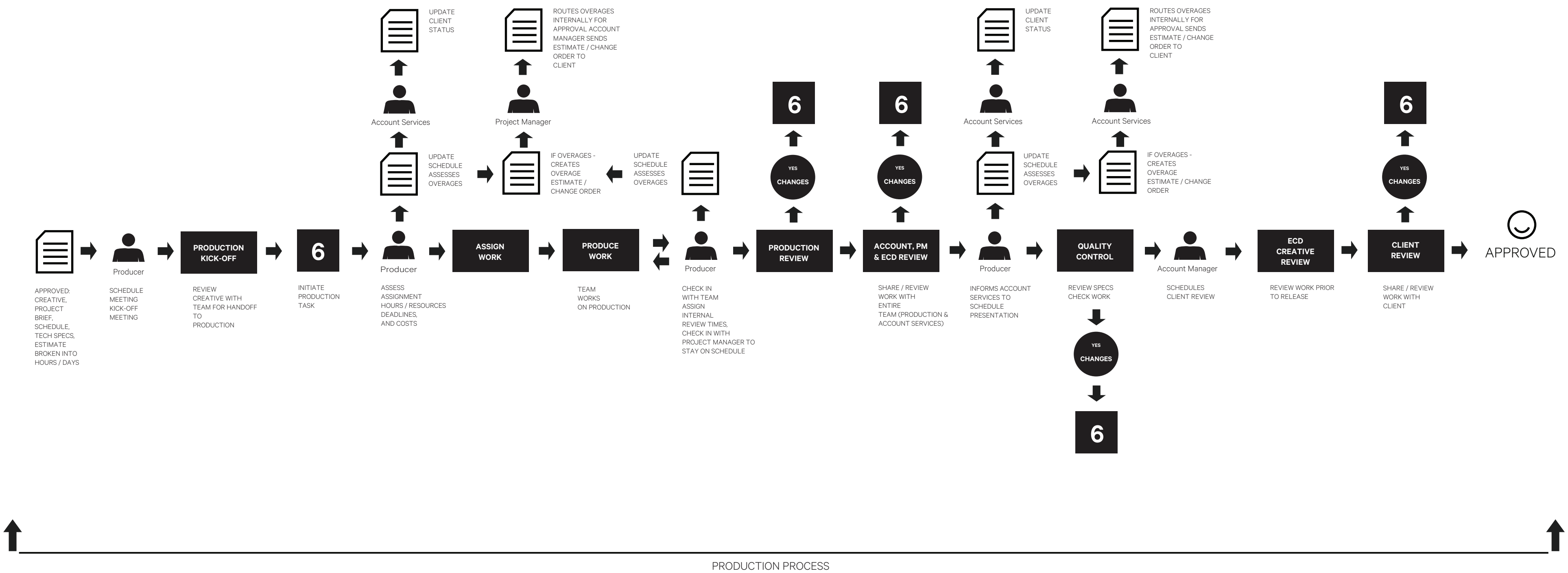
STEP 6:
THE “WE MAKE STUFF TOO” STAGE.

A large part of your culture should be the fact that you make stuff.
Craft is important to your success and you should care about the production process.

Production at an agency can range across media, platforms and well almost anything. Sometimes you hire people to help out, sometimes you make it and somestimes it is a large collaboration with outside resources.

Your producers are very important during this phase of a project. They are the team leaders – the conductors running the train. However, that doesn’t mean they work in a vaccum. Part of what makes an agency special is your attention to craft. That means that the creative teams play a role in your production process.

STEP 6:
THE PRODUCTION PROCESS.



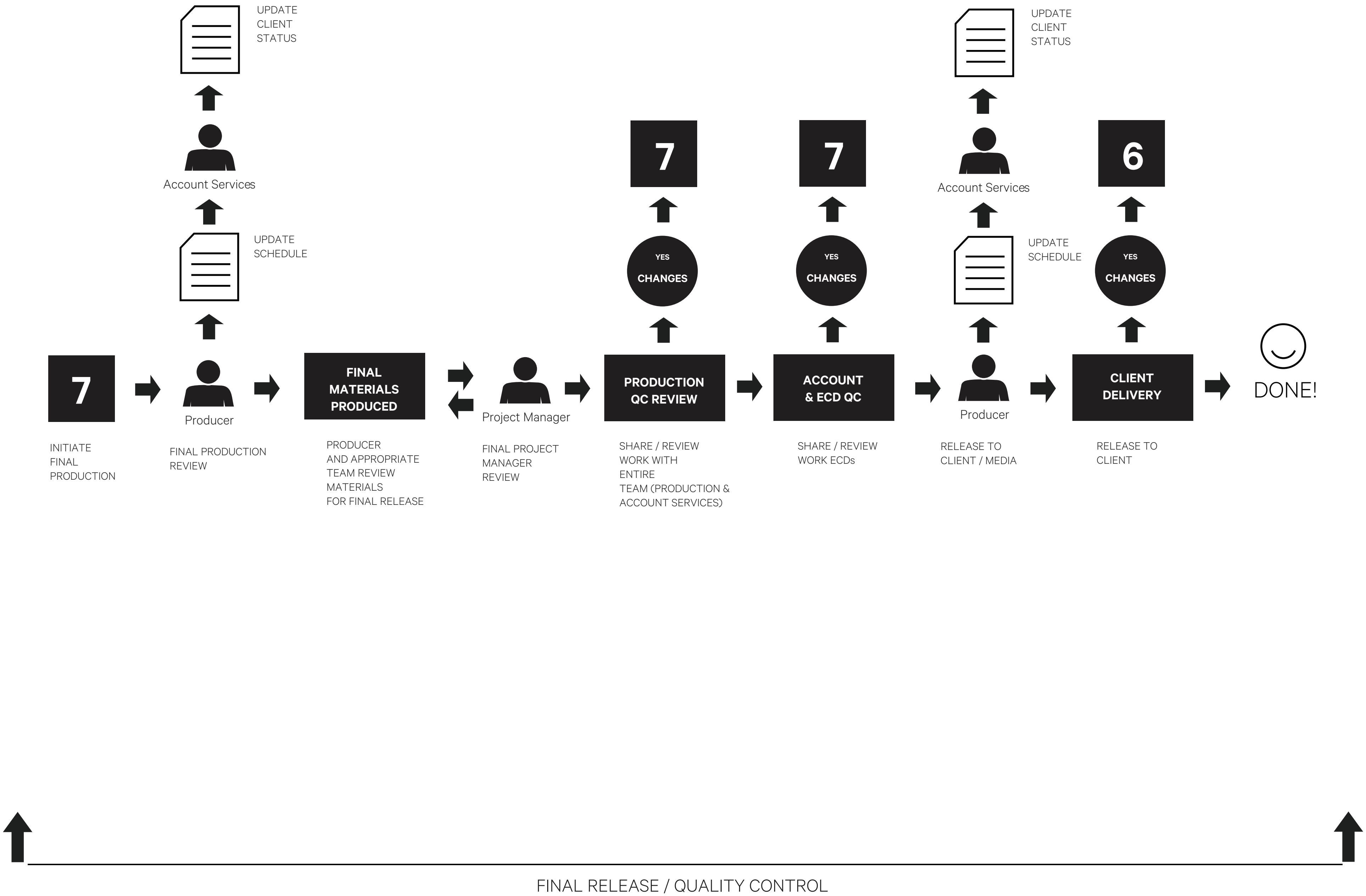
STEP 7:
KEEP UP THE QUALITY BEFORE YOU RELEASE IT TO THE WORLD.

Phew! Almost done.
Last call for quality control. An important last step in the process.

The last step in your process is quality control. No matter what type of project the agency produces or creates, we all participate in making sure the work that gets out is as perfect as it can be. While our lead here at this stage is the project producer. You owe it to our entire team to participate with a clear head at this stage in the work.

Take the time, double check it, play with it, test it, check all links, go over the entire user experience, phone numbers, web addresses, spell check, etc. This is your last chance to get things right and the last thing you need is to get a format or phone number wrong, some grandma in the midwest is going to be pretty cross with you if her number winds up on some social media contest site instead of your clients.

STEP 7:
QA.



UPDATE CLIENT STATUS
Account Services
UPDATE SCHEDULE
7
INITIATE FINAL PRODUCTION
Producer
FINAL PRODUCTION REVIEW
FINAL MATERIALS PRODUCED
PRODUCER AND APPROPRIATE TEAM REVIEW MATERIALS FOR FINAL RELEASE
Project Manager
FINAL PROJECT MANAGER REVIEW
7
YES
CHANGES
PRODUCTION QC REVIEW
SHARE / REVIEW WORK WITH ENTIRE TEAM (PRODUCTION & ACCOUNT SERVICES)
7
YES
CHANGES
ACCOUNT & ECD QC
SHARE / REVIEW WORK ECDs
UPDATE CLIENT STATUS
Account Services
UPDATE SCHEDULE
Producer
RELEASE TO CLIENT / MEDIA
6
YES
CHANGES
CLIENT DELIVERY
RELEASE TO CLIENT
DONE!
FINAL RELEASE / QUALITY CONTROL

TO QUOTE MONTY PYTHON, “I’M NOT DEAD YET.”

Doing a post-mortem; Putting the project to rest, so you don’t create the walking dead.

Pfew! The project is complete and out the door. But your work is not yet done. A part of the process still occurs after the work has left the door.

The production team is responsible for completing their financial work-sheets, reviewing invoices and insuring that all bills are in properly.

Your editting, development team and design staff are responsible for properly organizing their files on the server so they can be properly archived AND more importantly are put to sleep in a way that the work can be reawakened and reused. That means completing a project post mortem.

Your project managers, should also complete a project end form as well, and all projects should get a final review with your PMO.

Keep records so you can “resurrect” the project again if needed.