



Workloads are increasing, and the challenges that in-house creative teams are facing in their work are becoming more complex. However, the collective wisdom of experienced in-house creative leaders is vast and growing stronger over time. That's why InSource members find it worthwhile to take time out of their busy schedules for face-to-face conversations with their peers to share practical ideas and best practices in their work.

A group of in-house creative leaders came together for a lively discussion on The In-House/ Agency Relationship and Creative Management Challenges and Solutions on May 23, 2013. Facilitated by Andy Brenits, President of InSource and Creative Services Leader at APS, this InSource Roundtable was hosted at the APS Learning Center in Phoenix, Arizona.

Creative Outlets/Hobbies Outside of Work Shared by Our Roundtable Participants:

"I'm learning that gardening is a great way to learn patience, and I do special projects around the house."
• "I like cooking and traveling." • "I enjoy spending time with my dogs and my friends; I try to relax." • "I teach and foster golden lab dogs as rescue work. I also collect vintage toys." • "I like to paint and garden, enjoy my dog, and do various humanitarian projects." • "I play music and travel. I particularly enjoy theme-based travel." • "I like to travel, read, and cook." • I draw, ride my bike, travel, and spend a lot of time on my iPad." • "I like to bake and plan birthday parties with my children."

InSource provides the following takeaway messages from this roundtable.

- Everyone has stories to tell about job title struggles, understanding sensitivities over the use of the “director” title in the corporate setting. Earning respect in one’s organization can be done in many ways, not only formal job titles.
- Participants shared information and experiences with outside agencies, focusing on what they prefer in working with outside agencies. In-house creative leaders like to work with outside agencies that are direct and honest (e.g., some agencies may say, “We don’t want to see it go that way.”). It was noted that some agencies are good on strategy, but may not be as good on execution/production issues. Some agencies show their willingness to work with the in-house creative team. Yet, sometimes the complexity of the work and processes requires recognition that the in-house creative team is in the best position to tweak the creative work beyond what an outside agency presents. The agency’s willingness to be open to such tweaks is important.
- Cumbersome brand style guides (e.g., multiple binders or a 400-page tome) are not practical for everyday use by the in-house creative team and throughout one’s company. Prepare a far less lengthy document for others.
- Effective creative professionals know a good place to start in working with an outside agency is to determine “What do I need?” as well as “What works and what doesn’t work now?”
- Participants have witnessed the “consultant halo” effect when working with outside agencies; an in-house creative leader may say something for several years yet when an outside agency comes in on the first day and says the same thing, others embrace it as a new insight.
- Perceptions of outside agencies may include:
 - > “Agencies are more creative.”
 - > “Agencies own the brand.”
 - > “It’s cheaper to use an outside agency.”
 - > “Agencies can be faster.”

However, metrics can dispel these perceptions. In-house creative leaders can take the initiative to make a business case with metrics for when and under what circumstances the use of outside agencies versus in-house resources makes sense.

- Some in-house creative leaders have been able to make a strong case to convince others that having a monthly freelance budget for workload crunch times is good business.
- Having a chargeback system in place can help in-house creative teams compete better with the creative work of outside agencies; however, it’s best to avoid using “in-house is cheaper” as the only rationale for work assignments. Rather, the in-house creative

team is best at project management and they know the brand. A triage process for in-house work is useful to set priorities and determine what is best outsourced to others.

- When people understand the true costs of in-house work, it may provide some perspective. For example, using expressions such as “the \$100 comma” is one way to educate people about the cost of multiple revisions and encourage them to minimize the number of rounds of changes.
- Even when chargeback systems are not in place, tracking time spent on all projects is important data for in-house creative team managers.
- Many different tools are available for project management, including free or low-cost solutions (AtTask, Basecamp, Asana), mid-level/cost solutions (Workamajig, RoboHead, TimeFox), and more expensive solutions (Adobe Creative Cloud, Clients & Profits, ProofHQ). Participants like the idea of sharing project management tools with outside freelancers and agencies.
- Creative briefs are important. If the creative brief is incomplete, the outcomes may not be successful. People need to use forms to help them organize their needs and thoughts. Another option is offering “a 15-minute creative huddle” where elements of the creative brief are identified and then an estimate of cost and time can be made.
- Creative briefs are important for the client to spell out what is needed and wanted, along with approvals for in-house and outside agency work. In fact, some outside agencies will charge less when clear expectations are articulated via a creative brief, compared to when no creative brief is provided.
- Consider making the in-house creative team present their work to the client via creative brief elements, which can result in higher respect for their work and the value of the creative brief to the client. Also go back later to the client to ask if the execution, based on the information in the creative brief, was successful.
- Participants have found that collaboration with an outside agency works best when the in-house creative manager can work directly with the agency creatives, not only communication via the account manager. Likewise, it’s best when agency creatives accompany the agency’s account manager for key meetings and interactions with the in-house creative leader.
- The use of an app in which people can briefly share the content of information exchange is preferred to time-consuming emails. Create a centralized and archived conversation mechanism via social media to relevant people on a project (with restricted access) to keep everyone informed. More attention to email etiquette can lead to efficiencies; emails with cc function are not a good conversation tool.

- Moving forward beyond the review/approval of work generated by outside agencies, several participants would like to have their in-house creative team become brand consultants for the outside agencies who work with them. How to coach one’s team on this role and monitor how it’s done will require practice and is considered a work in progress at this time.
- Take field trips as an in-house creative team for inspiration and team building.
- Consider using outside agencies for strategy development only; make it clear the in-house team will use the research/data for in-house campaign production.
- Just as agencies can scale up or scale down, in-house creative teams can do the same by using freelance talent and short-term contractors.
- Applying the principles and techniques of the work of Myers & Briggs can be useful for in-house creative leaders in determining effective approaches in the workplace.
- Use metrics and spreadsheets to make a strong business case. However, be aware that not everything under the rubric of creative work should be reduced to spreadsheet decisions.

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