

Creative Agency Operational Strategy and SOP Development

Workplace Technology Audit, Recommendations and SOP Rollout

Introduction

Creative Agency

Busy and well established digital strategy, creative, and production agency in Minneapolis, Minnesota

Starting March 2020, the office went remote and came back as a hybrid office in late 2021

Context

Various workplace technology tools were used within the agency's day-to-day. Some were added as a workarounds.

Being remote, employees were dependant on the tools for collaboration, file sharing and to be efficient and effective in getting their work done

Problem statement

The lack of defined processes and standardization for the many available and used tools not only caused a difficult onboarding experience, but also confusion, swirl, lack of visibility, and an overall inefficient workflow process for the employees

Discovery - Workplace Technology

Audit

Review All Tools

Collected list of all tools being used within the agency and identified:

- Paid account(s)
- Free account(s)
- Individual account(s)
- Features
- Why, How, When it is used

Research

Qualitative Research

Conducted focus group sessions with the department teams and asked four open-ended questions and encouraged discussions

Analysis

Identify Pain points, gaps, and goals

Compiled all the notes & transcript to identify keywords and commonalities of the employees answers










Collaborated with the Stakeholders and teams to develop Business and Operational Goals

AUDIT: Compiled list of all workplace technology tools, use cases, subscription type, cost and explored all the features.

Only one or two features of each tool was being used.

How new tools were added:


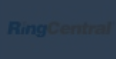







- To solve a problem or create a workaround
- New employee introduced it for their comfort
- Adopted from a client
- Lack of understanding and training on existing tools

Use Cases	 Basecamp - PM tool & job folder	 Meetings & calls only	 Financial + Job number	 Outlook, excel, word, Sharepoint, Teams	 Dropbox- File Storage only	 Creative Suite + XD	 Sheets, Docs	 Timelines & project tracking	 Estimate Generator only
Project Management	✓			✓			✓	✓	
Task Management	✓								
Resource Management							✓		
Reporting									
Proofing Tool						✓			
Communication Tool	✓	✓		✓					
File Management	✓				✓				
Financial			✓						✓

All of the tool capabilities overlapped

Leading the agency to:

- **Overspending** on subscriptions
 - \$53,400 estimated annual costs
- **Redundancies** in process, information and data
- **Productivity loss** - Information hunts with no single source of truth
- **Confusion** - No standardization or processes
- **Distractions** - a lot of noise coming from multiple sources
- **Lack of Consistency** - different process from person to person

Use Cases	 Basecamp PM tool & job folder	 RingCentral Meetings & calls only	 workamajig Financial + job number	 Outlook, excel, word, Sharepoint, Teams	 Dropbox- File Storage only	 Creative Suite + XD	 Sheets, Docs	 Timelines & project tracking	 Estimate Generator only
Project Management			✓	✓+			✓	✓	✓
Management				✓			✓	✓	✓
Management									
Dashboards & Reporting								✓	✓
Review & Proofing Tool				✓	✓	✓	✓	✓	
Communication Tool	✓	✓	✓	✓			✓	✓+	
File Management	✓		✓	✓	✓		✓	✓+	
Financial			✓						✓

✓+ Needs additional app or integration

Research

Focus Group Questions:

1. What are your feelings about our current process and toolset?
2. When you think about our process, what words come to mind?
3. What are your specific pain points when it comes to our process and communication tools
4. What works well?



Research Analysis

What Is Needed To Support The Business and Teams

Insights

- Dashboards
 - All Work, Status & Assignments
- Financials
 - Agency, Client, Project Profitability
- Employee Utilization
- Project History
 - Estimated vs Actuals
- Key Milestones & Timelines

Better Forecasting

- Client Projects
- Financials
- Staffing Needs
- Vendor Needs

Consistency & Standardization

- File Management
- SOP's
- Work Tools
- Terminology
- Templates
- Roles & Responsibilities

Easy Collaboration

- Team Collaboration
- Client Collaboration
- File Sharing
- Time Tracking
- Routing & Reviews

The Path Forward

Business & Operational Objectives

- **Financial Accountability And Reporting**
 - More Connected Data = More Insights = Better Business Decisions
- **Reduce Fixed Costs & Save Money**
- **Increase Productivity**
- **Simplify Everywhere**
- **Eliminate Redundancies & Workarounds**
 - Four Main Tools Chosen To Be Best At What They Do
- **Repeatability**
 - Systems That Can Remain Even As People Change
- **Scalability**
- **Improve Project Visibility**
 - Including Resourcing, Task Management, Planning, File Management And Project Insights
- **Consistency**

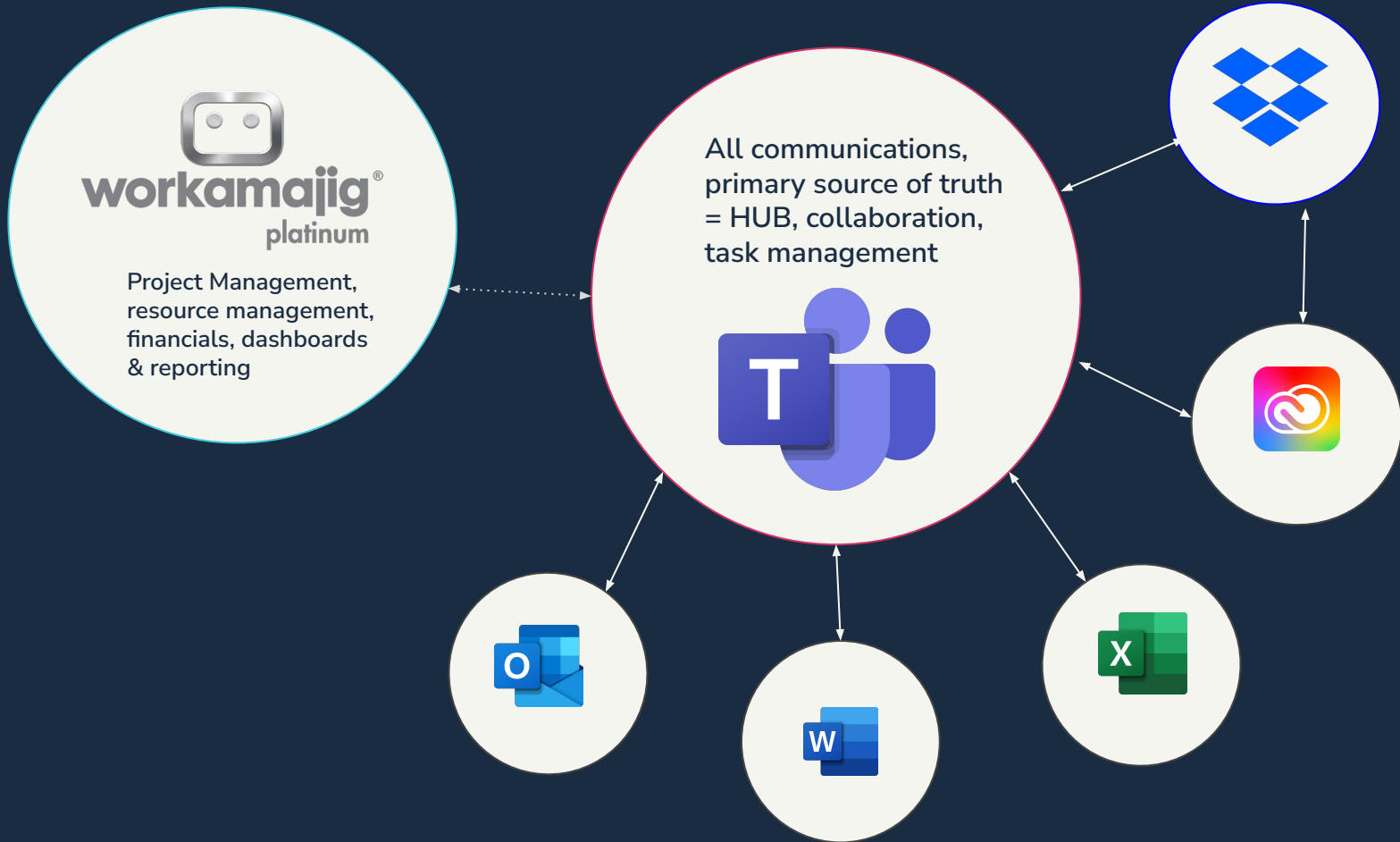
Solution

Utilize the more robust and existing tools and implement MS Teams as the hub and develop standard operational processes.

	 Project, Resource Management, Financials, Dashboards & Reporting	 Teams as the Hub - Outlook, excel, word, Sharepoint connecting	 Dropbox- File Storage and routing: connected to Teams	 Creative Suite + XD- connected to Teams
Project Management	✓	✓		
Task Management	✓	✓		
Resource Management	✓			
Dashboards & Reporting	✓			
Review & Proofing Tool		✓ ← →	✓ ← →	✓
Communication Tool		✓	✓	
File Management		✓	✓	
Financial	✓			

Connectors & Integrations Map

Dropbox: File storage, collaborative reviews, version control - replaced server + VPN



= \$35,000 annual costs

Saving \$18,000/year on subscriptions

Implementation

- Move To Dropbox
- Close Vpn Connection
- Pilot Using Teams For Select New Projects
- Design Project Plan For Workamajig

- Sunset RingCentral
- Completely Move To Teams
- Launch Workamajig

Collect And Report On Roi's Over The Previous Year



- Set Up Workamajig
- Test And Train Workamajig.
- Move Existing Projects Out Of Basecamp
- Close Basecamp

All Team Check In And Retrospective



Standard Operational Processes (SOP) Development

Workamajig - Project Management & Financial Tool

Workamajig

Company

“A Single Source Of Truth For Your Agency”

“Workamajig’s marketing agency project management software gives you accurate insight into your agency so you can make smarter business decisions.”

Context

The SaaS tool is capable of meeting just about all of the objectives identified by the teams.

It offers robust financial and business insights, effective project management, resource management, creative management - tasks, time tracking and consistency.

Problem statement

The agency only used this tool for generating job numbers, SOME estimates (Harvest for most), time tracking, payroll, employee, client and vendor setup, and invoicing/paying invoices.

Lack of training and knowledge transfer lead to this tool being underutilized and seen as a pain point.

Workamajig Will Achieve:

✓ Insights

- **Dashboards**
 - All Work, Status & Assignments
- **Financials**
 - Agency, Client, Project Profitability
- **Employee Utilization**
- **Project History**
 - Estimated vs Actuals
- **Key Milestones & Timelines**

✓ Better Forecasting

- **Client Projects**
- **Financials**
- **Staffing Needs**
- **Vendor Needs**

✓ Consistency & Standardization

- **File Management**
- **SOP's**
- **Work Tools**
- **Terminology**
- **Templates**
- **Roles & Responsibilities**

✓ Easy Collaboration

- Team Collaboration
- Client Collaboration
- File Sharing
- **Time Tracking**
- Routing & Reviews

The Path Forward

Workamajig As The Primary Agency Management Tool

- **Account Clean Up**
 - Removed Former Employees, Clients And Vendors
 - Delete Old Templates
 - Clear Out Incorrect Rates
- **Standardize:**
 - Auto-Generated Campaign & Project Numbers
 - Project Types & Categories
 - Project Timing, Resource Needs, And Hours (Approximate)
- **Build Project Templates**
- **Standardize, Rename And Define Statuses**
- **Develop SOP's For New Projects, Estimating, Reporting, Billing, And Closing**
- **Test New Process On A Selected Projects**
- **Stakeholder And All Agency Approval**
- **Training** - lead & supported by Workamajig product specialists

SOP Development

Standard Operating Processes brings consistency to the workflow and quality. No matter who does the work, there's every likelihood that it will be the same from person to person.

Getting there requires:

- Standardization
- Defining Terminology and Processes
- Consensus - connect changes to the objectives
- Implementation

Standardize

- Status Phases
- Project And Campaign Number Generation
- Project & Campaign Templates
 - With Timelines, Roles, And Estimated Hours
- Estimating Process
- Terminology

Define

● Status Phase Terms and Process

- New jobs opened and in a planning phase.
- Estimating in progress, timelines being built.
- Outside of set up, estimating, no creative hours should be billed while in this status.
- Once estimate is signed, the project moves the job to "Live".
- Time CANNOT be billed to a job in estimating status.

- Estimating
- In Process
- Complete
- Ready to Archive
- Archived

Live or In-Process

- Once estimate is signed, the project status will be changed to "Live".
- At this status, jobs can have hours tracked to it. Time can only be tracked to a job when in "Live" status.
- Reporting can be run on all projects with "Live" status.
- WMJ will track budget health for this project.

Complete

- Once project is complete, PM will change status to "Complete" to start final billing workflow.
- Complete means:
 - All final deliverables are out
 - All time and expenses for the job are in
 - No outstanding vendor invoices
- Monthly reports for "Complete" can be run to identify which projects are ready for final billing.
- Final invoice has been sent to the client.
- Project will remain in "Complete" until all payments from the client have been received.
- Time cannot be added to a project in "Complete" status.

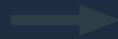
● Campaign & Project Categories

● Project & Campaign Templates

● Estimating Process and Steps

Ready to Archive

- Status set by financial lead when final bill has been paid and recognized in the system.
- Status "Ready to Archive" indicates that the project is ready to be closed in workamajig and archived in corresponding job folders. Eg. Basecamp, dropbox.
- Reports for all projects in "Ready to Archive" status can be run to get a list of projects that require archiving.
- Time CANNOT be billed to a project in "Ready to Archive" status.



Archived

- Status set by user responsible for archiving the job in all places.
- Status "Archived" indicates that the project has been archived in all places.
- NOTE: An "Archived" project is not gone forever and still in the system to view when needed. To do so, search for the job with the filter "include Archived status" on.

Consensus

Connecting The Outcomes From Change to Objectives

Expected Outcomes

- Provide Better Control Of Financials
 - Time & Expenses Billed To Job. Especially After A Job Has Been Final Billed
- Create A Single Source Of Truth
- Reduce The Need For Multiple Sheets & Manual Updates
- Produce More Accurate Reporting & Visibility On All Active Projects
- Reduce Additional Work Via Workflow Notifications/Initiations
 - Streamlining Process To Create An Easier Onboarding And Training Experience
- Standardizes The Steps For A Project (From Start To Finish) Across All Brands

Objectives

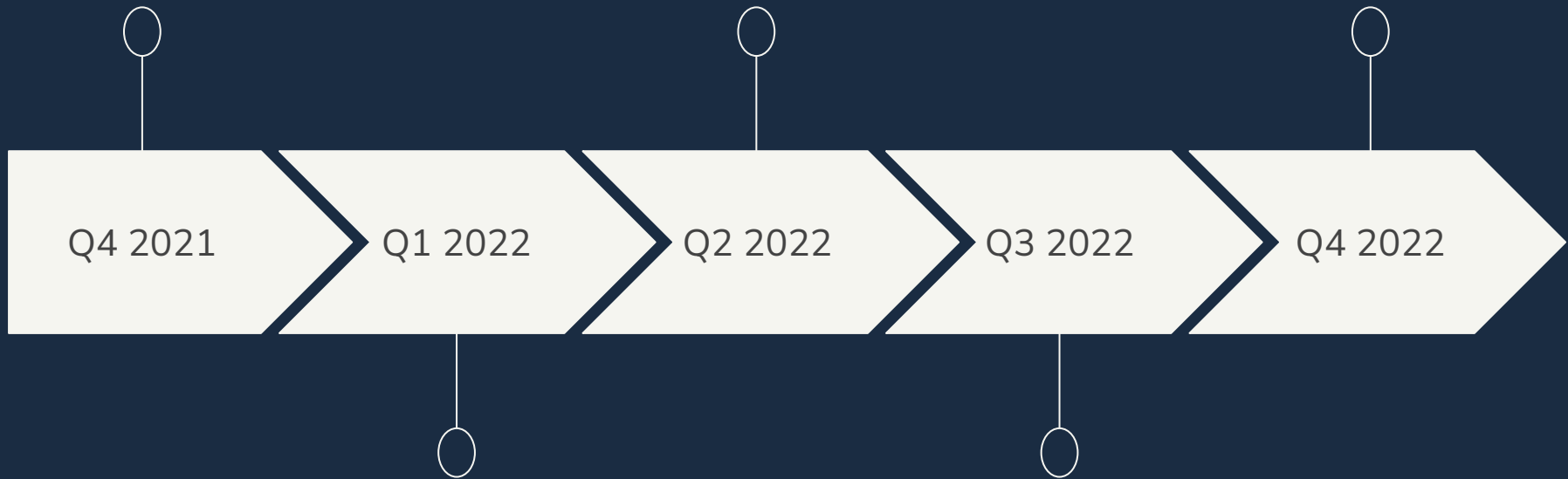
- Financial Accountability & Reporting
- Increase Productivity
- Simplify Everywhere
- Eliminate Redundancies & Workarounds
- Repeatability
- Scalability
- Improve Project Visibility
- Consistency

Implementation

Design Project Plan For
Implementing Workamajig

Launch Workamajig

Collect And Report On
ROI's Over The Previous
Year



- Set Up Workamajig Templates, Rates, Employees & Other Data
- Test & Train Workamajig

New Process Check In
& Retrospective

Impact

Tool Consolutions & Utilization

- ★ Annual savings of approx **\$18,000**
- ★ Increased Productivity
 - Dropbox alone saves hours per day per person
 - Single source of truth, no time wasted hunting for information
 - Less noise! Work and communications remain within Teams
- ★ Quick and Smoother Onboarding
 - 3-4 weeks of getting familiar & working without support dropped to 1.5 - 2 weeks
- ★ Financial Accountability & Reporting
 - Using Workamajig to its full potential provided more connected data = more insights = better business decisions!
- ★ Improved Project Visibility
 - Resourcing management, planning & forecasting
 - Accurate reporting on project budgets & staffing utilization

SOP Development

- ★ Increased Productivity
 - Everyone was doing everything the same way
- ★ Quick and Smoother Onboarding & overall employee work life
 - Clear and standardized direction on processes
- ★ Simplified everywhere!
- ★ Improved Project Visibility
 - Timelines, allocations, tasks
- ★ Eliminated Redundancies and workarounds
- ★ Repeatability and Scalability
 - Systems & process remain even as people change