Collaborative Work Management for Creative Teams: A BUYER'S GUIDE

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Table of Contents

| So, you're interested in collaborative work management | 3 |
|---|----|
| Question I: Will it streamline the creative request and intake process? | 4 |
| Question 2: Does it make it easier to manage my team's time and resources? | 6 |
| Question 3: How closely will I be able to track and measure my team's progress? | 8 |
| Question 4: Will it improve collaboration across my team, company, and clients? | 10 |
| Question 5: Does it support proofing, approvals, and asset management? | 12 |
| Question 6: Will it allow my team to work the way we want? | 14 |
| Question 7: How will it help me prove the value of my team and optimize our results? | 16 |
| Your Collaborative Work Management Checklist | 18 |
| Ready, Set, Evaluate | |



So, You're Interested in Collaborative Work Management

Being a creative is not for the faint of heart. Requests are many and resources too few. Tight deadlines and tighter budgets stretch your team paper-thin. Communication is haphazard, status updates go missing, and feedback loops never end. Juggling projects across email and spreadsheets is stressful and inefficient.

The right project management tool means better planning and processes, easy collaboration, and greater visibility into your creative team's work. The problem: there are hundreds of tools designed to help improve task management and productivity. Each promises to be better than the next, and they all look decent on paper.

The prospect of weeding through these solutions to find the right work management tool for your creative team is enough to make you throw in the towel. You don't have time to waste! That's why we've compiled this buyer's guide.

It provides seven key questions to help you quickly and effectively evaluate today's top collaborative work management solutions.

You'll find a feature and capability checklist at the end of the guide so you can confidently choose the perfect fit for your team.



Will it streamline the creative request and intake process?

Creative briefs are meant to be the first step in the creative process. But if your brief is too detailed, requesters find ways around it, muddling your process and scattering requests across email and chat. If your brief is too general, requests will be vague, forcing designers to go back-and-forth with requesters to fill in the blanks.

A 2013 survey of nearly 300 agency leaders reported **52%** of respondents found creative briefs lacking in focus. **27%** found them to be incomplete and inconsistent.

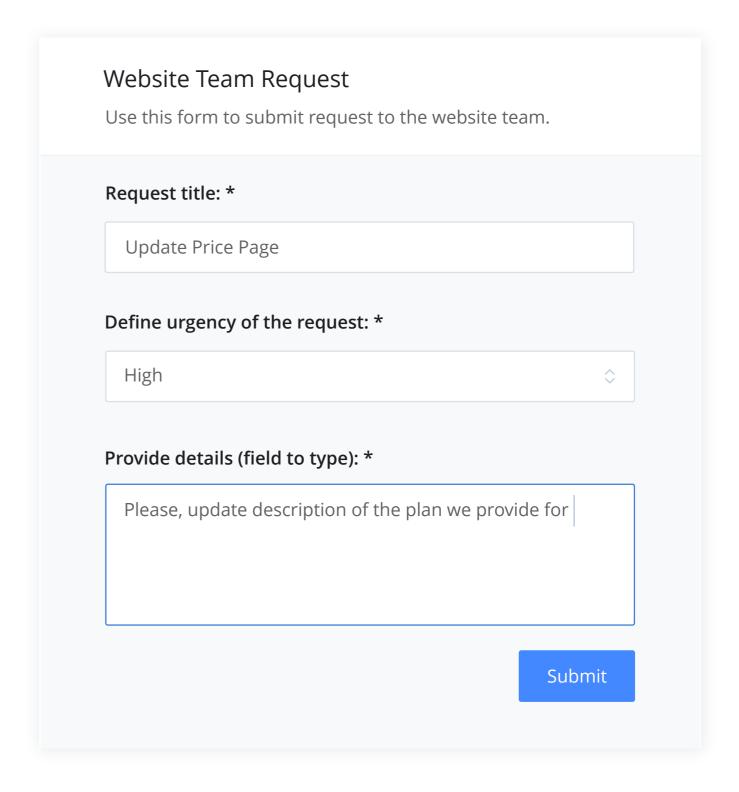
A good collaborative work management system adds structure to the intake process. It simplifies creative briefs for requesters, while ensuring creatives receive the relevant details they need to be successful.

"To make sure we get all the information we need without asking unnecessary questions, my team uses Dynamic Request Forms," says David Mekerishvili, design team lead at Wrike. "The questions change based on the information the requester provides as they fill out the brief. For example, if the requester is a marketer and the project is a web page, they will get different questions than if the requester is a sales rep asking for a presentation."

You can also embed Dynamic Request Forms on public web pages for external clients. When a request is submitted, a project or task is automatically created and assigned based on teammates' designated roles and responsibilities. Eliminating the time it takes to manually distribute projects further simplifies the intake process for creative teams.



- Dynamic Request Forms
- Embeddable request forms
- Automated project creation
- Automated project assignment





Does it make it easier to manage my team's time and resources?

E-books. Motion graphics. Wireframes. Revisions. Creative teams are pulled in many different directions each day. Juggling competing deadlines and balancing workload across team members is a major challenge for creative directors.

Resource allocation and time management are never checked off your to-do list. Project goals and requirements inevitably change, requiring management to take stock of remaining resources, shuffle priorities, and effectively communicate these updates to their team. Good luck managing all that in a spreadsheet!

People are your most important resource. A good resource management solution helps managers visualize workloads so they can accurately forecast commitments and plan work around their team's availability. At a glance, tap into your team's workload and instantly notify them when schedules or priorities shift. Choose a solution with a robust workload view that shows you who has reached full capacity, and who can take on additional tasks.

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. You'll also 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.

Finally, a <u>Gantt chart view</u> should allow you to add or reschedule projects in a couple clicks. Dragging and dropping projects or tasks on the timeline changes their due dates, and shifts the corresponding deadlines of any dependent tasks or subtasks. Assignees are instantly notified of these updates.



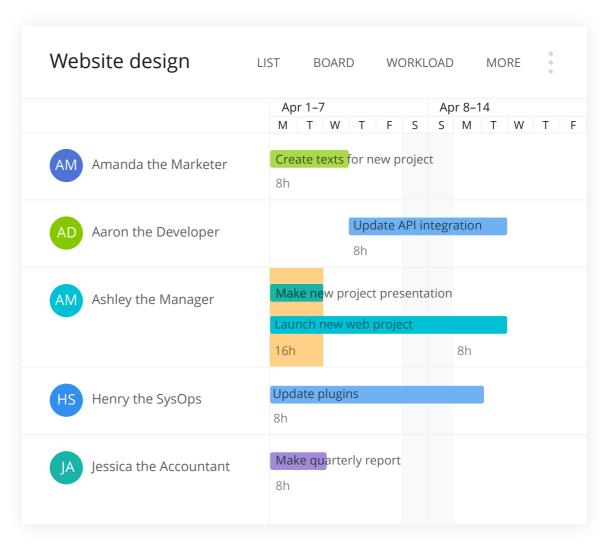
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I like the Gantt chart view to be able to see over the course of a project when things are happening. There are some things that I work on where I have to align milestones. The timeline view is the visual thing that I need to be able to see.

— Eve Maidenberg, Creative Services Director, Stitch Fix

Templates are another important time management feature. Saving common initiatives as templates within your work management platform enables you to simply clone them each time you start a new project. Rather than start each project from scratch, key components like dependencies, task duration, assignees, and reports are copied over. Knowing exactly what a project entails makes scheduling and execution less stressful for everyone involved.

- Easy task scheduling and assignment
- Gantt chart and calendar work views
- Workload views
- Drag and drop project/task rescheduling
- Automatic scheduling notifications
- Project templates
- Resource management tools





How closely will I be able to track and measure my team's progress?

When managing a few people or projects, it's easy to keep all the information in your head. Project details are practically absorbed through osmosis as you attend team meetings and overhear office conversation. But as creative teams grow, maintaining visibility becomes difficult.

Gone are the days of shouting across desks for status updates. The explosion of projects and a growing remote workforce have made regular face-to-face meetings a thing of the past. Verbal updates are imprecise and easily forgotten, and tracking progress via email is a recipe for inbox avalanches, confusing threads, and forgotten CCs.

The last thing you want to do is micromanage or bog down your team with frequent check-ins. With the right collaborative work management tool, you won't have to. Instead, you'll be able to see work as it's being done. You'll even receive automatic, real-time notifications when high-stakes projects move forward—or fall behind. This level of visibility allows you to anticipate problems and take action before they happen.

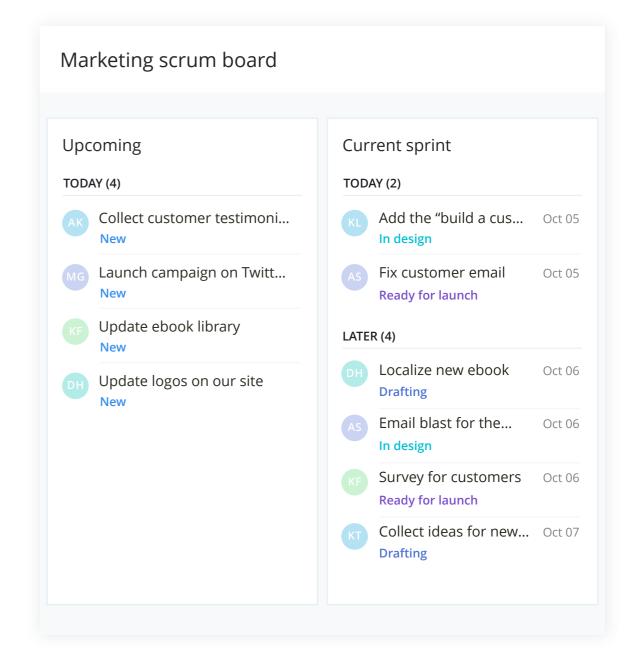
According to operations expert and Wrike Strategic Customer
Success Manager Roberto Wantland, one of the most effective project
management tools for visibility is Dashboards. "One of the first things
I do to help my clients is set up a shared dashboard that shows
the status of all active project tasks 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."

- Clear workflow statuses
- Real-time status updates
- Custom, shareable dashboards
- Robust search and filtering
- Reporting and analytics



Dashboards and Reporting have eliminated a lot of the constant 'what's the status' emails and meetings. People are now able to just check their dashboard and know what the health is, and then utilize their time more efficiently.

— Hoon Kim, Creative Production Manager, Airbnb





Will it improve collaboration across my team, company, and clients?

Collaboration is the lifeblood of creativity. Quality of work and likelihood of success increase when great minds work together. But as projects become more complex, workers grow increasingly specialized, and more teams and stakeholders get involved, collaboration quickly goes from inspiring to burdensome.

Work is duplicated or slips through the cracks entirely. Feedback is conflicting and given at the wrong moments. Files and emails go missing, meetings eat into creative time, and handoffs feel like acts of faith.

Leading collaborative work management solutions centralize conversations from across email, spreadsheets, and other messy mediums into a single shared workspace. All communication is kept in the context of specific projects, tasks, or files. Roles are clearly defined and work is assigned accordingly. Collaborators are notified of comments and @mentions in real-time, streamlining handoffs and shortening feedback loops.

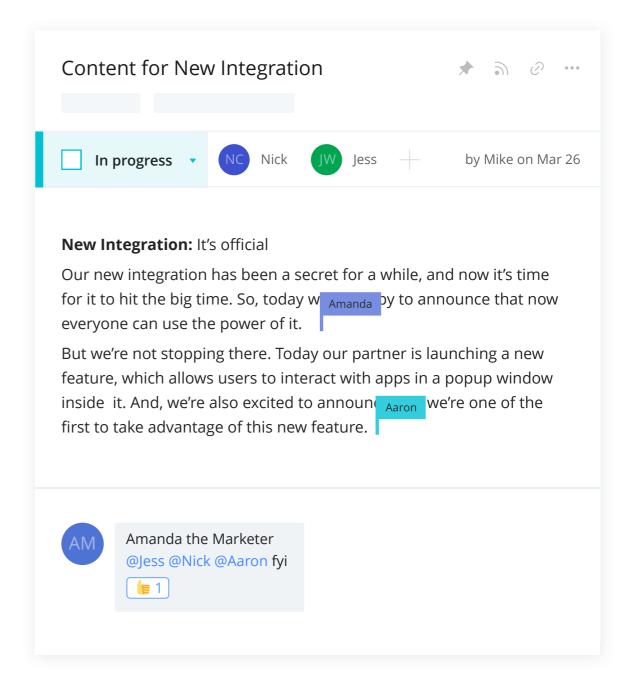
But collaboration doesn't stop within your team or organization. With the right project management tool, you can easily collaborate with external clients and contractors. These stakeholders will see only the information you choose to share with them.

Choosing a solution that integrates with popular tools like Slack and Gmail is also important, particularly for creatives working with external collaborators. The work management solution ultimately serves as the team's single source of truth, but information can also be accessed and entered using these existing tools. Their ability to "talk to one another" effectively centralizes communication while still allowing contributors to work the way they want.



- Contextual communication structure
- Live comments and @mentions (with notifications)
- User groups
- External sharing and access control
- Integrations with popular chat/email clients

A workplace collaboration survey by Fierce, Inc. of more than 1,400 corporate executives, employers, and educators found 86% of workers point to lack of collaboration when it comes to workplace failures.





Does it provide tools for proofing, approvals, and asset management?

Revisions and approvals can be challenging for creative teams. Sending files as email attachments leads to duplicate or conflicting changes across multiple documents. Designers are left with the time-consuming job of consolidating feedback and chasing down final approvals. Version control chaos ensues.

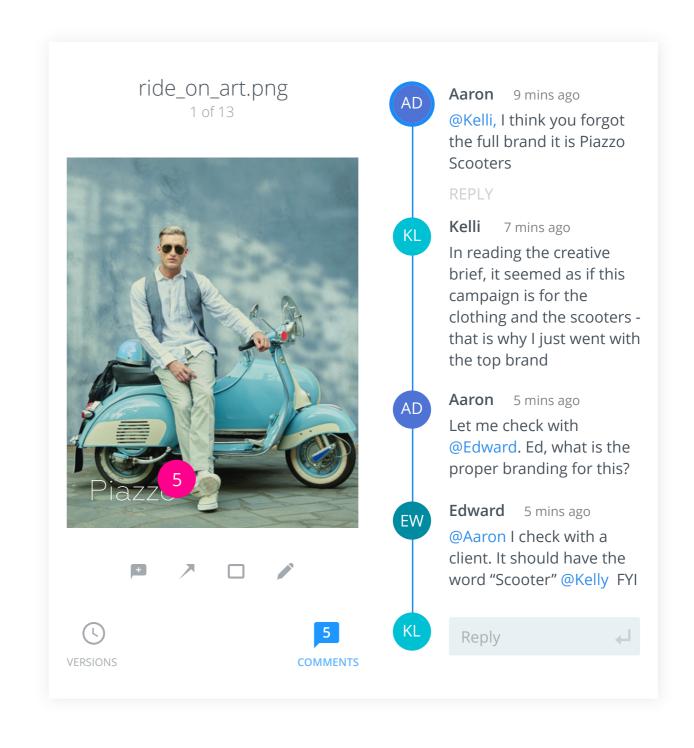
Using an asset management tool like Google Docs or Dropbox is a step in the right direction. But organizing files, making sure your team has access, and pulling clients or contractors in for review is tricky.

The best collaborative work management solutions bring all files and feedback together in one place. Documents are tied to their associated projects or tasks, so everyone knows where to find them. Files can even be uploaded directly from Google Docs, Box, and other integrated asset management tools. DAM (Digital Asset Management) integrations keep everything on brand by organizing and sharing approved brand assets across the organization.

Proofing and approval tools take the guesswork out of the revision process. The ability to visually markup documents and assign both internal and external approvers minimizes ambiguous feedback. Participants see each other's changes and can work through conflicting edits in real-time. Managing revisions for a single file, in a single place creates a clear edit and approval trail. The latest files are displayed front and center to mitigate version control issues, while previous versions remain accessible for easy reference.



- Ability to attach files to specific projects or tasks
- Integrations with digital asset management tools
- Proofing and Approvals
- Version tracking





Will it allow my team to work the way we want?

You've heard the phrase "you can't fit a square peg in a round hole." If you've ever worked in a project management solution that wasn't the right fit for your team, you know it's true.

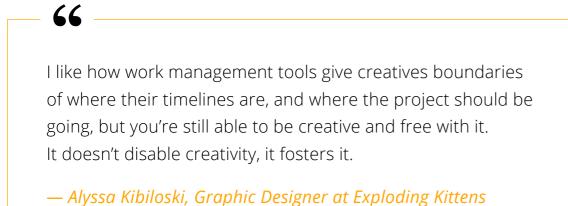
Each company and team has its own creative process, so it's important to select a flexible collaborative work management system. You'll want the ability to create custom project workflows and status updates based on your team's process. Integrations with the tools your team already uses, like Slack and Gmail, also organize projects and communication without disrupting existing workflows.

Not everyone organizes their work in lists. Some prefer timelines, while others relate better to tables. Whatever collaborative work management platform you choose should be versatile enough for team members to manage work in the way that makes them most comfortable.

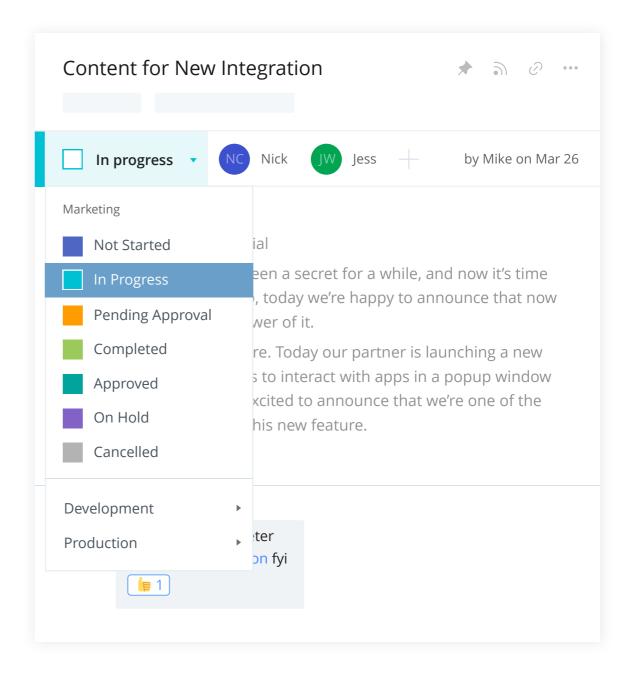
According to an iStock-commissioned survey of 400 creatives across the US and UK, about 25% of creatives spend less than two hours a day actually doing creative work. Choose a system that limits administrative work and keeps your team in the creative tools they love. For example, Wrike's Adobe Creative Cloud extension allows creatives to access tasks, leave comments, upload documents, and more from directly within Photoshop, Premiere Pro, InDesign, and Illustrator.

Finally, with <u>nearly half of Americans working remotely</u>, finding a project management solution that functions across mobile devices is key. Untether your creative team from their desks and empower them to work whenever and wherever inspiration strikes.





- Custom workflows and statuses
- Integrations with leading tools
- Multiple work views
- Adobe Creative Cloud Extension
- Robust mobile application





How will it help me prove the value of my team and optimize our results? Your team slaved away creating assets for that big conference. But when the deals start rolling in, event marketing and sales get all the glory. You know your team is working hard, but it's clear your peers and upper management wonder what you do all day.

A good collaborative work management solution enables creative leaders to measure output and prove the value of their teams. How many projects is your team working on at any given time? Which clients or departments make the most requests? How much time is being spent on particular projects?

If you're using a workspace that captures all the metadata around projects and processes, you should be able to run a report for projects with missed deadlines or unmet objectives. 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. You'll then be better prepared to make the case for additional headcount. Identifying issues related to specific team members also presents the opportunity for valuable coaching around skills like time management, organization, and communication.

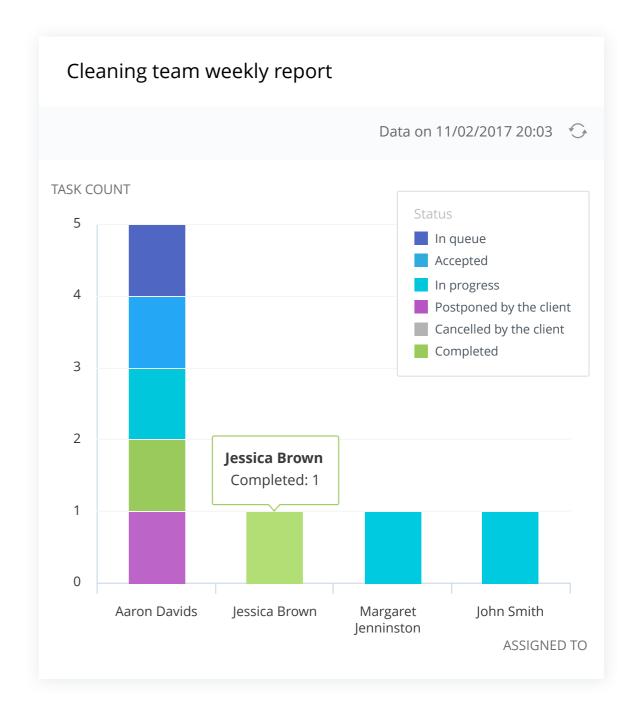




Since curiosity is really a key tenet of who we are, being able to surface the data of each project and my team's work capacity is very important for us. We're able to take those data insights and optimize the flow for future projects, use the data to make better informed decisions.

— Lydia Baillergeau, Senior Art Director of Video, SurveyMonkey

- Custom reporting
- Metadata capture
- Data export





Your Collaborative Work Management Checklist

Use this checklist to compare collaborative work management providers.

If a solution is unable to check most of the boxes, eliminate it from your list.

The solutions that check the most boxes are your top contenders!



Proofing, Approvals, and Asset Management

- Ability to attach files to specific projects or tasks
- Integrations with digital asset management tools
- Proofing and Approvals
- Version tracking

Creative Request and Intake Process

- Dynamic Request Forms
- Embeddable request forms
- Automated project creation
- Automated project assignment

Collaboration

- Contextual communication structure
- Live comments and @mentions (with notifications)
- User groups
- External sharing and permissions
- Integrations with popular chat/email clients

Work Flexibility

- Custom workflows and statuses
- Integrations with leading tool
- Multiple work views
- Adobe Creative Cloud Extension
- Robust mobile application

Time and Resource Management

- Easy task scheduling and assignmen
- Gantt chart and calendar work views
- Workflow view
- Drag and drop project/task rescheduling
- Automatic scheduling notifications
- Project templates
- Resource management and allocation

Progress Tracking

- Clear workflow statuses
- Real-time status updates
- Custom, shareable dashboards
- Robust search and filtering
- Reporting and analytics

Results Analysis and Improvement

- Custom reporting
- Metadata capture
- Data export

Other

- 24/7 tech suppor
- Implementation services
- Dedicated account management

Ready, Set, Evaluate

With hundreds of project management tools on the market, finding the best one for your creative team is no small feat. You've taken a smart shortcut by reading this guide to learn more about the most important features. Now use these seven questions and our accompanying checklist to narrow down the playing field and find your perfect fit.

Wrike could be the right tool for your creative team! Sign up for a free 14-day trial of our award-winning collaborative work management platform and start streamlining creative requests, improving collaboration, proving your team's value, and so much more today.

Get started for free









