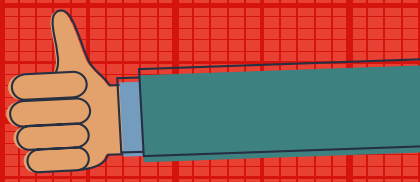
Your Workflow Process Sucks!

A blueprint to help you implement the right process for your agency

BY MAGNETIC



magnetic

CONTENTS

1	Workflow: what's the big deal?	**PG 4 –8**
2	Process SOS	**PG 9 –13**
3	The Magnetic Workflow Blueprint	**PG 14 –17**
4	Your worker bees	**PG 18 –29**
5	Why your process sucks	**PG 30 –32**
6	Look at all these nice, pretty rules	**PG 33 –37**
7	Homework	**PG 37 –38**

If you're reading this, your workflow process probably sucks.

We're not trying to be flippant, but we are trying to get your attention. Because process is the backbone of any business, and it can also be its Achilles' heel.

In our line of work, we see different agency processes every day. Some work. Some don't. All of them impact on productivity and output, and the way in which work is managed, tracked, trafficked and billed for. And those things all impact on a business's profits.

That's why the more time we spend with agencies, the more we're asked to provide a template on how to run one efficiently. So we decided to do just that.

In this ebook, you'll find the results of our research into the types of processes that work. We surveyed, we interviewed, we sent in our moles. Then we sent in some puppies - people weren't crazy about the moles - and agencies spilled their secrets. We're sharing them here.

Whether you're just starting out, needing to fix a broken workflow, or wanting to implement a process that actually works, this is the roadmap you've been looking for. By having an understanding of how productive, profitable agencies run their businesses, you can start to do the same.

Our aim is for this ebook to help you manage jobs - and by implication, your studio - more efficiently, productively and profitably, and to understand the common mistakes that are made when implementing and running processes.

It's our first ebook and we'd love your feedback - good, bad or puppygrams - and we'd especially like to know whether our blueprint works for you.

Happy reading :-)

Debby and the Magnetic team

PS: We're not saying our way is the only way. The blueprint we present here may work for your agency as it is, or it may need to be adapted. Don't be afraid of going rogue - we've included some rules to help you modify our process to suit your studio.

Debby Querido is the Content Marketing Manager at Magnetic. She loves cats, tats, travel and chocolate, and is especially partial to processes that don't suck. This is her first ebook.

---

*Throughout this ebook, you'll see quotes from the agency workers and consultants we interviewed. Because of the confidential nature of the information they shared, we promised to keep their identities anonymous.

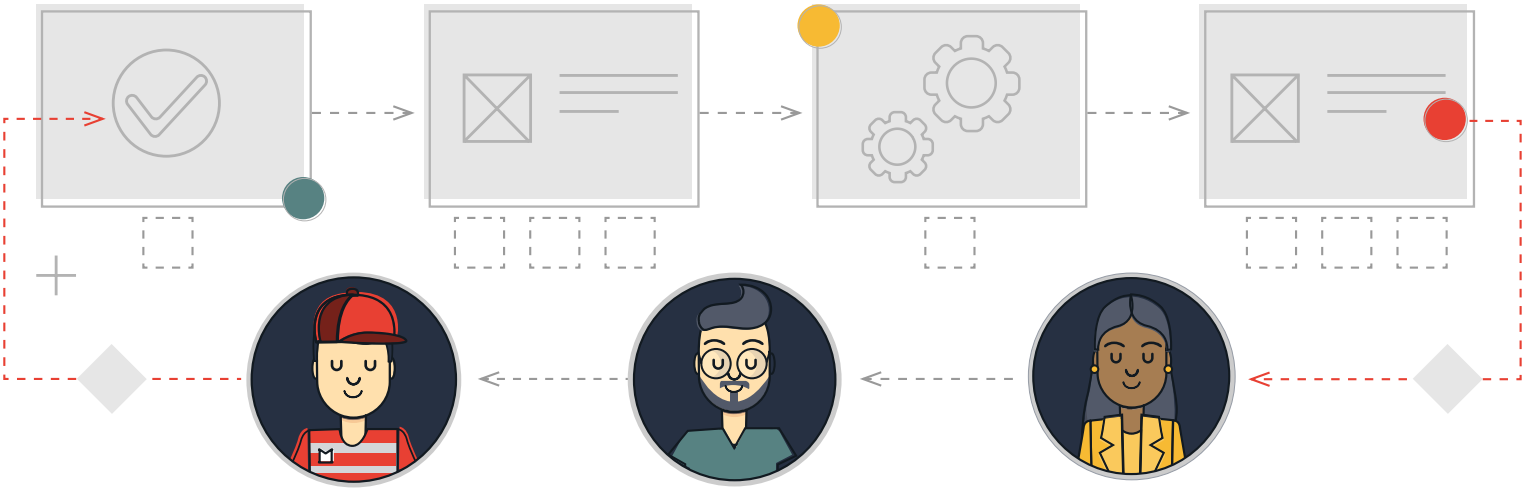
1

WORKFLOW: WHAT'S THE BIG DEAL?

Chapter: 1

WORKFLOW: WHAT'S THE BIG DEAL?

"Processes need to be there because people need to be managed. Without processes, they're going to drop balls."- Process consultant, Cape Town



Chaos theory

No business can run on chaos, especially not a creative one. But as most advertising agencies will tell you, disorder has a way of creeping in.

For many, broken processes are often at the core of their operations; the frayed cord tenuously stringing it all together. So when that final thread snaps - a costly printing error; a last-minute scope change - it's pandemonium. Translation: you're well and truly screwed.

It's time to put on your business pants

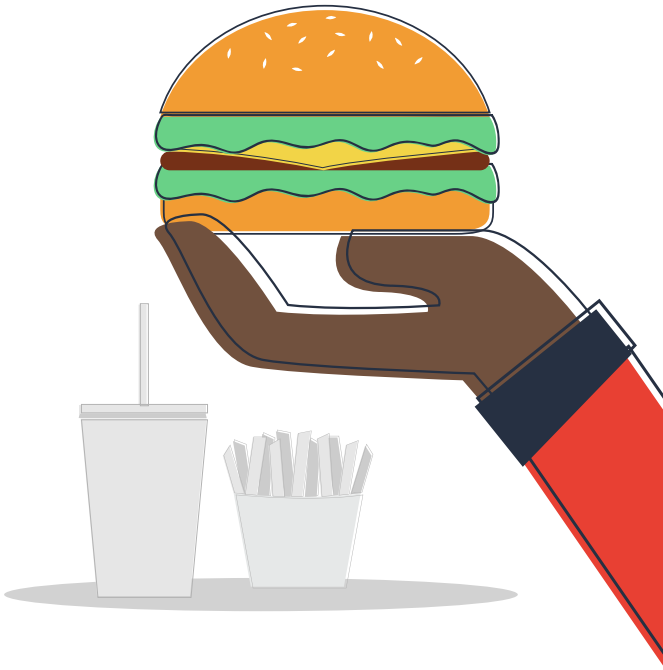
Creative agencies need to be run by businesspeople. Because agencies are, of course, businesses. They exist not only to build beautiful things, but to grow and be profitable.

That's where workflow comes in. Workflow is simply a series of tasks that produce an outcome. In the creative space, they're a set of rules for running your studio that ensure consistency across job completion, communication and billing. A system that enables teams to bring ideas to life within structured timeframes, costs and deliverables. Your agency is no different; your resources are not special. Even Michelangelo had a brief.

The right process brings efficiency, and efficiency is integral to your bottom line. Without healthy revenue, you can't keep building beautiful things.

"Time tracking isn't all that important," said no agency worker ever.

Give your team the gift of structure (And perhaps the occasional free lunch)



Where you have a straightforward, fully integrated workflow, you have employees who have a greater understanding of their role and what's expected of them. The result?

Improved productivity.

Better performance.

An accountable team.

A happier team.

The things you need to run your agency like a successful business with fully engaged staff.

77% of independently-owned agencies use time-tracking or project management software to improve productivity - Agency Survey 2015, The Wow Company

It's pretty unusual to find creatives who are also process-driven; usually, they're the ones who need to be frogmarched towards deadlines. Yet it's often also these guys running the show, because some of the most respected studios are the progeny of visionary art directors and kick-ass copywriters. Though they have the creative muscle to generate great concepts, they don't always employ a process-orientated mindset that keeps staff deadline-driven and companies turning a profit.

If you want to make sure your team is producing work efficiently and on deadline, rigorous processes need to be in place to keep them focused and productive.

Want your team's buy-in? Get them on board by letting them weigh in on the new workflow process. Give them a sense of ownership by letting them define the type of process that would work for them.

We asked some of our clients why workflow processes are so important in their agencies. ***They said:***

"Clients take advantage when you don't have your ducks in a row. Pushing back and implementing processes is hard, but it's possible."

"I can tell you with certainty that when things fall apart in the agency, it's due to process not being followed."

"Process is there to tick boxes, and that's where programs work well, because there's a built-in system to follow. The more you nail that down, the fewer problems you'll have."

"Following process is critical to getting work out on time and accurately. If there's no deadline, if you haven't been on brief, if you haven't briefed it in properly, don't ask where your work is or why it's late."

"One of the biggest challenges is getting people's heads around the fact that no matter how big or small a project, the process needs to be followed. I'm obsessive about scope and drilling it down into a brief."

"A strict process may freak your clients out at first, but it will impress them too. You have to be consistent and you have to do it every time."

"Agencies, especially small ones, want to be suits. They also want to be production, traffic, creative, finance and even the secretary. But you can't do it all. You'll end up being crap. So put your focus into one space."

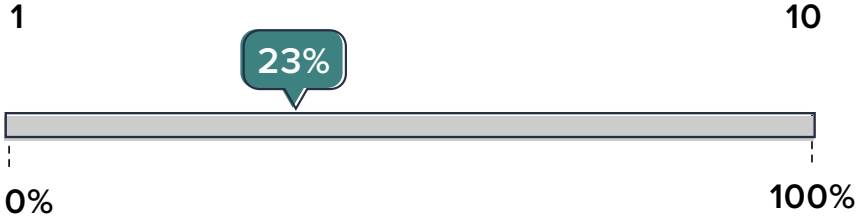
How does your agency compare?

In researching this ebook, we undertook the Magnetic Agency Survey to find out how efficient and profitable agencies really are. These are some of the results, and you'll find more throughout this ebook. So, how does your studio stack up?

Having a proper workflow in place helps you to improve these margins:

1. Reverts on job

2. Profit margin per job

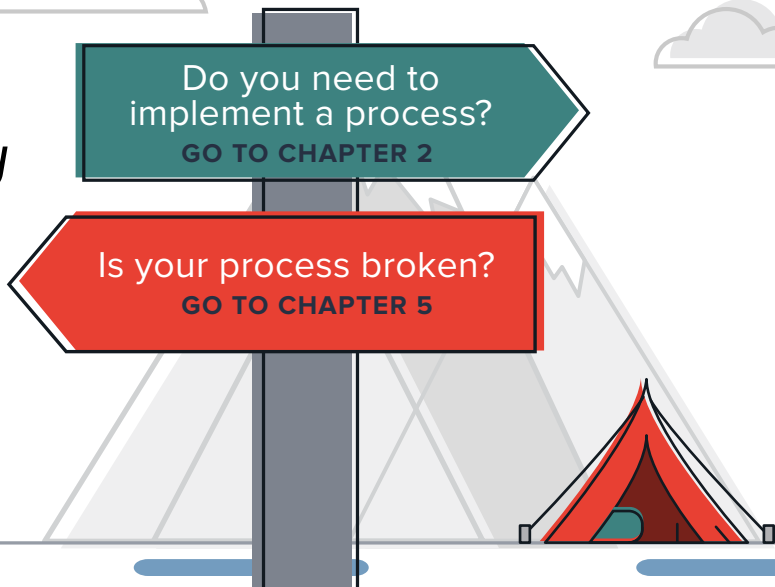


3. Days overdue on job delivery

4. Percentage of time spent on non-billable work

5. Percentage of work completed by freelancers

It's time to choose your own adventure. Before you go any further, stop and ask:



2

PROCESS SOS

Chapter: 2

PROCESS SOS

"Any change of habit is tough, but it becomes easier when you start experiencing the efficiency that change brings." - General Manager, Cape Town-based full service marketing agency

Until not-all-that-long-ago, jobs in the agency world were run on an *ad hoc* basis - yesteryear's equivalent of 'you do you'. It was a reactive rather than proactive approach, and it meant there was no set blueprint for the way a job should be completed.

But the time for playing is long over - or, as one of South Africa's top process consultants told us, "This is not la-la land anymore". Every day, brighter, smarter, artsier people are throwing open the doors to brighter, smarter, artsier agencies, and the only way to maintain a competitive edge is by delighting your customers.

We know, it's not always easy to delight customers. Customers are notoriously undelighted a lot of the time. But it's not impossible and it should always be your number one goal.

Things like meeting deadlines, giving clients greater job transparency, delivering top-class work and sticking to budgets are a few things that'll win clients over and win you more work.

These are not easy things to achieve without a solid process in place; a step-by-step plan that guides your team towards delivering quality work every time, analysing the things that worked and those that didn't, and improving with each successive delivery.

Below, we take a look at some of the process structures you'll find most often in agencies. We know that these don't fit every business exactly the same way, and that you may not even agree with some of them. They're the ones we've come across most often and which creative agencies find most practical to implement.

Before you implement a new process in your agency, create a workflow blueprint for your business. If you have a blueprint already, does your new process align with it?

Of agencies say their workflow process is too complicated.
- The Magnetic Agency Survey

Quick, get on the bus: The processes your competitors are (probably) following

Agile

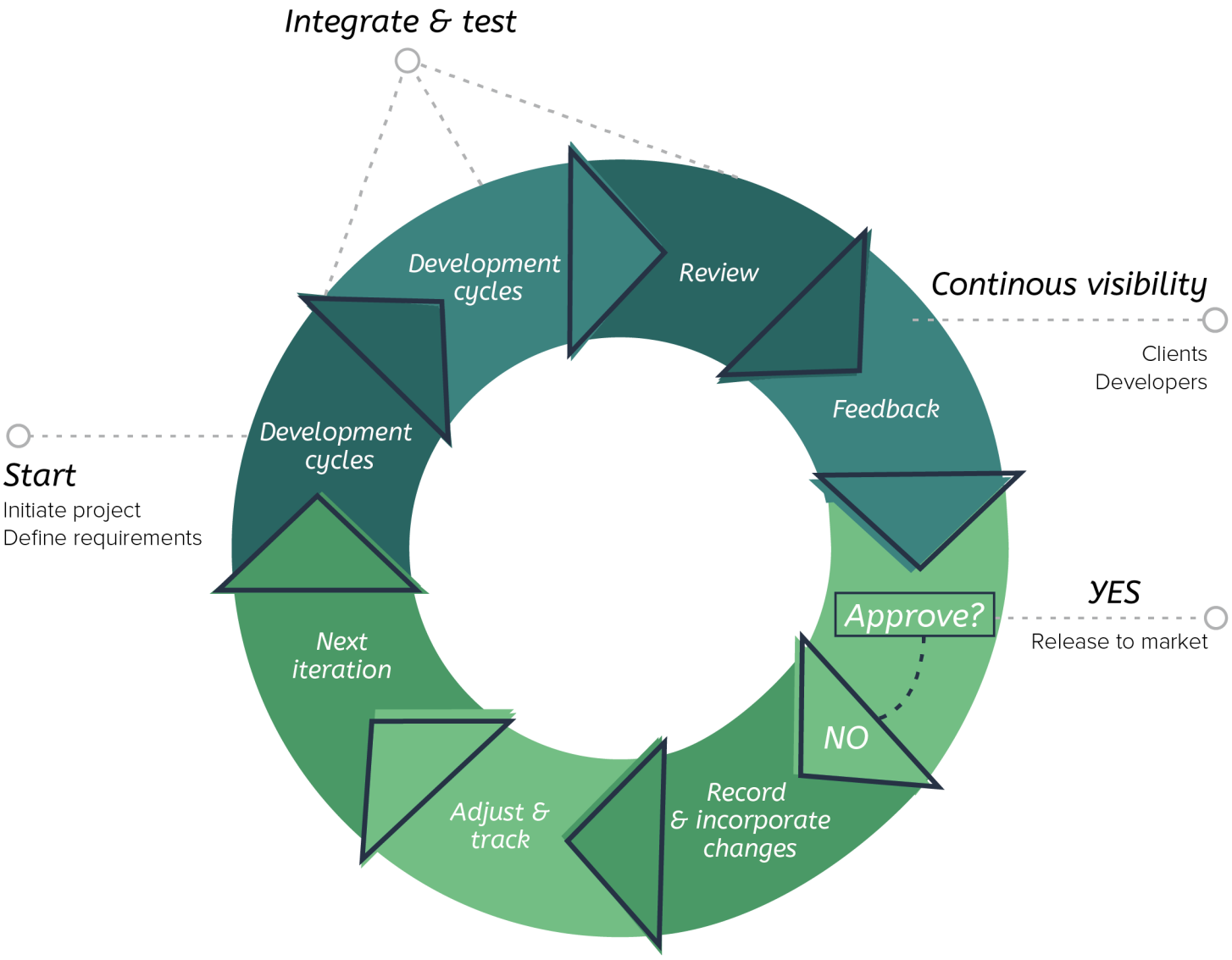
In today's agencies, Agile tends to be the go-to process because, quite simply, it's effective.

Instead of grinding through a job sequentially from start to finish, work follows an incremental approach: it's completed in small modules, given to the client for feedback, and amended before the next round of work proceeds.

During evaluation, errors can be found, adjustments made, and client feedback can be incorporated before moving forward, rather than only at the end.

"The challenge is how to make your process flexible to adapt quickly to changes," says the General Manager of a Cape Town-based full service marketing agency who runs her business on the tenets of Agile and Scrum

Agile is for you if your clients tend to change the scope of your jobs, or if you're anticipating lots of changes as the job progresses.



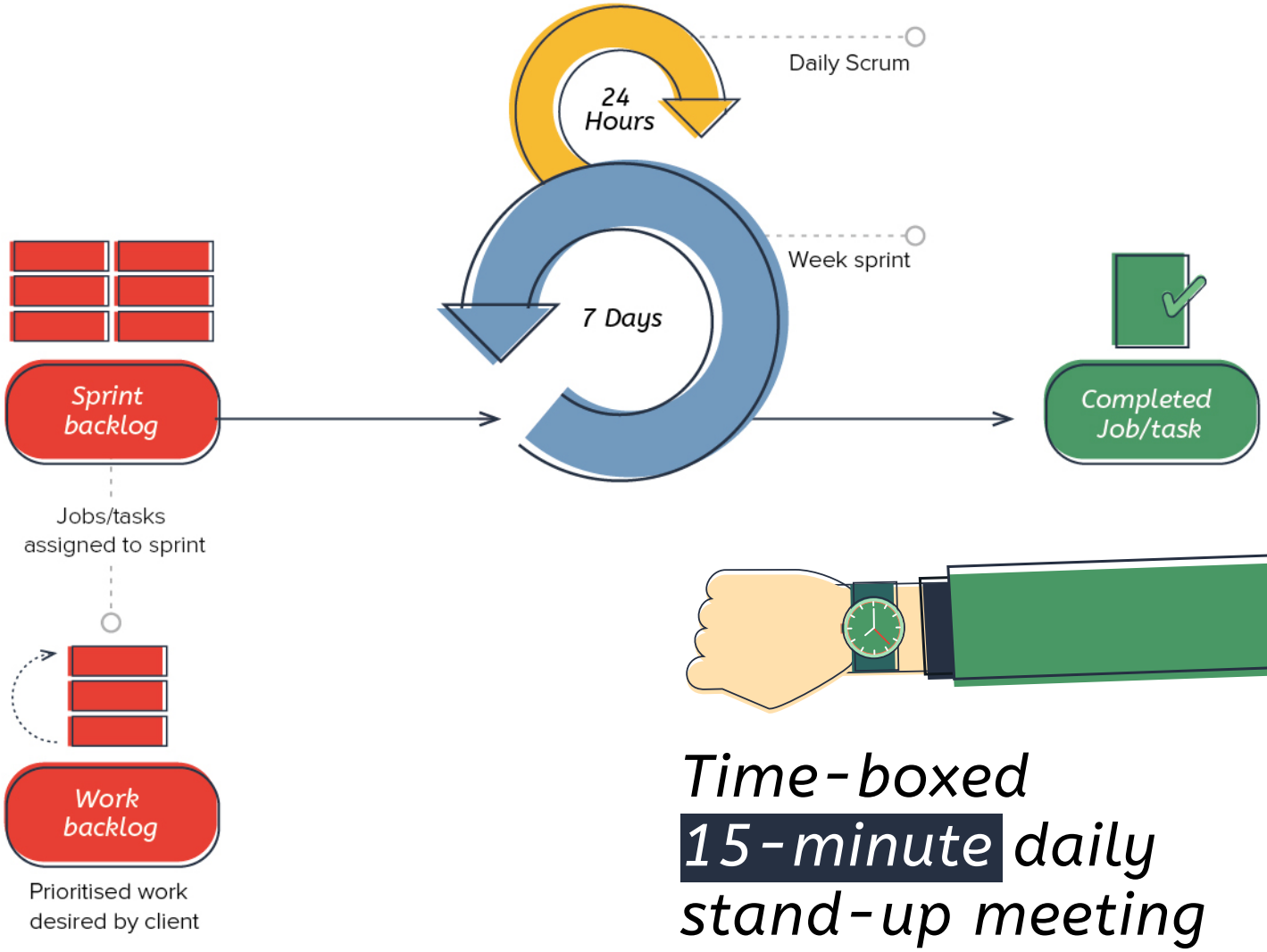
Scrum

Scrum isn't really a workflow on its own; it's a subset of Agile. It's a framework that specifies a particular set of practices and rules that need to be followed in order for the process to work consistently. In other words, for your team to attain agility.

Scrum is all about working in short, defined periods, often one to two weeks, where specific chunks of work are knocked out in a spirit of 'let's do this!'. The methodology is great for boosting motivation levels through a common drive to hit the sprint target, instead of just tackling what comes in day after day.

Although scrum is most often used for software and product development, the framework can be successfully applied to many departments. Agencies, as well as young, progressive companies and e-commerce businesses, are increasingly adopting it (or customised versions of it). Scrum provides them with a set of rules that bring daily visibility into the state of work.

Due to its agile nature and short sprint lengths, Scrum is not designed for managing a production schedule months in advance. It works at a pace of a sprint or two at a time, and agencies must adapt this and plan multiple sprints in advance.



Time-boxed 15-minute daily stand-up meeting

Team members discuss:

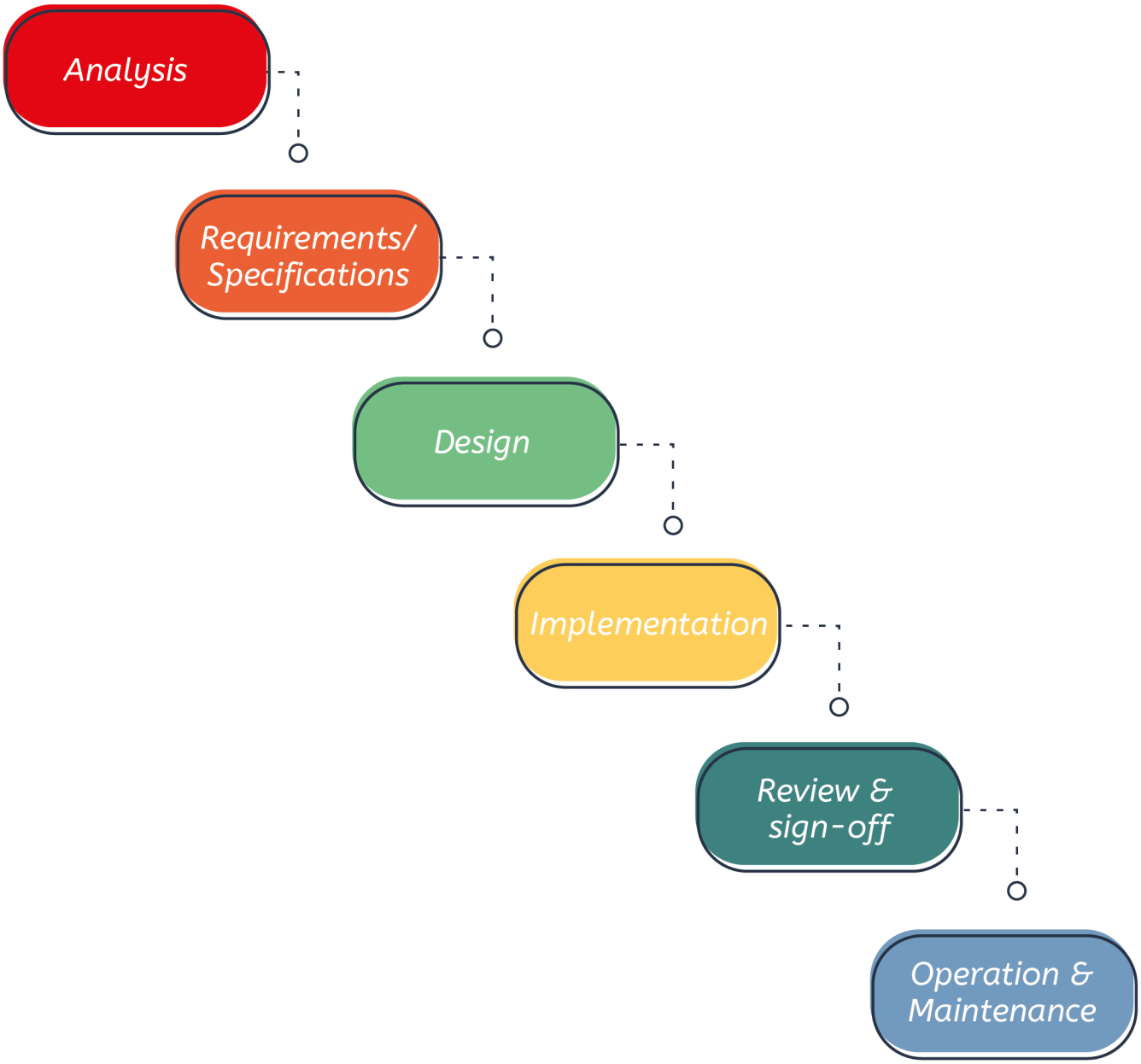
- What they've done since yesterday
- What they plan to do today
- Issues they need help resolving

Waterfall

Waterfall has been around a long time, it's well-established and many agencies were following it - even if they didn't realise it - before the slicker Agile came around.

This is a fairly old-school, pre-digital, sequential methodology with its roots in the manufacturing industry. It's all about speccing out a job in its entirety before getting stuck into the actual design and development work. So, you need to be absolutely clear on the full scope of the job before you start working, because once a step is complete, it's very difficult to go back and make changes.

Lots of agencies adopted this methodology in the past, but it's not always ideal in the digital era where client needs are more complex, and changes are frequent and rapid. Use Waterfall if your jobs are straightforward, easy to understand, and have very clear milestones.



3

THE MAGNETIC WORKFLOW BLUEPRINT

THE SOLUTION TO YOUR SUCKY PROCESS

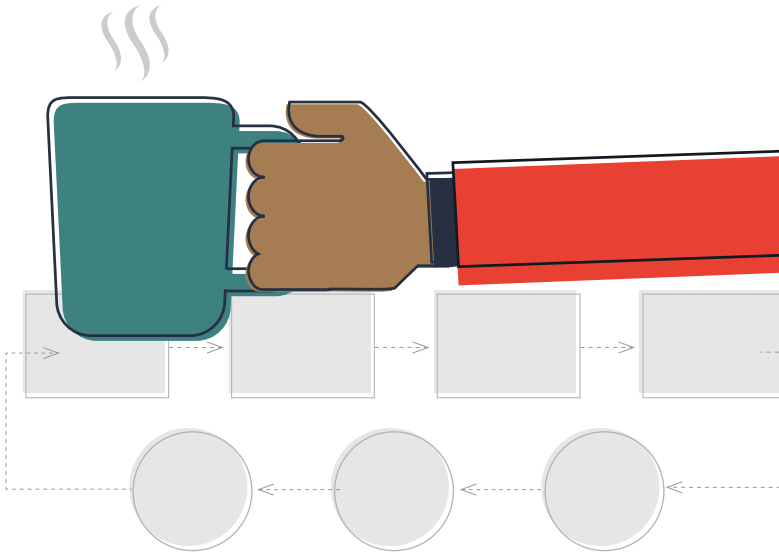
Chapter: 4

THE MAGNETIC WORKFLOW BLUEPRINT: THE SOLUTION TO YOUR SUCKY PROCESS

As you might have guessed by this point, we work with a lot of agencies.

We've seen some processes that work, and many more that don't. We've interviewed a ton of agencies. Maybe we even chatted personally to you.

- We surveyed
- We polled
- We measured
- We drank a lot of coffee



But most importantly, we got answers. And then we devised a solution, and we present it to you here: the Magnetic Workflow Blueprint.*

***The process illustrated below is the one we feel is most effective for agencies, but we do recognise that it may not work for every studio.**

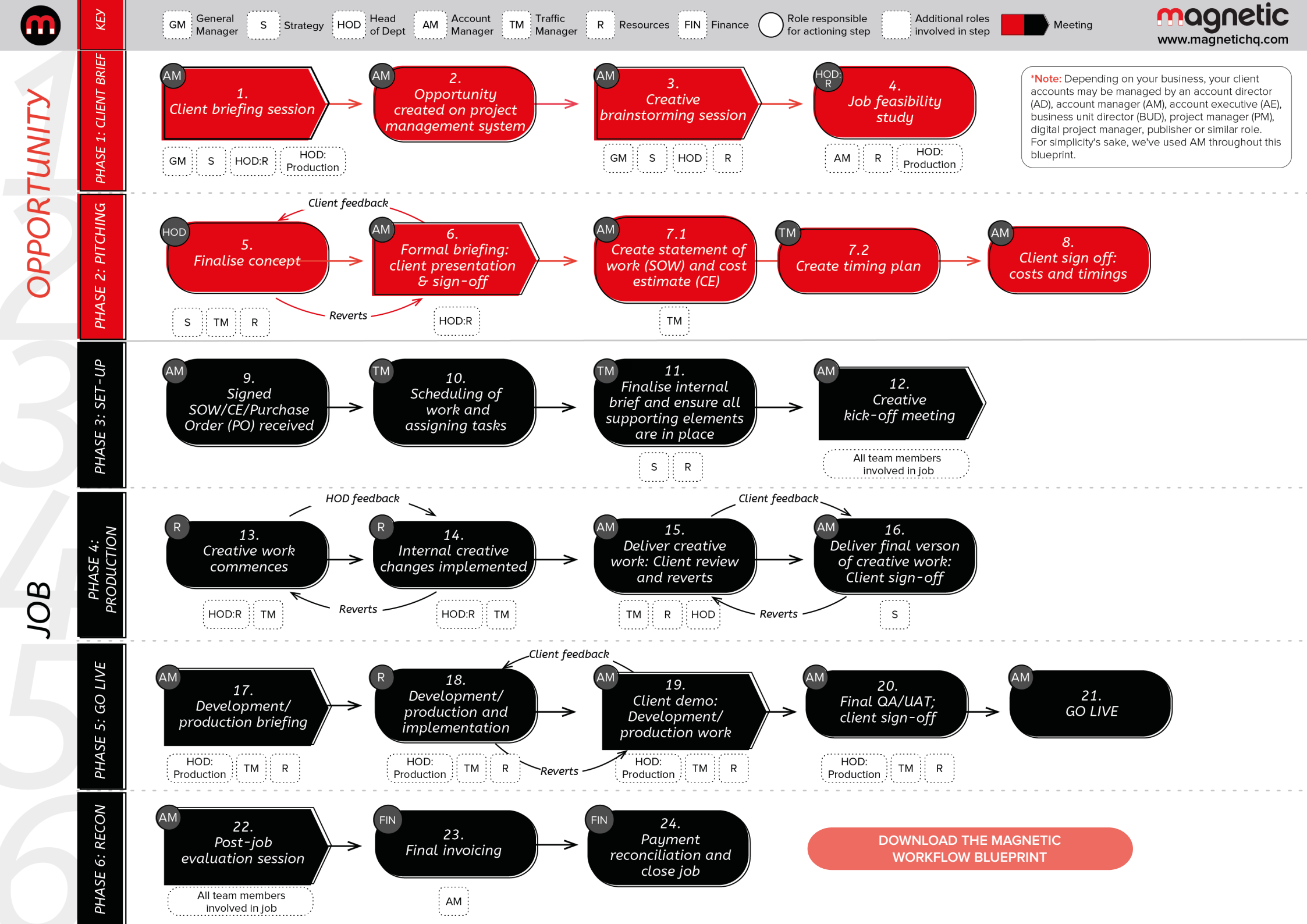
More than 53% of agencies receive job profitability warnings only after the job is complete. **- The Magnetic Agency Survey**

A note about the Magnetic Workflow Process

We know that every agency functions uniquely. That's why you may need to tailor this process to fit your studio most comfortably.

But don't worry, we wouldn't leave you hanging. In the next chapter, you'll find a list of best practices to follow once you've customised this workflow.

They'll help keep you on track as you make enhancements to suit your agency's needs.


KEY
GM General Manager
S Strategy
HOD Head of Dept
AM Account Manager
TM Traffic Manager
R Resources
FIN Finance
Role responsible for actioning step
Additional roles involved in step
Meeting
magnetic
www.magnetichq.com
OPPORTUNITY
JOB
PHASE 1: CLIENT BRIEF
AM 1. Client briefing session
GM S HOD:R HOD: Production
AM 2. Opportunity created on project management system
AM 3. Creative brainstorming session
GM S HOD R
HOD: R 4. Job feasibility study
AM R HOD: Production
*Note: Depending on your business, your client accounts may be managed by an account director (AD), account manager (AM), account executive (AE), business unit director (BUD), project manager (PM), digital project manager, publisher or similar role. For simplicity's sake, we've used AM throughout this blueprint.
PHASE 2: PITCHING
HOD 5. Finalise concept
Client feedback
Reverts
S TM R
AM 6. Formal briefing: client presentation & sign-off
HOD:R
AM 7.1 Create statement of work (SOW) and cost estimate (CE)
TM
TM 7.2 Create timing plan
AM 8. Client sign off: costs and timings
PHASE 3: SET-UP
AM 9. Signed SOW/CE/Purchase Order (PO) received
TM 10. Scheduling of work and assigning tasks
TM 11. Finalise internal brief and ensure all supporting elements are in place
S R
AM 12. Creative kick-off meeting
All team members involved in job
PHASE 4: PRODUCTION
R 13. Creative work commences
HOD feedback
Reverts
HOD:R TM
R 14. Internal creative changes implemented
HOD:R TM
AM 15. Deliver creative work: Client review and reverts
Client feedback
Reverts
TM R HOD
AM 16. Deliver final verson of creative work: Client sign-off
S
PHASE 5: GO LIVE
AM 17. Development/ production briefing
HOD: Production TM R
R 18. Development/ production and implementation
Client feedback
Reverts
HOD: Production TM R
AM 19. Client demo: Development/ production work
HOD: Production TM R
AM 20. Final QA/UAT; client sign-off
HOD: Production TM R
AM 21. GO LIVE
PHASE 6: RECON
AM 22. Post-job evaluation session
All team members involved in job
FIN 23. Final invoicing
AM
FIN 24. Payment reconciliation and close job
DOWNLOAD THE MAGNETIC WORKFLOW BLUEPRINT

A note about those pesky process breakers

Every agency has them; yours too. And if you can't pinpoint who your process breaker is, bad news: it's probably you.

Process breakers are the guys who refuse to follow the system and ruin it for everyone. The kind of people who put a wet spoon into the sugar. Yup, them.

We've seen some pretty powerful process breakers.

And by that, we don't mean they had the physique of a crossfit junkie on Paleo. We mean they sit right at the top of the agency food chain. MDs, CEOs, even accountants. When a process breaker is also a moneymaker, a deal-broker, a decision maker, it's extremely difficult to make your workflow stick.

No one is too powerful to follow the process. Not even the boss.

A few years back, one of our clients - a well-known South African agency - told us their entire system was... *messed up*. That may not have been the terminology they used. So we asked them who their process breakers were.

Turns out, out of an 80+ headcount, it was one person: an MD.

He'd often give work to the creative team without going via the traffic managers, causing a massive bottleneck and putting the team in an awkward position - I mean, who wants to say no to the boss?

We do, and we did.

We suggested that all employees be given permission to say a hard 'no' to any of these requests - even if they came from the boss. And you know what? It worked. Employees relished having the power to say no to a boss! Having his non-process requests refused meant that the MD had to start following the right steps - from approval through to traffic and production - which meant that every member of staff was now following the process. Teams were less confused and more structured, jobs were more viable and there was a great spirit of 'being in this together'. It was also an excellent way to keep everyone accountable, from senior management right down to juniors.

Making every member of staff follow your process to a T, from the most senior to the most junior, will boost morale and have a noticeable impact on your studio's efficiency and productivity levels.

Identify the process breakers in your company. Take some time to understand why they aren't on board and whether there are any barriers or obstacles in their way.

4

YOUR WORKER BEES

Chapter: 3

YOUR WORKER BEES

Whichever process you choose, it's only as successful as the people driving it. Critically, you need to make sure that every senior person in the company is 100% on board with it. Then, you have to choose the right employees, and place them into the right roles, so they can own the process and run it like a highly effective SWAT team.

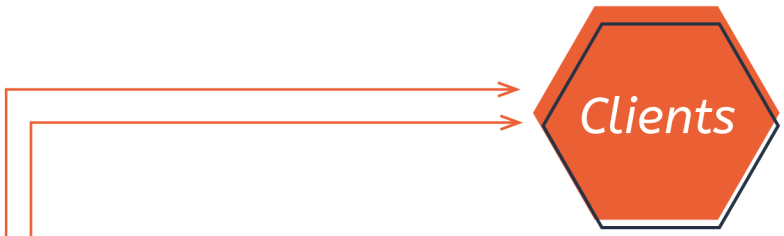
Key positions in your creative studio

Team size and structure is usually dependent on the size of your agency and may also be influenced by the type of work you do. The roles below, and their key responsibilities, are those we consider critical to effective workflow within a creative agency.

Of agencies cite scope creep and/or lack of process as the most common reason for exceeding job budgets. Other reasons include over-servicing clients and having insufficient briefs. - **The Magnetic Agency Survey**

Continue to drive your team's buy-in at every stage. When it comes to defining your process, get your team's input on their preferred workflow tools.

Key Studio Positions and KPIs



- **Interface** between business and clients
- **Manage** client communication and expectations
- **Send** quotes
- **Business** development
- **Confirms** job completeness

- **Schedules** work
- **Manages** deadlines
- **Feeds back** to account managers
- **Handles** project management system
- **Manages** capacities and expectations with Account Manager

- **Conceptualise** creative work
- **Produce** creative work
- **Get work** approved by HOD
- **Stick** to task and time deadlines (KPI-driven)

- **Invoice** clients
- **Reconcilliation** once job is completed
- **Supplier** payments

DOWNLOAD KEY STUDIO ROLES AND KPIS

Client service: *Account managers*

Your account managers are the face of your business and need to be expert communicators, negotiators, brand ambassadors, networkers and multitaskers.

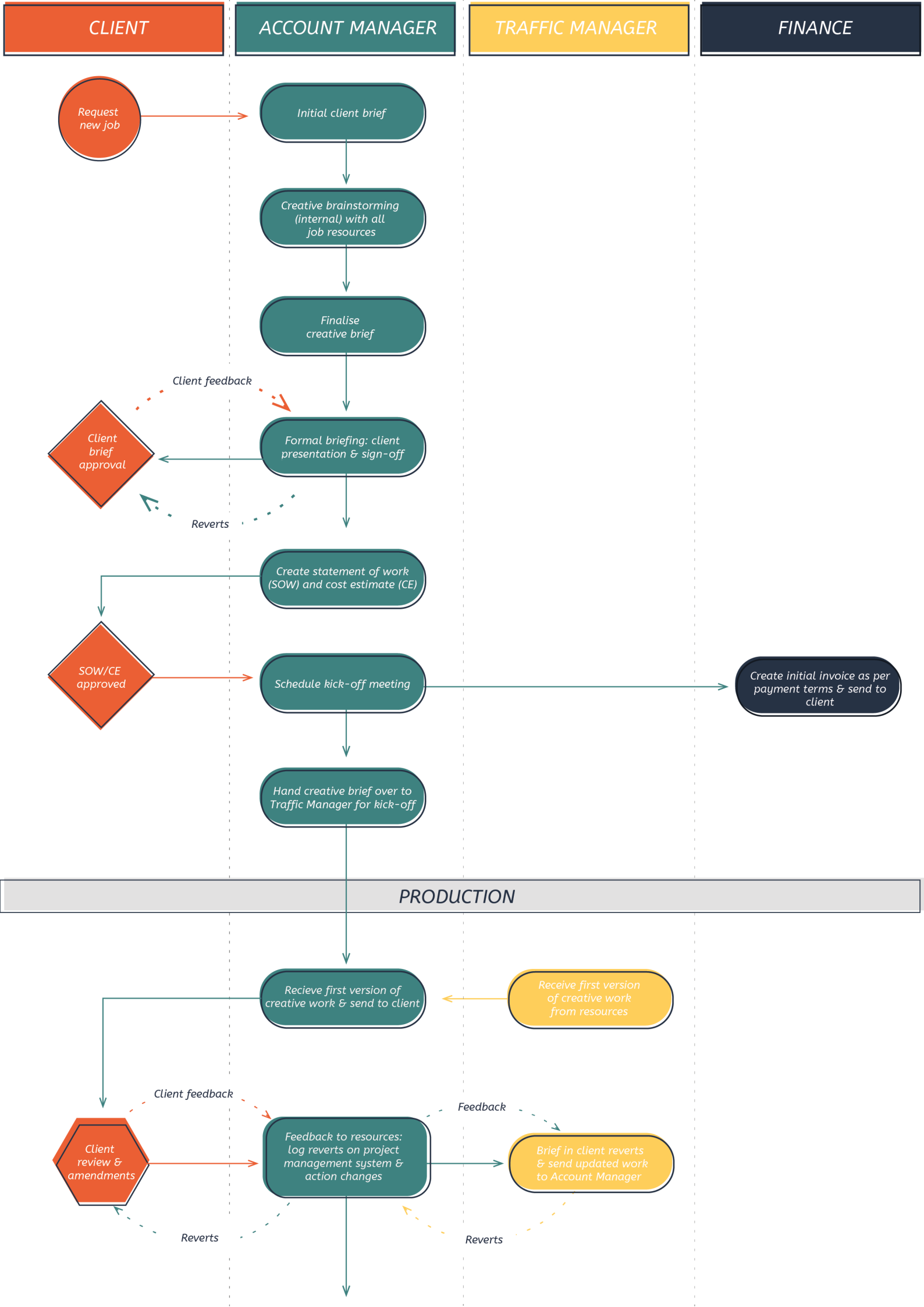
They also need to be decision-makers, peacemakers and (you don't need us to tell you), firefighters and miracle-workers. As the link between your business and your customers, they're at the coalface, constantly dealing with your clients and also with your traffic managers. Their points of contact with the studio are your traffic managers, and they don't deal directly with creative teams.

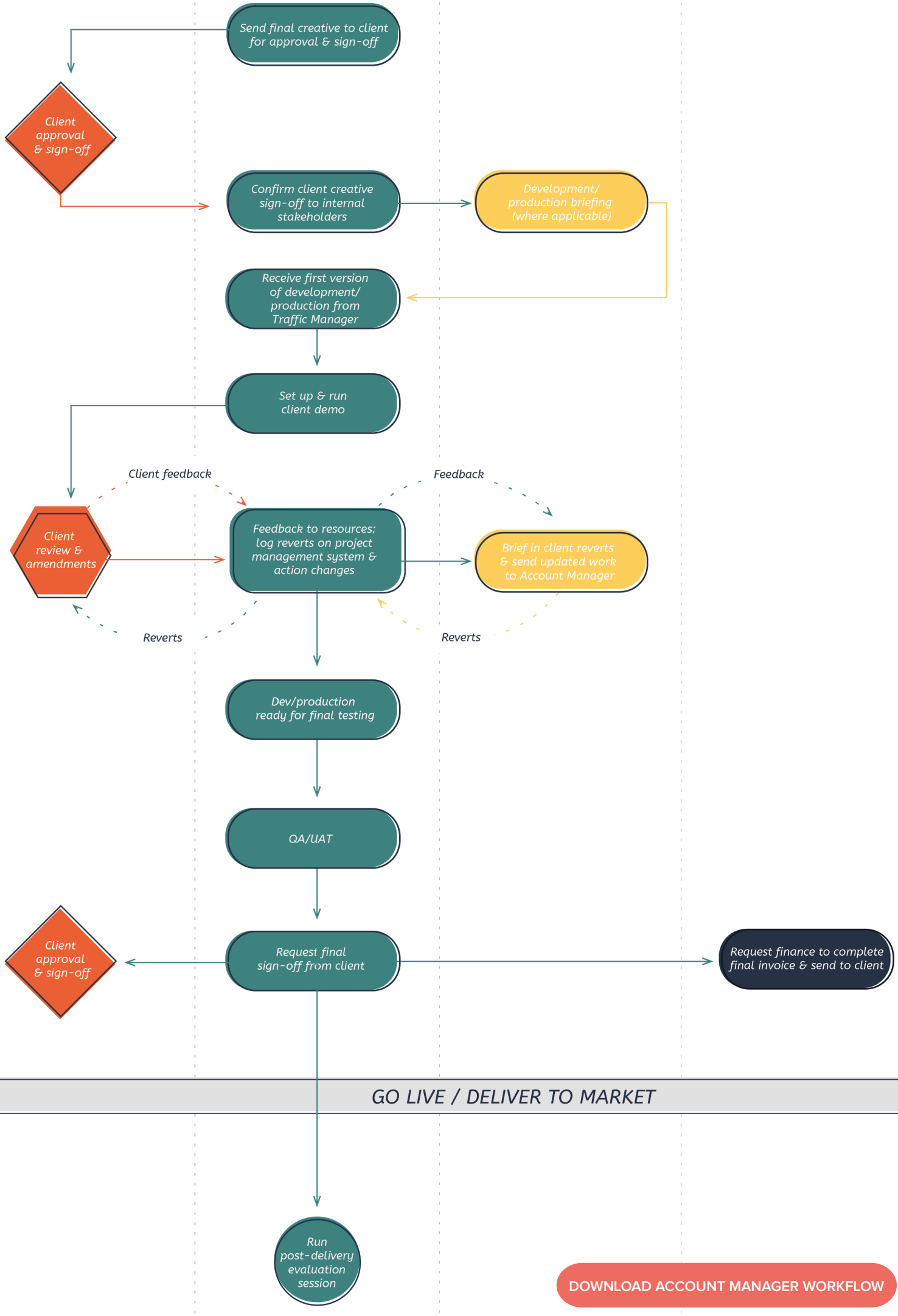
Because they are both the bridge between business and client, and often the first point of contact, account managers must be fastidious about implementing and following the process right from the start.

If the process breaks at this point, you'll struggle to get it back on track for the rest of the job.

Here's how the account manager role functions in your workflow:

The account manager is responsible for taking client briefs, creating and getting cost estimates (CEs) approved and getting the work briefed in to your traffic team. **Note that in some studios, particularly where the focus is on web builds, you may have project managers instead of account managers.** These project managers may also assume certain traffic functions depending on the size of your agency.


CLIENT
ACCOUNT MANAGER
TRAFFIC MANAGER
FINANCE
Request new job
Initial client brief
Creative brainstorming (internal) with all job resources
Finalise creative brief
Client feedback
Client brief approval
Formal briefing: client presentation & sign-off
Reverts
Create statement of work (SOW) and cost estimate (CE)
SOW/CE approved
Schedule kick-off meeting
Create initial invoice as per payment terms & send to client
Hand creative brief over to Traffic Manager for kick-off
PRODUCTION
Recieve first version of creative work & send to client
Receive first version of creative work from resources
Client feedback
Client review & amendments
Feedback to resources: log reverts on project management system & action changes
Feedback
Brief in client reverts & send updated work to Account Manager
Reverts
Reverts



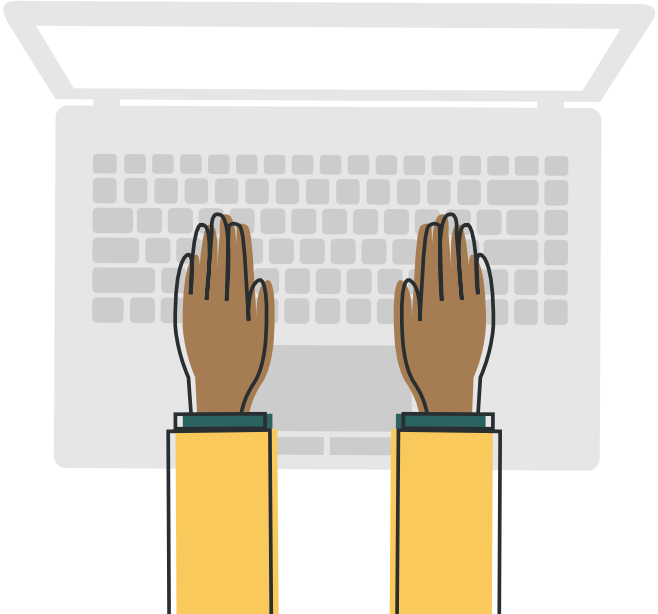
DOWNLOAD ACCOUNT MANAGER WORKFLOW

Traffic managers

Your traffic people are the guys who link your account managers to the teams who're going to produce the work. The major clue to their primary responsibility is in their title. They manage the flow of traffic (all job elements) to make sure resources are available and deadlines are met.

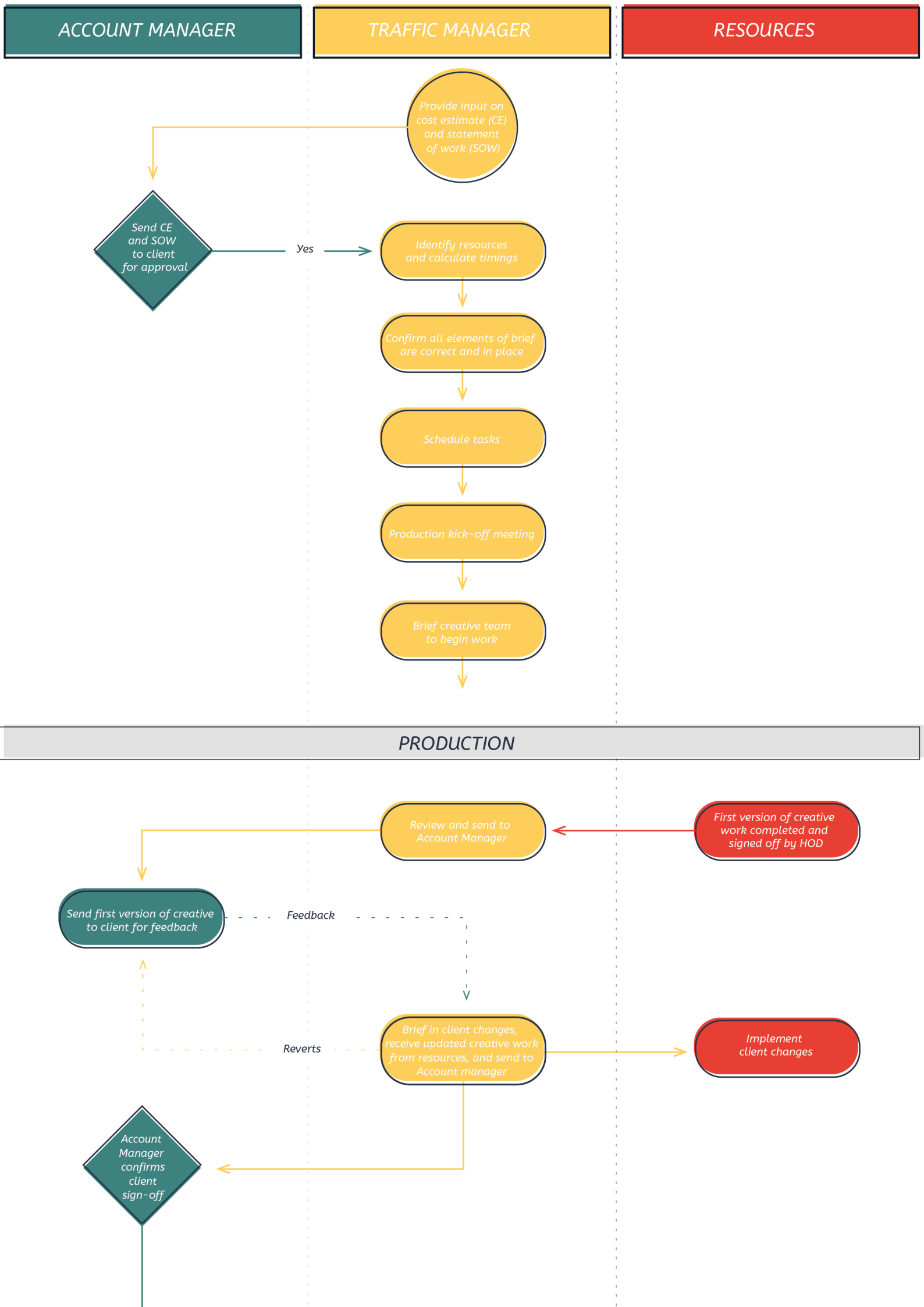
Traffic managers are your process.

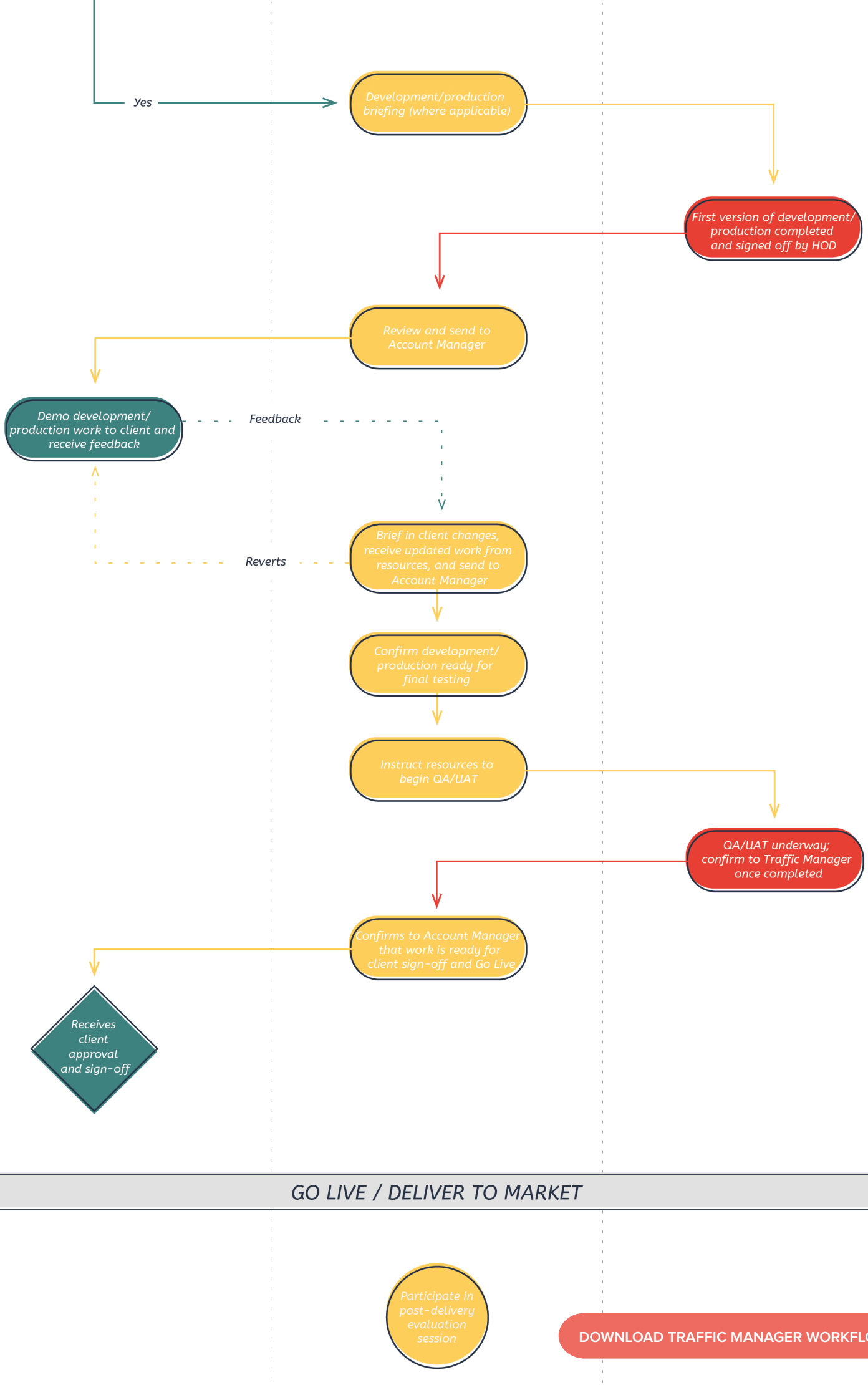
In the old days, they'd (literally, physically) run around with (literal, physical) job bags, transporting pieces of design, copy and other elements between relevant job resources. These days, many work with project management software that enables them to do all this digitally. Either way, if you don't have their 100% commitment to the process - and if they don't know and understand every part of it - your process will fail. Make sure they're fully invested in the system and well trained on any software they use.



Here's how the traffic manager functions in your workflow:

Traffic managers are your task owners. They're in charge of time and resource scheduling, setting deadlines, monitoring task progress, communicating any delays or glitches to the account managers, handling the flow of creative work and feedback between account managers and resources, and generally ensuring that the job runs seamlessly.


ACCOUNT MANAGER
TRAFFIC MANAGER
RESOURCES
Provide input on cost estimate (CE) and statement of work (SOW)
Send CE and SOW to client for approval
Yes
Identify resources and calculate timings
Confirm all elements of brief are correct and in place
Schedule tasks
Production kick-off meeting
Brief creative team to begin work
PRODUCTION
Review and send to Account Manager
First version of creative work completed and signed off by HOD
Send first version of creative to client for feedback
Feedback
Reverts
Brief in client changes, receive updated creative work from resources, and send to Account manager
Implement client changes
Account Manager confirms client sign-off


Yes
Development/production briefing (where applicable)
First version of development/ production completed and signed off by HOD
Review and send to Account Manager
Demo development/ production work to client and receive feedback
Feedback
Reverts
Brief in client changes, receive updated work from resources, and send to Account Manager
Confirm development/ production ready for final testing
Instruct resources to begin QA/UAT
QA/UAT underway; confirm to Traffic Manager once completed
Confirms to Account Manager that work is ready for client sign-off and Go Live
Receives client approval and sign-off
GO LIVE / DELIVER TO MARKET
Participate in post-delivery evaluation session
DOWNLOAD TRAFFIC MANAGER WORKFLOW

Creative and development team ('Resources')

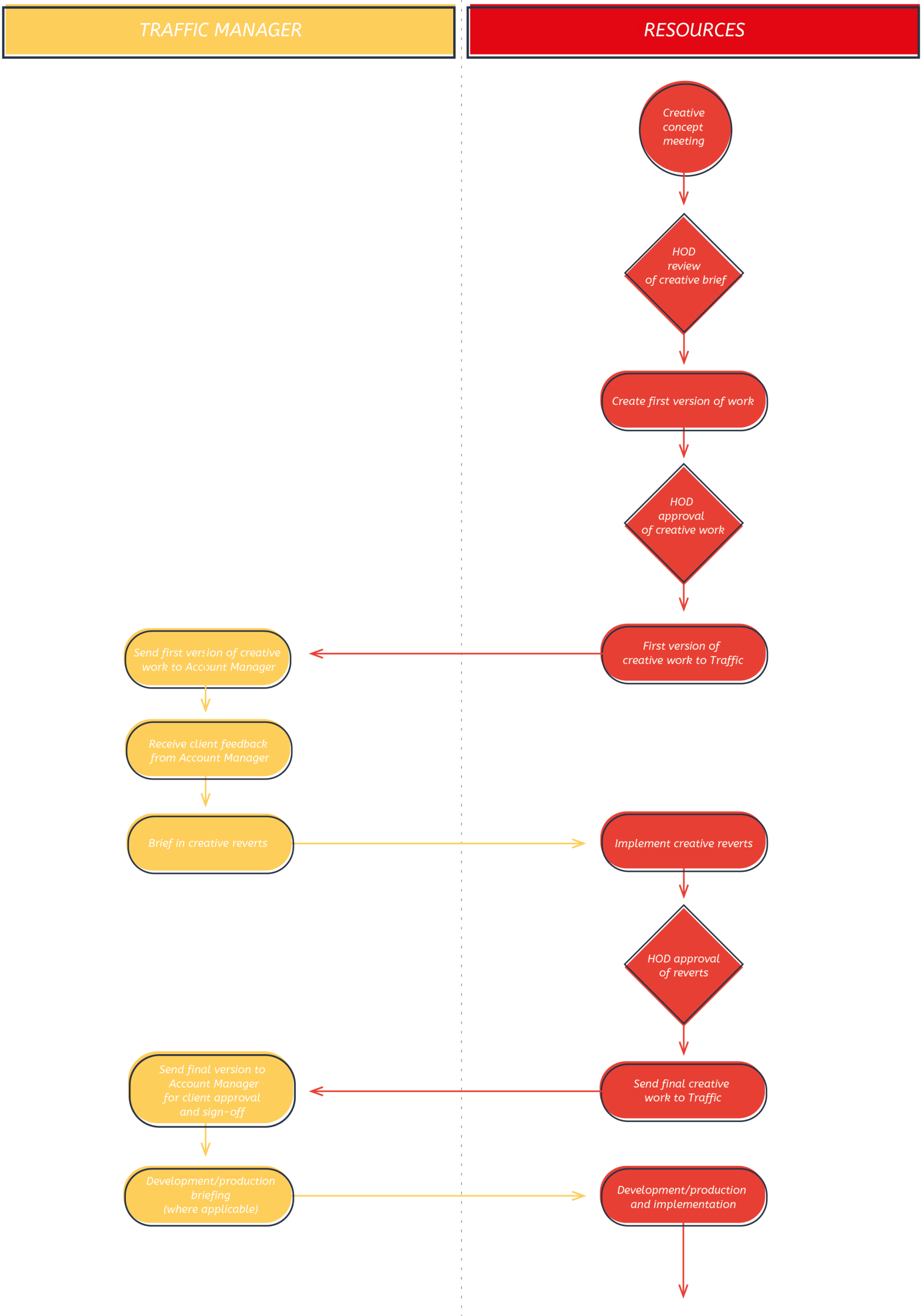
This is your engine room; the powerhouse that pushes out all your creative and development work.

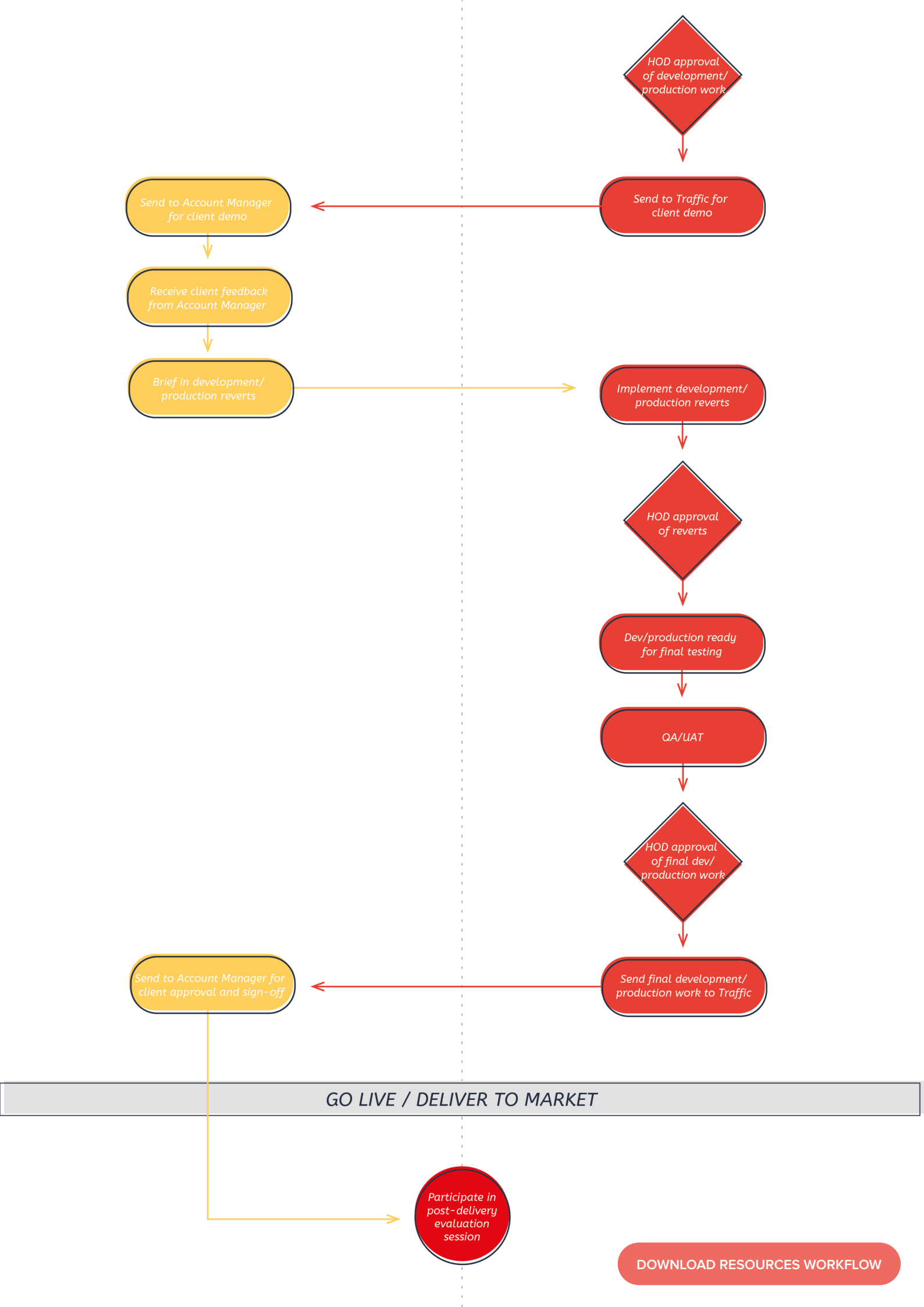
It's up to your traffic managers to steer them towards live dates and ensure they stay on track.

Your creative team is a collection of copywriters, designers and developers. Depending on the type of work you produce, you may also have DTPs, social media folk, media planners and buyers, SEO experts, a digital team and others.

Here's how your resource team functions in your workflow:

Your resources are involved in both conceptualising the brief and developing the work.


TRAFFIC MANAGER
RESOURCES
Creative concept meeting
HOD review of creative brief
Create first version of work
HOD approval of creative work
First version of creative work to Traffic
Send first version of creative work to Account Manager
Receive client feedback from Account Manager
Brief in creative reverts
Implement creative reverts
HOD approval of reverts
Send final creative work to Traffic
Send final version to Account Manager for client approval and sign-off
Development/production briefing (where applicable)
Development/production and implementation



DOWNLOAD RESOURCES WORKFLOW

5

WHY YOUR PROCESS SUCKS

Chapter: 5

WHY YOUR PROCESS SUCKS

Oh, hey! This part is for agencies with a broken process.

If you don't have a process yet, skip to Chapter 6.

Right, so you already have a process, but there's just one small problem: **it's crap. It's broken. It's as efficient as a seven-lane traffic circle.**

You can fix the cracks if you can correctly pinpoint their causes. Identify the elements contributing to the failure of your process from the list below.

- **There's no set procedure** that you follow when a new job comes in.
- **There's no defined process** that you follow to take a job from conception to completion and delivery.
- **Not all jobs** are assigned to account managers.
- **You don't insist on a signed-off creative brief** before beginning work on a job.
- **You lack visibility** when it comes to resource availability.
- **Task and job timelines** aren't accurately scheduled, which leads to delays and missed deadlines.
- **Scope creep or complete re-scoping** regularly takes place during the course of a job.
- **Employees short-circuit the system** by communicating with the wrong team members - for example, account managers going directly to resources.
- **Employees are confused** about their role within the process and/or unsure of what they're accountable for.
- **Team members lack visibility** and an understanding of where and how their contribution fits into the bigger picture.
- **Nobody logs time**, or time is logged inconsistently or inaccurately.
- **You don't recoup costs** when you exceed job budgets.
- **You don't push back** when clients want to flout the process.
- **There's a lack of task accountability** among your staff.
- **You don't have a clear costing** and billing system that you implement across all jobs.
- **You bend the rules for certain jobs and/or clients**, with excuses like, "It's just a small job", "They've been a client for a long time", or the opposite, "It's a new client; we need to impress them".

Understanding the reasons for your broken process is obviously the first step. The next is to begin your maintenance and repairs.

Check out our action point below as a practical first step, then move on to chapter 6 to discover the Magnetic 19 - a set of process rules that will help you to fix, maintain and uphold your workflow process.

Have one-on-one sessions with each member of your team to find out where and why they're struggling with the process. Drill deep to discover their sticking points, and how they feel the process could be improved, streamlined and simplified. Ensure they know that they are integral to repairing the workflow and driving its success within their team and the business as a whole.

Of agencies won't begin work on a job until a signed purchase order or cost estimate is received from the client. **- The Magnetic Agency Survey**

6

LOOK AT ALL THESE NICE, PRETTY RULES

Chapter: 6

LOOK AT ALL THESE NICE, PRETTY RULES

Don't deny it: you like rules. Actually, you love rules. While other people use yoga or bubble baths to feel calm and centred, for you, it's beautiful, shiny, rock-solid rules. Ahhhh, lovely.

So you've printed out our non-sucky process and you've made some adjustments so it suits your agency. You're ready to onboard your staff, but you're worried that someone's going to screw it up.

They are.

People screw up processes - if they didn't, you wouldn't be reading this.

Here's where rules are going to be your best defense against process breakers messing with your system. But not just any rules: tried, tested, proven rules that we nicked from several successful agencies. Because we want you to have a workflow that works.

So, take our blueprint. Tweak it, adjust it, limber it up. Then apply it along with these rules to fortify it against cracks and process breakers.

Of agencies say their process doesn't work because no one is managing it.
- The Magnetic Agency Survey

Non-negotiable rules for agencies: The Magnetic 19

Take the #Magnetic19 challenge! Once you've set your workflow in motion, see how many of these process rules you can tick off the list. Then tweet your score to @magnetichq using #Magnetic19.

Resources to make you (even) smarter

NON-NEGOTIABLE RULES FOR AGENCIES: THE MAGNETIC 19

1. Stick to the process **1000%** of the time.
2. Your workflow process **must have the buy-in of every senior person** in the agency.
3. **Following your agency's process must be a KPI for every employee** in the company.
4. **Do not tolerate** process breakers.
5. **Make sure your statement of work** (SOW) covers the full scope of the job, no matter how many times you may have to go back to the client with questions.
6. **Ensure your SOW lists the names of the stakeholders on the client's side** responsible for sign-off.
7. **Get your SOW signed off prior to kick-off.** Clients may resist signing it, but insist - every time. They'll respect you for it.
8. Once it's signed, **stick to your SOW religiously throughout the job** and consult it at every step. This is your job bible.
9. **No signed brief**, no work.
10. **No signed cost estimate**, no work.
11. **Don't begin work on a job until it's been assigned to a traffic/project manager** and added to your project management system. A job without a traffic/project manager is like a ship without a rudder: rudderless.
12. **Hold a kick-off meeting prior** to beginning creative work on your job, and ensure all key internal roleplayers are present.
13. **Assemble your resources with absolute precision.** Having a set team right from the start and sticking with them until the end of the job is key to executing work efficiently and saving money.
14. **Be highly disciplined** when it comes to daily stand-ups. Hold them without fail, even in the absence of a traffic manager.
15. **Make daily time-tracking a rule** and penalise anyone who doesn't log their time every day. Reverse-engineering your time-tracking does not work.
16. **Share job ownership and accountability** by assigning specific responsibilities for specific tasks. This ensures that every individual working on a job takes responsibility for their work, and that everyone is accountable for their part in the job.
17. **Grant clients a maximum number of reverts.** Bill for additional reverts.
18. **Make sure your account manager** closely monitors the budget throughout the job and flags it if it seems you may go over budget.
19. **Hold a post-delivery review after handover** to analyse job successes and losses, and to pinpoint areas of improvement going forward.

Good housekeeping

We asked traffic and project managers to share their top tips for improving productivity, efficiency and job satisfaction across their studios.

"NO TYPING IN CAPS. People still do this!"

"Implement multiple sign-offs for large jobs with huge budgets at stake - for example, multi-million rand print jobs."

"Traffic managers: Be tough, but nice."

"Restrict internet access for anyone who didn't track their time the day before. Automatically unblock it once they've done it."

"Track time and budgets throughout the job. Track reverts. At the end of the job, do a recon to see how much your reverts cost you, how and where money was lost, and how and where you squandered resources."

"Don't forward emails or email requests. Create a new email or task and detail the work required."

"Before any client presentation, do an internal dry-run to spot errors or changes required."

"Make sure the right people on the client's side are signing off on job deliverables."

"Your account managers should talk to traffic managers and your traffic managers should talk to your resources. Account managers should never go directly to creatives."

"Block access to the company bar for anyone who hasn't logged their time. This works brilliantly!"

"To avoid confusion, account managers shouldn't speak to each other's suppliers or teams."

"Set up regular reviews throughout the job to track its progress."

7

HOMEWORK

Chapter: 7

LOVE OUR EBOOK OR NOT, WE'D LOVE YOUR OPINION.

We've done all the instructing; now it's time for you to implement. We know it's not going to be easy: you're going to need the buy-in of your entire department, and that's going to take an ish-load of patience, perseverance and free lunches.
(You can get people to do almost anything if you buy them lunch #Management101).

Also, you're not alone. Isn't that awesome? We're here to help you - all you need to do is pick up the phone (obviously not literally though - who even makes phone calls anymore? **Hitting us up via support@magnetichq.com is a much better idea).**

We'd love your feedback on this ebook. If you thought it was amazing, if you thought it was the worst thing you ever read, or if you just thought, meh, what's for lunch? It doesn't matter - tell us.

It's our first ebook but there'll be more. So, make sure the next one is even better by giving us your feedback on this one.

Email

Facebook

Twitter

LinkedIn

Or pop by our offices and stalk us at our homes. It'll make us feel a lil' famous.

Thanks for reading, and if you helped to put this incredible resource together, thank you for your time, insights and great coffee. All of it was instrumental in creating a process that doesn't suck.

PS: Give the gift of a free ebook!
It's even better than re-gifting. Share this ebook with anyone you believe will get some value out of it.

Share Share Share

magnetic

www.magnetichq.com

hello@magnetichq.com
SA: +27 21 180 4119
UK: +44 1277 424 119
Suite 503, 5th Floor, The Point Mall.
76 Regent Road, Sea Point