Client Engagement Across Creative Disciplines:
An Open Dialogue of Best Practices

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E-Learning

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Dedication

For April

Thank you for being my inspiration, my mentor,

and the best thing that ever happened to me.

Without you, none of this would be possible—or near as much fun.

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Table of Contents

List of Figures

Client Engagement Across Creative Disciplines:

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Agency/client engagement is crucial to any creative discipline, no matter the size or focus of the company. Often, the way a company interacts with clients, not necessarily the work produced, is cited as the reason for continuing or terminating the professional partnership. In order to learn how different companies and different creative disciplines engage with clients throughout the creative development process, 16 in-depth interviews were conducted regarding what methods the firms have in place to enhance client interaction. Professionals interviewed represented an array of creative fields, including advertising, architecture, graphic design, public relations, and software development as well as client-side marketing personnel from various industries. Based on these interviews, themes and patterns have been identified that may be used as best practices for client engagement to help smaller companies and freelance professionals succeed in the highly-competitive creative industry.

Keywords: Client Engagement, Client Interaction, Creative Development, Agency, Freelance

Introduction

Client engagement is crucial to any creative discipline, no matter the size or focus of the company. If the client's experience with the creative company—commonly referred to as an agency, firm, or studio—is positive, then it will lead to better client retention and will help increase the agency's net earnings. According to Dan Plachta of The Bedford Group, an agency relationship consulting firm, "A client's relationship with its communications firm is one of the most complex in the business environment and requires a substantial level of collaboration from both parties to make it effective and sustainable, especially in these trying times when patience is thinner, loyalty is weaker and understanding is more shallow" (Plachta). Agency/client relationships have become shorter in recent years. In 1985, the average agency/client relationship lifespan was 7.2 years. By 1997, the agency/client relationship shrank to 5.3 years, which represents a 25 percent decline. Today, the average tenure of an agency/client relationship is less than three years (Plachta). Moreover, an article in *Inc.* magazine states that it is easier and more cost effective to retain existing clients than it is to acquire new ones, and the authors contend that "if this business can retain all of its customers by just one additional month on average, they can achieve an additional three percent of annual growth" (Stark, Stewart). Given these statistics, improving client engagement techniques is a critical strategy for the success of creative companies.

In today's marketplace, clients have unfettered access to limitless creative resources. The perpetually connected world means that agencies in any creative discipline can do business with clients across the country or around the world. Technological advances have also leveled the playing field. Now, small independent firms can go up against the large conglomerates and have a chance of winning the business (Shapiro). Because of this, client retention is more important than ever, and the best way to keep a client's business is to ensure the client is satisfied with the creative product as well as with the processes utilized throughout the creative development. "Project management is an area where the freedom of the creative process and the constraints of sound business procedures overlap. One [creative process] is quite loose and visionary, while the other [business] is more structured and driven by numbers" (Perkins 150). In order to increase their competitiveness, creative companies must consider ways to harness this visionary energy and meld it with project management processes. Because of the serious implications of client retention, it is essential for creative professionals to master the art of client engagement and to determine processes and procedures that lead to mutual success for both the agency and the client.

On a personal note, this research is important to me because of the more than 20 years I have spent in various creative fields, first as an environmental designer at an architectural firm, then as a graphic designer in a marketing communications agency, an art director and associate creative director with a public relations firm, and, finally, as the owner of a creative boutique. Originally, I had intended to narrow the scope of this research to large advertising agencies and graphic design firms, areas in which I have the most experience. However, as creative lines continue to blur throughout the industry, I decided to expand the study to include architectural, digital, and public relations firms, as well. I also thought it prudent to get the client's perspective in order to discover what methods and engagement practices resonate with them and what they look for in a marketing partner. Based on the research, I hope to reveal insightful information that may be used by small creative boutiques and freelance professionals as a roadmap for success.

Business Models

In the creative industry, businesses range from global conglomerates to smaller studios, or boutique agencies, and even the lone entrepreneur. Global conglomerates are holding companies that own numerous agencies around the world that all answer to a board of directors (Rosenblum). Unlike the conglomerates, studios or boutique agencies are independently owned creative firms or advertising agencies. The single entrepreneur or freelance professional is the most basic model in the creative industry. This model is comprised of a single person working out of a studio space or home-based office.

In the agency model, numerous marketing and creative professionals work together as a single company or corporation. Each employee of the agency has a distinct role, such as account service, creative, media, etc. In order to be considered an agency, the company must act as an agent on a client's behalf (Perkins 465). Agencies are given the authority from their client to negotiate pricing, such as media space, photography, and printing on behalf of the client. The other common business configuration is the freelance model, which is typically a single creative individual in business for him or herself (Perkins 63). In the freelance model, the owner is typically focused on one area of the marketing process, such as creative, media, or strategy. Both business models have positive and negative implications for the client and for the creative professional.

The Classic Agency Model

For decades, the marketing or advertising agency was a one-stop shop or full-service agency for the client. The agency could handle all aspects of a client's project from research and strategy to creative development and production to media placement (Perkins 469). Along with the creative department—comprised of art director and writer teams "often referred to as the

'Bernbach model' because it was developed in the 1950s by Bill Bernbach, co-founder of the famous ad agency Doyle Dane Bernbach"—most agencies also had a graphic design department within the creative department to handle print collateral development (Ogilvy 205). Many agencies also featured in-house photo studios and editing bays, so all aspects of production could be handled within the walls and under the control of the agency.

In the full-service agency model, the account executive or account director worked with the research department to develop the strategic direction for the client. Once the strategy was developed and approved by the client, a media plan was created to determine where and when the advertiser's message would be placed. Working from a creative brief written by the account service personnel, members of the creative department developed campaign concepts for the client. Once the client approved a campaign, it moved into production where final artwork was sourced or created, and then it was distributed or "trafficked" to the various media outlets (Suggett).

This linear, sequential developmental approach is referred to as "waterfall" methodology. In this methodology, the project is broken down into well-defined phases, and each phase is worked on in sequence. Once each phase of the development process (strategy, media, concept, and production) is complete, the project moves to the next phase (Base36). Having all of these resources in one place requires several departments: account service, media, strategy/planning, and creative—each with their own hierarchy or management. There also has to be a trafficking system in place to keep everyone communicating and working in the same direction. All these layers and systems require greater overhead costs.

Positives and Negatives of the Classic Agency Model

From the client's perspective, an agency can be a turnkey model to solve their marketing needs. Everything the client requires, from research and strategy to media and creative production, is handled through one source (Perkins 151). Agencies also have processes in place to shepherd projects through the system efficiently in order to meet deadlines, while the client has an account executive assigned to their business to serve as a point of contact in order to make sure their needs are met. For these reasons, working with an agency can be very appealing, particularly to a client with a considerable marketing budget.

Many of the things that make an agency appealing to one client, may be viewed as a negative by another client, particularly given budget constraints. Employing a large staff requires considerable agency overhead, and these costs are passed along to the client. Also, the structure implemented by a large agency adds layers and complexity to the organization, which slows the process as a job works its way through the system. As Dan Ward states in his book *F.I.R.E.*, "When we view complexity as a sign of sophistication, we build needlessly complicated things, which cost more, take longer, and do less than they might otherwise" (220). For some clients, especially those with limited budgets, bigger is not always better.

From a creative professional's perspective, working at an agency also has positive and negative implications. Working at an agency allows a creative professional to work on large, high-profile accounts. As previously mentioned, full-service agencies are expensive, so it follows that clients with ample marketing budgets engage these agencies to produce their creative work. A positive aspect of working at a large agency is the opportunity for creative professionals to work on national and international brands, which have ample media budgets that give their work greater exposure. A negative to working at a large agency for a creative professional is being assigned to a single account for long periods of time. “It’s difficult to continue to enjoy your work when you do the same thing day after day, year after year. It is even more difficult to remain creatively fresh” (Foote 17). Staying creatively fresh is the lifeblood of any agency’s creative department. While agency life can be challenging and rewarding for a creative professional, it is definitely not without its shortcomings.

The Freelance Model

The business model on the other end of the creative services field is the freelance model. This model traditionally consists of a single individual offering creative resources either directly to a client or to other agencies. These people are typically focused on a single element of the process, such as graphic design, copywriting, or art direction. There are also freelance editors, producers, directors, media planners, etc. Regardless of the area of expertise, the majority of freelancers are focused on a single skill. While the agency model is much more general, where a client typically brings their entire marketing problem and budget to be handled from start to finish, the freelance model is more niche-oriented and focuses on handling one specific client need. With the freelance model, the client is more responsible for the overall marketing strategy, while the freelancer focuses on the implementation of the client’s strategy (Belew).

Positives and Negatives of the Freelance Model

From the client’s perspective, one of the most appealing aspects of working with freelance talent is efficiency and budget effectiveness. “Small businesses are generally perceived as having a better record of productivity and innovation than larger companies” (Foote 11). This increased productivity means the freelancer is often able to turn work quicker than a large agency with its multiple layers of approvals and hierarchical systems. Also, by the sheer nature of the size of the freelance business as compared to a large agency, there is less overhead, meaning the freelancer can usually deliver a product more cost effectively than a large agency (Foote 23). Finally, when working with freelance talent, the client deals directly with the person who is creating the work. This direct contact between the client and the creative professional means there is less chance for the direction to get lost in translation, as can often happen in the agency model, when client direction goes through the account service department and is then relayed to the creative department (Heig Appendix T).

Conversely, things that clients perceive as positive aspects of working with an agency may also be viewed as negatives when working with freelance talent. While an agency can handle a project from start to finish, clients may be wary that a freelance professional cannot complete complex projects. For example, freelancer professionals are typically focused on one segment of the creative business, such as art direction or copywriting. Should a client need strategy or media planning, they will need to identify and procure additional resources for these services. Also, clients may perceive freelance talent as being less professional than larger agencies. Even if the work produced by the individual is on par with the larger agencies, the stigma of being one person with a home-based business may be difficult to overcome (Foote 62).

From a creative professional's perspective, freelance services have both positive and negative aspects as well. On the positive side, the freelance professional has the opportunity to make his or her own path and reap the rewards (Foote 17). Aside from the potential financial gains, freelance professionals control the type of work they pursue and the projects they accept, which allows more creative freedom and greater diversity of work. Freelance work has its shortcomings as well. The responsibilities placed on the freelancer are much greater than an employee of an agency or design studio. "You'll become an account representative, clerk, manager, worker, bookkeeper, and, yes, janitor. When stripped of all creative pretensions, freelancing is simply a small business requiring all the diverse skills of a businessperson" (Foote 29). Thus, the financial rewards of freelance work come with all the responsibilities any successful business requires. Unlike in an agency setting where the creative professional can rely on others to bring in the work, the freelance creative must solicit the work they do. Along with their creative duties, freelance professionals must also act as salespeople. Another negative aspect of the freelance model is that the size and scope of the projects are lower budget and less high-profile than the work at a large agency. Clients tend to look to freelance professionals to complete smaller tasks, while leaving the high-end, strategic and creative thinking to the agencies (Vaughn Appendix P, Loehr Appendix Q, McGee Appendix R).

Terms of the Trade

Prior to an analysis of the primary research or in-depth interviews conducted for this study, several industry terms and jargon used by interview subjects need be defined. The people in advertising agencies and design studios who prepare the creative work, such as print ads (newspaper and magazine), collateral (brochures, posters, etc.), broadcast (television or radio ads), out-of-home (billboards, bus benches, etc.), and online (websites, Internet advertising, etc.) are referred to as "creatives." This term encompasses art directors, writers, graphic designers, and production artists. The initial ideas that the creatives put together for a client presentation are called "concepts." Concepts are referred to differently, depending on the level of finish or completion that these concepts take during the development process. "Thumbnail" sketches are the first step, which refer to small, very loose, hand-drawn sketches that usually only mean something to the creator. They are often referred to simply as thumbnails. Rough sketches are the next phase of the process, which are hand-drawn sketches, typically to size, or at least to the proper ratio, of the finished piece. They show the basic layout and the embodiment of the concept. Sometimes these rough sketches will be scanned and colorized digitally, but they are still essentially hand-drawn representations of the final piece that contain just enough copy and detail to convey the concept. Computer “comps” are finished presentation pieces that include photography, copy, and final design elements like specified typefaces and graphic styling (Bean-Mellinger).

Before any creative work begins, the account representative will create a document that spells out the parameters of the project, including the goals, timelines, budgets, and other pertinent information. This document also embodies the overall strategy, which will drive the creative development process. In the advertising industry, this document is called a “creative brief.” In the graphic design and digital disciplines, it is often referred to as a “design brief” or “brand brief,” and in the architectural arena, it is called a “space program” (Stone). While there are subtle nuances between the information each creative discipline needs in this document, they all serve the same purpose, which is to act as a touch point for the work produced to make sure it is on strategy and within the project parameters.

Particularly in the architectural disciple and occasionally in the graphic design discipline, the term “charrette” is used. A charrette is a working meeting with clients where designers create loose drawings or sketches in the meeting to visually describe the ideas being discussed (Oxford Dictionary). This type of meeting is useful to help the client envision the direction the designers plan to take.

Creative disciplines often develop “moodboards,” sometimes referred to as “styleboards” or “visual briefs.” These are photomontages of found images and, sometimes, sample copy used to reflect the brand essence as the designers see it. A moodboard is used as a “visual tool to capture a particular style, trend atmosphere or feeling” (Tang). Moodboards are helpful to serve as an early development touch point with a client to make sure the creative strategy is on target and to determine the visual mood the project development should take.

For television or video production, the rough layout is often referred to as a “storyboard,” or simply as “boards.” These key frames (important or transition moments) are pasted onto a presentation board in the order they will appear in the video or commercial. Sometimes, there is a script, or visual cues written beneath each key frame. The idea is to give the client a general idea of what will happen in the video. The next level of finish is referred as an “animatic,” which is a low-fidelity video, utilizing the still frames from a storyboard. However, using video editing software, these frames are given some movement or transitions between frames. Animatics usually incorporate simple sound design and often have a recorded voiceover. As with rough comps, storyboards and animatics may have different levels of finish–from rough pencil sketches to colorized sketches to full-color photography. The final piece of a preliminary video presentation is called a “rip.” This is a piece of video, stock or original footage, which has been treated in the way the producer or director wants the final video to look. The rip is a teaser video or trailer of the much longer piece to come. Rips are more complicated and expensive to produce than storyboards or animatics, since they require additional editing and finishing steps, so they are typically only done for long-format videos or commercials with substantial budgets to justify the added expense (Wade Appendix J).

In terms of Web development, unique terms include: “sitemaps,” “wireframes,” and “low- and high-fidelity prototypes.” A sitemap is simply a diagram indicating where all the pages of a Website fall and which pages link to each other in order to determine a logical flow for the site. Wireframes are the next step in the process. These page schematics (or screen blueprints) are where functionality begins to take shape by showing where the button, links, visuals, and copy will be placed on the screen for the optimal user experience. The final step before programming is the prototyping phase. This is the full design of the Website or application, commonly referred to as an "app," and it may be low-fidelity in the early stages or high-fidelity in the final stage. Low- and high-fidelity refer to the level of finish put into the prototype (usability.gov).

Methodology of Primary Research

In order to gain a better understanding of client engagement models, a qualitative approach was used for this study. In-depth interviews were conducted with professionals from creative companies and from client-side marketing departments. Between May 8 and July 2, 2015, a total of 16 in-depth interviews were completed. Eleven of those interviews were with professionals at creative companies, and five interviews were with clients in corporate marketing departments (Appendix A, B). Of the 16 interviews, 11 were conducted by telephone, four were conducted in-person, and one via email. Interviewees were management level executives from cities across the country. Five respondents were female, and 11 were male. Interviews averaged 42 minutes in length with the longest interview being 77 minutes. Respondents were asked the same set of 12 questions, and a follow-up question regarding freelance talent was sent via email to the five client-side interviewees (Appendix C, D). All of the telephone and in-person interviews were digitally recorded and later transcribed for analysis.

More specifically, the 11 creative companies in this study encompassed five different creative disciplines, including two advertising agencies, one architectural firm, three digital/hybrid agencies, three graphic design/branding studios, and two public relations firms. These creative agencies were selected based on their size, notable work they had produced, and their reputation in the industry. In every instance, an effort was made to speak with at least two companies in each creative discipline. Despite numerous efforts, this was not possible for the architectural industry – only one interview was conducted for that discipline. Creative companies from across the United States were targeted with respondents in locations ranging from New York City, New York, to Austin, Texas, to Minneapolis, Minnesota. Most companies had more than one office location, and three had global presences as well.

As for the client-side interviewees, the original intent of the study was to focus on creative companies. However, getting feedback from client representatives who engage with these creative professionals on a daily basis was deemed necessary in hopes of obtaining greater insight and understanding of how the client engagement process works from both the client perspective as well as that of the creative company. For this study, five marketing professionals from the following industry segments were interviewed: alcoholic beverage, building products, health care/insurance, restaurant/food service, and tourism/hospitality. These clients represented a wide variety of industry segments and ranged from local and regional marketers to global brands. The five individuals interviewed were top-level executives within their organizations, and each had more than 20 years of marketing experience with four of the five interviewees having worked at advertising agencies at some point in their careers.

During the interviews, all of the respondents were asked a series of 12 open-ended questions pertaining to how they engage and interact with their clients during the development of a typical creative project. These questions were modified only slightly for the client-side interviewees by substituting the word “client” for “agency” (Appendix D). These original 12 questions sparked subsequent questions that led to more information and greater details about the creative process. Questions ranged from the timing of client touch points throughout the process and to the level of finish employed during client presentations to the amount of agency/client collaboration involved, and to trends and changes the interviewees have observed in the industry. Representatives from each of the 11 creative companies interviewed were asked to submit an artifact for the study related directly to the creative development process. Only four of these creative companies complied with the request for an artifact (Appendix U-X). A follow-up question was also sent via email to the five client-side interviewees to obtain more information regarding their use of freelance creative talent. The open-ended nature of all of the questions promoted and encouraged dialogue between the interviewer and interviewees.

Once the interviews were complete, the digital voice recordings were manually transcribed into a Microsoft® Word document format (Microsoft.com). Each interview was then imported into MAXQDA, a professional software program designed specifically for the analysis of qualitative data (maxqda.com). Using this software, a system of categories was developed, including client engagement models, agency staffing, the importance of client/creative interaction, level of finish presented to clients, and trust factors. The Word documents were then coded for certain words and phrases, such as *agile methodology*, *annual review*, *budgets, chemistry*, *client involvement in concept*, *client knowledge*, *collaboration*, *decision maker*, *digital comps*, *direct designer/client contact*, *meet through technology*, *mood boards*, *multiple solutions*, *processes for engagement*, *research*, *sketches*, *staff by specialty*, *testing*, *transparency*, *trust*, *waterfall methodology*. The interviews were manually coded for the specified concepts, and the MAXQDA software automatically calculated how many times each code appeared in the interviews. Reports were pulled based on the frequency of the occurrences. After interpreting and carefully analyzing the data, several patterns and themes emerged throughout the interviews, revealing numerous commonalities between the five creative disciplines as well as disconnects between the creative companies and the clients.

Differing Models of the Creative Disciplines

Although each company had certain methods and procedures for how they interact with their clients, most client engagement models were similar across all creative disciplines interviewed. All the disciplines felt client input was critical to successful work with the difference being the amount and type of client input the agency felt was appropriate. The ways in which the agencies went about getting the information they needed to successfully complete a job varied slightly depending on the discipline. Some agencies and disciplines employed deep dives into the client psyche, while others relied on quantitative and qualitative research and testing to discern the right direction in which to proceed. Every agency and discipline did its best to be flexible and conduct the process in a manner acceptable to the client. While each creative discipline had the same goal of pleasing their clients, some had different ways of measuring that success, ranging from increased sales to improved perceptions in the marketplace.

Advertising Model

In the advertising agency model, the client informs the agency of their marketing needs, and then the account manager or account executive shepherds the project through the system. The biggest hurdle for the account executive is to determine the client's goals and objectives before any creative work begins. Maureen Barry of GSD&M directly addresses this issue stating, "Understanding what success looks like for them [the client]. This is harder to get sometimes than you would think … But it's really important, so there's no emotionality at the end" (Appendix F). Once the goals are established, the account executive works with other departments within the agency to gather research.

In the advertising agency model, research is crucial to gain an understanding of not only the client's products and services but also of the consumers who use them, how they use them, and the best ways to reach them with effective marketing messages. Agencies spend considerable resources conducting research into understanding people's lives, how they engage with products and "their customer journey relative to their products" (Janicki Appendix E). In the advertising industry, a premium is placed on understanding the consumer, their changing lifestyles, and the best way to interact with them on a level that is genuine and empathetic.

Once the research is complete, a strategy is then formulated. Working with budgets and timeframes, all of this information is then synthesized into a creative brief, which is "the ignition for the team of creatives" (Pricken 14). This document is the roadmap for getting to the big ideas that will be presented to the client. This brief is handed off to the creative department to use as a touch point for the concepts they develop to make sure everything is on message and on strategy.

When asked how involved the agencies wanted the client to be in the concept development portion of the project, both interviewees said they really did not want client involvement. According to Stacy Janicki, Senior Partner at Carmichael Lynch, "Typically they're not involved in the concept generation … because they're not typically in the idea making business" (Appendix E). Agencies see the ideas they produce as a precious commodity. According to Barry, "Ideas are like children. I want to protect and nurture them when they're in an embryonic stage" (Appendix F). This viewpoint is understandable since the agencies are being judged on the effectiveness of the ideas they produce. Therefore, agencies need time to develop and polish concepts so they can prove their merit. Given this, both agencies said they usually only present polished comps or storyboards to the clients for their consideration or approval, instead of rough sketches. Also, the creative work was always presented to the client by the actual creative team who produced it so they could hear direct feedback from the client.

Both agencies interviewed stated that rough work was rarely presented to the clients. This was out of fear the client may not fully grasp the concept simply because of the elementary level of finish applied to it. The agencies did not want to have a great idea killed because the layouts were too rough for the client to understand. Client perceptions may be changing, though, as Barry states:

> More and more, [clients] really don't like that [finished comps]. I have one client in particular where this is actually a hot topic right this second. They have instituted what they call "Coffee Talks" … These are really informal conversations they want to have with us along the way, during the process. They don't want formalized Power Point presentations. They don't want highly polished layouts and copy or storyboards for TV. They just want to talk to us about "What are you thinking? Where are you headed? What are you exploring?" And so, I would just say that there is a little bit of a tension between what agencies probably are most comfortable with … [and the client's desire] to be part of the process. They want to be part of the team. They want to own it and they want to guide us and direct us, and they think that's all very positive (Appendix F).

This type of collaboration with more frequent checkpoints can sometimes be a point of contention between the agency and the client. While the client wants to be involved in the process, their presence too early on may stifle creative thinking and possibly cut off highly effective concepts before they are given the chance to bloom to their full potential. In contrast, the advertising agency's role as the keeper of ideas is a potentially outdated approach when the client could lend invaluable insight along the way or before agency creatives have gone too far in the development process.

Overall, the advertising agency process can be categorized as a waterfall methodology where each phase of the development process occurs in sequence. This requires a great deal of trust between the client and the advertising agency. Given the waterfall methodology, if the strategic direction changes toward the end of the project development, the only alternative is to start again from step one. This scenario is often successfully avoided if all the proper front-end research and strategic planning takes place.

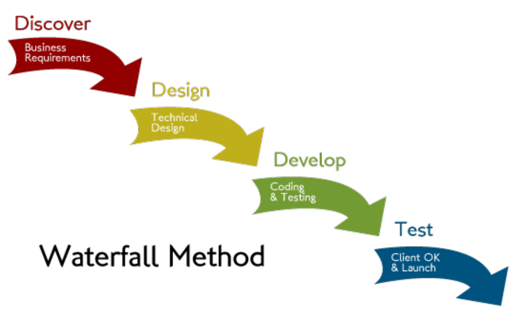


Figure 1 Waterfall Methodology (Reich)

The waterfall methodology brings the client into the process at the end of development.

Architectural Model

Of all the creative disciplines in this study, architecture has the most structured methods for project development. There are several reasons for this structure. The most obvious is the layers of regulations that must be navigated to build an edifice. On top of requirements for the structural integrity of the building, there are codes and regulations that must be addressed, all while trying to bring the client's vision to life and within budget (Tuck Appendix G). Also, unlike any of the other creative disciplines, architecture has a formal licensing procedure through the National Council of Architectural Registration Boards (NCARB), which must be completed in order for someone to legally practice as an architect (ncarb.org). Due to the licensing requirements, along with the local and state regulations, architects must have standardized systems in place in order to navigate a building's development process. While these systems do not directly determine how an architect engages with a client throughout the development process, the structure of the system greatly influences the process.

According to the American Institute of Architects (AIA), there is a five-step process for the development of any building project. Those five steps are: schematic design, design development, construction costs documentation, bid procurement, and construction administration (Appendix G). For purposes of this study, only the schematic design and design development are discussed since the other three are more technical and do not directly relate to the creative process.

In the architectural discipline, the main point of contact with the client is typically a partner of the firm. This is simply because the costs of a project are so high that the client usually demands to work with a partner-level person to feel like they are given the importance they deserve (Tuck Appendix G). This does not necessarily mean the partner will work on the project, but the partner will guide the project through the development process. Creative development begins with a space program consisting of an in-depth interview with the client where all the parameters are established, such as budget, timeframe, and design considerations. Seab Tuck of Tuck-Hinton Architects states:

> It can be as simple as sitting down and interviewing you if you wanted a house … Do you like to live outside? How many bedrooms? You got kids? All those type of things … It can get as complex as a convention center … where professional [site] programmers say [create] a room that is 300 square feet with three electrical outlets. I mean real specific. (Appendix G)

This space program guides the architect through the design process to make sure all of the goals and parameters are met along the way.

Once the space program is approved by the client, the schematic design phase begins. This is the rough concept development where floor plans are established, and the overall footprint and feel of the structure begins to take shape. After the schematic design is loosely established, the concept design begins. To help guide the architects working on the overall design, Tuck-Hinton Architects typically sets up a “war room” where they gather imagery relating to the project to help the architects get an idea of the mood the structure should embody. “You draw inspiration from that … if those things [architectural details] can have a deeper meaning, then to us it’s richer architecture,” said Tuck (Appendix G). After the general layout and design are developed, the client is brought into the process for approval or revisions of the plans.

When asked how involved his architectural firm wanted the client to be in the early development phases, Tuck responded that it depends on the client, stating “There are some clients that we will actually have charrettes with. They come over all day, and we’ll just brainstorm together” (Appendix G). The downside to this is, as Tuck explains, “Creativity involves coming up with a lot of different ideas, and a lot of those are bad ideas” (Appendix G). Should a client latch onto an idea, then the firm has an obligation to explore it even if they know it will not work because of aesthetic or codes issues. While Tuck welcomes client involvement, he realizes it may lead to uncomfortable discussions as to why a client directive is not feasible.

In conclusion, the architectural method for project development is much more structured than other creative disciplines because of the nature of the product being produced and the consequences involved. If a logo design does not meet the expectations of the client, the designer who produced it may receive negative feedback and be forced to develop a new design. However, if a building is produced poorly or is structurally unfit, then people could actually be harmed. For this reason alone, architects, unlike other creative practitioners, are required to be licensed in the state where they operate. While this process can be a long and expensive procedure, it is necessary for public safety.

Digital/Hybrid Agency Model

The digital/hybrid companies represented in this study, focus on Web, app and content development creation. All of them use an agile methodology to complete their creative development, and this philosophy seems to run deeper than just workflow processes. As stated earlier, the waterfall methodology is a step-by-step approach to project completion. Once one step is complete (for instance, planning), the project moves to the next phase and to the next until the project is complete. The agile methodology was developed as a direct response to this in an effort to fix the inherent problems of the waterfall methodology. In the agile methodology, a large project is broken down into smaller, more manageable pieces, which are referred to as modules. “Work on these modules is done in weekly or monthly sprints, and at the end of each sprint, project priorities are evaluated and tests are run” (Base 36). Using this approach, all parties involved in the project are working on the same piece at the same time, and the project is not necessarily relegated to one department and then moved to the next department upon completion of the task, as is the case with the waterfall methodology. In a traditional agency setting, the agile methodology means that preliminary concept development could occur simultaneously as the account service and media departments work on their campaign components with each of the departments collaborating with one another throughout the process.

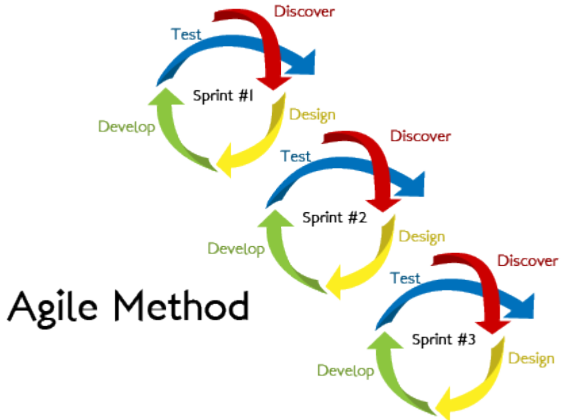


Figure 2 Agile Methodology (Reich)

The agile methodology brings the client into the process at each step of development process.

The main advantage of the agile methodology is that it allows for a great deal of flexibility, and it anticipates adjustments along the way. These changes may be due to the client changing parameters or from testing that has occurred during the development process. For example, Ben Rigsby of SnapShot Interactive states, when working on an animation project, his team will initially create "15 seconds of animation, we'll make their [client's] changes and then we'll move on to the next 15 seconds. It saves us … from getting all the way in and starting all the way over" (Appendix I). The primary disadvantage of the agile methodology is that the project may not have clearly defined parameters from its inception. While this allows for a great deal of creativity to occur, "the final product can be grossly different than what was initially intended" (Base36). Beyond that, the agile methodology, if not managed properly, can result in a series of unnecessary sprints. "If this happens, the project is likely to come in late and over budget" (Base36). While the agile methodology is great for sparking collaboration and creativity, there needs to be a strong leader guiding the project to keep it on track. Given this agile approach to project development, it is no surprise the digital/hybrid shops interviewed believed in frequent client contact. Paulo Vieira of Integritas states, “We’re active [with our clients] every day. There’s at least a daily call the client will get from account management … It’s a constant two-way conversation” (Appendix H). These daily touch points ensure projects stay focused and on schedule.

When asked about the level of finish presented to a client for initial concept development, their responses varied, but they skewed toward a higher level of finish. For Web and app work, Vieira said his company presents high-fidelity wire frames. Vieira stated, “Our wires are pretty high-def. They’ll give you a pretty good idea what that’s going to end up looking like” (Appendix H). Shali Wade, Group Director, Client Engagement at VML also leans toward a higher level of finish. They often produce moodboards to make sure their thinking is in line with the client. On the back end, VML goes as far as producing rips, or short video treatment segments, for video work to show the client before going into production (Wade Appendix J). SnapShot Interactive reported about half of their projects are initially pitched as written treatments and loose storyboards, while the remaining half range from high-fidelity wire frames for Web work to fully-polished style frames and animatics for video work (Rigsby Appendix I).

The digital/hybrid agencies seem to fully embrace the agile workflow methodology, not only for purely Web-based work, but also for content creation and anything that can feasibly be broken into smaller pieces. This makes sense because of the User Interface (UI) and User Experience (UX) work and testing that is required for the development of a successful Web-based product. The agile workflow methodology allows the digital/hybrid agency to design the foundational structure before the full scope of the project may be realized. The digital/hybrid agencies, like the other disciplines in this study, place a premium on client interaction and communication.

Graphic Design/Branding Model

Graphic design/branding studios follow a similar framework as the other disciplines. They begin by learning all they can about the audience and the marketplace before developing a creative brief to be approved by the client. However, in advertising and digital, the ultimate goal is to reach a target audience and convince them to take action. While getting a target audience to take action is important in the branding arena, the branding process is much more of an inward focus rather than an outward projection. Rex Peteet, creative director at Sherry Matthews Advocacy Marketing and Studio Peteet Design, states, “Branding is a little different. We’re seeking a different source of information. In branding, we’re interested in [the client’s] vision … their values” (Appendix L). In order to determine this, you first have to figure out what branding strategist Simon Sinek calls the “why” (39). Throughout his research into highly innovative companies and inspirational people, Sinek has discovered that effective communicators do not focus on what they are selling or even how they are selling it. The truly innovative individuals and companies focus on why they are selling it. For example, Sinek cites Apple’s marketing strategy of not touting their great computers, but instead communicating the company’s belief in thinking differently and challenging the status quo (40-41). This genuineness is what appeals directly to consumers and is what a brand needs in order to be effective. Nicole Satterwhite, Senior Design Director at Willoughby Design states, “[The goal of] design is not just to make something look good, it’s [about] serving a purpose” (Appendix M). The only way to establish a brand’s purpose is to conduct in-depth interviews with members of a company’s leadership team, specifically the ultimate decision maker of the company. In these instances, more opinions are not better. Steff Geissbühler, Principal of Geissbühler Design, states:

> The more people between you [designer] and the client, the less total understanding you get. Even though you have researchers and marketing people and tech people

> and, you know, all kinds of assistants [on the client side], it doesn't make things better. It just involves more people. (Appendix K)

From a branding perspective, a keen understanding of the client's vision and values is vital. Knowing how the client's brand fits in the marketplace, while important, is almost secondary to understanding the purpose of the brand. It is only then that the brand may be represented in a meaningful and authentic way.

Once the purpose of the project and the client's vision are established, the designer can move forward in a direction that is based on sound, strategic thinking. At this point, the creative brief or brand brief as it is commonly called in the graphic design industry, may be created and agreed upon by the designer and client. Like the other creative disciplines, this brief serves as a guide for the designers. They can refer to it during project development to make sure they are always on strategy.

When asked how involved the design/branding agencies want the client to be in the concept generation portion of the work, most said they prefer the client to be very involved. Peteet says it is common for his company to conduct brainstorming sessions with a client's executive team. Peteet states, "A good idea could come from anywhere. Just because we were creative people didn't mean were the only guys that had good ideas" (Appendix L). Satterwhite agrees stating, "I like to get them involved right away because a lot of times they have something in their minds they think it should be. So we try to extract as much from them as we possibly can" (Appendix M). This seems to be the point of difference between branding design and advertising. In the branding model, the designer digs deep for what is important to the client and transmits that to the end user in an authentic way. While in advertising, the main focus is to determine the important points for the end user and communicate how the client's product or service fulfills a need. This difference is driven by the nature of the creative projects being produced. On the branding side, the work tends to be big picture and visionary, where the designer is building a brand that is meant to stand the test of time. In contrast, an advertising campaign is very focused and expected to have a short lifespan. While this may seem like a subtle distinction, it is an important point of difference between the disciplines.

When asked about the level of finish of the work shown to clients for initial concept presentations, all of the interviewees said the work was polished to a certain point without being final artwork. Geissbühler states, “They are usually computer-generated sketches. I call them sketches because they are not refined …They’re more or less showing the raw idea and concept” (Appendix K). Peteet agrees that all of his initial work is done in Adobe® Illustrator (Adobe.com). While it may appear to be finished, the nuances and the typography may not be complete (Appendix L). Satterwhite notes that Willoughby Design often includes an interim step between the creative brief approval and the first round of creative development, which involves idea or moodboards to help identify a style or direction for the designers. This step narrows the options and clarifies the brand feel, which will ultimately be presented to the client (Appendix M).

Like the other creative disciplines, the graphic design/branding model follows a typical workflow of research, creative brief, and execution. However, unlike other models, the graphic design/branding model seems to take a more introspective approach into the client’s mission and values. Based on that, communications are created, disseminating the client’s ideals in an authentic manner that is appealing to the target audience.

Public Relations Model

Of all of the disciplines included in this study, the public relations agencies were the most familiar with the co-design model of creative development. In this model, agencies interact directly with consumers to learn more about them. The concept of “pro-sumer,” in which consumers actively seek information regarding a product or service, is important to note for agencies (Toffler). Technology allows "designers [to] have spontaneous discussions with users" to gain critical feedback (Lupton 30). Consumer blogs and customer reviews give quick insight into the product or service as well as what methods can be used to better reach the end user. Nelson Eddy, Partner at DVL Seigenthaler says, "Dialogue [with end users] is much more a part of everything you do … it's not just broadcasting [a message] anymore as it is people engaging in community and conversation" (Appendix N). With this shift in communications, today's consumers have much more control over a product's development and enhancements, almost to the point where they may be viewed as "co-creators" (Stappers 145). According to Eddy:

> You're crowd sourcing creative. You're informing your creative by engaging your audience in it. So there's more collaboration at every level. And I do think it's largely driven by technology where you can instantly respond to a consumer. And the amount of effort going into social media now by different companies is amazing. (Appendix N)

David Krejci of Weber Shandwick agrees saying they will often launch something as a "minimally viable product and see what the universe does with it and then go back and refine it from that point" (Appendix O). This level of collaboration is not seen in any of the other disciplines interviewed.

Given the co-design philosophy embraced by the public relations agencies interviewed for this study, it is not surprising to see this same principle applies to the way they interact with their clients. Both agencies interviewed want as much input from clients as possible, and both work to discover new insights through market and consumer research. When asked how involved they want clients to be in the concept generation portion of project development, their responses varied somewhat. Weber Shandwick follows a more traditional waterfall methodology where the agency takes the client input, works on the project, and returns with layouts for client review (Appendix O). DVL Seigenthaler, on the other hand, includes several more touch points along the way, stating they often have client/agency brainstorming meetings (Appendix N).

When asked about the level of finish the public relations agencies show clients for initial concept presentation, the answers were also mixed. Weber Shandwick shows very polished comps as Krejci states, “It’s somewhat of a treacherous world to get into unless it’s a very finished version, because our clients look at what we might call a sketch and often take it to be further down the road than we wished” (Appendix O). Krejci continues by saying he would personally prefer to show rough work, but he is tentative of the client’s reaction to it. DVL Seigenthaler, on the other end of the spectrum, is very comfortable showing rough sketches to clients. Eddy states, “The looser we can keep it and the more conceptual on the front end, they’ll [the client] actually listen to the concept and not judge it by all the final details” (Appendix N). While both agency representatives believe rougher is better for initial work, only one was willing to show rougher work for initial presentations. An interesting factor for this may be that DVL Seigenthaler spun off of an advertising agency in 1980 and has a much longer track record of presenting and producing creative work. Since the company’s inception, they have been adept at developing creative components in-house to go along with their public relations campaigns (dvl.com). In contrast, Krejci states, “Three years ago, I don’t think we had a single creative director in our entire agency” (Appendix O). A fully staffed creative department is relatively new to Weber Shandwick, which could help explain the differing opinions on the best way to present creative.

From the interviews conducted, it is clear that the public relations discipline more openly embraces the co-design model of creative development. Also, while all disciplines interviewed speak of the virtues of client/agency collaboration, the public relations agencies seem to implement it more than the others. None of the creative professionals interviewed were familiar with the term co-design. However, all utilized it in some manner, such as through end-user interviews, consumer feedback, and/or focus groups.

Common Themes between Creative Disciplines

Once all of the interviews were transcribed and coded, common themes regarding client engagement and shared philosophies began to emerge. While the different creative disciplines and companies within each discipline may have various names and techniques for things, they all share some core methodologies and practices. There are also common obstacles across all disciplines. While the five disciplines approach the creative process from differing perspectives and with diverse goals in mind, there are commonalities shared by all.

Creative Briefs

Every agency interviewed incorporates some sort of fact gathering that was aggregated into a creative brief, which is used as a roadmap and for touch points throughout the creative development process. In the architectural discipline, the brief is referred to as a space program, while professionals in the graphic design/branding discipline refer to it as a design brief or brand brief. No matter what it was called, they all contain basically the same pertinent information: the scope of the project, timelines, milestones, budgets, audiences/users, and project goals. These briefs help narrow a project's focus to what is important. Peteet of Sherry Matthews Advocacy Marketing explains that the creative brief is critical to ensure there is not anything arbitrary with the work being produced. The creative brief acts as a filter to make sure all the agreed upon key concepts are met (Appendix L). While it may be tempting to begin work without this document, the time spent on the front-end of a project developing the creative brief helps focus the concepts and keep the agency and client in agreement as to the goals and parameters of the creative project at hand.

Creative/Client Interaction

All the professionals from the various creative disciplines agree the best way to get high-quality, effective creative is for the person creating the work to directly interact with the client (Geissbühler Appendix K). Such direct interaction between the client and the creator of the work has not always been standard within the creative field (Krejci Appendix O). However, this interaction is critical for several reasons. First, it gives the designer a full understanding of the project directly from the client's perspective. "Designers are brought in from the get-go, because you learn a lot during the strategic phase," says Satterwhite of Willoughby Design (Appendix M). Direct interaction also helps the client put a face with the work being produced (Rigsby Appendix I). This relationship development between the client and designer ultimately results in stronger creative work. It allows the designer to understand the nuances of the client's thinking rather than simply having the account service representative relay the information second-hand (Peteet Appendix L). Finally, direct interaction makes it possible for the client to understand the rationale behind the work directly from the person creating the work. Krejci of Weber Shandwick sums this up stating:

> If an account service person says to me, "When should we bring in the creative [person]?" My response, not intending to be glib is, "As soon as you bring yourself in." We've found there is so much more success when the creative [person] is there to listen to the client's needs and to develop a relationship with [them]. (Appendix O)

Successful businesses across all creative disciplines have realized the best product grows from a collaborative relationship between the client and the agency at all levels of the organization. Whenever a person can be attached to the work being presented, the insights and outcomes are always much more positive. This is simply because the person who actually produces the work is much closer to it and able to explain the nuances with more insight and passion. While creative/client interaction is very important, creative professionals do not necessarily have to be present at every meeting. The creative team members should be involved with the initial client input, creative presentations, and whenever creative strategy is being discussed. However, the day-to-day management should be left to the account executives acting as the liaison between the client and the creative organization. By being able to understand the business goals as well as the end-users' motivations, creative professionals can develop work that engages with the audience in a meaningful way.

Transparency and Trust

When a client enlists the help of a creative professional to bring a product, service, or vision to life, that client is taking a leap of faith. There are financial and reputational repercussions involved in every job, which can make the client look brilliant or poor in the eyes of their boss, their user groups and society in general (Foote 266). All of the creative professionals interviewed understand the importance of trust, and all say that it begins with transparency of your business practices and dedicating yourself to honesty. Trust helps build shared goals and helps overcome common obstacles. As Tuck of Tuck-Hinton Architects says, "It's not all about making money … it's how our values mesh in a way that we're very excited about the project and they're very excited about having us work on the project" (Appendix G). This mutual trust and transparency can lead to a team environment where the creative company is more than a vendor, but is truly a trusted business partner. When this trust is established, it makes the creative company work harder for the client and results in a better end product (Satterwhite Appendix M). The creative companies involved in this study had various methods to help build this trust. Some held day-long, off-site meetings, while others invited the client to the agency to collaborate in brainstorming sessions or charrettes. Despite the method employed to gain the client's trust, all of the companies started by listening to and engaging in open and honest dialogue with the client (Satterwhite Appendix M).

Several of the creative professionals interviewed made a point of saying this trust was not only between the client and agency, but it was also within the creative company and even beyond to the client's end user. When discussing the power of trust, Eddy of DVL Seigenthaler stated, "AEs [account executives] respect creatives. Creatives respect AEs, and both parties the client. And all three of those parties respect the end user of the product. They [the end user] own it [the brand]" (Appendix N). Krejci of Weber Shandwick states, "If there's a deep level of trust between the creative and the account person … then you bring that to the client and he/she sees that trust and can build upon that confidence … the relationship takes off from there" (Appendix O). Such trust leads to lasting relationships, as long as all parties understand they are working toward a common goal.

Technology and Communication

Technology has revolutionized the creative business, particularly in terms of communication. In the last two decades, the business has gone from faxing and overnight shipping of layouts to emailing PDFs around the world in a matter of seconds. From the launch of the first Web-based email service (Hotmail) in 1996 to 90 million Americans accessing email through a mobile device in 2012, communications have changed dramatically (Fleishman).

Everyone interviewed in this survey has worked in their fields long enough to remember the days before business was conducted with cell phones and email. Having this perspective allows each of them to compare how business was conducted then and how it is conducted now. While everyone interviewed believes technology has made the way we work much better and afforded them opportunities to work with people and businesses around the world, they also feel like technology has posed challenges to their working environments.

Technology has allowed creative companies easier access to global clients. “You can send them a PDF and get instant feedback” (Satterwhite Appendix M). Gone are the days of overnight shipments and paying expedited fees. “Now you can work right up to the minute and then upload your files” (Satterwhite Appendix M). Technology has also allowed for easier communication and collaboration between companies with multiple locations. “The ability to … show people your work right off your desktop with Skype® and with other things has made it a lot better” (Eddy Appendix N). Social media has further changed the way business is conducted. Rigsby of SnapShot Interactive explained how they use social media to connect with their clients on a human level. Rigsby states, “You know, a client has a birthday, we want to take a group shot that says, ‘Happy Birthday, Sam’ and send it to them and tag him in it. It makes him feel good, like he’s got a team round him” (Appendix I). Technology has made the creative business world more accessible, allowing for instant collaboration with clients and colleagues around the globe.

While technology has enhanced the creative business, it is not without its challenges. Email was specifically singled out by those interviewed as posing a problem in today’s business environment. In discussing the use of email for client correspondence, most said while it allows for more frequent communication, it is less personal, and relied upon far too much (Janicki

Appendix E, Barry Appendix F). Email has created a situation where everyone is expected to be available at all times of the day or night. Rigsby states, “Clients will email me at 11:10 p.m. … I’m always right there to respond back just because … my job is to make sure the client is happy so that we have repeat business, so we all have jobs” (Appendix I). This theme runs throughout all of the creative disciplines in this study. As Janicki reports, “[We are] a service industry … the fear of not being responsive and the fact that clients can go to other agencies … you try to make yourself as available as possible” (Appendix E). While technology has increased an employee’s productivity and the speed at which business is conducted, these enhancements have come at a price. Technology has created a culture of constant connectivity, which can take a large toll on people’s personal lives and their creativity. Each creative individual and company must deal with this work/life balance in order to be effective.

Client Interviews

Once the agency interviews were complete, interviews with marketing department professionals on the client side of the engagement model were conducted in order to get a complete understanding of the agency/client interaction through the creative development process. Five client representatives were interviewed from different market segments: alcoholic beverage, building products, health care/insurance, restaurant/food service, and tourism/hospitality (Appendix B). The clients were asked the same 12 questions as the creative companies, but with the perspective changed to fit their side of the interaction (Appendix D). After the initial interviews, the client representatives were asked a follow-up question regarding whether or not they would consider hiring freelance professionals and, if so, in what capacity.

Common Themes between Clients

As with the interviews from the creative companies, the client interviews were transcribed and coded to help reveal commonalities between them. Communication was the largest issue with clients expressing concern about their creative partners not listening or accurately understanding what they say. All of the interviewees agreed that two-way communication was ideal for producing the best work, and chemistry and personality between the client and creative professional outweighed industry experience as markers for success within the relationship. Overall, clients viewed their creative companies as strategic partners who help them maximize resources and get results.

Communication and Collaboration

The most important point for clients is to feel like their creative partner is listening to what they say. For example, Pat McGee of Great Southern Wood Preserving, the Makers of YellaWood®, describes a past experience:

> [The agency] didn't want input from us. They had all the answers. If they said this was the creative to do, that was the creative to do. They didn't like us saying, well, you know, you're using this word and this word doesn't resonate well with our customers. "That's too bad, that's the word we're using." I mean, it was almost their response. (Appendix R)

Angie Heig of Ruby Tuesday, Inc. expresses a similar frustration by describing how she thinks the client's message gets lost within an agency after it leaves the account services department. She feels the original message gets altered as it is funneled through the multiple layers of the agency, and the resulting creative is different from what the client intended (Appendix T). Both of these examples reinforce the notion that direct communication between the client and the creative professional working on the project is the best method for success.

More specifically, the communication must be a two-way process. Jason Loehr of Brown-Forman states, “It’s the two Cs–communication and candor” (Appendix Q). He feels it is important for his creative partner to stand up and call him out if they are not getting the information they need. He believes it is the “garbage in, garbage out” principle, and the agency can only work with the information they are given. Chuck Creasy of the Nashville Convention and Visitors Corp. reiterates this stating, “I want the creatives intimately involved throughout the process. Great ads are produced by the creative team once they have proper input from the client and other agency departments” (Appendix S). All of the clients interviewed agreed communication is the largest issue they face when working with their creative partners. Ideally, they would like open and honest dialogue, where both sides listen and build off of the thoughts of the other to create meaningful and effective work.

Chemistry and Personalities

When asked about the creative professionals assigned to certain accounts, the clients responded in a much different manner than did the creative companies. For the creative companies, they tended to staff accounts with team members who possessed the same industry experience as the client. However, the clients interviewed stated that while professional experience in their type of business is a positive, personality and chemistry are incredibly important as well. According to Loehr:

> For me personally, I care more about the personality than I do anything else. I am one that will err on the side of chemistry much more than capability. Capability

> you can learn. The chemistry … you've either got it or you don't, and if you don't, it can be a disaster. (Appendix Q)

Roy Vaughn of BlueCross BlueShield of Tennessee echoes Loehr's sentiment stating, "Individually as people, they [clients] want to be successful. So, in addition to looking for someone who can help them achieve the company goal, because they really want to be [personally] successful, they also look for the right person they feel comfortable with" (Appendix P). Based on these responses, creative companies must carefully consider the professionals they assign to a client's account to ensure they are a good fit.

Resources and Results

In today's fast-paced world filled with endless marketing messages and new ways to engage a brand's target audience, client-side marketing departments are under enormous pressure to show positive results. Loehr states, "It's a scary scenario. We've got to be timely. We've got to be relevant, and we've got to be on brand" (Appendix Q). While the creative businesses engaging with their clients are mainly focused on completing the creative task at hand, they must also be mindful that "creativity is only one aspect of communication, communication is only one aspect of marketing, and marketing is only one aspect of business" (Foote 265). For these reasons, clients need creative partners who are strategically focused. Loehr states:

> I need a partner that's thinking a step ahead of me and is positioning me for that greater success. As an example, I might pay an agency, I don't know, $800,000 to produce a 30-second or 60-second spot. That one spot is one thing and in the context of TV, sure, but the role of digital [has made it] that I need to create more spots for very narrow, targeted, niche segments. (Appendix Q)

Given this, clients look to their creative partners to lead the way strategically, helping them to maximize their marketing resources across multiple platforms that go beyond traditional media outlets.

To take the partnership concept one step further, all of the clients interviewed said they feel the best working scenario is when they consider their creative resources part of their marketing team. The clients interviewed all stated they feel short-staffed and look to their creative partners to help fill in the gaps. Heig of Ruby Tuesday, Inc. states, “The only thing that would make it a little better is if they [the agency] were closer [geographically] to our business. So it’s crazy because [in] my perfect world … they would be an extension of our team, and not the agency” (Appendix T). Because of this, creative companies must embrace the client’s ideals, vision, and goals in order to be recognized as a vital part of the team. This will lead to more positive results and will help facilitate a successful relationship between the two.

Implications for Freelance Professionals and Creative Boutiques

Based on the findings of this study, the research yielded several valuable insights regarding client engagement, which may be used by freelance professionals and smaller creative boutiques to help give their businesses a competitive edge in today’s marketplace. Prior to doing any creative work, these professionals must think strategically, immersing themselves in the product or service being promoted and learning as much as possible about the intended audience. They must also implement processes and procedures, such as creative briefs and annual client reviews. Furthermore, these professionals need to be cognizant of the fact that personalities must mesh, and chemistry with the client is crucial to long-term relationships. One way to help build this trust is to look to the client for expertise, since no one knows the business better than the client. Finally, freelance professionals and creative boutiques should use size to their advantage, touting their agility and ability to work without all of the added layers of a larger company.

Think Strategically

In the past, creative professionals have focused on aesthetics. However, it is now imperative to think strategically and get to know the target audience. As Pieter Jan Stappers from Creation & Company explains in his book *Open Design Now*, "The role of designers is becoming more varied: part creator, part researcher, part facilitator … part process manager" (151). As part researcher, creative professionals must make an effort to obtain an in-depth understanding of the audience or user group to whom the work is targeted and understand the factors that go into the purchasing process (Sinek). Not all research has to be expensive and conducted by large research firms. As Satterwhite of Willoughby Design states:

> We've worked with a notebook company that didn't have time or budget to do in-depth research … [the product] was a line of notebooks for teenage girls. So we rounded up our ten best babysitters … teenage girls to come in and give us their feedback ... Sometimes you have to be really creative on how you get [insights]. (Appendix M)

Creative professionals must put aside their own assumptions about a product or service and engage with the intended audience in order to develop an effective strategy for the creative task at hand.

In addition to research, testing is also an important step in the creative development process. In the world of Web and app design, usability testing is an expected and necessary step to be included in the project development (Martin, Hanington 195). Testing also has a place in other design disciplines, such as advertising and graphic design. Ruby Tuesday tests all of their annual promotions for effectiveness with their core user group. Heig states, “We develop what we call internally ‘concepts.’ [These are] literally two or three sentence [descriptions each] … [we] content test rather than [test] advertisements” (Appendix T). Everyone interviewed for the study agrees the most effective way to conduct testing is at the concept or directional level. It is never a good idea to test final creative pieces. As Janicki of Carmichael Lynch explains, “If you ask someone [in a focus group] – ‘Do you like the ice cream [television] spot?’ They’ll say, ‘Well, I don’t see anyone eating it. And they’re not smiling. And no one told me it was just five grams of fat in a serving” (Appendix E). Janicki’s point is that testing the final creative product is too subjective, and by its very nature, testing is asking a person to find something wrong with the final product. Testing should be conducted early on in the process at the directional level to give creative professionals a chance to revise the work to have stronger impact on the target audience.

In today’s technologically-savvy world, creative professionals must also think strategically in terms of producing work that will be used across various platforms, as noted earlier by Loehr of Brown-Forman in the need to create multiple spots to work on television and online (Appendix Q). Another example of this is how Web designers must consider how their designs will translate into print or into an experiential environment. In contrast, a print designer needs to think how a concept would play out in a Web-based video or mobile application. This concept is often referred to as being “T-shaped,” meaning the creative professional is highly skilled in a particular medium or expertise, but also has a keen understanding of how that skill works across the entire marketing landscape (creativegroup.com). This is not to imply the creative professional has to be able to complete every step of a project. The creative professional simply needs to know how it all fits together and how to assemble the right parts.

Implement Processes

All creative professionals can benefit from the processes and procedures that larger companies have instituted. Based on the interviews of the creative companies, examples of these artifacts range from a formal contract for project development to step-by-step processes for creative development (Appendices U-X). One of the very basic processes that freelance professionals should utilize is the creative brief, which is the first step in development and is used as a guide throughout the process. The brief is used to judge the validity of the concepts generated to make sure they are on strategy and on target. It also gives the client an understanding of the creative development process and the steps required to produce the work. Such transparency helps increase collaboration and builds trust between the creative professionals and their clients. Regular touch points may be as simple as a daily call to check in with the client (Vieira, Appendix H). It could also be a standing meeting to review everything in the creative development pipeline (Rigsby, Appendix I). As Barry from GSD&M states, “During the process, mistakes are always going to happen, but it’s how you deal with those mistakes that determines whether you keep [the client’s] trust or not” (Appendix F). If a creative company is open and transparent about their processes, there is a better chance of the company continuing a client relationship despite making an occasional mistake.

Another method cited by interviewees regarding fostering client engagement and collaboration is to conduct an annual review with the client. Janicki of Carmichael Lynch says, “We sit down and do annual reviews with our clients to try and hear what’s not working and address that stuff” (Appendix E). Since it is more cost effective to keep an account than to search for new business, annual reviews are a proactive way to help counter problems before the account falls into jeopardy. Such transparency between the creative company and client helps both parties determine what processes and procedures are working, what is not working, and what changes need to be made. This type of honest and open dialogue between the creative company and the client serves to strengthen the business relationship. It is also a good idea to conduct creative audits internally and with the client upon the completion of any major project, using the goals spelled out in the creative brief to determine if the project was a success or to develop improvements for the next project.

Build Chemistry

Getting to know a client and showing a genuine interest in what they do is important for creative professionals. Loehr of Brown-Forman believes this is as simple as having face-to-face conversations with people. When selecting a new firm, Loehr said, “We did chemistry sessions both in the U.S. and in London with the international teams … we got through that process, and it was immediate consensus on who we knew the leader was coming out of the discussions” (Appendix Q). Vaughn of BlueCross BlueShield places an emphasis on trust for long-term agency/client relationships, stating, “You want to be able to size up who you’ve got with you. And that’s really, really important. For all the changes, it’s still about relationships and knowing that you can count on that person. Can I trust them?” (Appendix P). Chemistry, likeability, and the ability to prove the freelance professional has the client’s best intentions in mind are crucial to a successful relationship.

A good strategy for building chemistry with the client is for creative professionals to involve clients in the early stages of the development process. This can be easily accomplished by showing the client rough sketches of some of the concepts being considered. This helps give clients a sense of ownership and a better understanding of the process. As Tuck of Tuck-Hinton Architects states:

> [Having the ability to] sit down with a client and sketching a solution, or an idea or a vision, [and saying], “Is this what you’re talking about?” That kind of ability to take an idea and put it on paper, I think, is almost fundamental … If you’ve got to say, “Oh, I think I understand what you mean. Let me go back to the office. In two days I’ll get back with you and show you a computer drawing.” Well that’s fine, but you’ve lost an opportunity to sell yourself [and] to sell the idea right then. (Appendix G)

This rough sketch phase is a peek behind the curtain for the client, which shows a level of trust and engagement that will lead to a stronger relationship and, ultimately, a better creative product.

Leverage Client Expertise

Creative professionals must take advantage of the vast wealth of knowledge their clients possess by listening and learning. Loehr of Brown-Forman states, “The last thing you want is having a group tell you how they know your business and what you can do better” (Appendix Q). Several of the clients interviewed also cite the fact they felt like their creative partners did not listen to them. Creasy of the Nashville Convention and Visitors Corp. bluntly states, “Listen more; talk less” (Appendix S). Satterwhite of Willoughby Design admitted that clients have become increasingly savvy and sophisticated, and are more engaged with the creative development process than ever in the past (Appendix M).

Given this, it is important for creative professionals to take a step back and listen to clients before starting any work. As Krejci of Weber Shandwick states, “We want to know as much about the industry; we want to know as much about the audience as possible. So one of the sources of that information, of course, is the client” (Appendix O). Eddy of DVL Seigenthaler reiterated this sentiment stating, “The client probably knows the audience better than I do …

there’s a wealth of knowledge there that you need to tap into” (Appendix N). By taking this knowledge and using it to develop powerful creative deliverables that resonate with the intended audience, the creative professional will be viewed as a strategic partner and trusted marketing advisor, not simply a tactician hired to carry out a client’s orders.

Future of Marketing—Team Model

When asked specifically about freelance talent, each of the clients interviewed said they use freelance professionals for certain tasks. However, they prefer larger agencies for integrated campaigns and more high-profile projects. These clients reported using freelance professionals when the scope of a project was small, budgets did not warrant engaging a large agency, and when there was no need for strategies to be developed. Clients trusted the individual skills of freelancer professionals, but they trusted agencies for more complex projects with multiple deliverables (Appendices P-T).

Despite this feedback, freelance professionals should not be discouraged. As an increasing number of professionals leave large agencies to work on their own, a new model has begun to take shape–the team or virtual agency model. As Foote states:

> It is possible … to have writers in New York working with designers in Los Angeles; production people in Chicago working on projects for a client in London… Technology makes it possible for creative individuals to work easily outside the traditional work environment. (12)

In the team approach, highly specialized professionals ban together to produce creative work for a client.

For instance, a freelance team consisting of an art director, a writer, a producer, and a director could be pulled together to work on a television campaign. If a client needs a full campaign across several media channels, a freelance strategist or account manager could be added to the team. The purpose of the team model is to assemble just the right resources for the task at hand and nothing more. “It really comes down to placing a premium on speed, thrift, simplicity, and restraint, and then using those principles to shape our approach to problem solving and decision making” (Ward 217). This collaboration of talented individuals allows a client’s needs to be fulfilled just as a large agency would, but without all of the overhead costs.

The team model has challenges of its own. For example, the various creative professionals needed for any job must be sourced, and they must have the capacity in their schedules to take on the newly proposed project. Also, since the talent is often in different locations, collaboration is not as easy as in the agency model where everyone is under the same roof. However, technology does help alleviate some of those issues. Even with these challenges, the team approach can be a very effective model, which allows the “best of breed” talent to work together on a project without being in the same location at the same time (Peteet Appendix L).

Conclusion

The results of this study reveal there are several best practices for client engagement that are common across creative disciplines, including thinking strategically, implementing processes, building chemistry, and leveraging client expertise. As traditional models of marketing continue to change and evolve, advertisers are looking to “cut agency fees … production costs … marketing overhead” (*Advertising Age* 23). Because of this, freelance creative professionals and small boutique agencies can learn from these best practices and implement them as proactive strategies to help improve their client relationships and to position themselves as more efficient, cost-effective alternatives to larger agencies. They should also take advantage of their agility and small size to team up with other professionals to compete for more high-profile projects. Given the endless possibilities, research into these client engagement models should be ongoing, particularly as rapidly changing technology transforms the way business is conducted as well as how creative professionals communicate with one another and their clients.

Appendix A

Creative Companies interviewed

ADVERTISING

Carmichael Lynch (www.carmichaellynch.com)

Stacy Janicki, Senior Partner, Director of Account Management

Carmichael Lynch is a full-service advertising agency located in Minneapolis, Minnesota. Founded in 1962, Carmichael Lynch has grown to over 200 employees and offers their clients everything from brand planning, media planning and buying services, creative development and public relations. Some of their noteworthy clients include: Jack Links, Subaru, and American Standard (carmichaellynch.com).

GSD&M (www.gsdm.com)

Maureen Barry, Senior Vice President, Managing Director

Founded in 1971 in Austin Texas, GSD&M also has since expanded to Chicago, Illinois. "GSD&M is a leading national marketing communications and advertising company that has helped grow some of the world's most successful brands" (gsdm.com). GSD&M is a full-service advertising agency offering everything from strategy to media planning and buying to creative implementation. Notable clients include: Southwest Airlines, PetSmart, Walgreens, John Deere, and the U.S. Air Force to name a few.

ARCHITECTURE

Tuck-Hinton Architects (www.tuckhinton.com)

Seab Tuck, FAIA, Principal

Tuck-Hinton Architects is one of the premiere architects in the Nashville and greater Middle Tennessee areas. They have extensive experience in office buildings, banking facilities, civic structures, and retail centers. A few notable projects completed by Tuck-Hinton Architects are the Country Music Hall of Fame and Museum, the Frist Center for the Visual Arts, the Music City Center, and the Lipscomb University Allen Arena. The twenty-person firm was founded by Seab Tuck, FAIA and Kem Hinton, FAIA in 1984 (tuckhinton.com).

DIGITAL/HYBRID

Integritas (www.integritastech.com)

Paulo Vieira, CEO and Founder

Founded in 2003 by two veterans of the software development industry, Integritas builds software solutions for large-scale companies here in the United States and around the world. With their corporate headquarters in Austin, Texas, they also have offices is Brazil and Sri Lanka, allowing them to meet a client's development and QA needs anywhere in the world at any time of the day or night (integritastech.com).

SnapShot Interactive (www.snapshotinteractive.com)

Ben Rigsby, Partner

Founded in 2010 in Nashville, Tennessee, SnapShot Interactive also has offices Chattanooga, TN, St Louis, MO, and Louisville, KY. With their roots in video development, SnapShot's focus transitioned to web design and development to help their clients promote video content. SnapShot Interactive's services include: video production, web design, web development, mobile site development, search engine optimization (SEO) and website analytics (snapshotinteractive.com).

VML (www.vml.com)

Shali Wade, Group Director, Client Engagement

Founded in Kansas City, Missouri, as a digital agency in 1992, VML expanded its marketing offerings to include a full-array of marketing, advertising and brand experience products. In 2001, VML joined WPP, the world's largest communication services group. VML's client roster includes: Coors and Coors Light, Colgate-Palmolive, Gatorade, Kellogg Company, Microsoft, NAPA Auto Parts, PepsiCo, and Southwest Airlines to name a few. Today, VML has more than 2,400 employees with offices in 26 locations around the world and employs 920 people in North America (vml.com).

GRAPHIC DESIGN

Geissbühler Design (www.geissbuhler.com)

Steff Geissbühler, Principal

Geissbühler Design was founded in Hastings-on-Hudson, New York, in 2011 by Steff Geissbühler one of America's most recognized corporate identity designers. Geissbühler's work has been honored with the American Institute of Graphic Arts Medal, and he served as the U.S. President of the Alliance Graphique Internationale. Prior to founding Geissbühler Design, Geissbühler was a partner at Chermayeff & Geismar Inc. for over 30 years, and he co-founded C&G Partners in 2005. Above and beyond his professional success, Geissbühler has taught at the Philadelphia College of Art, Cooper Union, and Yale University and has lectured throughout the United States (geissbuhler.com).

Sherry Matthews Advocacy Marketing (www.sherrymatthews.com)

Studio | Peteet Design (www.spdaustin.com)

Rex Peteet, Creative Director

Studio | Peteet Design is a design consultancy with expertise in brand strategy and identity development located in Austin, Texas. Studio | Peteet Design began as Sibley/Peteet

Design founded in 1982 in Dallas, Texas, by Don Sibley and Rex Peteet, two premier designers. In 2010, Studio | Peteet Design joined forces with Sherry Matthews Advocacy Marketing in Austin. Studio | Peteet Design's work has been recognized by numerous communication publications (spdaustin.com), and in 2015, Rex Peteet received the AIGA Austin Fellow Award (Austin.aiga.org).

Willoughby Design (www.willoughbydesign.com)

Nicole Satterwhite, Senior Design Director

Founded in 1978, "Willoughby Design is recognized by industry peers as one of the leading global design firms" (willoughbydesign.com). Willoughby's work has been recognized by leading industry publications, such as: *Communications Arts*, *Print Magazine* and *Graphis* to name a few. Willoughby Design team members have presented at numerous design conferences. With offices in Kansas City, Missouri, and San Francisco, California, Willoughby offers branding and design solutions for clients such as: Black & Decker, Hallmark Cards, Inc., Nestlé and Panera Bread.

PUBLIC RELATIONS

DVL Seigenthaler, A Finn Partners Company (www.dvl.com)

Nelson Eddy, Partner, Creative Director

Originally founded as Dye, Van Mol and Lawrence in 1980, DVL Seigenthaler is a full-service public relations and advertising agency located in Nashville, Tennessee. They offer communication strategies "from the latest technologies and alternative solutions to the tried and true mediums that continue to touch, inspire, motivate and inform" (dvl.com). Notable clients include: Bridgestone/Firestone, Jack Daniel's Tennessee Whiskey, Tractor Supply Co. and many more. In 2015, DVL Seigenthaler joined Finn Partners to expand their reach across the globe.

Weber Shandwick (www.webershandwick.com)

David Krejci, Executive Vice President, Creative Experience

Named by *PRWeek* as the 2015 U.S. and Global Agency of the Year and headquartered in New York, New York, Weber Shandwick is one of the largest public relations firms in the world with offices in 81 countries. The firm has won 23 Cannes Lions since 2009 and was named an A-List Agency in 2014 and 2015 by *Ad Age*. Weber Shandwick offers communication expertise in numerous industries, including: consumer marketing, healthcare, public affairs, corporate social responsibility, financial communications and crisis management. Weber Shandwick is part of the Interpublic Group (webershandwick.com).

Appendix B

Clients interviewed

BlueCross BlueShield of Tennessee (www.bcbst.com)

Roy Vaughn, Vice President, Corporate Communications

Located in Chattanooga, Tennessee, BlueCross BlueShield of Tennessee is the largest health benefit plan provider in the state, employing more than 5,200 Tennesseans. Founded in 1945, BlueCross BlueShield serves more than three million members in Tennessee. BlueCross BlueShield of Tennessee is a licensee of the BlueCross BlueShield Association (bcbst.com).

Brown-Forman (www.brown-forman.com)

Jason Loehr, Vice President, Director of Global Media & Digital Marketing

Founded in 1870 in Louisville, Kentucky, the Brown-Forman Corporation one of the largest American-owned spirits and wine companies and is ranked in the top ten global spirits companies. Brown-Forman employs more than 4,000 people worldwide and has more than 25 brands in its portfolio of wines and spirits, including: Jack Daniel's Tennessee Whiskey, Finlandia, Southern Comfort, and Korbel (brown-forman.com).

Great Southern Wood Preserving (www.yellawood.com)

Pat McGee, Marketing Director

Great Southern Wood Preserving located in Abbeville, Alabama, is the manufacturer of YellaWood® Pressure Treated Pine, the leading pressure-treated lumber product in the United States. Great Southern Wood Preserving has close to 1,000 employees in 15 locations. With the help of their sister company, Greenbush Logistics, Inc., Great Southern Wood Preserving distributes its product from South America and the Caribbean to 31 states in the eastern United States (yellawood.com).

Nashville Convention and Visitors Corp. (NCVC) (www.visitmusiccity.com)

Chuck Creasy, Vice President, Creative Services

NCVC brands and markets Nashville aka Music City to the world as a premier entertainment destination for travelers who seek authentic and unique vacation and convention experiences. Nashville's convention and tourism business is a $5 billion industry with offices in Nashville and other key cities for the meeting market, such as: Atlanta, Chicago, Denver, Lost Angeles, and Washington D.C. The NCVC is governed by a 20-member board of community leaders who donate their time for the economic development of Nashville (visitmusiccity.com).

Ruby Tuesday, Inc. (www.rubytuesday.com)

Angie Heig, Vice President, Marketing

Ruby Tuesday, Inc. with global headquarters in Maryville, Tennessee, owns, operates, and franchises the Ruby Tuesday casual dining restaurant chain. During its 42-year history, Ruby Tuesday has fostered its strong brand recognition as one of the original bar and grill restaurant concepts. As of June 3, 2014, Ruby Tuesday, Inc. owned and operated 668, and franchised another 79, Ruby Tuesday restaurants with 48 franchises operating internationally. Ruby Tuesday restaurants operate in 45 states and the District of Columbia domestically as well as in 12 foreign countries, and Guam (rubytuesday.com).

Appendix C

Creative Company Questionnaire

1. Does your agency have a formalized procedure for client engagement and interaction throughout the creative development process?
    a. Is it a model/philosophy that is unique to your agency?
    b. Would you be willing to share that with me?
2. When do you check in with your clients during the creative development process?
3. How involved do you want clients to be in the concept generation portion of the work?
4. What level of finish do you present to clients for initial work? Sketches, finished comps, storyboards, animatics, etc?
5. How or when do creatives engage directly with clients? Or do they?
6. How do you feel the agency/client interaction model should work in a perfect world? How do creatives fit into this?
    a. Does your agency do these things?
    b. Why or why not?
7. Do you do anything specific to match your account service representative to the client?
    a. By type of business?
    b. Do personalities play into the decisions?
8. Do you think the agency/client dynamic has changed in the last decade or so?
    a. If so, how?
    b. Specifically how has agency/client communication changed?
9. Do you feel the size of the client's budget plays into the agency/client dynamic?

10. Since trust is paramount to the development of effective creative, how can that trust be undermined, and what can be done to restore it?
11. Are you always able to deal with the ultimate decision maker during the creative development process? If not, how do you proceed?
12. Are you familiar with the co-design model of creative development?
    a. How important is the co-design model to your agency?
    b. Do you have an example where it worked or didn't work as planned?

Appendix D

Client Questionnaire

1. Does your agency have a formalized procedure for client engagement and interaction throughout the creative development process? And, is it a model/philosophy that is unique to your agency?
2. When does your agency check in with you during the creative development process?
3. How involved do you want to be in the concept generation portion of the work?
4. What level of finish does your agency present to you for initial work? Sketches, finished comps, storyboards, animatics, etc? And, what level of finish do you prefer?
5. How or when do the creatives that actually produce the work engage directly with you during the process? Or do they?
6. How do you feel the agency/client interaction model should work in a perfect world? How do creatives fit into this?
    a. Does your agency do these things?
    b. Why or why not?
7. Does your agency do anything specific to match your account service representative to you or your business?
    a. By type of business?
    b. Do personalities play into the decisions?
8. Do you think the agency/client dynamic has changed in the last decade or so?
    a. If so, how?
    b. Specifically how has agency/client communication changed?
9. Do you feel the size of your account's budget plays into the agency/client dynamic?

10. Since trust is paramount to the development of effective creative, how can that trust be undermined, and what can be done to restore it?
11. Are you the ultimate decision maker during the creative development process? If not, how do you proceed and how does your agency help you sell the work up the ladder?
12. Are you familiar with the co-design model of creative development?
    a. How important is the co-design model to your agency?
    b. Do you have an example where it worked or didn't work as planned?

Follow-Up Question

13. Do you ever hire freelancers for creative projects?
    a. What is the motivating factor(s) for either hiring or not hiring them?
    b. Do you feel like a freelancer can handle the strategy portion of your business?

Appendix E

Stacy Janicki

Senior Partner, Director of Account Management – Carmichael Lynch

Telephone Interview

May 22, 2015 at 2:30p.m. CST

Duration: 39 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Let's jump right into it. Stacy, what is your title at Carmichael Lynch?

STACY JANICKI: I'm Director of Account Management, Senior Partner.

DA: Thank you. So the first question: Does your agency have a formalized procedure or client engagement model to interact with the client through the creative development process?

SJ: No, we don't.

DA: Walk me through the steps you would go through with a client on a potential project.

SJ: The one thing I would note is it varies by client and what their process might be or what their comfort level is.

So I would say of all the clients we have in the agency they all have different processes. So we kind of base it off of what their preferences are, but typically we do a internal creative review and the first one might not involve the broader agency team, but just the creative team. And then depending on who else is interacting, whether it's PR people, media people, we have our second internal creative review. A lot of times our first meetings with the clients will be what some people call "tissue sessions," generally speaking sharing big ideas without a lot of tactics broken out. And then usually from there you hope to get clients to select a main idea, if we've presented two, three, four different campaign options, and then we'd start pulling out the details from that. From that point forward you start working through revisions before you get approval to produce something.

DA: You mentioned the tissue sessions and how involved do you want the client to be in the concept generation part of the work or do you not want them to be involved at all? Different agencies work different ways. How do you all prefer to work?

SJ: Typically they're not involved in the concept generation itself. We're open to hearing feedback and suggestions. A lot of times it's better because they're not in the idea-making business. It's often better for them to kind of express for us what the objective is or if there's a problem that needs to be solved so we can develop a creative solution for it. I think most clients feel more comfortable in that role. I don't think we have a lot of clients who actively engage from the standpoint of participating by sending ideas to brainstorm, for example.

DA: Do you ever deal with creatives on the client side, like their internal creative team at all?

SJ: Again, it will vary by client. I think some of our retail clients if they have a lot of in-house people and we might give a template to them and then they use that to create a lot of, for example, in-store signage. So we might get asked to weigh in on something or to have a kind of point of view. So we might share some feedback, but usually what we're doing in that case is giving them almost a toolbox with the colors, the templates, and the fonts, maybe an example of a layout to base their rest of their work on.

DA: Sure. On your tissue sessions, or just in general, what level of finish do you usually present the client on the first pass of creative work. Do you go with full-blow comps, sketches, animatics? How far do you take it?

SJ: You know, when you're just looking for new business where you're obviously kind of going above and beyond, but I think typically I wouldn't. It completely depends on the client. There are some clients that need to see full-blown storyboards because they cannot conceptualize the idea unless they understand the scripts and the action associated with it. And then there's other clients, who are fine with kind of a few frames if it's TV and conceptually know what the spot's about. If it's digital social media concept ideas, I would say not fully comped, but definitely when we start something there's something representative of what the picture would look like. So usually there's some Photoshopping involved just to have a key image to go along with kind of a layout.

DA: Okay, and probably the same thing for print?

SJ: Yeah.

DA: All right. How do you the creatives that develop the concepts engage with the clients or do they? Do you have a barrier between the creatives and the clients or are the creatives actively involved with the clients?

SJ: You know, the account people primarily own the client relationship to the extent the creatives are involved. Typically, if we're presenting new work, sort of just minor revisions, we'll set up conference calls or in-person meetings if that's warrants it the creatives are always part of that. We would never present the work without the creatives there and often they're the ones walking through the work. In terms of direct correspondence, if the client's struggling with something, they'll pick up the phone and call the account people or email us as opposed to sending feedback directly through to the creative team.

DA: So account service is the keeper of the relationship, I guess. Am I hearing that correctly?

SJ: That's right and then I would say either we'll go directly to the creatives or we'll work through project management then disseminate feedback to all the appropriate people.

DA: Okay. This is a hypothetical question, but if you could create your perfect agency, how would the agency/client relationship work? What would be the absolute ideal way for everything to work and how would the creatives fit into that. Is it exactly how you described that you do it at Carmichael Lynch or do you feel like there's other better ways? Or things you would or wouldn't do?

SJ: You know, to answer your question I would say that the prefect agency to me would be less about how the creatives engage with the clients as much as how the process works in terms of just full-bore transparency and collaboration from the agency. Where it's just transparent about, hey we want to say something that wasn't working. You have for example, a lot of times, like yesterday I looked at a rough cut to present to the client and I got one rough cut to look at after they'd been working on it for days. That's the one rough cut I sent our client and when you have a bunch of questions, it's, "well, we looked at that. It doesn't work." I think in the ideal situation, we kind of put egos aside and we figure out how we trust the clients, we trust everyone else that's outside the creatives to have an opinion about the work and share ideas early and often in the development stage where you can effect change without getting into very prescriptive feedback. I think it would make the discussions much more strategic. Some clients aren't able to do that. Some clients choose strategy by seeing the work. We've had a lot of clients do that at a lot of different agencies. They don't know what they want to say until they see the work and then we end up having to change the strategies to retrofit that. So, you know, that's an ideal world, but a lot of clients need to be led more.

DA: Do you feel like Carmichael Lynch does a good job of that or comes pretty close to that ideal situation?

SJ: I would say we do better than we did three years ago. We're still not there. I've worked at newer, start-up agencies. Older agencies that have been around a while and I think agencies that have more years under their belt, I think there are just some old habits that die hard. I think new people that have started new processes largely at new agencies have largely done so because of their frustrations of how things worked in the more traditional environment, so they've purposely started new places to have a different way to do things. But I think that more often than not, clients push the agencies to that before the agencies change on their own just because, we're so protective of the work.

DA: This is kind of a tangent question off of that, do you feel like ideas kind freely between different departments, between account services to creative, or are there sacred cows where creatives are the ones that come in with the ideas? Or how do you feel about that in the whole process what with the way it should be or the way it is?

SJ: Most places I've worked have said "an idea can come from anywhere," but 99% of the time an idea comes from the creative department. There's still some kind of a protective nature there. And let's be honest, for the most part that's because those folks are experts at what they do and they tend to be more skilled at it than the rest of us are.

DA: Sure.

SJ: There are probably reasons for that, but I think some agencies probably do a little better thing in taking ideas from anywhere. PR agencies do a better job of that because physically the people that are called account management/client service folks are also the ones conceptually coming up with media ideas, or social ideas. So they tend to be less reliant on say a creative department to provide that content.

DA: It's not a creative-driven product as much as it is, like as you were saying, a social-driven product or something that can take all different kinds of forms.

SJ: Yeah, or they're coming up with an experiential event that might get the press to show up.

DA: How do you match your AE teams with the clients? Is there anything in particular that you do? Is it just by the type of business? Do personalities come into the decision?

SJ: Yes, I think in theory that would be the case, but more often than not when you win a new piece of business it is based largely on what the agency resources are currently that you can put on the business and utilize those people you already have on staff. So in that case, it's based who has the bandwidth. If there's not enough people with bandwidth then yes, you'd go out and largely it might be based on what their experience is. For example, do they have a financial services background. Who's gonna be on a bank? Do they have automotive experience or have consumer packed goods experience. Sometimes it might be personality-based, but a lot of times we're dealing with so many clients and all different personalities. You have to find someone that you think can get along with a lot of different types of people.

DA: Are clients demanding to meet the team that will work on their business in the pitch or are they okay with, this is the pitch, we know the team might change, how have you seen that work?

SJ: Yeah, most of them ask and, some of them are up front in acknowledging they realize that might change a little bit, but some really truly think, it'd be like any other service business. If you ran a barbershop and you had four people that didn't have any customers to cut their hair you wouldn't keep them on staff until 20 people walked in saying they need haircuts. Agencies are the same way. I'm not sitting around with three people in my account management department just waiting for a new piece business to roll in, for an RFP to come in the door. We're just staffed too lean to support that. So, I think all agencies put together a list of people that you think on paper look like what the client's looking for, hopefully maybe they have some time on their hands. If not, it gets you through the first presentation.

DA: Okay. You've alluded to this a little bit when you said that your shop has gotten better about it in the last few years, but how do you feel the agency/client dynamic has changed over the last decade or so?

SJ: I would say we are far less viewed as advertising experts and authorities. I think as everyone has gotten an MBA our lives [and profession] have become the buzzword amongst a lot of current companies. I think everyone thinks they get social media because they're on Facebook. I think some of that authority figure, where I remember just coming up in this business in the mid 90s, I remember how much more aggressive the agencies were in pushing the work that they believed was right and really putting up a fight. I think now it's a little more challenging. Everything has to be proved, tested, which has taken over a little bit of the creative risk taking. In addition to that, I think the tenure of client relationships have become so much shorter, perhaps even the tenure at the companies has become shorter. So if you don't figure things out in six months they're going to find another agency. That's the biggest change, I think, which has the biggest impact on agency/client relationships.

DA: If I hear you right, mistakes are much more costly now than they were back when you started?

SJ: Well sometimes it's not even a mistake. Sometimes it's – we've launched a new campaign in June and [if in] July we hadn't seen the immediate success, we're going a different direction.

DA: Wow.

SJ: So in that case it's not necessarily a mistake, but impatience. We're lucky to have some clients that are super. More committed to building a brand and not just trying to incentivize sales and as a results they have had historically high sales for six or seven years because we'd built on an emotional brand campaign and they have the patience to do that. Other clients, especially retail ones, they look at week over week sales and make a decision after a month if it's working or not, then pull the plug. It's hard to build a brand with that mentality. If you just think of about meeting short-term success it pushes you to a place creatively, but that's not gonna necessarily lead to the best work.

DA: Yeah, wow. How do you feel agency/client communication has changed? And I guess what I mean by that is I came up in early 90s as well and when I started email wasn't even around then. Everything was a face-to-face conversation or on the phone or something. So how would you say communication has change with clients since then to now?

SJ: It's more frequent, but less personal because people can use email. I think because of technology and everything, it's so meeting-centric. I find so many of our clients are, as are agency people, in meetings from 9-5 and then the real work happens when people get their laptops home and you're getting emails, firing things back and forth at odd hours of the day. And then, things are reduced to standing two-hour staff meetings that are relatively unproductive, but serve nothing [more than getting] everyone in the same room and remind ourselves of what the hot items are. So, I think there's other examples. For example, like for our Subaru client, we've worked with them forever and we have a super close relationship. Everyone on my team down to the junior level has a person on the client side they have direct contact with. We had 20 people in Indianapolis this week at their annual sales meeting and we're just included as part of the team. And it's no mistake that those are the best relationship with the best work, with the best results, and there's a deeper kind of appreciation for building that relationship because you're made to feel like you're a partner not a vendor.

DA: How do you handle the after hour, late-night emails, early-morning emails? Do you feel obligated to respond immediately? Do you have set rules you try to live by?

SJ: No, we just reply at all times. It's the way you look at it, it's a service industry. And again with the fear of not being responsive and the fact that clients can go to other agencies, I think you try to make yourself as available as possible. So, I think, that's another one of the outcomes of technology, people can be reached at all times. Like you and I remember no email, definitely not laptops, so you would just sign out of your work for the night, you didn't even PDF work, you... I remember running into a FedEx station getting something off by eight o'clock, drop off time. And you knew you wouldn't even hear back until the package arrived the next day. So you wouldn't even get feedback until that happened, you knew you had a little breathing room. I think probably clients understand maybe subconsciously that they're in the position to kind of leverage that and say, hey, I need XYZ tonight. Or I'll get a phone call, like just Tuesday I got a phone call at eight o'clock at night, my client's [on the] West Coast. Still would be six o'clock his time. And I was watching my son's baseball game and he says, "Hey Stacy, what are you doing?" I said, "I'm watching my son's baseball game." And I took it and I answered his questions. But it's not like there's ever an, "Oh I'm sorry, I'll call you back," it's he's finally getting to his work after being in meetings all day and now he needs an answer to his question. So there's not, a great deal of boundaries.

DA: Yeah, I remember making the mad dash for the FedEx, that brings up all kinds of memories.

SJ: Yeah, right.

DA: Do you feel like the size of the client's budget plays into the agency/client dynamic?

SJ: You know, I think clients think it does, but it doesn't really, at least not what I've observed. I think we try to do the best thing we can do with each opportunity. Sometimes it's the opposite where a client will have a small budget and you almost need to kind of hold back the agency and remind them, "Hey, this is all they have. We can't give them 40 million things they can't produce." Umm. You know, I've heard clients are smaller say that they assume that they're getting kind of a B team, but I've never been at an agency where that's ever been approached that way. It's often based on what people are actually available to handle it.

DA: Since trust is the ultimate thing in agency/client relationships, how have you seen that trust be undermined? And once it is, can it be restored?

SJ: Between a client and an agency?

DA: Yes, between the client and the agency. And trust on either end.

SJ: Yeah, I know a lot of times [with] face-to-face conversations sometimes ultimately things can be resolved. We'll trade-off, it'll come to having to move a team member off of the business, if the relationships is just not working out. If it's bigger than that and it speaks direct to an agency or processes and not an individual, I think we sit down and do annual reviews with our client to try to hear what's not working and address that stuff.

DA: So you do annual reviews with every client just to say, how are we doing, what's going on here and there?

SJ: Yeah, we do, we have a formal process.

DA: Okay. And does that often lead to team shifts?

SJ: Not team shifts, but it might change the process. You had asked earlier about creative. We came up with one client that once we show rough cuts, they'd like to kind of go at it a different way. So we'll take that feedback and take it into effect for the next year. A lot of times it's more of a process changes that come about as a result as opposed to staffing changes.

DA: Are you always able to deal with the ultimate decision maker during the creative development process? And if not, how do you proceed?

SJ: Again, it completely varies by client. A lot of times, I think the thing I've noticed is there are levels to the ultimate decision maker. Even a CMO may not be the ultimate decision maker, it might be the CEO. And then there's a brand manager that you work with on a daily basis. And I've seen this happen at multiple clients where that brand manager tries to anticipate what his or her boss wants, the CMO. And then that CMO finally sees the work and they're trying to anticipate what the CEO wants and there are several rounds of revisions. And I can't tell you how many times that I've thought, could we just show the original creative to the CEO? Because sometimes their feedback is fitting and sometimes it would've been better to show all the stuff that we started. And unfortunately because of how busy those CEOs schedules are we just don't have the luxury of having access to them. Or it's the reverse, I've seen situations where their CEO is down in the nitty-gritty, day-to-day, when really they should be running the company, right? And I'm thinking, why are they approving the banner headlines for a digital display that's running on a small global network? Really, you know, there's got to be something more important to be doing.

DA: When you can't deal with the ultimate decision maker, is there anything you can do to help your contact sell it up the food chain? Or do you always try to say, hey, at least let us be in the room so we can discuss it more? Anything like that?

SJ: Yeah, we try to be present to discuss it. And then a lot of times we're asked to create the basic presentations with all the background. Here's why, the rationale, strategy, cost, here's the work. So we're creating little selling documents.

Today was the weirdest thing, we're waiting to present something to the CEO for a client and there are two concepts and they're very clear what the two concepts are. And the CMO – once it gets to this point where it takes forever to get to the CEO because I think he just starts over-thinking and trying to anticipate the reaction. And so he had said, "You know, I think if we swapped out a picture of Jon Gruden instead of like some general football coach that we have in place, I feel like he'll understand that more." We're like okay, so we put in a picture of Jon Gruden. We try it again and he says, "No, we need more like this picture of Jon Gruden." Then suddenly this screen grab of a picture he found at on Google. And I'm thinking to myself, none of this changes what the concept and we've spent two days swapping out pictures of Jon Gruden, who we can't cast anyways, just because we're trying to anticipate what the CEO thinks. So, that makes it hard, right? Because it's like, what do you think, CMO? Which one do you like the best? And at the end of the day you also [have] to stand in front of your boss and be the presenter of that regardless of it's Jon Gruden or a picture of, you know, a Vince Lombardi-type coach. You can explain that this idea is about a burger coach that teaches people true inspiration, the proper way to eat a burger. So I don't know, I think on the agency side say, "we would be so much better clients if we were clients." But I think it is because we just don't understand the demands and the expectations and the other aspects of jobs that go beyond what we have exposure to.

DA: Are you familiar with the co-design process of creative development at all?

SJ: Uh, no.

DA: It's getting the client involved early and often and going much rougher on the front end and then tons of focus groups. Basically it's giving the end user, or the person consuming the product, an opportunity to have input into the product.

SJ: Into the product or into the creative process?

DA: Into the creative.

SJ: Yeah.

DA: So it might be like, sort of like what Doritos has done with their user-created spots, that type of idea. Have you ever been involved with anything like that? I know through research, but is there anything special you do to try to engage the ultimate consumer to find out what makes them tick?

SJ: I understand. There's, there's two different ways I'm gonna answer that. The first is consumer-generated content, which is like more the power of your brand over, like many customers have shared with you kind of creating the brand. And usually on that to a certain extent [they are] more tactics, if the program calls for it. And the other is about having the consumers weighing in. Is good business, with companies like General Mills and Con Agra. That's very much that model where you're testing all of our work on-spot testing, first starting with focus groups getting their personal opinions on products. I've had enough focus groups to last a lifetime. There's a reason why most of those packaging companies have never produced a good piece of work. Because we just can't. If you ask someone, their, "Do you like the ice cream spot? They'll say, "Well, I don't see anyone eating it. And they're not smiling. And no one told me that it was just 5 gram of fat in a serving." I think about our Jack Link's work, which has just won an EFFIE for advertising effectiveness and going on 10 years, it's been super effective, and now they're a billion dollar-plus company. There's not a thing said about the product in that ad that should have ever been focus group tested. So I get nervous about that.

I think more companies and agencies should do [research] on the front end before you even lift up your pencil to concept, going to talk to the consumers to get insights and to see how they talk about their lives, and how they engage with products, what kind of customer journey is relative to their products. And when you hear that stuff, I think, a lot of times it creates really great insight. I mean, the one that's kind of, led to that is the deprivation study that was done for the "Got Milk?" campaign. Where they asked consumers to think when they normally drink milk or not drink milk and they realized there were certain things that if you didn't have milk, the experience wasn't there. So, it was less about them testing the work and more about how do you do really interesting ethnographies, and engage consumers early to see and hear insights that help make the work stronger, more insightful, more relevant to customers, to consumers.

DA: That's great.

SJ: We're working on a pitch right now for an outdoor company – you know kayaks and hiking boots and things like that. And we text ten people that don't know what brand we're working on and gave them $150 to go online and buy gear and diary their experiences and take pictures and social media to talk about how the experience has made them feel, and basically journal it. The hope is we get from that some insights that can help lead to the work.

DA: So, if I'm hearing you correct, you feel like focus groups are good things you shouldn't live and die by focus groups?

SJ: Focus groups, oh yeah, focus groups to get insight into either strategic territories and less about the work itself. But I think if you're trying to test four different ways to position a brand, it's really great to go hear, what consumers think about whether those strategic directions are relevant to them. As opposed to putting a bunch of storyboards in front of them and saying, which ones do you like and what don't you like and what don't you like about it?

DA: Okay, that's all I have. Is there anything else you feel like I missed or any parting?

SJ: No, what I would say is you asked initially if we had a formal process. We have a formal internal process and we call it "the grid," It largely came about because we always got asked in our RFP and new business pitches if we have a proprietary process. You kind of felt like you need one. I think a lot of agencies do and 99 percent of what every agency does from a process standpoint is exactly the same. And I say that only because I've worked in five agencies. And in the five I've worked at, maybe there's a two percent difference from agency to agency. But I think a lot of places do that because what I've read is, research suggests usually when a client walks away from an agency it doesn't have to do with the work, it more has to do with frustration with the process. Things didn't happen fast enough. They thought they were too expensive. They didn't feel responsive [to] feedback. It was really process-oriented. So I think that's why a lot of times in new business pitches that question comes up, because it is clearly a sore subject with the agency [the potential client] came from, where they felt like the process fell apart and [they are] wondering if there's more of a formalized way to go about creative development. A lot of times that process covers how the agency engages the client as part of that process. So it's clearly something that I think clients are asking and looking for, the kind of early and often engagement.

DA: Do you have that grid in a document you might be able to share with me? Just, part of my research is also a artifact analysis just to kind of see the look and feel. Or is there a general client contract or something I can get my hands on?

SJ: You know it's, our document, and we actually built it out electronically on the Intranet, but I could try to do like a screen grab or something like that for you.

DA: Yeah, anything I can get my hands on I would be very grateful.

SJ: Okay.

DA: Great. Thank you so much, Stacy. What I will do, we're going to get, I'm getting these interviews transcribed once I get it transcribed, it may be a couple weeks, but we'll get it done and it's just a matter of capacity, but once we get it transcribed, I'll send it to you to have a look at and make sure that I heard you correctly. That everything is as it should be before we proceed.

SJ: Perfect. And I'm assuming, just because I've kind of told client stories that it's not going to be something that like publicly published, is there?

DA: I'll make sure no client names are mentioned or anything like that. This will be my written thesis. And then there will be a visual component to it. But you will see it before it goes anywhere, that anybody else might see.

SJ: Sounds good.

DA: Okay great. Thank you so much for your time.

Appendix F

Maureen Barry

Senior Vice President, Managing Director – GSD&M

Telephone Interview

May 8, 2015 at 10a.m. CST

Duration: 50 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: I'm here with Maureen Barry from GSD&M, and you've seen the questions so I want to get your thoughts on agency/client interaction. My first question is does your agency have a formalized procedure for client engagement throughout the creative development process?

MB: I would say it actually varies client by client to some extent, although there's some commonality across the board. So, I'll give you some high points of things that are so common that it would be fair to say that these happen with every client. The first, of course, is the initial engagement from the client in terms of what is it they're trying to accomplish for their brand or for a particular initiative. So in essence, the brief from them to us is a critically important collaboration point at the very beginning – understanding what success looks like for them. This is harder to get from them sometimes than you would think too, but getting them to clearly define what is it we need to accomplish together. What does that success look like? Trying to get them to quantify success metrics can get, but it's really important so there's no emotionality at the end. We will critically know if we succeeded or not. Say we need to, for example, raise awareness of this brand. We want to understand that there's a benchmark measure in place and so we want to raise it let's say from 32% to 43% or whatever it may be. That way we either did it or we didn't. [To say] we have to raise awareness, period, is too vague. So getting them to state what we're trying to do together and also just making sure there's a measurement plan in place. Sometimes [the client will] say something they want to do and then if you don't think it through you realize that's a great objective, but there's actually no way to reach it. For example, a client who might rely on a dealer network and if they don't get good data back from their dealers you may not be able to get the sales data you need. So that first engagement point I think is very common. You just can't really get started without that.

Once an agency has that from the client, then we move into a mode where we collaborate internally in terms of developing our own briefs. It's usually done in collaboration with the strategy department. You know, it's called different things at different agencies – strategic planning, experience and insights. There's lots of names for it, but it's the folks that specialize in understanding the consumer, doing research, trying to get to that real human insight that can inspire big ideas. So taking that client assignment and then translating it to a brief for our internal teams by working with those strategy folks and doing whatever research is necessary so we have consumer insight happens next. When you asked about a client engagement, this is where it begins to vary a little bit. In some cases, agency teams will then take our brief, that's hopefully meant to be – their typically a little more inspirational and ultimately briefer than the marketing brief you tend to get from a client. And so it is a different document although, you know, it's in essence supposed to inspire or to solve whatever problem you're trying to solve. But in some cases accounts will go back to the client to make sure that they approve the agency brief because nobody wants to – once we end up presenting work have them say "That's not our strategy" or "not our brief" and it's because it frankly evolved too much from their brief to ours. But I would say it doesn't happen in every case. So that's a touch point that happens in some cases, but not all. Then, of course, the work begins to be developed. One of the things GSD&M in particular offers that not every agency has is a completely integrated approach. And all I mean by that is [a lot of] agencies back in the 80s spun off their media planning and buying functions. There's tons of really big media buying agencies and there's a lot of creative agencies that do just that. They do the creative, but they don't do any media planning and buying. We never spun ours off, so we do all of that. And so where we're really best for clients is we take that brief and it's an entire integrated team that's briefed. So what we're working on is not just a creative idea, but it's a creative idea inspiring a media strategy that is based in a deep, deep understanding of the target audience. How they live their lives, you know, how they consume media, how they consume content and so on. And so that integrated plan is developed. And then, of course, the pretty universal touch point with the client is presentation of that work. And where it goes from there is purely dependent on how successful that presentation is. So, in an ideal world the client is thrilled and really happy and we go off and produce the work. It other cases the client is not [happy or the work] does not resonate and we're either, in the worst case, back to the drawing board re-questioning everything from even the strategy on. Or, in the less severe case, it's – nobody's questioning the strategy, but they just really don't like the executions or the recommended campaign and we have to go back and try to explore other ways to bring the messaging to life in the marketplace. So, those are kind of the key times when the client's involved.

DA: That sounds good. So, that leads the next question. It sounds like the client isn't involved in concept generation much, or how involved do you want them to be or do you not want them to be in the actual concept generation?

MB: That's a good question. So many of these answers are going to be that it depends on the client.

DA: Certainly.

MB: That's really the reality of our world. I think an agency's natural inclination, frankly, is to be a little protective of the process to frankly not want clients involved. We sometimes use analogies like ideas are like children. Don't kill any of my children, you know, I love them all. I want to protect them and nurture them and certainly when they're in an embryonic stage. I don't want you anywhere near them because it's not fully formed. This is like an agency talking to a client, we'd never say this to them, but a fear is I don't know that you have the imagination or the vision to understand the power of this idea in this early stage. I don't [know] you can really see where we're trying to head with this, how many legs it has, and so on. So I think the natural inclination, especially of creative teams is to protect that concept and frankly present it at a point where it is highly evolved and polished and almost literally ready to go into production. Having said that clients, I think, to varying degrees that as a trend, more and more, really don't like that. I have one client in particular where this is actually a hot topic right at this second. The Stainmaster brand which is actually an organization called Invista. They have instituted what they call "Coffee Talks," which is a funny name, but I think it's just meant to apply to them that these are really informal conversations that they want to have with us along the way, during the process. They don't want formalized Power Point presentations. They don't want highly polished layouts and copy or storyboards for TV. They just want to talk to us about "What are you thinking? Where are you headed? What are you exploring? What do you think?" And so, I would just say that there is a little bit of a tension between what agencies probably are most comfortable with, which is like please leave us alone until we can [get it] just right versus wanting to [be involved] at least in that one instance, I'm hearing that loud and clear from them. They want to be part of the process. They want to be part of the team. They want to own it and they want to guide us and direct us and they think that's all very positive. They think they can help us be more efficient. So if we say, well, we were thinking of exploring this area or that, I'm making this up, they make X so it's like, you know, the idea of your new product replacing an area rug is really about, about play and creativity, not so much about high design. And they would say, "Oh, no, no, no. Don't go there because..." Whatever. So, but to do that to an agency then that might be like, well, they just killed a potentially great idea. We talked to them about it too soon. So it's an interesting dichotomy right now.

DA: You're saying that this is a new thing that you're seeing. So obviously you're seeing this change in the last decade or so, or the last few years?

MB: I think that's fair. I think over time if clients were more used to just, again, perhaps fewer points of engagement, just the idea like we give the agency an assignment, they come to us when they have perfectly figured it out and then frankly, we'll still tell them if we hate it, but we don't expect necessarily all these conversations along the way. So, yeah, I do think that's changed over time.

DA: What level of finish do you typically show clients for initial concept presentations? Is it sketches? Is it full-blown comps – you said comps earlier or animatics – how far do you go on the front end?

MB: That's come a long way as well just because of technology, obviously. So, you know, back in, "Mad Men" days, I guess, it really would be kind of sketched, ideas. Well, we were just talking about how technology has changed what we show the client and so you don't really see hand-drawn sketches anymore. There's just no real reason to do that even for things like we sometimes call a "tissue session," which is simply meant to indicate that these are ideas that are in development. But you know they all use their technology and software programs that make it look much more polished. So for a TV spot for example, they will typically have one or two what they call key frames. Which are just all kinds of imagery available online. So whatever story they're trying to tell, it'll strictly be a board where the client can see the script. And again, if it is a TV spot, a script on the right-hand side of the page, and on the left-hand side perhaps one or two key frames, which are just images that are meant to represent the story we're trying to tell. Radio scripts are all language, so a script is a script. We usually present a full-blown script. A print ad, again, they're able to construct something that looks almost as if you went out already and took the photography, they can do a pretty highly polished layout. Now it's not the actual photography. Sometimes it's kind of funny because technology has made the ability to present these concepts to clients in such an evolved state that if you have a particularly unsophisticated client – we've literally had times where these are just found online images, we don't typically even have the rights to use them and yet clients, sometimes they fall in love with them and want to use that. So that's not at all our intent. We would take original photography or whatever it may be, but... At any rate, what's presented these days is sometimes what we refer to as pad-like objects. So they look an awful lot like the final product.

DA: Have you ever had what you felt like was a really good concept killed because the client didn't like or understand the stock photo that was in place? You know, the old story that the client hates red or something like that. You know what I mean?

MB: Yeah, but very rarely, I would say. That's happened, you know, time and again over the years – That maddening thing where a client decides to show their wife. Or show their secretary, or show whatever and on just an absolutely purely subjective basis like the example you gave, they just – they don't like the color red or they think the woman is not attractive, or just silly stupid reasons that you can have one killed. Luckily, I don't think that happens very often.

DA: So, how often do the creatives that actually create the work engage with the client? Or do they?

MB: In our agency they absolutely do, on a couple levels. In terms of presenting ideas to the client, it really always is the creative team themselves. Now, I would say, I will back up and say this. In the creative department we have a structure, as you might imagine, that goes from the most senior folks down to the most junior folks. So under our chief creative officer who runs the department you have different what are called group creative directors. These are the most senior art director, copywriters and they have what it sounds like, they have a group of creative people underneath them that they can call on. So they're really expected to be the lead, they hold the relationship with the client on an ongoing basis. So that's the one level that I'm referring to. A best practice to us is we're not precious about what I do versus account leaderships, otherwise known as, you know, as account service or account management, where I'm the direct-to-client contact type of person. But we're not precious like, "Oh, only account management is allowed to talk to the client." We actually encourage the development of direct one-on-one relationships between – not everybody at the agency, but leadership. So you have this group creative director team. We encourage the idea that there would always be [the] kind of relationship where they could feel free to call. Because a lot of times clients will have creative directors on their side as well. And so there's some peer-to-peer relationship. And so our creative leaders should be able to call the creative leader on the client [side] and have a one-on-one conversation. It shouldn't have to be they're monitored or arranged by the account team. So we encourage that kind of relationship on an ongoing basis to deal with whatever issues or questions or concerns that may be ongoing. And then more specifically, for presentation of work because those group creative directors have these different teams underneath them, they will often – it depends, but sometimes these GCDs, just to use the shorthand, will make the presentation to the client themselves even though they may not have physically done the work, like literally wrote the script and, you know. They have teams do that for them. Sometimes, especially if you have a very talented member on the team who's good at presenting, they'll have the people who actually did do that work. They wrote the script, they came up with the visuals, they came up with the idea. They will present directly to the client, but it is always creative presenting creative to the client. It's not like, again kind of like back to "Mad Men" days. It's not although I'd have to say Don Draper, it does seem like he always presents his work, but I mean it was the case many years ago where, the account people were considered "sales people." So, the creative would hand a board to us and we were expected to sell it through, but we don't do it that way anymore.

DA: You've kind of brushed on this point, but do you feel like that's how the agency/client interaction model should work? Or if you could build your own agency and the absolute perfect way to deal with clients would it be that way or how would it be?

MB: Yeah, I would actually agree with that. That's not just the way that GSD&M happens to do it. I approve of it. And I will say, the caveat is you gotta have good mature strategic leadership across the board. It's not gonna help if you have a creative person on your team who is frankly, maybe they're wildly creative, but if they're kind of a crazy loose cannon and you can never really count on them, you have the maturity and the understanding to know how to manage a relationship with a client. If you're afraid they're gonna say the wrong thing to a client, that's not good. So with the caveat that you've got to have good, strong, mature leadership in place, I agree that it's great for them to have direct relationships with the client.

DA: I guess that puts a lot of onus on the group creative directors to make sure traffic knows what's going on and everybody else knows what's going on based on conversations they've had.

MB: That's true. In fact, you bring up a great point. It does – because when you do that it does require a – because here's the truth, we're never gonna – well, not today anyway, not at my agency – we're never gonna expect creative directors to have a conversation with a client and then write a conference report. That's never gonna happen. It's in a way maybe a little bit of a risk or a downside is you're asking them to play that account leadership role. What it does require then is a very close collaboration between the leadership on the account side and the leadership on the creative side. So while you're not gonna ask them to issue a conference report, it should be very clear that they should swing by your desk and say, "Hey, I just talked to Adina Baker, the creative director for Stainmaster, and I ran some of our thinking by her and she actually thinks it sounds great," or she said, "It sucks." Or whatever it is, but that the account person is then crystal clear about where everything stands and can keep everything moving in the right direction.

DA: Is there anything specific that GSD&M does to match account service reps with the client? Is it by the type of business – do personalities ever come into the decision-making process? How does that work?

MB: If you think about it, it really starts with the new business pitch. So, we have clients on our roster, in particular, Southwest Airlines is a good example of a client we've had for 33 years. So obviously over time there have been different account leaders on that business and decisions are made along the way and certainly yes, what's the right fit? Who's had the right experience? So if you have an account that long those decisions do need to be made along the way, but for newer accounts, it really starts with the new business pitch. Where more and more clients have as an absolute mandate that you not send in a “pitch team,” which, as you know is obviously, a team who is particularly good at presenting and then they see it as a potential bait and switch. Meaning like well, you made this amazing pitch and there was that guy that I thought was gonna be my account lead, and now suddenly you’re introducing me to Maureen, I’ve never even met her before. They don’t like that. So we typically have to figure who’s gonna run the business as we put together a pitch team. Because that’s what they’ll say, “Send me the people who are actually going to work on my business.” And, you know, so who is it? It’s fairly rare that we have the luxury of going out and hiring somebody when you don’t have the business yet. So it needs to be led by somebody who is already in place and then the decision of who it should be is obviously a variety of factors. I mean one just purely practical one is capacity? Who has the time and the wherewithal with all their other work that they’re already doing to actually devote time to lead this pitch? Then category experience, you know. If it’s a retail account, who would be best suited, who’s got a resume with clients that they really have a lot of retail experience? Personality to some extent if we, if we know a client is, I don’t know, extremely conservative, family-values kinda client, maybe, you’re gonna let that guide who you put in front of them as well. So, that’s kind of how that works.

DA: Okay, that makes perfect sense. Do you think, the agency/client dynamic changed in the last say decade or so, or just since, since you’ve been in the business?

MB: I’m not sure what you mean exactly by the agency/client dynamic.

DA: For example, you mentioned earlier that it used to be that clients just wanted to engage the agency to do their work and they got out of the way and now you’re seeing more clients want to be involved. In day-to-day work, have you noticed any changes beyond that in the way – do you find that marketing directors are more hands-on now than they were a decade or so ago? Or is it about the same?

MB: You know, Dale, the honest to God truth – this is absolutely not helpful to you, but it absolutely varies client by client by client. I mean, there are some CMOs that are really hands-on and want to be a part of the process and guide and direct and so on, and there are others that are very hands-off. So it really does vary. I mean, we have other kinds of dynamic changes that over time are not very great for agencies like the increasing involvement of procurement, for example. So as opposed to the purity of marketing partners working together with clients and agency. You now have this factor of procurement people who really don't even typically understand marketing and advertising at all, but their job is to make sure that they're getting the lowest possible price from the agency for what we do. So there's lot of engagement along those lines in terms of the overall dynamic.

DA: I've heard the procurement argument for years about how that has hurt – this is a total tangent – but how this has hurt the agency/client interaction quite a bit.

MB: It's not good from our perspective. I guess it's probably good from a client's perspective in terms of just the bottom line and getting a cheap price, but you really have to question the wisdom of it overall in the bigger picture.

DA: Yeah, less dollars does not equate to better work. And neither does a ton of dollars equate to better work. It just depends on how good the agency is and how everybody gets along, I believe. Like I said, that's a total tangent for me, so.

MB: Right.

DA: How do you think agency communication has changed? For example, I started in this business in the early 90s and we didn't have email, or email was just starting to catch on. So everything was face-to-face interaction or phone call or fax. How do you feel the agency communication has change in that amount of time and is it better or worse? If you could lament about how we do business now compared to how we did business back then, how has it changed good, bad, and indifferent?

MB: Do you mean communication within the agency or between the agency and client, or both?

DA: Both.

MB: Yeah, I would say, and I mean this is a pretty obvious answer. But technology has just made all of our lives crazier. It's just the speed with which answers are expected has obviously grown exponentially and so everything – so what used to be nice just in terms of overall work/life balance, there was no email, to your point. So, I mean, you literally relied on, if you had to have communication go back and forth, you had to mail it. I mean, there were days involved, not hours, certainly not minutes. So you had real conversations over the phone or in person. So it was just a slower pace and essentially perhaps a more thoughtful approach to everything. But obviously, those days are long gone. I think one general observation is both internal communication and with the client is everybody relies way too much on email. It has its purpose, I guess. But the big advantage of email is you can communicate exactly the same message to multiple people at one time. You don't have to go from desk to desk or make phone call after phone call after phone call. You can communicate exactly the same thing to a team or to a group of clients. So it is a big efficiency advantage in that sense, but unfortunately there's not as much thought as there should be, like is this the best way to have this conversation? Is this the best way to get this done? If I'm checking in, is email really the right way? So we're overly reliant on email, I would say. The other phrase sometime used is, lead by walking around. When you're just tethered to your desk and you just seemingly only communicate with people through email, it's not a very effective team-building or leadership approach. So I think there's a general over reliance on email. And again, because of technology, the ability to provide everything electronically to clients, there's just the expectation of speed. Everything has gotten shorter. So everything is expected in a much faster turnaround time.

DA: Does your agency have a practice or how do you handle when you get emails from clients before hours, after hours, middle of the night? Do you feel expected to respond immediately? How do you handle that kind of stuff?

MB: Again, sorry, there. The lame answer depends on the client.

DA: That's all right.

MB: I think for the most part, luckily, at least at GSD&M, we have clients who pretty much just operate within normal business hours. Now having said that, generally speaking if it's a type of business that it is really not a 9-5 business. Certainly on the agency side, very, very few people really are able to get their job done 9-5. So most people are online after hours. And there are a few crazy clients. I think if you're on a particular account you might – or if you know, they have a particularly crazy retail type of business, it might be more likely that you just have to know that you could get a text or an email any time of the day or night. The expectation of client is how you develop that relationship and "train" the client in the first place. If you've got some kind of Type A personality hard-charging account person who is not gonna let an email go by without answering it within the hour, and [will] even do that at two in the morning, that crazy client is gonna get it. I mean, those situations can just spiral out of control. I would say that those are unusual. I think for the most part it's pretty reasonable I'd say. Certainly there are email exchanges in the evening, but the middle of the night stuff and even weekend stuff, luckily, I think it's fairly rare.

DA: I guess it's one of those things if happens you know there's an issue that needs to be dealt with.

MB: Right.

DA: Do you feel like the client's overall budget plays into the agent-client dynamic?

MB: I don't know about dynamic. Budget is hugely important because unfortunately, there has to be some currency to make all this happen. And budget, of course, can cover everything from the agency fee to budget for media investment, to budget to produce work. So if you have a client, you know – like AT&T, for example. Back in the day, back when we had AT&T, I'd say around 2006 or so, and they reinvested one billion with a "B," one billion dollars in media and we planned and bought all of that. I don't even know what their production budget was, but if they were spending a billion in media, it was certainly multi-millions of dollars in production. Agency fee, probably $20 million. I mean, when you have accounts like that, it's so much work to do that it's a machine. There are hundreds of people working on that account so there's not a lot discussion time spent on budget because there's plenty of money. So that's one extreme. The other extreme are just clients with just frankly completely inadequate budgets. They're not willing to pay the agency for the talent, that's really the right talent to get done what they need to do. They don't spend enough money just by hardcore analysis of what they should be spending in the marketplace in terms of investment on content for media, they under-spend. They always want to do production on the cheap. Then what characterizes that kind of client is an over-obsession with budget 'cause you never had enough money to do what you really need to do. It requires over-attention. You have to figure out how can we get this done? And then everybody else is somewhere in between. So in the middle you have more of a sweet spot where they pay us a decent fee. They may not be the top spender in their category, but they spend a decent amount of money in the marketplace. And if it takes a million dollars to produce a short film or a TV spot, they're willing to spend it. So that's kind of the sweet spot in the middle.

DA: I think we would all agree that trust is paramount to the development of great creatives, trust on the agency side and trust on the client side. How have you seen that trust can be undermined, and once it has been undermined, what can be done to restore it?

MB: Well, I think once it's been undermined I think it's really hard to restore it. Maybe it can be done, but I agree with you. It's of paramount importance and you really have to work hard to make sure it's not undermined. Because look, if you would lose a client's trust, I think you're probably on your way out. I mean, I don't know what you can do to [restore it] – I guess it's like a marriage, it's like any relationship. I guess you could certainly try by just demonstrating over and over again that you are trustworthy, that your behavior has changed. So that's pretty tough. So obviously what you would want to do with a client is, always to just tell the truth. That's the primary thing is – as we – our founder Roy Spence has the phrase, "Fess up what you mess up," if you like Texas expressions. So, you know, don't try to hide things from clients. If a mistake was made, admit to the mistake. It's the political thing too. The scandal is always due to the cover up. So if you make a mistake, let the client know or let them know what you're gonna do about it. Take full accountability. You have to just demonstrate over time that they can count on you to be honest with them, to be accountable, and to make things right – That you've got their back. Where you lose trust is just what you would imagine, any sort of sneaky behavior. I mean, if something went wrong and you just try to hope that they never discover it, try to cover it up, never admit to it, never bring it up. You know, close your eyes, cross your fingers, hope for the best. That never really works too well. It's just any kind of duplicity, any kind of dishonestly will undermine that trust and then it's really tough to get it back.

DA: How about the other side? What happens when the agency loses trust in the client or can't – how does that happen and is it the same thing?

MB: It's tough. If you have a client that's just a very difficult client because honestly you can't trust them, you can't count on what they say, they kept constantly changing direction or their team, you just can't ever rely on the information they're giving you. All these things, all this bad behavior leads to the fact that, day in and day out, you just have a client that you just have to endure as best you can because you – it doesn't feel like a true honest partnership. You just have to try to cope as best you can with this every-changing direction you're getting from them. Or just like really bad behavior they throw you under the bus to their superior, because you know there are legendary stories about bad clients. So, unfortunately, they do happen. The problem is, when you undermine trust of a client, you're probably on your way out, well that's because obviously the client is in power. So they no longer trust the agency, why would they keep you? It's not the same with agencies because unless you somehow have some sort of independent source of wealth you know we have to keep those bad clients if we're getting any decent amount of revenue from them at all. We just don't have the luxury of resigning business because they behave badly. You just have to endure it. So at any agency there are clients that everybody knows are wonderful and everybody loves to work on because the client really is just an upstanding, honest, trustworthy, nice person, so-to-speak, or team. And then, you know, at the opposite end of the spectrum you have some pretty difficult clients that are just very tough on those teams that have to deal with those clients day in and day out. That's where you get a lot of burnout. You have to figure out ways to move people around because they can only handle it for so long, because you can't resign them. That's the downside on the agency side, you have to keep slogging away because you gotta have that revenue.

DA: Are you always able to deal with the ultimate decision maker during the development, creative development process? And if not, how do you deal with that situation?

MB: That's a great question 'cause it's an age-old problem. We deal with it on almost every client. It's a really tough one because what typically happens is for any major initiative or campaign if you have, let's say – not every client has what they call a CMO, I'll just use that as shorthand. Because they either have a chief marketing officer or they have someone that might not have that title, but in essence plays that role, but the lead marketing person. That's the pretty senior person at the client. And yet, again, they're in charge of marketing and so if it's any kind of a major campaign they are at some point gonna want to approve it or disapprove it. And so from an agency perspective, and we've tried this on many accounts with varying degrees of success, I mean, honestly my approach has always been that whoever gets a vote at any point along the way should be in every major presentation. It doesn't have to be at every single conversation or like a tweak of a word here or a word there. You have to be reasonable, obviously. But the major touch points along the way that we discussed earlier or an agency interaction. We try to make that happen where they have to agree. You know if the CMOs are ultimately have to greenlight this or not, we cannot wait until there's been four other presentations where people down the line, are all afraid for their jobs so they want to make sure that they have their handprints all over the work. So there's a really dangerous situation, cause to be perfectly honest. They think that they're contributing. They think that they're making the work better. Sometimes maybe they do, but all too often it turns out that the CMO is a CMO for a reason. And we've had instances where we've had no access to the CMO until everybody underneath him or her thinks they've had their shot at making the work better and manipulating it and frankly oftentimes diluting it. And then we finally present to the CMO and we hear all the things that we would have said in response to his or her underlings. In other words, we clearly can see that the work in its original state is what should have been presented. And so it's a tough situation. The very best clients understand that they have to take responsibility and you can get the CMOs to be in those key meetings and presentations so that you don't have this problem. You know, you have that highest-level engagement and approval. If they refuse to do it, then that's what you hear from clients sometimes is like especially the CMO and then underneath him or her you have somebody called, I don't know, Director of Brand Advertising and underneath that person you have the advertising manager, and underneath that person you have the Production Manager. Or whatever. So you have this advertising department hierarchy and when you try to establish this up front where we say, "We love all of you and we want to hear from all of you, but honestly, Joe, the CMO, has got to be in even from the very first concept presentation." Or whatever. Then you sometimes hear back from them, "No way. What do you think we get paid for? We're not gonna bother Joe. We're gonna make sure the work is right." Sometimes you don't even have access to the CMO. That's the worst-case scenario. Sometimes they don't even want you to present to the CMO. They're like that's our job. When we think the work is right, we will present it to him or her. And then you get the feedback second-hand, which is even harder. So anyway, it varies. The very best cases where you really should have access to all the decision-makers at every key step along the way, but it doesn't always happen that way.

DA: In those cases where you're not in touch with the CMO on the major basis it's almost like design or adverting by committee at some point.

MB: Right, that's right. Which and we know how that goes.

DA: Yeah, we all love that.

MB: And that rarely results in groundbreaking communication.

DA: Exactly. We've discussed this last point probably ad nauseam, but are you familiar with the co-design model of creative development?

MB: I don't know if I'm familiar with that term exactly.

DA: I'm sure you're familiar with the rationale behind it, but the co-design model is basically the client is involved heavily in the creative development process as well as consumers can even be involved in it through things like, recommendations or by how they respond to social media. All that factors into the design and advertising decisions. I guess what it comes down to is listening to the consumers as much as possible and giving them even more so than just focus groups. Giving them an actual, for lack of a better term, a seat at the table. How do you all try to get the end consumer into the development process. Or is that important?

MB: Yeah, not really. Honestly, not really. It's kind of like Steve Jobs used to talk about it at Apple where he didn't even bother asking consumers what it is they need or want because he would say, "They don't know." They don't know what they need. We have a better vision for where things are headed. Or that's a little different than creative co-creation. I mean, maybe it sounds snobby, but we would not – we do want to understand, that's obviously, that's consumers, who they really are, how they live their lives, what they do, what's meaningful to them, what's relevant to them? How they consume content. We have tremendous respect for consumers and we want to have a deep understanding of who they are and how they live their lives and how we can accept them with a brand, with messaging that is in some way actually truly meaningful to them, that they appreciate, that they can engage in, a value that they believe in or just a great deal for them for whatever it may be. But when it comes to the design of that actual communication, what we need to do to get to grab their attention, break through all this unbelievable clutter of everything that assaults them everyday, to invite them into that process, we don't – at least we, as an agency, don't do that. I don't know what the point would be as far as asking? That's like asking me to try to help fix a car. I have no idea how to do that. (LAUGHS) So to invite them in to actually co-create the communication is not something we've done.

DA: Sure. I understand exactly what you're saying. I guess it would be things like, well, that this is more of a contest, I'd say, like how Doritos does with their Superbowl ads where it's supposedly consumer-created advertising.

MB: That is one. No, I hear what you're saying. That is one approach. Doritos has been pretty successful with it for the Superbowl. It's also a PR-generation tactic. You know, the idea that you're gonna let user generated content, let consumers make their own TV spots. And again, given the evolution of technology and editing [software] that people have on their laptops and sophistication of cameras and consumers can make pretty good commercials. So that certainly is a choice a brand can make, but that's a distinct [tactic] you know, we're gonna open it up to consumers, we'll give them a brief basically and let them – see how they would bring a story to life and you get some good interesting stuff. I guess I'm just saying that's a fairly distinct choice that we frankly haven't done. Not to say that we couldn't. And again, it's a pretty interesting from a PR or a media perspective. But I think that in the normal, day in and day out, it's not something we'd just normally invite consumers into "help" us. Like if you want to turn it over to them completely like Doritos has done, sure, but that's a little different from somehow inviting them to a seat at the table to actually develop the communication.

DA: One last question. It's kind of a curveball here and I only bring this up because of what you just mentioned with how computers, editing software, Photoshop has all gotten to the point where pretty much anybody can do something that's fairly passable.

MB: Yeah.

DA: Have you ever had clients that even have tried to say, “Hey, I came up with a layout. What do you think?” I know you deal with much larger clients, so probably not. It’s probably more of a Mom and Pop that would do that, but I’m just curious.

MB: Once in a while. Luckily it doesn’t seem to happen too much, but yeah, every once in a while, you just have a client who fancies him or herself, as having creative talents and so whether it’s a sketch or however they present it to you. I mean, we certainly had clients that say “I was thinking if we did it this way,” and then you just have to handle it very diplomatically. First of all, we try to stay very open-minded. We’re a humble agency in terms of our corporate personality. So we have a phrase that, “no one has the corner on the smarts.” So just because a client has an idea or an approach or a scenario or a story that they think they want to tell, number one, I think we aspire to believing that great ideas come from everywhere. So, it’s not necessarily a bad idea if a client has it. I mean, I think creative people are a little protective. So I think it’s sort of rare that a creative person would greet a client’s suggestion with the same passion that they’d tend to promote their own ideas. So you just have to handle it kind of diplomatically or figure out some way to honor their idea or incorporate into the process. So I would say it doesn’t happen a lot, but it does happen every once in a while.

DA: So you try to find the kind of nugget in that that you can take and...

MB: Exactly. It may not be the creative execution as he or she is outlining it, but that’s the classic account leadership role. It’s like saying like, “Tom, what is brilliant about what you described is – the recognition that you have of consumers’ passion for sports.” Or whatever. You know, you just try to acknowledge something in what they’ve presented that helps them feel like, "Wow, I'm moving this forward," you know, contributing even if it's not gonna end up being – we'll just make that ad that you just described.

Appendix G

Seab Tuck, FAIA

Principal – Tuck-Hinton Architects

Personal Interview

May 8, 2015 at 2p.m. CST

Duration: 48 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: You've seen the questions and I just want to get your insight on client engagement. You're the first architectural firm that I've spoken with. So I'm interested to hear what you have to say.

So, first question: Does your agency or firm have a formalized procedure for client engagement?

SEAB TUCK: When you say, "formalized procedure," tell me what you think client engagement is first. We've got the job and then what do we do?

DA: You've got the job, how do you walk somebody through the process of developing the idea through the concept, through the fabrication, all that stuff.

ST: Well, most projects we do have phases or steps in them. And per the architect contract agreements, there's five of those. The first two are design-related. That's schematic design, design development. Then you do the construction cost documents, which are really the technical aspects of when you build the building. Then you have a bid procurement and then construction administration, which is watching over it during construction. Taking care of changes that the owner may make and things like that. So the first thing we do is explain – and this is assuming it's an owner that's not familiar with the architectural process – when you work with some developers normally they are. I think at that point – and this gets a little bit into some of the questions you asked – we have to get a feel for how involved the client wants to be. Because we definitely have clients that hire us and say, "Look, I'm busy. That's why you're doing this." We had one of our largest office buildings in St. Louis. The client's company was growing so fast, he could not slow down long enough to even talk. I literally went to him at the end of each phase and said, "Here's the building." "[He said] it looks great. How big is it? No, no, no, it's not big enough, make it bigger, thanks bye." You know? But that was a client that had an enormous amount of trust in us. They weren't concerned about what it looked like. They knew it was gonna look good. Their concern was is the building big enough for the company as it was growing. So that's one extreme. On the other hand, we have done projects for clients that are – they want to be in the design, they want to be in all the detail, they wanna be part of that. They wanna be in all meetings to make decisions on mechanical systems, electrical, that's the other extreme. So you sort of have to ask those questions up front or get a sense of what their involvement needs to be. Now typically, we would meet with the client three times during the first phase – maybe three or four times during the second phase. A couple times during the construction document phase. And then during construction, it depends a lot on the project, and then during construction it might be monthly, maybe every two months. So I think the engagement, to answer the question, really varies depending on the type of project. If it's a really simple project, like an office building or something simple, that's less. If it's a museum, it's usually a lot more because a lot more detail, a lot more consultants [are] in that. We did a convention center, and I'll bet we had two or three presentations with the mayor and that was it.

DA: Wow.

ST: That was it. On a huge job. Now, he had people that were sort of running it and, making sure it was on budget and on time and all those things, but as far as what does it look like? We had about three meetings on what it looked like. And he made no changes. Said, "I love it. Keep on going," and that was it. Of course he had many other things to do. And he also, he had a lot of trust in the firms that were working on it and so I think that can vary some.

DA: Do you have anything in writing that you show clients on the front end of here's the way the process is going to work? Or how do you educate them on these things?

ST: Some have asked us that in the proposal [and] we'll do that if they aren't sophisticated or necessarily been through this process. We will lay that out in the proposal, those five phases and what they expect in each phase. We like to have a little bit of a proposal [meeting] and we might work and they'll sign and we'll work on the proposal until the scope is defined and then we'll get an actual contract. Because a lot projects these days don't go forward. You study something, you're doing this, cost is too high, this happened, that happened. And so you don't want to go through all the process and do a fairly complicated contract until you know this is moving forward. So you do that usually during the design phase.

DA: Would you happen to have a generic one you'd be willing to share with me?

ST: Contract? Yeah.

DA: That would be fantastic because part of my analysis is an artifact study just to see what different forms and questions and the way different companies spell it out.

You mentioned you kind of check on the client like three times in the initial creative process, how does that work? Is it very rough sketches first and then...?

ST: Well, the first thing we do in our business is we would do a program, which is a space program. That's where – and it can be as simple as sitting down and interviewing you if you wanted to have a house, you and your wife were sitting in here and we're talking about what your expectations are, do you like to live outside, how many bedrooms, you got kids and all those things to develop a written program – no design, just what the requirements are, what your expectations are. That's a simple one. It can get as complex as a convention center and you get a book this thick. You know, I want so many rooms – there are professionals that actually do that. Or a museum, and you kind of get professional programmers and they'll say do a room that is 300 square feet with three electrical outlets and I mean really specific.

So that's the [space] program and then that's gotta be agreed up. And the program has to come close to matching the budget. In other words, if you came to me and said "I want to build a 10,000 square foot house but I don't want to spend a million dollars." We'll go, well your expectations don't match the budget. We've got to get – before we even draw a line or waste somebody's time we've gotta get those a little closer together. So you either have to come up with more money or build something smaller. And so that happens a lot. Many clients come to us, they don't know what construction costs, almost all of them have more ideas than they can afford. And so you have to get it to that degree because then what happens is you can do a simple building with not very many finishes in it or you can do a very small building that has gold leaf all over the walls, just to exaggerate that point. And so there's a lot of innuendo in there, but you've got to get it sort of close and say, "Okay, I think we can do that for this, let's move forward." Then we start [the] building conceptual design. Now, there are some things that we do that other firms do not do. Some do, some don't. We usually try to create imagery that influences our design. And what I mean by that is, and I'll take the Country Music Hall of Fame because it's a good example and it's one that you're maybe more familiar with, but we would go in there and we had one of our conference rooms, we made it a war room. On the walls while we're designing for about the first month, month and a half of design. We put imagery up of "What is country music?" You know, it's barns, fences, you know, railroads, water towers, railroads, railroad bridges. I mean, what are country songs about? Trucks, cars, all this stuff. And we covered the wall with all this stuff. And so what happens is, is that you're designing and, for example, the Hall of Fame, when we said "Okay, we need to get some windows here and here's this, and let's make the window, here's the form. It's got the '57 Cadillac fin coming over here like this." You draw inspiration from that. You sort of let that swoop there. For cynical reasons or whatever, then what gives it – why's it that way? We'll let's look at the '57 Cadillac and sort of pick up on that. Or the windows, what if they're tall thin windows sort of like prison windows or that drop like prison and all that. And what if they're in the arrangement of the black keys on a piano, you know? 'Cause otherwise, they're just windows to put windows there, but think if the pattern and the sizing, if those things can have a deeper meaning, then to us it's a richer architecture. And it's not that you need to know that. It's not that you're gonna say, "Well, look, piano keys," because those are relatively obvious. There are a lot of things on at the Hall of Fame that are not very obvious, but as you go back you tend to go, "Wow, I didn't really quite realize that or this." So it really sort of unfolds itself as you go on multiple visits. And so building the symbolism in the architecture is really important to us. And so part of our design is looking at that imagery, seeing what it is and letting it directly or indirectly infuse itself into the design. Sometimes you do things and you don't know why you did it and you go, oh, because I've been looking at a picture – that photograph or that image or something. So we go through that process and then you do what will be concept design. Concept design for a project would be just what we call, well, it's concept design, but it's just getting the basic floor plan down. This space beside this space, it’s this tall, and then sort of a form study or a floor model. How tall is it, how big is it, how does it fit in the block? And all that. And at that point, we would go to the client.

And then they say well, this room, maybe it would look better if it were back here and how about security? And so you basically want to be sure that the working of the building and the way it’s forming that we’re pretty close on that. And then he would approve that, obviously with some changed and comments, and we would go back and then go to the next step, which is to finish that first phase in schematic design. That’s where it gets into a little of the detail. We would go back and show what does it look like, we’re using brick on this building, we’re using this kind of roof, we’re doing this, here’s the windows, here’s the kind of color of the windows. It’s no detail, but he has a pretty good idea how the building is laying out, how efficient it is, and generally what it’s gonna look like and what the materials are. And then we give that to a contractor typically for preliminary pricing.

That’s the first phase. I hope that answers your question.

DA: So that kind of answers the question about – do you want clients involved all the way through? Some do, some don’t like it?

ST: There are clients that we will actually have Charrettes with. They’ll come over all day and we’ll just brainstorm together. And, you know, one thing I wrote down here is some of our clients want [to see the] creativity. But we don’t necessarily want them to see the sausage being made in a way because creativity involves coming up with a lot of different ideas and a lot of those are bad ideas. And if you’re sitting in a room – because many times clients don’t think three dimensionally like architects have to be trained to do. So they may say, “I like the way that functions and I like those two rooms together,” but they don’t understand if you really did that it would cause something really strange in the way the building works together. So when you’re designing a building, which is a really complex monster. You've got structural engineers, there are codes, you've got all kinds of things influencing this piece of art sculpture you're trying to do, and so everything is a compromise. Everything's a compromise. You're compromising because of structure. You're compromising the room because you really want the window on the outside to look like that and everything is being bent and it's twisted. So if I'm sitting and the client's in the room and I throw out an idea and he says," that's a great idea. That's what I want to do." Then you've got some obligation to chase that a little ways and then you've got to talk them off the ledge because it ain't gonna work. "I really like it. I really like it." "Well, you know, it ain't gonna..." "Well, why?"

Well, mechanical systems or whatever, you know. And so we tend to do that more in master plans then you do buildings, because master plans don't involve mechanical codes and all that. They're like visions. Like a master plan for the Gulch is a vision or a master plan for a school, it's a vision. When you start building the building a lot of complexities are there that they don't understand. And so that's the reason it would make me more nervous to get them involved in that process.

DA: What level of finish do you typically show clients when you're first presenting a building. Is it computer comps? Is it rough sketches?

ST: It used to always be rough sketches. My partner and I and maybe a couple of others down there are the only ones that even really sketch anymore. Everything's digital – everything's on the computer. They just work on the computers. It's very strange to me. I don't get it, but I mean I get it, but I don't get it. So mostly everything we present are computer drawings of some kind. They may look sketchy, and they're diagram – at first they're very diagrammatic on the computer with color – I probably can walk around and show you some samples of that. What the diagrammatic sketch would be and then how it sort of moves through to more finished presentations with like a rendering that looks like the buildings really built and it's really there and you can see all the people and all that. That's the most finished way to tell the story and you'll do those for interior and exterior. Then you also do finish boards, where you show here's the tile, and here's the carpet, here's this, you know. So those come much later, but mostly it's digital.

DA: Okay. You said it used to be all hand sketches and it's gone. Do you feel like there's pros and cons to each method or is there one that you prefer?

ST: Well...architects are a rare profession in that we can sit down with a client and we can sketch a solution, or an idea, or a vision. And having that ability to do that. And I tell [my colleagues] that all the time, not that they'll listen to me, but to sit down in a restaurant with somebody that says something and you're sitting there sketching, "Is this what you're talking about?" "Oh, that is great!" You know, that kind of ability to take an idea and put it on paper – I think is almost fundamental to being an architect – and then to relay that idea. If you've got to say, "Oh, I think I understand what you mean. Let me go back to the office. In two days I'll get back with you and I'll show you a computer drawing." Well, that's fine, but you lost an opportunity to sell yourself, to sell the firm, to sell the idea right then. Now that doesn't mean your best ideas come just like that either, but you can really use that opportunity to get a client really excited about their project. So I think that mind to hand process, I think is really, really important. Architects now sit in front of a computer and they just draw with the computer. They'll draw and design and move boxes and they'll do all that and I just think it misses – artistic piece of it is coming out of it. If you're looking at buildings now, the buildings are much more complicated. They're all curvy and wavy and all that, the computer lets them do all that.

Before you could never do a set of drawings like that. It'd take you forever. You couldn't charge a client enough money to do that, but now a computer does it and does it so quickly it's just no big deal. It's rather expensive as far as construction costs, but as far as getting a big curve on the building, not about the roof, on that building, it's just not a big deal to do. So the advantage of [computer based] design is that you have freedom to do things otherwise you wouldn't think of. I mean, if we showed that to a structural engineers and said that's what we wanted to do, I mean, he may not have [the] fee to begin to do that by hand, but a computer can figure it all out. Figure out how will the beams go and all that. It's much either. So you've got a lot of freedom with a computer, but I think the best thing is somebody that's a really good artist that can sketch and a good architect, but they understand what the computer can do for them. You can in seconds study all kind of brick patterns on a building, in just seconds. Don't have to draw every little brick like you used to, or try that pattern and then a day later you'd do another one. It's like in two seconds.

DA: It just pops in, right?

ST: Or color or whatever. So those are huge advantages that allow us to do our work quicker than we used to be able to do. I mean, our firm's 20-25 people and we're doing big projects. So, I think that the question was getting, how do we get the clients involved in that, all of the sketches and the computers and models and so forth, we use all of those. A lot diagrams. A lot of times when you're trying to get them to understand [the] direction you're headed, diagrams work. So we're really good at diagramming, for example, if you took a program, we might do a bubble, what we call "bubble diagrams," where you can take a circle so it doesn't read as a room and it's just a blob and so it's about that big and that's how big it is compared to this blob, which is another room, and there's errors saying those two need to directly connect, you know, a minor connection with this one over here and this is a department. And so there's a lot of diagramming that we'll do in order to try to take a complex problem and get it down to its essence so we can then start designing.

DA: Do your architects that are doing the drawings and the day-to-day work on a project engage directly with the clients? Or how do you have them engage their clients?

ST: It depends on the complexity and the size of the project. Usually the more complex projects, my partner and I are involved in more because they take a lot of experience. And it's not that we're heavily involved in the day-to-day, but we're heavily involved with the client to make sure the direction doesn't get off course. A younger person has a hard time telling – if a client's building a pretty good-sized building, they are probably 55-75 years old, they've been around the block for a while. It's a lot of money. A lot of it may be their money – but they may still not have an idea what's in their best interest in the way of a building. So if you take someone that's relatively young they aren't gonna say, "That's a stupid idea." I mean, they're afraid to say it because they don't wanna get fired. But if I'm more, for example, a contemporary of theirs, I wouldn't necessarily say it that way, but I can say, "Look, there are better ways to do it. We really need to talk about this further before we move in that direction and here's why." Because they're paying us for our creativity, our experience, our ideas, and when you get something complex, you need people that have been around the block to make sure those are guided correctly and then we'll come back and we'll work with them. Now a lot of times we try to take younger staff with us on those meetings. We've had a couple meetings lately where we've had younger staff in there, with the president of Lipscomb, for example, did a lot of work over there. And for them to hear the conversation between us is good for them. In some cases, they hear clients that – two weeks ago we had clients that – they weren't upset with us, they were upset with somebody and for that young person to hear that and have to deal with that in a meeting, and watch me deal with it. They weren't mad at me, but I was trying to – it might have been a consultant or something, but those are very good experiences, but at the same time, you can't take five people to a meeting with a client. And so we just try to bounce around and say, "Look, sometimes it works. Don't get your feelings hurt if we say you can't go." But then on smaller projects we let the younger people deal directly with the client and communicate with them. It may be a house or maybe a small little building of some kind. Then I might not be involved at all, my partner and I, but we've got three other partners in the firm now and they, they would be involved just to go up and say, "Hey, is that meeting coming up? Did it go well? What do we need to do this week on the project?" You know, they'd be watching over them, but [younger staff] might have very direct client contact.

DA: How do you feel relationships should work between the firm and the client? Is there a perfect way? If you could design the perfect client, and the perfect firm and they work together, you know, what would that be? What would that look like?

ST: I think the most important thing is trust. We want people to hire us because they really want us and we want to work for them because they are great clients. They're cool. They want to do something good for the community. Their values align with our values. In business it's about making money, but it's not all about making money. So it's how do our values mesh in a way that we're very excited about the project and they're very excited about having us work on the project. Now... what was the question again?

DA: How do you feel that that agency/client interaction should work in a perfect world?

ST: Okay. So, once the values between our firm and their aspirations are sort of aligned and we know that, and there's a trust factor there. What happens is some of the clients that have been –

that have given us the most difficult projects have been the ones that have been the most sophisticated and let us alone, leave us to do our creative work. The Frist Center was one of them, for example. There have been several clients who were like that, where the client just had so much trust in us that you could not fail. It was like you had this Fabergé egg in your hand and you weren't gonna drop it because they're was so much trust. If someone's breathing down your neck, and this is true, if someone's breathing down your neck and questioning everything you do and why did you do that, and that's stupid, and your engineers are stupid, and they're crazy, and you start hearing that. First of all it's not any fun. But you then just start losing interest in the project. It's like, "Well you know everything. You're so dang smart, just go do it yourself." You know? And you've got clients that are like that. Now to be quite honest, the older I get the less tolerance I have to work with those clients because the older you get you realize your time is really important. And you want to spend time with people you want to spend time with and (Laughs) not crummy clients. And we really have really good clients. We've had great opportunities in this firm to do some really good civic architecture and things that will be standing for a long, long time. And so we've had great opportunities. And I think a lot of it goes with the trust that we've created and that transfers from one client to another. Because if people in town know that you've done, the museums and some of the things we've done in town, then they know that important people have given us this opportunity and they were happy with it and so they could easily do that too.

DA: How do you decide which project managers or which designers are going to work on which job? Is it based on the type of project? Do personalities come in to it at all?

ST: All of that. We'll sit down and talk about – we've got a new client [or] we're interviewing for a particular project, who's got the best experience? Who's available to do it, if we happen to get it? You know, we've got – one of our owners is a woman, Mary Roskilly. Mary is really good with clients. If we had a woman client, like head of some organization, they'll probably appreciate having another woman that's a real decision-maker. That's worked in our favor a lot, I think. So it's all those things. It's this person is very high strung, so we don't need to put another high strung person with them. Some clients are very laid-back and you need someone to go in there and just really take notes and keep things on track. And then other people – the client's high strung, so you want somebody that can sort of take it, a little softer spoken. And so you – it's all those things. Now, the frustrating thing is many times those don't work. Many times the person that's most available for a project isn't going to be a good match, now what are we going to do? Or the person you're interviewing and the person you really want to put on the job, it's another office building, we've already got people with the most office building experience, working on office buildings. How do you go to the client and tell them they'll do the job, but they're really busy right now. So we have to put someone else that's done a lot of schools. And that's all touchy stuff. I mean, it's how do you do it, you know? There's some people out there that say, "Look, get the job above anything, do whatever you've got to do to get the job and then go in and tell the client, "Well I'm sorry, Joe can't work on it like we told you he could." And they probably aren't going to fire you. And that's true, but I feel bad about that. So we always try to go in and say – and [this] probably hasn't done us any favors, but you try to go in and say, here's so and so and this person is really busy doing an office building, but he's going to be our quality assurance on this project and he can oversee the project, but this person is going to do it. And he's got a lot of school experience, there's a lot of similarities in schools and offices and it's going to work out great. So, you just do what you can?

DA: Sure. How do you feel working with the clients has changed however long you all have been in business, or let's say the last 10 years? Or has it changed?

ST: I've had several people tell me this. I think the lack of loyalty is going down, it just went down the tubes.

DA: There is no more loyalty?

ST: I think loyalty is real hard to come by with clients these days. I think it happened for a couple of reasons. I think during the recession, people just got really, really lean. And then some places were forced to bid projects, bid services, cut marketing. You know, do all those things. And so they've come out of the recession and so much is about the dollar and not so much, "I'm using Tuck Hinton because they're really good and they've got a great reputation and their fee's going to be in the range anyway." As opposed to, "Well, we like Tuck Hinton a lot and their fees are in the range, but man, if I could save $40,000 I want to bid this thing out, and interview and drag a few architects through the mud and make us spend a whole bunch of time and I might save me a little bit of money." And you get what you pay for. So, I think the loyalty is very different. We didn't hardly interview for a job eight years ago. We just got them. I mean people would just call to say, " I got this job I want you to work on." That happened a lot. We might have gone to, 4 to 6 interviews a year, and now we're going to one [or] two a month. So it's just very different.

DA: How do you feel like communication has changed? Did it used to be you would have more conversations on the phone or face-to-face and now it's more email?

ST: Oh yeah, a lot more email. I mean, it's even in the office, you know? Instead of walking around and say, "Hey," [it's] just send an email. You know, I don't really like that so much, but I understand it. It really makes it easy setting up meetings and things like that. We tell our people, there's nothing like a personal phone call to a client every once in a while because they get so much email anyway – I mean, it's amazing. My phone doesn't ring near as much as it did just five or six years ago. It just doesn't because you get all email. And there's good and bad. I think it makes things happen quicker. I think it's less personal. I think clients – their expectations are faster, faster, faster, expectations are faster. And I think that's true of us, we expect the same from our consultants that work with us. Because you say, look, I got to have this project in… I've got to get it done in a month or this phase or something. And then it's like, you do it and so the next project, they'll say you can you do it in three weeks or something. The bar gets raised a little bit and you try to do everything you can to meet those expectations and what you end up doing is you meet their expectations, but you sort of redefine expectations. So, everything's [faster] and I try not to give clients my cell phone, but over the past few years they pretty much all have it. Before people didn't ask for your cell phone, it's interesting. It's like your personal phone. It went from being a personal device, it's your cell phone and you talk to the family and maybe call in an emergency and all kinds of stuff. And it just moved into, "Can I have your cell phone number?" People won't call offices now. Like you tell your clients, I say, "Look, just call me on my cell phone, I'm never in my office" or they don't have office phones. And so what happens is they expect you, because they know you've got a cell phone, to step up out of a meeting and answer their call because they're that important or whatever. You should be immediately available to me. And now that's very different than it was five years ago.

DA: Do you have a policy here about emails before hours, after hours, how do you handle those? If a client calls you in the middle of the night, things like that?

ST: No. I don't know that we've ever really had a problem. We don't tell clients when to call or not to call. They call here all the time. Most of them don't do it. I'll get emails, they just don't expect an answer at night.

DA: They don't? Okay, so you'll get them but you don't feel obligated to respond?

ST: No, I'll be sitting at home and I'll look before going to bed. I'll look at my messages, but I very rarely answer them unless it's an emergency. So yeah, I think that's sort of how it works at least with me. I think there's others, I've gotten emails from a couple people, like, 2:00 or 3:00 in the morning. I don't think they expect an answer. You know it's, like, what the hell are you doing up at 2:30 in the morning? You know?

DA: Exactly. You kind of touched on this but do you feel like the size of the client's budget plays into the dynamic? You've said the more sophisticated or the larger scale projects are actually easier on you than the small ones – unless I'm reading that wrong.

ST: I would say from a client relationship standpoint that's generally true. The larger projects, the clients who've been through it before, there's more sophistication. There has to be a lot of trust because you're dealing with a lot of money. But in the smaller projects, yes, many times it could be the client's first project they're doing. They're real nervous and they just know better than you about everything. And so it can get – client control could be difficult. Particularly when we're dealing with somebody's house. We build condominiums and stuff like that. And Lord have mercy, people who have their own money in their own houses, you know they think it should be built better than anything else they've ever seen. You know? I've had clients that take flashlights and turn the lights off and shine them above the walls to see if there's any little indentation in the drywall, which you normally would never see. "Look at that, look at that. See? Come here, fix this." I say, "Well are you going to walk around with a flash lights around your walls?" "Turn off your flashlight light, do you see it now?" "No." "Well, then don't worry about it." That's a reasonable expectation of drywall work. That's a whole other conversation. I could take a couple of hours talking about subcontractors and building and expectations of construction these days, that's crazy.

DA: You talked about trust and how that's the most important thing. I completely agree. How can that trust be undermined and once it's undermined, can it ever be won back?

ST: I would say it can. It's much more difficult these days. I think than it used to be because most of that trust is all about relationships. Whether it's your friends, your client, your son, your daughter, I mean, it's all those same issues come to bear in your personal relationships. I think that you can probably win trust back, it's just a really, really difficult to do. And what happens is, and I do it myself, if I have someone that I felt like didn't do something right whether it be an engineer or a banker didn't treat me right or something, and I think this is the case with a lot of people, usually you might mention something to them and say something and see if there's any response to remedy the problem, but more times than the other you'll just go with somebody else the next time. That's what I see. If your bank pisses you off, you might call and say, "Look, why did you charge me for this or whatever. I don't understand this." "Oh, I'm sorry." If they correct it or something, you'll say, "Oh, that's good, that's fine, that's fine. We're good now, back to even." But if something's happened and you say, "Look, I called and it keeps happening. I'm just gonna move my bank account somewhere else." And that's just sort of what you do, I guess. I think a lot of that goes on when you lose trust and you might not know why you particularly lost a project. The client just sort of quit calling and you might call them and I don't know that they'd say, "I lost trust in you." They probably wouldn't say that. Trust is sort of hard to define in a way. It's a big complicated word. We all know what it means, but it means a lot of different things in a lot of different situations. There are clients that would say, "Well, I trusted you to take care of this, but it might not have been in your contract to take care. You know? (Laughs) And that happens a lot too. So that's not your responsibility. You know, the furniture [for example]. You said you were gonna do the furniture. So if you tell me that I'm not gonna bring furniture. Yeah, I've lost trust with you. So, there's a lot of that. A lot of things like that.

DA: Do you always demand to work with the final decision maker on each project, or do you always try? But if you can't, how do you handle that situation?

ST: Well, I think our [business] is a little different than most others you will talk to, because we're dealing with a lot of money. You know, we're building multi-million dollar buildings and usually when somebody that has that much on the line, the decision maker is sitting at the table. Now in some cases that's not the case. The convention center, you know. There was a lot of decision makers. You had the mayor, you had your community, which is they had power, but they didn't have the decision-making power. You had the Convention Center Authority, which had power. So you really had multiple owners and you had to sort of go back and forth with those a little bit. That can happen a lot for projects where you might have multiple decision makers. We have projects right now where we have two decision makers and you just have to communicate with both of them to make sure they both know what's going on, but usually that's not the problem. I would say 99 percent of the time you're gonna have the head guy sitting in the meeting with you because it involves a lot of money. He's got a lot on the line. He's gotta make sure it's right. But in the cases that we don't – like this project we're building now, this office building, one of the guys is local. Well, his immediate boss in New York, we start getting word that the new boss is calling some shots on the sidelines and so we said, "Now, wait a minute. Whose decision is it, yours or his?" "Well, it's mine." But he was saying that because he's got enough ego to say that. But there have been several other conversations where we said, "Does so-and-so know that you're making this decisions?" "Yeah, he knows about it." Then I'd copy him in the minutes [of the meeting] or something like that just to make sure he did know. So you sometimes have to be careful, but that's really rare in our business.

DA: You already hit on this a little bit, but are you familiar with the co-design process?

ST: No.

DA: It's more for graphic design. It's the idea that the client is involved every step of the way. You involve them in and you have tissue sessions or something like that, bring them in much earlier on in the process and they're almost an equal partner in the process to give them ownership of the ideas as you go through. And I was just curious if there was anything like that in the architectural field?

ST: I would say definitely in master plan work, like I said, really, the owner's usually involved in that process. Let me give you an example. We would do a building and we would block it out and then we would have a meeting with a client about that concept, that block out, and that in itself would be kind of a working session. It might last three hours, but they weren't really involved in the actual first initial block out. As you said, we might start from day one, okay, let's sit down and start work on this. The difference is that graphic design is sort of two-dimensional, there are no codes, there's no structure, there's no budget. It's imagery. It's like a focus group. What do you think when you see this, what do you think when you see this, what do you think when you see this? And buildings because they're more complicated you can't just sit down there and necessarily wing it with a client because there are too many other unknowns that you won't think of at the time. You might say I wanna do that, but is the structure gonna work and where's the mechanical system going? And I've got a difference in slabs, I've got code issues there. Just so many things, it's hard to do that. Now once you're really into it, you can get them involved to start getting in some details and talking through those once the basics are there. But it's hard to do with just a blank piece of paper.

DA: Sure. Just one more point based off something you said earlier. You talked about how email is less personal than sitting and talking to somebody. Do you feel like business in general has gotten less personal or is it about the same as it's always been? Because you had mentioned clients are more apt to just split.

ST: No, I think it's probably more important that it was in a way. I guess because everything is so informal and email and less communication. I mean, a lot of communication by email and not so much personal that if you have those personal communications I think they mean a lot more. I don't know if that answers your question.

DA: Yeah, it did.

ST: But I would say personal communication – it's really funny, my partner and I have this argument and we agree but we disagree. It's a matter of the percentages. He says, "People hire us because we do good designs." and I say, "No, they hire us because they know us." You know, and they know our ways. And, they're both right. But my point is if you went out and asked people out there, "Who are the best architects in Nashville?" It would probably be us and two other firms, maybe three other firms. And so at that point, you're in this group of good designers, most people don't know good design versus bad design in architecture anyway. That's a whole other argument. And so once you're in that tier, then what makes the difference is who you know. Did I play golf with him last week? Did I do this, did I do that? Did I happen to call at just the right time? Did I run into them at rotary? Has a lot to do with it. Now, some of that's going away a little bit. There are a lot of people of interviewing, going through the full process. A lot of that is driven by other people interjecting themselves into the process. And that's fairly new, where you have real estate companies, for example, instead of someone doing an office – let's say Bridgestone. If Bridgestone wanted to do this tower down here instead of what would [have happened] 15 years ago, they'd pick up the phone and the CEO of Bridgestone would call some architect and say, "I've seen you at Rotary and I'd like for you to do this building for us." Or I'm gonna have a talk with three architects over an interview and "I want you all to do it." What happens now [is] real estate firms have come in, and some construction firms, and interjected themselves – many times real estate firms because they've been in touch with the client earliest to find a site. So they can say, "Oh, by the way, we'll help you go through this process and we'll save you money." "How you gonna do that?" Well, we're gonna go in there and we know what architects charge and we'll beat them up and we'll do all this. And what they're saying is, "You hire us, it won't cost you anything because we'll get it out of the architects and engineers." So they interject themselves into the middle of that process and what happens is that sometimes they play the role of the owner and you aren't even directly talking to the other. Now that happens – I see it happening more and more. We haven't been as involved in that because that happens primarily on a lot of commercial projects and development projects, where it really is all about the money. Build an office building, let's fill it up, I'm gonna sell it in two years to Northwestern Mutual. So it's all about money. It's not like the Country Music Hall of Fame or a custom office for Bridgestone, or something like that where image is important. It's purely a money-making venture.

DA: Great. Well, thank you.

ST: Is that it?

DA: That's what I got. What I would like to do, if you don't mind, is you had mentioned...

ST: Contracts?

DA: Yeah. A contract and then is there any way you could get me some samples of the block diagrams and the different, the different types of diagrams you use to present.

ST: I can probably show some to you. The only ones that [I] would have – I gotta think through this, cause normally those things, after we get through the process, we don't keep all that stuff. I can show you, but most of them are projects that haven't even been announced yet.

Appendix H

Paulo Vieira

CEO and Founder – Integritas

Telephone Interview

May 29, 2015 at 3:30p.m. CST

Duration: 33 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does your agency have a formalized procedure for client engagement or interaction through the project development process? And can you explain that to me a little bit?

PAULO VIEIRA: How do we go from engagement through the development part?

DA: Yes, how do you interact with your clients through the development? Is there a specific process you would say is unique to your shop or anything like that?

PV: The big differentiator that I like to talk about is the level of engagement we have. Unless we consider ourselves as partners, it doesn't work out for either of us. Because if we try and invent a relationship that puts a lot of tension in the air like attorneys, there's a phone call for you, so I should bill you for that or well that's not in scope or this is not what we do. That makes it a little harder to have the true partnership relationship. So it is that centric that we both see each other in a way that I can only succeed if your project succeeds therefore we produce work like that. So we're active every day. There's at least a daily call that the client will get from account management, and they would say, "Hey, how are we doing? Do you have everything you need? Did we miss anything for you today? We are missing this or that from you." But it's a constant two-way conversation.

DA: Would you say that that's unique to your agency or that's just kind of the way you've learned to work over the years?

PV: I learned that because I was on the opposite side of things before as a big corporate guy. I managed things that were outsourced [and] I knew that was the thing that was missing. We just could not find an agency that had that level of involvement. Most were really interested in, give us the specs and we'll give you the code. Or tell us what to do and we'll go do it. There was not that level of, hey, you asked us to do this. However, have you considered doing this instead because, number one – you're gonna save money. Number two – we can deliver it quickly, you know. It was very much a financial transaction before when I was managing that world. That didn't work so well, when you're exclusively thinking in terms of, of dollars.

DA: I understand completely.

PV: I may not make $100,000 in the first two weeks of a product for the client, but I made $20,000 and I've engaged a client for life.

DA: Makes perfect sense, yes. Is there anything tangible that spells out your process, it is PowerPoint slides or anything that shows "here's how we work with clients" that you'd be willing to share with me?

PV: Yeah, I can send that to you.

DA: That would be great. Thank you.

When do you check in with your clients? You say you check in with them pretty much every day, but are there, are there specific checkpoints or is it just a constant touch point or how do you choose to work through the development process?

PV: We have several layers of touch points. We make sure no layer on the client side is feeling left out. So there's, of course, the CEO to CEO, or CTO or whoever is high up in the company.

So in my side of the world mostly I deal with the upper level guys of our clients. I usually deal with the C-level people. But we don't want the lower level management to feel left out now that the CEO made the decision with other companies out there to do the work. So we have an account management team that deals with that part of the relationship. So those guys do daily touch points. You know, a five-minute call, "Hey, is everything okay?" Sometimes it's just Snapchat, or talk to them on a live Snapchat or a Google chat or text message or something. It's a daily thing of, hey, everything all right? How's it going today? Any roadblocks? Anything preventing the work from moving forward? Then at the labor level – the actual developers and our crack team of developers on the client side and vice versa. Then we'll have our tech people do that interaction as well.

DA: Okay. How involved do you want the clients to be in the sort of concept generation of the work you do?

PV: For our business, 100%. I usually pass on any projects that the client comes up with an idea and hands it off to us and wants it executed. That rarely works. Well, I haven't seen it work yet because it goes isolated and silo. And while we're developing the client might have changed his mind already or added features or whatever in his brain that it's not going to reflect on the product. So very rarely [does] a case that it's a clear-cut here it is, go do it [ever] works.

DA: So as you are coming up with the concepts or the overall framework, you would say that you do want the client involved?

PV: Absolutely, yes.

DA: For initial presentation work, what level of finish do you typically show clients? Are they sketches, are they full-blown comps or animatics or wireframes or what? How far do you go with the initial work?

PV: We usually start with wires (wireframes). And our UX guy will, will give that presentation based on prior discussions about what the problem to be solved is. Most of the wires are accompanied by some kind of business analysis on the sidelines explaining what business followed that call, but if it gets done well most wires are self-explanatory.

DA: Do you do style frames also. How do you show what it's going to look like as opposed to just functionality of a wireframe?

PV: That one is kind of a mix. We do what we call a high-fidelity wire. Our wires are not your typical video or graph or diagrams. They're pretty high-def. They'll give you a pretty good idea of what that's gonna end up looking like and then from there it goes to the UI guys to put the lipstick on it. But the variation from the wire to the final product is mostly cosmetic at that point. For those that can't see it, we apply the lipstick to one, like you say, just to show them. And some clients have their style guides to apply themselves so we have to work under those constraints. And when we work in an agile form too so we have UX sprint defined for each release. So let's say this is the first of the week, the UX sprint where that UX gets created and approved then the development sprint starts. The next two weeks we'll have a UX sprint as well. There's usually a fourth overlap with the development sprint still going for from the previous week.

DA: I'm not sure what you call your designers, but in the ad world we call them creatives, but the folks that actually due the development work, how or when do they directly engage with the client, or do you have them directly engage with the client?

PV: Everybody here gets to actually engage with the client. That's just the transparency of the business that we like to talk about. Everybody has access to everybody. So we tend to not hire people that are not be able to be released into the wild.

DA: Sure, you wouldn't want somebody that you wouldn't feel comfortable putting in front of a client. So I understand completely.

PV: Yeah, of course. Ideally, the perfect scenario is I would feel comfortable with anyone on the team taking a meeting with a client, which I do, but not all of them can answer all of the questions that a client might have. I'd never have a problem with any one my developers being called into any meeting with any client and having to worry about what they are going to say or not.

DA: If you could design the perfect shop, and this may be your shop, and this may be exactly how you feel about your shop, but how do you feel that client/agency interaction should work?

PV: In the ideal world the client would be more involved, in my perspective. You know, there's still a little tendency to think, "well if I hired you, you should know what to do." But we're really good at creating software. I'm not necessarily really good in traffic engineering, right? So if you're a traffic engineering company that wants software developed, I need your traffic engineering expertise as much as possible. I can guarantee I can give you the best software you can get, but I do not know your business. So that's always our greatest hurdle is that I'm understanding that yes, we'll be delivering your software, but without us having access to you to understand the business needs, it will be weak software. We have a client right now that's our toughest client. He wrote a very detailed set of specs, and handed it over to us and disappeared. Well, I can't deliver on that. Because I'm sure that in his head there's something that he wants that isn't written out.

DA: I understand completely.

PV: You know what I mean, it's like if I gave you the rules on how to play Scrabble®. I just give you the set of rules, but you never saw what a game board looks like or the tiles or whatever. It would be hard to picture.

DA: Definitely. I understand completely. So basically you feel like the client has the expertise in their brain because they live with it every day and you would try to tap into that more if given the opportunity.

PV: Exactly, it's that experience you grow.

DA: When you begin a project and you have a new client, is there anything you specifically do to match the team with the client? Is it based on expertise, does personality ever come into play. How do you, how do you decide who works on what?

PV: There's a very big amount of gut. Even if I meet with a client and my gut tells me it's a bad deal, with no particular reason, I usually go with the gut. I wish I had a translation for that, a document that I could check boxes and see if it's in the checklist or not. I don't. It's one of those [things] I think it comes with experiences that we had, and the years in business where we figured out what will work and what will not. And then after that there's a lot of matching in terms of skill sets, but personality too. You know, sometimes when I want a more rigorous, a more detail-oriented project manager, but a more jack of all trades developer or vice versa. Like they [the client] do not even need anybody embedded in the project, they just need a solid developer. So, that takes some time to match but you also have tools to help you with that.

DA: Do you think, do you feel like the agency/client dynamic has changed since you've been involved in the business and what has changed if anything?

PV: It has, I'll say it's specifically because you have people out of the United States as well. But at first it was a very shunned upon thing to do, to hire a company that had offshore resources.

Not only because we don't keep it all in the United States, however, but in addition to that, [the perception that] these guys don't know what they're doing as well as we do, you know. And yes, some of that was right, at least back in the late 90s. Yes, the U.S. had all the best technologists on earth and the offshore teams that were in Russia and India or whatever. But they're catching up. Not only were [there] cultural differences, but they didn't have access to all the stuff we had here. Well now it's so spread out, the best talent is not always here. Yes, most of the best talent is still here, but some of the best database guys I've ever [worked with] in my life, are in the Philippines. They're better than anyone I've ever met here and no, they do not have any interest in leaving their posh lives in the Philippines to move here. They're fine where they are. So we have to go get the talent where the talent is. I think that now clients understand that a lot more than before. And there are certain people that you just can't hire. So there's a really significant shortage of technical resources in the U.S. right now. An example here in Austin right now, one of our clients has had a position for a senior, senior software architect that's been open for six months and the starting salary is $170,000. And they can't fill it.

DA: I guess they just can't find the talent to do the job even at that price point.

PV: Austin is saturated and very well paid, so people are taking really good jobs and getting other type gigs. So that client's choice, [is] either get the talent wherever we can get the talent. Or don't do anything. Don't do anything is not an option.

DA: How do you think or do you feel like client communication has changed, client/agency communication has changed with technology? You mentioned Skype and Google chat and all that kind of stuff. Has that helped business, hurt business, what has that done?

PV: We're 100% all for it. We use a multitude of tools. All of our guys have a GoToMeeting® account. All of them are on Skype® all day. We all use Slack® internally and whatever tool the client wants us to use for communication through the development. Even just, if we ask them what tools you guys want to use, it's no less than Skype or Hangout, GoToMeeting than internally Slack.

DA: Do you feel like the size of the client's budget plays into the client/agency dynamic?

PV: I'm not sure if it's the budget but the size of the company, a factor [is] the size of the company. So we have a start up company here that money's not an obstacle. They're sponsored by one of the sheikhs in the United Arab Emirates that they can throw more money at them than they can spend. So, in that case it's not a factor in their relationship with me because as a start up that can only take them about the new features or whatever so fast. The size of the company affects a lot, who's got [a] higher corporate scale kind of thing, with the multiple departments and everything else. Things tend to move a lot slower. And the managers tend to think they are right. Like they are the maximum authority in that part of the world or whatever. So some of those guys have been around for 20-30 years at that same job and they'll come and tell us that technology is the one to use because it's the best. Well that technology in 30 years, dude. You know? Or with the function of how big their company is than actually the budget. So we've had project where it's100K and it's a big company and it's a drag, and [another] it's100K and a start up and it moves super-fast.

DA: Just based on the levels of bureaucracy and things like that it sounds like.

PV: Yeah.

DA: Since you were talking about that openness and transparency, I guess a better term for that would be trust. Would you agree that trust is kind of paramount in the development process and if that trust is ever broken, is it possible to be restored? Do you have examples of how trust has been hurt and how you've been able to get it back? Or can it be gotten back? Just talk about that a little bit for me.

PV: So when I'm saying transparent, it absolutely will be. Like our business cards are transparent, they're clear plastic. We never make up anything, we tell a client absolutely the true thing that's happening. So not only do they know who their developers are and they [have] access to their developer. We don't have that thing of traditional outsourcing saying, "We'll talk to the team and then the team will let you know." They know who their team is and they can call them themselves. I tell them up front what their rates are, how their rates are the same as everyone and every client. So if they want to check another client's invoice, we can. I don't hide that from them. So we know these guys are not ripping me off or not. If we run into a problem we let them know exactly what that problem is and how that problem will be solved and, there's no fluff. So when the news is bad, they can trust us because they know that what they're hearing is really what's happening. So when it's happy news they hear and when it's bad news they hear. Can put that server back up by the end of the day? Uh, no. There's no, well, depends on how the guy would think [it] is. There's no sugar coating. I mean, it's, it's pretty open. Like our invoices are ridiculously detailed. Like most finance departments call us and say, hey, we've never seen invoices this detailed before. They're multiple pages long. Because everything's absolutely cataloged, they now exactly what they're paying for and who they're paying for it.

DA: So basically you would say it's almost like you're so transparent that trust doesn't even, doesn't even come into question because everything is so out in the open, there's nothing to even be worried about. You never have to say trust because everybody sees exactly what's going on. Is that a correct statement?

PV: So trust is a two-way thing, right? Transparency just can't be one way. I can be very transparent and you cannot, right? I have to do the part of the transparency on my side if I want to gain their trust. Hoping that they do the same in return. I've had clients that I know they trust us but I know I cannot trust them. You know what I mean?

DA: Yes, I do.

PV: But from our perspective, just because I cannot trust them, it doesn't mean that I will keep hiding things and not showing our cards. I want to put my head on the pillow at night and not have a problem – you know what I mean?

DA: I do. I understand completely.

PV: That lies on their heart, not mine.

DA: Yeah, so if you do what's right, usually the best thing will work out. Correct?

PV: Exactly.

DA: You mentioned this before a little bit, but when you're selling a project, or when you're going through the approval process are you always able to deal with the ultimate decision maker? And if not, how do you proceed with that process? Are there special things you do?

PV: If I'm involved, we have product people and business development people that deal with selling our services as well. If I'm involved, I'm usually dealing with the decision maker. Rarely, like for example, we're dealing with a bid for a State project. We're dealing with the management of the group that will deal with the project, but [not] the ultimate decision – these people don't know who makes the ultimate decision. It's one of those bidding processes. So that's a different target all together. But that's just one percent of our projects. Now a lot of times our project guys will call me and say hey, I'm trying to get through with this. Can you call the CEO or the CTO or whatever?

DA: Are you familiar with the co-design model of creative development? It's very much akin to the sort of the agile methodologies. Basically very transparent, a lot of focus groups, a lot of releasing things out to the wild, so to speak and getting feedback from the end user to kind of help develop the project. It's a lot of open source type stuff. Do you have any experience working that way and does that play into how you're agency works? The question is basically how do you get inside the end users head when you're developing your work?

PV: It usually starts with an interview. Let's gets past the initial meeting or the sales part or me having lunch or dinner with someone and saying, "What's up?" Right. So then we would have a meeting where that client or that client's representative would meet with someone like Danny. And Danny ends up in the, in a product [leadership role] now so he'll be at that meeting. He'll be listening into what that pitch is, what the business proposition is, what's the problem that they're trying to solve. And then they'll start with the questions. If you're trying to solve this, what are the alternatives that you have considered? How do you plan on going about that? How do you plan on modifying that? What's your timeline? Have you looked at your competition, if there is any competition, who are they? And all those questions. I'm sure you've done some of that yourself. Basically interviewing the client for the – the other one will become a product requirement document. It's not really a true PRD like in the old days, but it's, you know we have all the proper nouns and verbs to start with the wires.

DA: Sure.

PV: Then they'll get together with the wire guys, the UI guys, and start planning what this work in progress needs to do. When we circle back with the client again, with a first round of wires and say, hey, what does this look like? Is this along the lines of what you had in mind? And start generating on that.

DA: That's pretty much all I have, Paulo. Is there anything you feel like I've missed or any other words of wisdom about client engagement you feel sets you all apart or would be good to include?

PV: Uh, I think that the big difference with us is that mix of local and offshore people. But with the off-shore people really being deeply in communication and engaged all day long with the local guys here. I mean, we're part of what I call the cross-pollination. You know I fly the guys from overseas here and we fly clients there and always doing that kind of exchange so they, everybody gets to shake hands and look each other in the eye every now and then.

DA: To that point, looking people in the eyes and shaking hands. Technology has allowed us to be able to not do that anymore, but do you feel like there's something that's lost with that?

PV: I think that as much as I hate bashing technology because that's my livelihood, it has created some problems. But there's a lot that you can get out of body language and water-cooler conversations. Warren Buffet had said once that, "I had never shaken anyone's hand over the phone." And translate that to never shaking anyone's hand over Skype or GoToMeeting or whatever. There's a lot that's good about that. Hey so, you are Dale? Well you're the guy I've been talking to? Hey Dale, how are you doing, man? You know, oh, you wear this brand of shirt too? Well, me too, awesome. You know you identify the entry points from having conversations that as little as they may seem are important in the course of business. If I find a place where I can identify with you, I may have an easier way of communicating with you than the one I've been communicating before.

DA: So basically, technology's a wonderful thing, it's allowed us to shrink our world but there's still something to be said for that human interaction that technology can't make up for.

Appendix I

Ben Rigsby

Partner – SnapShot Interactive

Personal Interview

May 7, 2015 at 3p.m. CST

Duration: 41 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: I'm here with Ben Rigsby at Snapshot Interactive. You've seen the questions, So I'm just gonna ask you a little bit about them and see where this leads us. The first question is does you agency have a formalized procedure for client engagement throughout the creative development process?

BEN RIGSBY: We do. Do you want me to just go ahead and elaborate?

DA: Yes, please.

BR: The way our agency is set up is we've got account executives, which we essentially call project managers and they function in a dual role through traffic management as well as building the relationships. So when we engage with a clients it normally starts from a pretty formalized sales opportunity where the client will reach out or one of our business development officials will meet with the client or network with the client and a sale comes in. We go through a kickoff with that client, and that project manager, an account executive is then assigned to that account. The business development person and the project managers, are involved in that kickoff. Really at that point were just talking about timelines, making sure that everything that was in the scope of work is actually still applicable, something hasn't changed. Making sure that everybody's on the same foot. And then we bring in the creatives for the discovery. Now that we've got the scope of work, we understand our timelines, let's really start putting rubber to the road and understand where we want to go from our vision standpoint. But the project manager kind of sticks with that project all the way out through the lifecycle of it. So there are touch points throughout, engaging with the clients all the way through.

DA: So your project manager acts as the traffic person on the job as well?

BR: Pretty much. That is correct. We're a small shop and we ask our creatives to be in the loop. So we've got a project management system that every morning we report on, every morning we know where every single open job is in our shop. So every creative, every project manager, every account executive in that situation knows everything that's due, when it's due, what's hot this week, what's a priority, what shuffles to the bottom, all that stuff.

DA: Would you say this model is unique to your agency or is it just kind of what you've learned through the years?

BR: You know, I don't know that it's unique. I'm sure there are elements of it that are unique. I think the unique element of [it is] the morning rhythms. So every morning at 8:30, our web team meets for 15 minutes with all of our project managers. And we go through every single open project within a 15-minute window. And we pretty much just go down, person one, this is where I'm at, this is where I'm at, this is where I'm at, this is what I need. Person two, this is where I'm at, all the way through. And then from 8:45 to 9:00, we go through all of our video and animation projects. And that happens every single morning without fail at those times. And then at 9:09, we have a very specific purposeful time, at 9:09 to then do a company-wide huddle where we all get together every single morning without fail and we talk about the wins that happened yesterday and the one thing that we're going to get out today. So it creates team accountability. So I think that's probably the uniqueness that maybe not all agencies do. But in terms of account executives and project managers I'm sure every agency's got some form or fashion of that.

DA: So being late is not, it's frowned upon?

BR: It happens. You know, honestly if somebody is not there for the morning meeting, it's not a big deal. But everybody sees the value in it because that's the one time where everybody can get on the same page. Project managers and account executives then go off to clients and say, "Hey, were missing this asset." You know whatever it is – it just keeps things moving.

DA: Is there any tangible thing that spells that out that you wouldn't mind sharing with me?

BR: Yeah, I'll get you our process document, absolutely.

DA: That would be fantastic. You mentioned that the clients are involved every step of the way, but, when do you check on the clients in the development process? Are there specific touch points?

BR: Usually each typical, or each type of project, and I don't know how much you want me to elaborate, but each type of project has a normal workflow for us. So a video usually starts with a concept. Then it goes into a scripting from a story standpoint. Then we're scheduling shoots. Then we shoot it. Then we go into post-production. So really at every milestone we have a client check-ins. Every project for us from web to animation always starts with that kickoff with the project manager and the business development officer and that's when we determine timelines. From that meeting, the project manager leaves and cranks out milestones. So the client has full expectations of here's where you can expect to see what by when, and here's the time we're going to need from you to keep this project on schedule. If you can't dedicate that time, that's fine, but it's going to push your timelines. So the client knows before we really get deep at all in the project, hey, I'm going to keep this in, this in, this in, this in.

DA: How involved do what the client to be in the actual concepting portion of what you do? Or do you want them involved?

BR: That's a double-edged sword right there. You get the clients that are super creative and truly trust you for what you can bring to the table and those are the fun clients to work with. And then there's some clients that you feel like you may just be the executor for their idea. And both are just fine, there's not a right or wrong, but from a creative standpoint obviously you want to push the limits and lead the client versus follow the client through that process. And so we do ask – we've been burned quite a few times early on by not having client input at the right times. And that just starts the process all over. So we make sure that we get signed off approvals through those stages. It doesn't guarantee us from having to start back up a couple of steps above, but it does ensure that everybody's on the same page. And we have found that beyond anything, communication and over-communication just solves all of these problems. So the more we can just pound our clients with communication being proactive on it, the less they feel like they need to take that actual role in the process.

DA: For the concept portion, what level of finish do you show clients? Do you show sketches, finished comps, how far do you go with the finish?

BR: So our shallowest finish is a simple Word document with a creative concept, here's our direction, here's our price. You know, that kind of thing. Depending on who the client is, what the budget range is and the product they're looking for. If it's more abstract we'll go into animatics, we'll do style frames and we'll show full polished work before we step through. And that comes in really handy on our animations because we need to see that stuff through that process. So from a very shallow standpoint, which I would say probably happens 50 percent of the time, we're in that Word document phase where we're just stepping it out through words. The other probably 30 percent of the time we're doing wire-frames and sketches on a storyboard and probably the other 20 percent of the time at that point, we're doing a full polished style frames animatics.

DA: This is a tangent off of that, does that depend on the client, depend on the budget, depend on whether you feel like the client will understand sketches? Can you elaborate on that a little bit?

BR: Absolutely. Usually through the kickoff and through the discovery process we can gauge the personality of that client and how much they either get our space or are new to our space. And one of the big things we do is we try to take the friction out of it and make the process easy no matter who the client is. So we can gauge both off the product that they're trying to display, the story they're trying to tell and the budget range, how far we need to go with getting those comps approved before we step into. Like a high-end commercial, we're gonna go the full gamut. We're gonna do animatics, were gonna do storyboards, were gonna do the wire-frames, the scripting, all that stuff. For a product launch that needs to be turned quite quickly, we're just gonna step through Word documentation. So to answer your question point blankly, it does depend on the client and their level of understanding of our world.

DA: How or when do the creatives, the ones that actually produce the work, do they get in front of the clients or do they? That can be a double-edged sword as well.

BR: It can be. It's a mixed bag a little bit. So everyone that we have in our shop enjoys talking with our clients. So we've got developers in our shop, we've got animators, we've got storytellers [who] obviously, probably want to be in front of the client and tell their story and then we've got editors as well, and designers. But none of our people internally has any trouble getting in front of a client. Now, they're probably not going to be the lead in pitching the presentation just because that's not their forte, right? Their forte is creating brilliance, maybe not getting in front of a packed room and giving a formal presentation. So we'll take the load off them just from a comfort standpoint. But every time we can show their face in front of the client we do so because it provides a human connection between the person doing the work and the person receiving the work. And we have found that as simple as a cell phone picture of our developer standing in front of a computer screen with code in the background and we send that to the client and say, "Hey this is your website. Phil is working on your website," provides that connection. And that client is going to be less aggressive through the process because now they know Phil's working on my website. And they know who Phil is and they know what Phil looks like and so it makes that process a little bit easier. And so Phil feels good because now the client knows who he is and the client feels good because, "Hey, that's somebody in your shop. You were telling me the truth. That's good, I want that." So it kind of ranges. They don't ever really take the lead of client communication just because of all the stuff that's going on, but they are heavily involved in the process from the timelines and all that stuff.

DA: That's interesting about the quick little photo saying, here's Phil working on your stuff. It seems like that's something that I've never really considered, but I could see how that would be valuable and that could be really disarming in the process.

BR: Totally. And imagine you're working on some marks for client and you're showing some sketches and you wake up one morning, you've got a coffee mug sitting right there and you take a picture of it and you're like, "Hey, just working on your marks, excited to send it to you." You know? And you probably don't want to send something that then they start saying, "Oh, I like that one, I don't like that one." You know it opens Pandora's box, but it does, it provides a human connection to the process.

DA: And if the client could see that it's postmarked 3:00 a.m. that helps too.

BR: That's exactly right. We try to always fudge that (laugh).

DA: That's a nice touch. How do you feel like the agency/client interaction should work in a perfect world? And how do the creatives that do the work fit into that? I mean, is there a perfect world and what would you say the perfect way that the process should work is?

BR: You know, we have talked a lot about how there is a parallel track between running an agency and creating work within [an] agency. And that parallel tract for us is we want to make the client happy, so that client will either come back to us or refer more business to us. The creative team within our agency is tasked with one thing and that is creating the best work that they possibly can for that client. A lot of times those run in parallel. And so you're going to make the client happy by giving them the best possible work you can create. There's times where those crossroads intersect and it creates friction where the client doesn't want what we think is the best work and so you get that friction from a creative standpoint of, I don't want to [do that], I'm not producing my best work, but this is what the client wants. And so you asked about the perfect world of an agency and the perfect world is that they can run parallel and harmonious the whole time. The reality is that just never happens. And so you've got to be able to balance the friction with the business and be able to support the creative in that process. And a lot of that comes down to communication with clients. It's the purpose behind why we want to create it this way and a lot of times that alleviates it. Sometimes clients say, "No, I want it this way," and you have to do that way. And in those moments you have to support the creative too, essentially, we've got to suck it up, we've got to get through this, we're 80 percent here. Let's get through it, let's make the client happy and we'll move onto the next one.

DA: Do you feel like your agency does these things? You said kind of as best you can.

BR: I think that's all we can do is just best as we can. You know, I think, a lot of the work that comes out of here we're incredibly proud of. And some of the work that comes out of here we are proud that the client is proud. You know and there's a subtle difference, but it's a big difference. But yes, I think we do, we ride the line as close as we can without ticking the client off through the process, but also ticking the creative off enough to where they lose respect for the work that we're doing.

DA: Back to the account managers or your project managers. Do you do anything specific to match your account service reps, your project managers to the client?

BR: It's interesting – less to the client, more to the project. We do DISC profiles here. So we understand personality types. Personality in our world is huge because you're interacting with clients [and] you're creating work. You need detail-oriented people, you need just outlandish creative ideas. And so all of our project managers range from the "S" personality to the "I" personality. And it's not like that's a requirement by any means, it just so happens that they fall into that. And that for us means they are supportive to the needs of the group and they're also very interested in making connections. So all of our project managers in accounts, you can essentially say they're helpful people, but they're people-people, they like engaging with people. But from a web standpoint the detail that you go through from a website is much different than the detail you go through for a video project. A video may be 3 feet deep, a website is going to be 20 feet deep just [with] all the steps you've got to go through. In the webspace we look for very specific people that know that space, that can interact with a client and walk him through in a frictionless way – same thing in the video space. So we pay less attention to Person A matched with Client B, more so this client has a web project, we need to get this person in front of them because they will walk them through it in an easy way. That's probably more so what we do.

DA: So it's more by project type or business type than anything?

BR: That's exactly right.

DA: But you also get into personalities as well?

BR: That's right. And so again we run into that little friction and every once in a while you'll come across a situation where the two just don't match and then someone else steps in and takes it over. Whether it's their realm of profession or not, just getting the client through the process. We've had a couple of times where that's happened, but more often than not it just works.

DA: How do you think the agency/client dynamic has changed in the last decade or so, or has it?

BR: Well, I'm sure it has. I'm trying to think just in our time in business. I would say with budgets, is that fair to bring into this?

DA: Yeah, I think so.

BR: Okay so, client expectations for the budget ranges I think have changed. And I think that is due to the digital space that we live in today. Everything is cheaper, but our expectations of quality and performance tend to go up. So they're going in opposite ways in a lot of situations until you get to a client level of the big boys that budgets don't matter and they're looking for more experiential products. But especially the people just starting up a business, they have very high expectations for very low budgets, and it's just because they're starting a business. I don't mean anything derogatory towards that. But that client enjoys a lot of handholding through the process. So we do find that the lower budget clients need a little bit more handholding whereas the higher budget clients don't need handholding. It's an interesting dynamic on how you play it, you know, because one group may be fueling the fire to keep your lights on and directing you towards the bigger clients. But the bigger clients are the ones that have the shinier lights and the big objects. I don't know, that probably doesn't answer your question at all.

DA: No, it really does. So if I'm hearing you correctly it's almost like from an account management standpoint with just client interaction, the smaller clients take more than the larger clients. Is that it?

BR: That's very fair to say. And we run into that all the time. We have to be careful about that. In our business we don't want one client to take up more than five percent of our billings. We just want to be diversified just to protect our people and our company. But the double-edged sword of that is you get a lot of clients with lower end budgets and so how do you staff up appropriately without burning your team out, but also getting the client what they wanted. Your assessment is dead on.

DA: Is there anything else about why you think that is? Is it a sophistication level, is it that they know they have limited resources, why is it do you think the smaller budgets take more time?

BR: You know I think when you are dealing with a smaller budget client it may personally be their money versus the company's money. And I know that may sound weird, but John Smith who just started up company Acme may have $1,500 to spend, but that's John Smith's $1,500. And you're asking him to spend it on this not really tangible idea that he's never done before that is a video versus you've got Johnson & Johnson who's got $30,000 to spend on a video. They're just like, "I need to get this off my budgets." And so for John Smith that's a very personal project that he's got a make sure that he feels as though that investment in capital is worth his time and energy. And because of that he needs to be handheld through that process because he doesn't understand it, he's never gone through it, and that's $1,500 of his money. He's got to make sure it is spent well.

DA: That's a good way to put it. How do you feel agency/client communication has changed in the last 10 years? You've already talked about sending quick cell phone shots and things like that. Does social media play into it, how has it changed, I guess?

BR: I think the level of responsiveness has probably changed with the expectation. I probably get over 200 emails a day and I probably respond to all of them within that day. And you look at it and say, holy cow, you're just spending your day responding to emails. Where is the creative, where is the work? And so, it is that balance? The expectation to respond back to a client is so much so that if we don't respond back within an hour or two our client thinks something's wrong and now they're calling. And so our level of engagement with a client on a daily basis has just increased. Social media does play a great role into that, but more so from the human element of it. You know, a client has a birthday, we want to take a group shot that says, "Happy Birthday, Sam" and send it to them and tag him in it. And it makes him feel good, like he's got a team around him. And we care about him and his project and now he knows it. So I do think social media has played a role creating that human connection between the work, which may be intangible, and the client. And so I think that's helped a lot. I think the rhythm of emails is just – I don't see that going anywhere and I just see it getting worse and worse and worse. And so we are trying to figure out ways to do it. And we've been talking to other people out there that say anything I'm cc-ed on goes in a junk folder. If I'm cc-ed on it, I don't ever need to know about it. And they get an automatic response saying, "Hey, you cc-ed me, I'm not going to read this. If you need me on it, call me or direct it to me." That doesn't really work for our business. Then we get people that say, "Hey, I only check email twice a day." And God love 'em, but man, I'd get so many phone calls if that happened. So we're just trying to figure that out. But communication, for us, is hugely important. And what's strange about that is yes, we have to have a certain level to the quality of work we do, the craftsmanship has to be there, we have to stand behind our products, but those are almost givens in our industry for what we do. We're either good or we're not. And there are plenty of other good people out there. But the thing that separates us and the thing that we strive really hard for is the communication aspect of it. The client just wants to be communicated to and talked to, outside of that, they're going to be fine with the work that we do for them. That's one thing that we're constantly working on.

DA: Do you find that you get more emails either before hours or after hours in the middle of the night than you used to and you feel obligated to respond to them at that time?

BR: That's a great point. I do, I get, I don't get emails usually before hours, I do get emails after hours. I personally feel obligated to respond to them just because where I'm at in the company. We make it a point if we are responding to anyone on our team to say, "Hey, after this time, don't respond back. If you respond back, we're gonna have an issue with it just simply because we don't want you to be focused on this. We're getting it out of our heads so that tomorrow morning you can get cranking on it" that kind of a thing. Even though that's still unfair to their time – that is our rhythm right now. Now clients will email me at 11:10, you know whatever, but I'm always right there to respond back just because again, between running the business, or the parallel between running the business and the creative, my job is to make sure that client is happy so that we have repeat business so we all have jobs. But also still give them awesome creative. So part of that happiness and rhythm is me just being incredibly responsive to their needs.

DA: We've talked about this a little bit too, but do you feel like the client's budget size plays into the client/agency engagement model? I mean we always try to say we give everybody the exact same amount of work, but is that possible and doable, I guess is the question?

BR: It's not doable without frustration. So there are certain clients that we have that have very sizable budgets and they get an immense amount of responsiveness and attention and all that stuff. And all of our clients would probably say, yes, you're very attentive to our needs, but the reality is yes, budget does play a role. What's interesting about it is [in] our creative team it's hard to say, "You can only produce this product for this amount. No, they don't have the budget for that, you can't produce the product." That's almost like saying, going into this project you can't produce something great. And that's very hard to swallow for any creative. It's interesting, whether a client, and hopefully won't publish this, whether a client spends $10,000 with us, or $1500 with us, they're going to get a badass video. Now they're $1,500 isn't going to get actors and lights and all that stuff, but the quality of an in-studio shoot from a $1,500 video is the exact same quality of in-studio shoot at a $3,000 video. The only thing that changes is maybe some of the animations, some of the links all that stuff. But the quality of work, we hit that. Once you hit the minimum you can go below it, regardless of price. And that's where we just started saying that, we can't work with you on this project, maybe another time. We refer it out. But from a client engagement standpoint, yes, budgets do play a role.

DA: I don't think that would be a bad thing, I think it's a very honest answer. And what you're talking about is that clients get great thinking no matter the budget, it's just how many things can you hang on it, how many cool tricks can you bring to it.

BR: That's a very fair way to say that, that's a great point. And you know a website is a great example. If you compare two of our websites that we did and one is $5,000 and one is $10,000, you know from a design standpoint, yes they look totally different, but all the things are there. They've got all of the CSS3 transitions – it's all bulletproof code. They will look great. They function great. The [only] difference maybe with the $10,000 [one] is they may have e-commerce added to it, or they may have something like that. But that just takes more time, a higher level of skill, but the creative is there on both products.

DA: Since trust is kind of a big thing with agency/client interaction. How do you feel trust can be undermined on either side? And if it is, how can that be restored?

BR: Well it's interesting. When we are dealing with the decision-maker of the company it's very rare that trust is undermined. Because that person is able to make the decisions, is able to call the shots and we're able to be very frank and candid with that person and that person is with us. It is when we are working with somebody that may not be the decision-maker, that may be new to company or that may feel an immense amount of responsibility towards getting it right, but is also not the decision-maker, in those moments we have walked into certain situations where one thing we're told is not the reality and now were judged on something that is not our reality. And so we say this all the time, it's not our fault, but it is our problem. And so we have to make both people look good in that situation in a way to regain that trust. So when that happens, we feel burned or thrown under the bus in some situations, usually it involves a conversation between myself and our partner and the client and it's just a very candid, hey, this happened, understand we don't want you to look bad in front your boss either. Are there ways that we can engage that person throughout this process so that we aren't going back to square one over and over again. It's usually [happens] on, hey, this is approved, this is approved and then we get to the end and that's not approved, we want to start over. And that's the trust. We never, I like to say we never, I would hope that we actually truly never do anything on our end to undermine the trust of our clients. Simply because everything we signed up for in the front end is what we’re going to execute. And if we do a poor job of executing it we’re going to eat it in the shorts and we’re gonna make it right. We’re not a per hour shop, we’re a per project shop. So there are times where will we make great margins and there’s times where we just lose it. But in the end we do what we say we’re going to do.

DA: Are you always able to deal with the key decision-maker? If you’re not, are there specific things you can do to make the process run the way it should?

BR: One of those things that we do is we try, in that kickoff meeting, to identify who is the person making the decisions and we can tell usually if it’s for marketing, we want to be talking to that head marketing person or a product, we want to be talking to the product owner. And if it’s not that person we can just identify right there, hey, this is not the person. But that’s okay, let’s slow this process down a little bit. So when were coming up with timelines we’ve pad it a little bit to allow a little bit of extra room for approvals. And so we start introducing the idea of, hey, we’re gonna get approval here, let’s make sure we get all the decision-makers in the room and let’s talk about it. And so it gives that person an opportunity – one, to go through a round of approval with us, make their changes. Then we get the decision-makers in the room, we make their changes and now we’re moving on to step two. It’s a matter of, instead of flying through the project, now we’ve got to slow it down just a little bit to allow for those mistakes.

DA: Are you familiar with a term called co-design?

BR: I saw that. I’m not, but I’m sure if you explained it to me.

DA: It come about with social media in a lot of ways, that clients and also consumers help drive the product. Through product reviews or things like that, they kind of help determine what direction a project takes.

BR: Okay, like focus groups?

DA: Yeah, focus groups and things like that. How much of that do you do and how important is that? And also basically it's the idea of giving the client a sense of ownership in the project. Like making them feel their ideas have value and they move forward with that.

BR: Absolutely. So the level of experience that we have in that is more on the focus groups side. So when we're in the middle of a UI and UX process if it is, like we've done this a couple of times for larger healthcare clients of ours. Where we'll design an interface for them and then they'll want to get a focus group. So we'll panel, you know, maybe like HealthStream for example, it maybe for nurses or it maybe for physicians. And we will get those people in a room and we'll start to go through it and we'll do A/B tests. To where we'll give them two options and then we'll kind of take the panel of what works, what doesn't work. But you're right from a client standpoint, it does give them the opportunity to either have their ideas validated or for us to say, we don't want to say your idea's bad, but let's guide you in a graceful way to a better idea. And so getting more opinions in that situation for the people that are going to be using the product is always very helpful. We just did this actually last week with a sales application we developed. The marketing team developed it and it was for the sales team. As so we brought the entire sales team in and we demoed the product and then we brought the other half of the sales team in and we demoed a totally different product. And we took benefits out of both of them and now they have the final product that's kind of a mesh between both of them. But it was an interesting experience to see what marketing really wanted is not really what sales needed. It was a great opportunity for [marketing] to have 20 people tell them, that's not what we need, but what we need is very close, let's change it.

DA: So basically you use it as a way to get the people that are actually going to use it, to get their input and you found in the past it might not necessarily jive with what the marketing wants.

BR: That's exactly right or it may not jive exactly with what we're thinking either. I mean, we're in that bag too. It's always interesting coming from a technology background, a digital background, but we're reminded in those instances that the people that are using the products often are not the digital people, the tech people. And so we're trying to market, communicate and build applications and tools and experiences for people that are not used to our environment. We always think, hell yeah, they're gonna have the latest of this and they're gonna know where that button is and they're going to be able to understand this story, but it just doesn't always pan out that way. And focus groups can be an expensive situation to walk into, but also you don't want to release a product to the wild and it not work, either.

DA: That kind of brings me up to the last point. Are you familiar with the terminology waterfall or agile?

BR: Agile, yes.

DA: You know how you break it into little modules and develop it that way. Waterfall is I guess your kind of classic thing where you do the design, you get the design totally signed off on, then it goes to programming and get the program totally signed off on and then it goes implementation. Where as, if you get all way down to the end of programming and there's a problem, you basically start over again.

BR: That's right.

DA: How do you feel is the proper way to develop apps or websites or anything like that?

BR: I would say the agile environment is the better way – maybe not better way – agile environment is the way that we go at it. It's more of the sprints, where we'll start off with an idea, we'll prototype it, we'll see how it moves and how it feels from a design and development standpoint. It's much easier for us to go in an agile workflow because there's more touch-points. And a website is a personal experience for the client and there's a lot of ways they can go right and there's a lot of ways it can go bad. So the more you can break it up into chunks – I'm not talking like 50 chunks, but the more you can get by and along the way and we can stair step our way through it, the better off we are and the client is. From a video standpoint, it's actually the opposite. So it's very hard for us to shoot a little piece of a video and do it, so it's probably more the waterfall method – although, there are milestones throughout that. We'll get a story approved before we go into motion graphics. Then we'll go into motion graphics, we'll get those approved. Then we'll go into sound design. You know so there is a methodical approach, but it's not your traditional agile approach.

DA: So, say like the video scenario you just pointed out. So you would get scripts approved, obviously, before you start shooting. On the motion graphics, when the motion graphics side came around to it would you, I would assume there are be like style frames and design frames for each little piece before you implemented the whole thing?

BR: That's correct. And so animation is probably another example where the agile approach works really well. We do 15 second chunks. And so we start off with a script and then we go into style frames, storyboards, that kind of stuff. So we have an idea, ideally we have an idea of where we're starting and where we're ending and how the pieces connect. But even still when you get storyboard approved, when you get style frames approved and people see movement it changes the dynamic of it. Early on we did 60 seconds of animation – and we're like, here you go. That's not what you want? Well, that's weird. We've learned 15-second increments [are best]. So we'll do 15 seconds of animation, we'll make their changes and then we'll move onto the next 15 seconds. So it saves us, you're right, from getting all the way in and starting all the way over. So animation and web, are absolutely agile. Video, it's more just chunks at a time that we go through.

DA: Do you feel like can that ever bite you in the backside sometimes?

BR: Totally.

DA: And how so?

BR: So you mean from a video standpoint?

DA: Well, I'm just talking just agile standpoint.

BR: Yeah, so agile, it's interesting, animation more so than anything, especially if you're not dealing with that decision-maker in those 15-second increments. But we have had had times where we have gotten storyboards approved, looks approved, we've gone through 15 seconds and gotten that approved, 30, 45, 60 seconds approved, now we're in that final phase and we're coming back here. So the way it's burned us is the client has no problem paying for it, like we're very communicative, were very, hey, you approved this. We want to give you a final piece that you're happy with, but we're going have to re-scope this. Generally speaking, the client knows that going into it. But what stinks is from a creative standpoint, you just poured all this energy into it and now you've got to unwind it and start over again. And that's frustrating and it's hard to do because you've already paved a road and now you've got to re-visualize the road differently. And so it presents tons of challenges just from a creative process standpoint and mental workout standpoint. Very rarely does it from a financial standpoint.

DA: Well that's all I've got. Anything else that you can think of that is unique about SnapShot?

BR: No, I mean, I think we've covered pretty much everything in there. The big thing that we always come back to is just the communication that we try to have. You know we put on our website, we answer our phones. It’s amazing how many people that we deal with across the country that it’s just hard to get in touch with these people. And so we are very open and transparent with our clients about where they are in the [development] stage and all that stuff.

Appendix J

Shali Wade

Group Director, Client Engagement – VML

Personal Interview

May 12, 2015 at 8:30a.m. CST

Duration: 43 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: You've seen the questions. I want to go over them and get your thoughts. If we see something we'll go off on a tangent and go from there.

So the first question. Does VML have a formalized procedure for client engagement through the creative process?

SHALI WADE: So when you say through the creative process, do you mean working then with client's on – just creative?

DA: No it could be anything – just not a pitch – like day-to-day clients, when a job starts. Do you have a methodology you use to take client through the process?

SW: Yes, and I actually brought you something and we'll walk through it too. But just to introduce [it] – when we changed the name of our department about a year and a half ago from "Account Management" to "Client Engagement," and that was a very purposeful decision by our leadership. And I think very indicative of the way the industry is changing and the way we look at our roles as the industry changes. You know, we certainly do not, and I'm sure this is true of all good shops, but we certainly do not look at account management as delivering work, passing things back and forth, crossing T's and dotting I's and doing the billing. Although all those things are part of that role, we very much look at client engagement as a leadership opportunity and instead of – advertising has changed so much from sort of "push/pull' to everything everywhere all the time and then to really understanding channels, understand message and figuring out the best way to reach, people and where. I think that everything we do is engaging with clients and with our own teams, so that's what drove the shift. I have an internal document. I can't really leave it with you. But I thought that you'd probably find it relevant, that it was the initial construct of how we developed our client engagement model for our agency. And it starts by just outlining – these are the things that we feel are important to our role on what our responsibilities are. And we break them down in three or four tenets of operational excellence, business of doing business and the business of growing our business. So together, when we look at account management/client engagement, what does that mean; it's about – making sure that we're owning what we do. And the business of doing business, making sure that we understand and care about what our clients are doing, and growing our business, looking for opportunities to continue. And of course, we look at talent, we look at partnerships, we look at all of those things. What's not in here, and the reason why this is not complete is that a ton of what we do is about building relationship and I don't know that you can put that in a chart or a piece of paper and tape it up on a wall and teach people how to do that. I think you can demonstrate it and show it, but I think that's where we find success, where we find opportunities like what we've found with Nashville, comes from being real. Looking for opportunities, but at the same time, building relationships because we care and because we love the work. And I think client engagement and creative working together can be pretty powerful in moving business forward. So, that's how I view client engagement. I think that's how VML views client engagement, and I think it's probably the way forward for a lot of agencies.

DA: Would you say that your model is unique to VML?

SW: I think it's very unique. Yeah, I do think it's unique. I think that probably a lot of agencies have models for how they view their developments.

But I was proud to be a part and to see our leadership make that decision to change our department name. It feels much more like what we do.

DA: When do you check in with your client during the creative development of a project? Are there specific touch points or is it an ongoing thing or how do you tend to work through that?

SW: I think it probably depends on the client and how they like to work. I don't know that I necessarily ever start any kind of relationship having set check-ins. I think it's just the conversation that continues the way any relationship continues. I mean, clearly there are probably set and known points of interaction when it comes to sharing information and approvals and all that kind of stuff. But I think the most successful relationships have not been when we waited until we're ready for round one creative review and that's the first time we've talked to the client since creative brief approval. I think that's a mistake.

So it's an ongoing conversation. I'd say there are known things and then you look for opportunities to continue to have that conversation.

DA: To that point, how involved do you want the clients to be in the concept generation portion of the work?

SW: I think that's a fine line because I think pretty involved. Again it depends on the client and the relationship and how many clients we're talking about. I think you evaluate every situation based on its unique properties and sometimes you're dealing with a large board and that's different than dealing with a couple of people like Jeff and Rich and Dean. But, upfront when we're in information gathering, you want as much as you can possibly get from everybody involved. And then naturally you want to go away and do some work and then come back. But I think it would be, the closer we can keep our clients the better. I think you hope that your clients trust you and have hired you based on the good work that you've done and want to let you do your thing a little bit. I don't know if you talk to our executive creative director if he'd say the same thing, but I think he wouldn't be too far off. He'd probably say he needs a little time to go away and do work. But I don't think he would argue with getting as much information and building that relationship up front as much as possible.

DA: For initial concept work, the first creative presentation, what level of finish do you usually go to when you show work? Is it rough sketches, tissues, is it full-on comps, animatics?

SW: I think that also depends and I think it's part of the conversation. I think it depends on again how many people we're talking to, what the stakes are, how much time we have. We've done all [those]. I mean, when we started the website project for the CVB, for example, I believe we started with mood boards, and we didn't go into concepts until we felt like we had a good vibration going on with Chuck and our creative team from a tonality standpoint. He wanted to make sure we got it, and then once we had it and once we felt really good about where we were going style-wise, we moved into concepts. But we don't do that all the time. It just depends, I think, again, it's unique to the situation. But I would say we go into concept presentations pretty well polished. If it's a website, you're may have a beautiful homepage and a sub page design. If it's a TV spot, you may have storyboards. That are really well done and that would be the first step. Then you go into Rip and then that would be the second piece before you go into production. If it's a radio spot, you need to be looking at a script. But I would say you try to get it as close to where you're going as you can – it is just then part of that ongoing dialogue you'll have with the client about how they want to do this.

DA: Do you find that some clients prefer to see rough stuff as opposed to finished stuff, or have you never really come across that?

SW: It depends on the client – it just depends. I think Chuck would have preferred, we can ask him, but I would say he liked going to the moodboard step with us. Now would he want to do that with everyone? I don't know. He might not need to do that with everybody, but that was in the very beginning of our relationship and the very first thing we'd done and he wanted to make sure that we'd struck the right chord. So, it depends.

I wish there were black and white answers for any of this stuff. But I think that that's probably the theme, overall, is that it just depends.

DA: I've heard that from pretty much everybody and I agree with that. You have to be able to read your client a little bit to see kind of what they want.

SW: Yeah, and ask them. I mean, I don't think that's an out of bounds question to ask. How do you prefer to do this? We can show you... No, I don't know that I would ask that without making sure I knew how my creative team felt about their approach. So I don't think I'd call a client and say, "Hey, do you wanna see something rough?" without making sure that that was the way our team wanted to do it. So I think there's two parts to a client engagement. It's working with our clients, obviously, and then building a fantastic rapport with our creative team, and they have to be able to trust us and know that we are all together working towards something that's gonna bring us success. So, we may have a read on a situation where we don't want to show them anything rough or we may together go, okay, we are not going to go full throttle here until we have a couple of green lights. So I think that is something we would work out together and then we'd have a conversation with the client based on what that feels like. And that's probably a conversation I'd bring the creative team in on too. I believe VML is very much like this. We don't have one way. Client engagement is not the only communication with our clients. We are very sticky across all departments. We don't hide our creatives from our clients and our creatives have very direct conversations with our clients and that's very intentional. So I would probably pull in our creative director and have that conversation with our client together.

DA: That actually brings up my next question which is how, or when, do the creatives engage directly with the client?

SW: From the first day, all the way throughout.

DA: Is that just your creative leadership, your creative directors, ECDs, or is it down to the art director, copywriter level?

SW: I think it's anybody that's appropriate. Now, we certainly don't want them getting phone calls all day long and not able to do their work. So we would set it up so that we're the first line of defense, but there's no reason why one of our clients wouldn't feel comfortable reaching out directly to, especially a creative leader. I think we try to set it up just like that. I would probably again, have that conversation. Our whole philosophy is to try to make sure you have people available to you at all times. Call me first. I'll hook you up with the right people if you have a serious need. Always feel free to call John Godsey or, Allison Pierce, who is our creative lead, and they would make the connection in the right way. I don't know that we have any rules about that. I think we just try to respect our creative's time, and when to let them focus on what they do, but they also know that we're in advertising, we work for clients. And so the more conversation they have and the more of a connection they have with our clients, the more likely we are to have a successful end result.

DA: I can say this because I'm a creative – creatives aren't the greatest with being meticulous about meeting notes and things like that. Do you find, has that ever raised any issues, I mean, you said you ask the clients, hey, at least give me a call first so you know what's going on.

SW: I don't think we put creatives in a position to take notes. Or to have to deal with anything like that. We're not sending a creative person to a meeting by themselves. I think we all know that we're catching that kind of stuff and our goal is to make sure that we're following up. But I'm saying if somebody's feeling uncomfortable about something or has an idea about something or wants to gut check something there's no reason why they wouldn't be able to communicate with a creative. I think clients are smart. I think they know, they understand, that they're not expecting to dump a bunch of action items on a creative person and expect for that to happen without follow up. I think it's more about moving as a team together throughout the project – and same with our developers. Developers are creative creatures also. Depending on the effort and what we're doing, to include who you need for a particular project – from the technology folks.

DA: How do you feel the agency/client interaction should work, if you could design your own agency, how would it be? Would there be account service and creative, or would it be one big entity?

SW: I think you would have account services and creative, but I think you would have everybody working very closely together. Very similar in some ways to the way our teams are structured at VML. We have folks sitting by each other working hand-in-hand and a part of growing the business together is creatives that are accountable for the business side of things to a certain extent and account folks who inspire creativity. That's a big part of our role. I may not be able to manifest the idea, but I sure can provide a spark every once in a while. And I think it's working together to solve problems very closely. So we have smaller teams that work together and then we pull in specialties as we need or experts in particular areas to supplement. That would be how we do it.

DA: You mentioned working closely together and are your offices in proximity to each other?

SW: We don't have any doors to our offices. We're all out in the open working together.

DA: So, like, the CVB team, for example. You guys are all within a stone's throw of each other – you bounce ideas off of each other?

SW: Yeah, we're sitting as close as this room. We're always working, talking, white boarding.

DA: The old-style agency had account service on one floor, creative on the other floor and that type of thing.

SW: No, we have none of that. We all sit together; we're all working together. We're called over to look at concepts and ideas and give our thoughts and we give them, and vice versa. We have a creatives looking at our scopes saying, hey, we know you don't want this in your in-box, but come over here and look at this, this is a decision that I think we need to make and we want to make sure you're okay with it before we have somebody sign. We do a lot of cross-pollination. And there's a lot of mutual respect. I think that's what makes us. We don't have creative teams thinking that we are waiters and waitresses here to take notes and do the bills. That's not the way we're viewed and it allows for a lot of really good [chemistry], we're out there working on behalf of the team. We feel very proud of it. You know, we're given credits on everything that we do from a creative standpoint and for that we take a lot of pride in the work, just as much. It wouldn't happen without all of us here.

DA: Do you do anything specific to match account service with the client? Is it by industry, do personalities come into play? How did they decide that Shali needed to work on the CVB business? How is that decision made?

SW: There's probably a little bit of everything. I think we grow our teams and naturally match some personalities. But you know, clients change within an industry, so that's tough. You know, it's probably most people in client engagement tend to be good communicators and tend be able to deal with all kinds of different people. We have lots of different clients that have different personalities and are easier than others. Sometimes, I guess, it could be based on expertise or industry. I tend to be working more on brand opportunities because I have that experience, but it's not exclusive and I also work on technical projects and other things. I think it kind of depends on where the relationships are and what we're interested in and it evolves from there. But personally I'd say individual assignments, if you asked Chuck, who's our chief client officer, he'd probably say he puts a good amount of thought into who makes sense where, but there's also some sort of organic evolution to things and people tend to gravitate toward – relationships tend to grow when they're fed right. So the relationships that grow tend to be good matches. Nashville was a great match for us. It just happened that way. Would it have grown the same way with a different person? I don't know, but that's sort of what the magic is about, relationships in general, you find kind of that chemistry and go from there. He (Chuck) might be a good person to talk to actually. And he was a master behind our entire evolution as a department and some of this stuff. He'd be the person I'd be talking to about with sharing some of that stuff. So, maybe putting a bug in his ear.

DA: If he's willing. I'd love to talk with him. I know you all are busy.

SW: Yeah. I'll check with him.

DA: As long as you've been in the business have you seen or do you feel that the agency/client dynamic has changed in the last say decade or so?

SW: Maybe. I don't know. Probably everything has changed because our communication landscape has changed so much. So I would certainly say we're expected to be "on" more often. We are always available and that's probably because we are always on and always connected. I think speed, certainly things have sped up and expectations for delivery have sped up. If you can perform a miracle, you're expected to do it again. So that's probably changed a little bit. I've only been doing this for 15 years, but when I started we didn't have smart phones. So I think that's probably changed a lot. I would say the fundamentals though are what they are. I think if anything there's so much happening and so much change in our responsibly to make sure that we're on top of what's happening in the world and why we would choose a particular communication tactic. Or what things are, being able to explain things has probably evolved. There's no more living in silos so much. You know, we're not experts in any one medium. We have to sort of know a little bit about everything and then be really smart about who we bring in. There is the expert in mobility, for example. Search engine optimization or whatever. So, I think that's probably as far as that goes.

DA: You mentioned smart phones – do you engage with your clients on social media, for example? As an agency, as professionals, as friends?

SW: Yeah, absolutely. It's also something you kind of follow the cue. I'd probably follow a client's cue on that. I probably wouldn't go find a new client and Facebook friend them, but I would certainly accept it if they did with me. I'd probably connect [with] them first on LinkedIn, but you know, I have a lot of clients that I'm connected with on social media. And there are clients that prefer text messages to email and there are clients that prefer to have a conversation – you just sort of have to figure out what everybody's preferences are. I don't think there's such a world where you have a private social life anymore, I think [we're] pretty much open to communicating any way that's available.

DA: I've been in the business a little bit longer than you, but not a whole lot longer, but well it is seems like when we first started, email wasn't prevalent and all that kind of stuff, so every conversation was either on the phone or face to face. Has the business changed in that way? Has it gotten better, colder, anything you can see with that?

SW: It's probably just tempting to stick to email. I really try to rebel against that as much as I can. I mean email is a necessary evil, but email is crazy, but sometimes it's the easiest and fastest way to get messages. So it does a lot of good too. I don't have to wait for that status meeting or a phone call, to get a quick question answered, or have some of those individual beats within a conversation. So it's hard, but I think it's really important. But I think we all have to take a lot of care to make sure that we're – in person you always get so much more done, emotionally and practically when you're in front of somebody, I think. So supplementing that with as many in-person opportunities as possible and the second best is the phone. And again, you have clients who don't want to do either or clients that only want to do one. You learn pretty quickly what someone's communication style is like. Certainly anything that deals with conflict is much better person-to-person.

DA: So if I'm hearing you correctly email communications is great for keeping track of things, but if you really want to have a conversation we need to get in front of the client.

SW: Absolutely, yeah. That's true.

DA: Do you feel like the size of the client's budget has anything to do with the agency/client dynamic?

SW: Um, well, I think in all the practical ways it just allows you to have more resources on something and to be able to support it more. And then from a creative side, the more, for example, production budget you have, the more you can do. But I also don't think that – I worked for a lot of my time on a team that worked pretty specifically with small client budgets. I think our relationships were in some ways stronger. You're dealing more with the owners of a company or someone who has a much higher stake versus a brand manager or somebody who works for a company. So relationships with some of the smallest clients with smaller budgets can be more intense. Stakes are higher. You know, their $10,000 is literally coming out of their pocket versus $100,000 that's a line item on spreadsheet. That being said, sometimes working with smaller clients can bring bigger rewards because of that relationship and emotional connection, but it can sometimes be hard too because you can't do some of the things that you wished that you could. I have relationships with clients that have large budgets and organizations that I'm very close with and, I still have [clients that have] a very small amount to spend every year that I maintain relationships with. I'd say the only trend that I would see is the smaller the client and budget, the more often the clients tend to have a personal stake in the business. They tend to have a little more of an emotional connection.

DA: Because it's their money basically.

SW: Yeah.

DA: Do you find that having a smaller budget can actually be a good thing because it forces you to kind of think around it a little more? Or is that not necessarily the case?

SW: Absolutely, sure. Absolutely. But I don't think it makes anything easier. I think what is easier is the production of the idea when you have more money, not necessarily coming up with the idea. A good idea doesn't have a budget. It's just about whether or not you can bring it to life and how. But sure, sometimes you can end up in a situation where you are forced to be scrappy and that can be the best thing that could have ever happened.

DA: You talked about trust a little bit earlier and you mentioned that trust is kind of the most important thing.

SW: Yes.

DA: Since that is paramount, do you have any anecdotes or have you see where trust has been undermined and once it is, can it be repaired and how do you do that? I mean, nobody tries to undermine trust and if they do, they're just an evil person that I don't want to be working with. But have you ever seen it where things have happened and how do you fix it?

SW: Well, if that happens, we're humans, we're humans having human connections. I think in client engagement in particular you start building trust based on delivering on the foundational elements, right? So following up when you say you're gonna follow up, sending notes after a meeting within an appropriate amount of time, being the first person on the conference call, making sure you're delivering something that's been proofed and that feels good. So you start with all those foundational things. Okay, this person's got it together and then continuing to again say what you're gonna do, do what you're gonna say, be careful how you communicate outside and inside the work, being respectful. I think people fall down, I think you make mistakes, I think you forgot to do some stuff, I think you mess up, I think you drop the ball. And I think you have – You hope that what you've done has built a relationship where someone knows that was genuinely a mistake and you own it and you move on. I mean, can you recover from it? I don't know. I think it just all depends on how you handle it. That's where character comes out, on both sides. It's a messy world and we're all human beings and we're dealing with things that happen very fast and a lot of times we're all doing things that we haven't really done before or that have high stakes. You just – you dive in, I guess, and you figure it out. Just hopefully you have a relationship where you can talk things through. I've had to make phone calls in my life to fall on my sword about things and most of the time they go well because somebody knows that it was a mistake. Or that I've come with a solution to how I think I can make it better. But sometimes you just mess up. Sometimes there is no fixing it and it just is what it is. Sometimes agencies lose business over it. You hope that people would rather have this human being over somebody else because there's been an establishment of trust along the way. But it's the same with any relationship that you have with anyone. I really don't think it's all that different.

DA: I've heard other people say it's kind of like a marriage in a lot of ways. It's built on trust completely and you have to work to foster that.

SW: Yeah. And you may not love everybody. You may not have that deep connection with everybody, but, you try to connect yourself. You don't BCC people. You try to connect yourself with not putting things in email where you are going to have some kind of big disaster by forwarding it to the wrong person. You know you try to make sure that when you're speaking of your partners you're speaking respectfully whenever you can. And I think it's the Golden Rule a little bit. And that doesn't mean that people don't have opinions and they don't have conflicts with people. I don't mean to sound like it's this perfect "Pollyanna" situation all the time, but I think that you just try. You try to avoid situations where you're being disrespectful. And most of the time that'll get you where you need to be.

DA: Yeah, I'm with you. I've had to make a few of those calls too. I really don't want to make this call.

SW: No, it's awful.

DA: But most of the time, like you said, if you're honest and you take responsibility for it, it usually goes a lot better than you think it will.

SW: Yes, yes.

DA: We always try to work with the ultimate decision-maker. How do you deal with those kind of situations when you can't deal with the ultimate decision-maker?

SW: I think that up front we try to establish who has ultimate approval control. I think that's one of the first conversations you have with people. You know if you're working on a daily basis with someone that does not have ultimate approval control establishing who that person is and what the communication points are with that person up front just has to be clear. So, that's just part of looking at the landscape of new relationship and figuring out how to navigate it.

DA: If you can't get that person, do you have anything in place that you do to help your chances? Do you try to arm the person that you are pitching to when they go to pitch it or do you want to be in the room or how do you...?

SW: I think whenever possible you want to be in the room with people that are approving things. I think you'd ride a pretty tight scope that says how you plan to handle that situation. If there's a situation where you have to arm somebody you do the best that you can and say a little prayer.

DA: Are familiar with the co-design model at all?

SW: Hmm. No, I'm not.

DA: Okay. How about waterfall and agile?

SW: Yeah, waterfall and agile.

DA: Okay. I would, maybe you will disagree with me, but I would say that co-design is a lot like agile. In the fact that basically it's more touch points, it's bringing a lot of what we've talked about already, bringing the client in on the concept portion as early as possible – a lot of focus groups, lots of consumer feedback to try to build better products and processes. Would you say you lean more towards waterfall or agile?

SW: As an agency we have practice in all methodologies that way, whether it's for creative or technology. Lots of times those descriptions are used for technology. Again, it's a tool in a toolbox and you evaluate the situation, the client, the opportunity what we're asked to do and recommend a solution based on what we know. You may not recommend an agile process if you've got a client or you're not dealing with "the" client or you have a client that isn't capable or prepared or willing to do that. I think it just depends.

DA: The knock against agile is that it can explode the amount of time it takes to develop something. Do you have any experience with that happening?

SW: Again, more on the development and technology side of things where you have less descriptive deliverables that are coming out of each situation. Instead you have sprints and you let the client kind of decide what future set is going to happen in a certain sprint period. And I think it requires over-communication and understanding what overall expectations are up front because you could end up doing an agile process and end up with "But I didn't get this" and "I told you this is one of my key goals that I wanted to get out of this project." So I think you have to make sure that if you're doing something that way, the communications stays really fluid and that you have people on the other end that are accountable, that understand they have to communicate it to their stakeholders and their board of directors, because it's just a different way of doing things. It can be very successful. I think there's a reason why a lot of people do it. It just has to be used in the right way for the right opportunity.

DA: Okay. That's all I have. Is there anything you feel like I've missed or anything, any – anything you feel like..?

SW: No, I don't think so.

DA: Words of wisdom about account management?

SW: Those were great questions.

DA: I know a lot it feels like I was asking the same question over and over, I mean, just kind of in different ways.

SW: No, it's fun to talk about. I think it takes an interesting group of people to do what we do and no matter what we're all pretty passionate about. We care a lot on all sides and I think when you find a great client engagement person it's just as important as finding a great creative person, you know. Different people, at different levels, doing different things, and you hope what people love about it is working together. That's pretty cool.

DA: You mentioned just now it takes an interesting group of people. How do you take a product that maybe you're not – right off the bat you're not terribly passionate about. How do you find that passion to make it as good as it can be?

SW: Not everything is a Nashville documentary. But at the same time you're working with a great team – you're working with a team of people that you love, that are real great at what they do, hopefully, and you're just solving a different kind of problem. Everything may not be as sparkly and fun as – one project may not [be as] much [fun] as the next, but we all still really like what we do. The fundamentals of what you do in solving communications problems are all the same no matter how sexy it is. So I think everybody gets a little bit of everything. Also I think it's hard to know. Sometimes we have a client that you think is the most boring thing ever, it's window films or some kind of software as a service or something like that and you think, oh

God, this is gonna be a nightmare, but the client can be fantastic and the opportunity could be great and there could be some really cool thing that we can do that they've never done before. You just have to find those things. And, you know, you can also have something like, now not in our situation, but you have something as cool as a branded content piece for, you know, a town with a bunch of artists and have a real jerk client and that can be a nightmare. So it just depends. Again, I don't think there's any rules to how this all works.

DA: You try to find what is that one thing that you can kind of grab on to.

SW: Totally. I think you can make a lot of things really cool that don't seem very cool. Creatives may have a different view on that.

DA: Well, this a total different conversation, but I've found in my career that some of the projects that I'm the most proud of, I'd say, are not the ones that were recognized by anybody or didn't win a bunch of awards, but it's about making a difference for that client.

SW: Sure, exactly.

DA: It's that kind of, it's that wow, I actually was able to do this with something that you would have thought was nothing.

SW: Yeah, totally. Totally.

DA: So, I understand what you're saying. And then there are other projects where you're going, well, okay it's a great project – you've got an opportunity to do some great stuff. Let's just hang on and not screw it up.

SW: Yeah, totally. There are some where you grit your teeth and you just get through it, for sure. But, you know, not as many – I mean there aren't many of those. They're not common and it's usually when there's not a relationship there because the client doesn't want to participate – one person, one side of it isn't participating and it usually isn't mine. It's somebody, I mean, you just are working on the transaction and sometimes that's what's needed, but rare. I hope it's rare. I think it's probably rare type of agency and if that were the norm I wouldn't be doing what I do.

DA: Well, great. Thank you. That was fantastic.

Appendix K

Steff Geissbühler

Principal – Geissbühler Design

Telephone Interview/Email Follow-up

June 19, 2015 @ 3p.m. CST

Duration: 16 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does your agency or do you have a formalized procedure that you use for client engagement during the creative development process? Is there anything that you use to specifically walk a client through as you develop a project?

STEFF GEISSBUHLER: I usually present sketches. I've tried a few different ways in order to explain my process an options. So, I really believe in letting the client see options, rather than just presenting one solution.

DA: Are there specific times when you check in with your client during the development process? Do you go through the creative brief process and then initial concepts and so on and so forth? Or how do you do it?

SG: I follow through. In other words, if you're narrowing it down to fewer options and possibly play it out a little more. I mean it depends on what we're talking about. If it's a branding project, you ease the client in by showing him early sketches and ideas and concepts and try at the same time to ascertain or get a feeling of what the client reacts to and what key things resonate with them. You just get a reading as to how you're doing and whether you're fishing in the right pond.

Obviously before all that is research. Do you want me to describe, what I do before I engage with the client? Obviously I look at their website and annual report, I pick up everything I can about the client and the particular project if there is something to be looked at, their products or whatever. That takes quite a while because I really believe in completely immersing myself in the business and the client, and understand them completely and interview whoever is in charge, not the second in command. I try to get to the head of the institution or corporation or whatever institution it is, and understand their vision and how they want to be perceived, where they want to go, what they want to achieve with this project, and what their goal is. And then interview employees and the competition and what the competition does and how do they think about the particular company I'm dealing with?

DA: Okay, so sort of to the full market analysis?

SG: Yes, totally.

DA: Yeah, what everybody's doing, perceptions and.

SG: Right.

DA: How involved do you want the clients to be in the concept generation portion of the work?

SG: Usually, you know, after the initial contact and understanding of what the project is and what it entails then I get lost for a couple weeks. I only resurface when I have some notion of where I've been fishing and what I've been exploring before I go on. So that would be the first presentation of what I've been thinking about and see whether that resonates with the client.

DA: What level of finish do you present a client for initial work? You mentioned sketches, Are we talking pencil and paper sketches or are they digital comps or storyboards?

SG: Pencil sketches, I do for myself. Then I work them out a little bit more. They are usually computer-generated sketches. But I call them sketches because they're not refined, they're not fine tuned in any way, they're more or less showing the raw idea and concept, you know, before I go on.

DA: Okay, if I'm hearing you correctly, try to keep it as rough as possible initially to sort of just give the client the essence of what you're selling?

SG: Exactly. I want to keep calling them sketches even if they look refined because the computer has that tendency to make things look too perfect, too soon. And so it's an old struggle I have. And I say, look, those are just directions, those are not refined options. They usually say, what do you mean by refinement? They look good to us. Computer printouts or projections are too clean and perfect to be roughs. But I have to explain what that means, refinement means that the typography needs adjusting and kerning and re-drawing certain things to make them perfect in every way. That's a whole other phase when you do your final art. The color and shape and you know all kinds of other things. – I usually explain to the client that this is really just a design direction, to show a couple of different avenues in the refinement, but it's still sort of a rough idea of what direction I'm fishing in. And then to narrow it down, to more or less, the final design direction.

DA: Since you're, you say you're a one-man design shop, which I understand completely. The next question is geared more towards agencies, when do they creatives engage with the client. But you do all the time, so that's not really a valid question at this point, but..

SG: Well, I do, I work with agencies at times. And I obviously have my own design firm. And was a partner in two design firms. It's just a different way of working when I'm on my own.

DA: Okay. In your old firms where you had multiple staff people, did you have account executives that were strictly the business side or was everybody designers and they held their own accounts or how did that work?

SG: In both firms it was more a bunch of designers working together. I never really had account executives in that way. That's much more of an agency kind of thing. You know, hand holding the client and making appointments for meetings and all that kind of stuff. So I didn't have that. I have had an assistant who would facilitate that, but that might or might not have been a designer her or himself.

DA: Sure. How do you feel agency/client interaction or design firm agency interaction should work in a perfect world? If you could spell out the perfect way that a creative works with a client, how would that be in your opinion?

SG: Well, a one-to-one relationship is still the best. You know, if you can directly interview the person in charge and then also present it to the same person and deal with them and forge some kind of relationship with them. You don't have to marry them, but you certainly [need to] show interest in their business and forge a little bit of a professional relationship. That is still the very best way. The more people are in between you and the client, the less total understanding you get, even though you have researchers and marketing people and tech people and you know, all kinds of assistants. It doesn't make things better. It just involves a lot more people. I'm not sure that's a good thing.

DA: So that one-on-one dynamic you feel is always the best way to handle anything?

SG: Absolutely. That's not always possible, of course, if you're dealing with a whole committee or something like that. Like many times I've had clients who were multifaceted and every meeting involved a lot of people on their end. So then it's difficult to sort of forge a relationship, when you're talking to a lot of different people. You have to single out the person who is going to be in charge eventually, or the person who was designated to deal with you. And then you focus on that person.

DA: At your previous shops, where you had multiple designers working on a specific project, how did you decide what designers worked on what pieces of business? Was it by the type of business? Was it by style? And did the personalities of the individuals play into that decision at all?

SG: It definitely had to do with the type of client and the actual talent on my staff, In a smaller firm you might have to choose the person who is available.

DA: How or when do creatives (designers) engage directly with clients? Or do they?

SG: It is very important that the "creative", as you call it, is directly involved with the client. You need to be able to interview the top most person, CEO, President, or at least the head of marketing and/or communications, etc., in order to understand the vision the client has. Only top management knows where they want to go with the company. Everybody else only interprets what they believe the boss wants.

DA: Do you do anything specific to match your account service representative to the client?

SG: Personality and chemistry is most important. If they don't like you or your approach, method, sense of humor, looks, presentation, accent, you wont succeed in working for them.

DA: Do you think the agency/client dynamic has changed in the last decade or so?

SG: Most business is conducted via phone, internet, skype, email, etc. It is rare these days that you have personal contact throughout the project. Perhaps initially you meet, but after that it is often only remotely. Hopefully the final presentation is to top management.

DA: Do you feel the size of the client's budget plays into the agency/client dynamic?

SG: Of course. The bigger the budget, the more attention the client wants. Which in turn means often more people are required to do some "hand holding". The client wants more bang for their buck.

DA: Since trust is paramount to the development of effective creative, how can that trust be undermined, and what can be done to restore it?

SG: I don't quite understand your question. There are many ways to undermine the client's trust. By working also with a competitor behind your clients back, publicizing work without permission, talking badly about "the boss" to employees, or jeopardizing the project in any way, shape or form. To restore that trust, once it's broken, is impossible.

DA: Are you always able to deal with the ultimate decision maker during the creative development process? If not, how do you proceed?

SG: I always try to engage with the ultimate decision maker. If for any reason, that person doesn't make him/herself available, the project is obviously not important to him or her. But we often have to settle for second in command. We need to make sure however, that that person has the full backing of top management.

DA: Are you familiar with the co-design model of creative development?

SG: I assume that you mean the work is done by more than one agency. "No man is an island". Many large projects call for a variety of professionals. In branding, for example, we often need to work with outside specialists. Naming, Marketing, Video or Film, Web and Interactive, Animation, e-commerce, model building, signage, etc. are part of a project where you need specialists.

I personally work only with people I trust and who have shown in the past that they are reliable and excellent. If I sub-contract with people, it's still my reputation on the line.

In other words, the client trusts me to engage other people to work with me. If the client wants to choose someone specifically, they need to contract with them directly.

Appendix L

Rex Peteet

EVP, Creative Director, Sherry Matthews Advocacy Marketing – Austin, TX

Principal, Studio Peteet Design – Austin, TX

Telephone Interview

June 20, 2015 at 1p.m. CST

Duration: 65 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: The first question is does you agency have a formalized procedure for client engagement throughout the creative development process?

REX PETEET: Yes. And it's different from my own just from having worked at so many agencies through Matthews and when we were in Dallas, TracyLocke – some big agencies. From my experience – the initial engagement would be to satisfy the top ten, and they all vary a little bit, but they have the top questions. That they use to create the creative brief, which guides everything. And you know it's typical questions. How are we to know if we are successful? I have a primer that will really be helpful. I can give it to you.

DA: Yes, I would love that, if you don't mind.

RP: So that's the beginning and for branding it's a little different. We're seeking a different source of information. In branding we're interested in their vision, their value statements. And if they don't have them then, we help craft them. To help them get to a point where they really are what they say they are. A lot of people have vision and some values but it's really not too actionable. I don't know if you're more interested in how this pertains to our advertising or more closely to what I do for the agency?

DA: More closely what you do is really what I'm looking for.

RP: Well that's good, because I can talk with a little bit more authority. We usually try to spend those initial meetings just listening, and not telling. You know it's difficult sometimes to not sell yourself and spend a lot of time talking about you, but more listening to them. And so we spent a lot of time just trying to do that, you know not too deep of a job but a deep enough dive that they know that we're interested in helping them solve their problems. And then finding out who the decision maker is and the key players are where we can, without wasting everybody's time do real silo and targeted deeper dives with all the key people. The other thing too is it really helps, if you get a variety of opinions about the state of the union rather than having a strong individual in the room. You know I'm sure you've been in focus groups where somebody that's really comfortable and outgoing and they can just sway the whole room. It's really like that in a corporate environment where the higher-level executives influence what everybody is saying, but that's not really what they're thinking. So we try to make those meetings a focused discovery of sorts to create the master creative brief. And that sometimes can take many, many interviews, interviewing customers and interviewing the vendors – lots of different points of view to assemble where they are at that point.

DA: Sure. Would you say that your model is unique or is it what you developed over the years?

RP: Well, certainly I don't think it's unique because I've been around other branding people and in other agencies too. Even architects they operate in a similar way, there isn't anything that I was taught by another branding powerhouse. I didn't work for Landor or one of the bigger branding design firms. I came up through the Richards Group. And I don't know how much you know about the Richards Group, but Stan started as a graphic design studio that serviced advertising agencies. And his office really didn't have a discipline and a certain way of doing it. In fact, they didn't even have creative briefs when I was there. It was real seat-of-the-pants. Stan didn't have account people. That's [what was] particularly different about his agency is that you wore all the hats. If you could write and you're also an art director and a designer, then you would write.

DA: You were a writer too then?

RP: Yeah, and if you could draw, even better. Being an art director was kind of the table stakes. If you have the ability to really design and really draw and write, that was nurtured and encouraged. So that's the school that I came up through. And I guess the benefit was it certainly cut down on overhead because you didn't have to have writers who were sitting around waiting for something to write if they didn't have a writing assignment. We were just kind of switching hats. Doing four or five different things in a day. We did our own production and we did our own client service. So, that was the world that I was brought up in. So it was natural for me to do what account people do in my agency now. As we've all gotten busier you really appreciate what account people do. It's frustrating because it keeps you at arm's length from the client a lot of times. And sometimes, as you probably are aware, it becomes what the account person thinks, but not necessarily what you think as the creative person.

DA: Yeah.

RP: And so you're constantly bumping into that and juggling that and trying to get an audience with the client so that you can be in the room and read the body language and facial expressions and all that sort of thing. You know how it is, if you're in the room the question path that you would go down would be entirely different than if an account person was doing it for you.

DA: You mentioned, you have some kind of framework or something you wouldn't mind sharing with me, about how you work? Is that a possibility? If not, I don't want to take anything that's proprietary by any stretch but if you had anything...

RP: No, it's nothing that I wouldn't mind sharing with you. It's really kind of custom to every client. [But] you're essentially after the same sorts of information, but how you get there and how the creative brief looks isn't always the same. There's not a template so it doesn't look identical for each one. But you know it is talking to them about their business or their values and then using that as the initial filter that all things go through. How they think, act and behave is all influenced through those documents. [Even down] to how they answer the phone, how they treat their customers and how they treat vendors. It's all influenced by those documents. You know, we try to help them figure out their brand persona. Like we refer back to the "The Hero and The Outlaw" – have you seen that particular book?

DA: I've heard of it, I need to pick it up.

RP: It's a great one. It's a start, but by no means the only thing that provides guidance, but it does a pretty good job of explaining the concepts. And so a lot of times we bring copies of that book into our discovery sessions and try to get them to be thinking in terms of, you're an outlaw brand, you're a caregiver brand. You know just try to get them to line up things about themselves that all fit. And they don't sometimes. I had one client who recently said, I'm a caregiver, I'm also a magician. I think there was one other [persona] they identified with and so we kind of created one for them from that formula. Or we might even look at the real world. You know, are you Tom Hanks? Just pick somebody that has a really strong personality that responds or reacts a certain way that you would expect for that particular person.

DA: Sort of gives a visual and historical touch point for how they would describe the brand, if I'm hearing you correctly.

RP: Right, right.

DA: When do you typically check in with your clients during the creative development process? I mean you mentioned the creative brief, but beyond that, how does your flow usually work?

RP: Well, we would in this discovery process when were doing our interviews and asking a lot of questions, also [we'd conduct] the brand audit. Just figuring out all the places that their brand touches. I've been around long enough that websites weren't always part of it. But you know it's gotten a lot broader with the social media aspect of it now and the digital aspects. It's no longer annual reports, ads on TV and radio. As you know, that's just a bite of it.

DA: Sure.

RP: So that's going on. And then to answer your question – once we feel like we've assimilated all the responses and asked all the questions, we then put it in some sort of brief and get it back to them and they say yay or nay. They'd say, now this is right, you got the nuance of this particular segment. This isn't quite right. This is what we meant to say or this is what we really meant when we said it. And then you get the clarification. That can take some time too just to have everybody on board and trying to massage that to get it just right. Then once the creative brief has been signed off on, and [we reached] agreement on the scope then the creative brief would go to the creatives. And so there isn't anything that is arbitrary. [We'd] continually run the creative that we're doing back through that brief to make sure it's hitting all the key concepts that we all agreed on. So that we don't come back and present something that they go, that's wrong, that doesn't fit. We try to do all the vetting before we ever get back with them. Sometimes, as far as getting back in touch with the client, they want the big idea and wanted it so big they could send us down a different path. You know, we'll get back in front of the client or through a conference call or whatever, so there's those kind of interim things that happen. You never know. It's always different with each client.

DA: How involved do you want the client to be in the concept generation portion of the work? Do you hold like brainstorming sessions or anything like that? Or do you want them involved?

RP: Yeah, we do. As my firm grew we actually had strategists on staff. That's what they did is just get in a room full of executives and brainstorm. And when I had the time, and when it was appropriate, I liked to be in on those meetings. I feel like a good idea could come from anywhere. Just because we are creative people doesn't mean were the only guys that had good ideas, you know? Just a little kind of sidebar story, when we were doing the Sid Richardson Museum and we were working with the architects – are you familiar with the Bass brothers? We were working with Ed Bass, who to me was one of the neatest, most approachable and creative of the brothers. It was great, every meeting that we had at the museum, he made time to be in those meetings. And there was enough dollars there that we have the opportunity to go down a lot of different paths, much further and deeper than we normally do. So we had really done our homework on Sid Richardson because obviously, they wanted the identity of him for the Museum. They wanted it to reflect his personality and who this guy was. He was very philanthropic. He was an oilman so he was as comfortable at a diner sitting across from a bunch of roughnecks as he was at a five-star restaurant in New York. So you had this really diverse personality – he was a horseman, he had a ranch. Plus, he was a very sophisticated art lover. He collected Great Western artwork. And his family, because of tax reasons, needed to put all these artworks into a museum for a lot of tax technical reasons. But anyway, we went down all these paths. You know, would the identity reflect this rich vocabulary that's all things Western? Now you go back and look at the Ranger belt sets, and all the engraving and ornate belt buckles and spurs and the leather tooling and all that sort of really great stuff that would've been appropriate for a Western Museum. And then we went down a path like a [cattle] brand. You know, to reflect the side of his personality that was a rancher. Anyway, long story short, we had probably eight different directions that we were going down and we were all in a meeting presenting these ideas and talking about Sid and the architecture, when Ed [Bass] said, "You know what we really need to do to help us decide which direction is going to resonate is, if Sid Richards were sitting at this table right now, what would he sign off on?" And Ed Bass, the architects and myself looked at each other and said, Gee, that's it. We all remembered some correspondence because Sid Richardson was really good friends with Dwight Eisenhower. And in our research we had all of their correspondence and Sid Richardson had this very specific way of writing his initials. And we just said, we'll embrace that and walk away from all these other concepts, his signature will be what the identity is based on. So that's what we did. It changed the course. And a long-winded way of answering your question, I didn't come up with that idea. It was one of those serendipitous [ideas] that came out because of three guys that were all creative shared [their thoughts].

DA: For initial concept work, what level of finish do you usually present? Do you go with sketches, are they finished comps, storyboards, animatics, how far or how rough do you go?

RP: In identity [work] we typically have 3 to 4 rounds and that first round, we are trying anything and everything, there are no bad ideas. And in order to get far enough down the road of the particular – do you do branding?

DA: Yes, we do.

RP: Do you do identity work?

DA: Yeah.

RP: Okay, so you know you could do a sketch, and that fits one of those kind of singular sort of brilliant ah-has, sometimes a sketch will get it done. But those are so rare. I've only done a couple of those in my career. Most of the time it's nuanced and it's how something is rendered, particularly if you're talking about an icon or a badge, not necessarily the typography, but doing a logo. All of those take time. What we like to do is present it exhaustively to say, yeah, here's the menu. We can't figure out all the nuances, but we keep working it long enough to where it's either validated or it's not. So you know as a designer whether it's going to work or not. And those are done really tight. We do those in Illustrator and when appropriate, we'll begin to work typography. You know again, it just depends if it's one of those identities that the name is it and there isn't a logo, it's just a wordmark. Most of the time it is not. You're doing the identity and it's got a longer name and [an icon] so we don't get too caught up in typography at that point or color. But sometimes color is part of that initial expression. So we'll present it. When I had a full staff of 20 designers and creative people, including myself, we'd present, 50 to 75 directions. And then when we get together with the client and we would present them one at a time and fill a conference table and sometimes the floor, against the wall, just fill the room. And then there were two ways that we would start to whittle that down. We'd either say, okay, let's pick out the ones that are really resonating that we know are really successful that we want to proceed further, or okay, let's get the losers out of here, the ones that aren't working. And we worked it from both ends. But the ideal goal would be to get it down to six or fewer. And then once you have that, almost without fail what would happen is that once we were in the room with the creative people and executives, there would be other directions or other ideas that would come out of those meetings. So although we may have narrowed it down to six, there might be two or three that we sketch out real quick and say okay, let's pursue this path too. So it might grow to eight or so. Once we had that, we really had a chance to get to the nuance. So we take each one of those and exhaust it and put in the typography and start looking at color. Then a lot of times in that next presentation we would begin to apply it, not always, but you know some guys just can't visualize unless it's on their business card. Or if you really want to sell them, put it on a flag in front of the building, which we did a few times. Put it on things that are really big and larger-than-life. So, let's assume that we didn't do that, we'd go through that second phase, we narrow it down to two or three and that's when we get into a real serious application phase, the color phase and make recommendations. And make a third presentation. And then they picked the one and then we go in and start applying it to the beginning applications for real. So, there's the process.

DA: Yeah, people that think it just kind of falls out of our head are crazy. I mean, occasionally it does, but like you said, that's a once or twice in a career type thing. The next question was how and when do creatives engage clients. But it sounds like at your shop they do all the time.

RP: Right.

DA: In a perfect world, how should that agency/client model work? Are there specific gives and takes that could be better? Do you feel like the way you did it in your shop is the exact right way or what could you change if you could?

RP: Well, I have one client that comes to mind when you asked the question. One of their values is that they're cordial. I started working for this company when they were a Fortune 500 company – I did their annual report. And when we did their annual report we had to go get in front of their most senior executives and gain their confidence so that when they had other assignments, like branding or packaging, this particular company had a real estate arm too. So, then we had the ability to get in and help them brand these real estate concepts. And it was amazing how they did the hiring. The people in this company were cordial. They were considerate. A lot of times the first question that would be asked when I went into any business meeting would be, “Have we paid you? Are you guys up to date?” You know just, nobody asks that question.

DA: No, they don’t.

RP: Are you guys getting taking care of all right? Is this a win-win for you guys too. So, ask the question again. I’m sorry – I started kind of rambling.

DA: No, that’s okay. You were talking about it. How do you feel the agency/client interaction model should work in a perfect world?

RP: So that is the foundation that this relationship was built on, that trust and mutual respect. But when it came to doing their annual report I almost never got to do the annual report I wanted to do. And as a graphic designer it’s pretty frustrating because you’re out there every day looking at really good work and the sort of corporate literature that’s really getting a lot of recognition and then they’re not, they’re in their own little world. And again as a designer, and even the guy that owns the firm, I had to switch to a different gear and just wrap my head around [the fact] these guys are living and breathing their business. And you think you might have the right idea, and you may, but at some point those guys are the client and my job is to make it as good as it can be even if it isn’t universally my idea. I did not come up with it from beginning to end. And so there’s just a tiny compromise. And I can’t, in 30 years, I haven’t figured out a way to get around that. And I don’t know even if you further along if you do win. So if there’s anything that I can do differently is wish, I had the ability maybe to be a better salesman. I kind of look to myself as like, did I just not give them enough reason why this is the right thing to do? Why this is the direction to go? Did I quit too soon? You know because you see those identities out there and those reports and you think, God dang, I wish I’d done that. And it’s just really hard. And you don’t win that many times.

It’s interesting, and you know this because you’ve been in this business long enough. When you started out and your assignments were more boutique, and you weren’t doing them for a lot of money, you could tend to do better work. Like I just did a freelance project for an architect friend of mine for boutique hotel and I knocked it out of the park. But if I were working with Hyatt or Four Seasons, it never would’ve happened. You know it’s just the higher up the food chain you go, the more difficult it is to hit those home runs. So, if I could do it differently Id try to figure out how the heck do you – you know these companies get big and there’s too many people having too many opinions. How do you navigate that and get the best idea sold and executed? I hope that answers your question.

DA: It does. And I agree with you completely. There’s never been a job in my career where I’ve stepped back and said, man, that’s perfect. I just couldn’t have done any better. There’s always something. No matter how good it is, you’re always kind of going, man, if I’d only done this or this or this, you know? So I think that’s just kind of in our nature as designers to second-guess things constantly.

So, you said that your shop started to bring on account service people, did you do anything specific to match the account service rep to the client? Was it business type, or did personalities ever play into those decisions?

RP: Yeah, they tend to work its way out. I’ll tell you how it happened, the big growth spurt from our company. You know we started in Dallas. And I built that firm up to about 15 people and then I pretty much took a designer. I told my partner I was going to go do it again in Austin. And so I left that studio and all its business, took a couple of close relationships to Austin and started all over. And like we did in Dallas, the model was to service the agencies, as sort of the baseline and then you would get your own personal accounts as they came in, just based on your reputation of work or somebody needed a specific branding assignment and heard about our boutique and we came recommended and we got the project. So through that course I ran across a really talented creative director at one of the other big agencies in Austin. I was so impressed, he was one of the smartest guys I ever met, and he was so articulate. He's the guy that I really went to school on, or he took me to school. And he helped create a lot of the systems that we use to really dig deep with bigger brands. He had a real mind for technology. And AMD has their corporate headquarters in Austin, Advanced Micro Devices. And he'd also had experience at his agency with Hewlett Packard and some other technology companies you probably never heard of. There was a ton of them in Austin all starting up at that time. Citrix – and we did some things for them. Austin Ventures, venture capitalists that got us involved. He was just a guy that needed to be at the front of the table when it came to these IT things. And so he could handle that part of the business. I did annual reports, real estate, things that were more in my wheelhouse. So we kind of divided it that way, but we didn't have an account service. We were still wearing all the hats. But then, as we got into it more and more, we were hiring identity strategists. And there's one in particular that really clicked, and so we hired her. And she had the ability to handle her own accounts, and she did. She was shoulder to shoulder at those big IT meetings with AMD. And then she had her relationships too. She came from Hal Riney and she was working on some [of the] very first websites, ever. She had that rich background, so she helped us develop the web side of our business. And so it was really more about by discipline and background and expertise than it was personality.

But now that I'm in an advertising agency with 80 people or so, there's a big enough pond – we have the staff. We have lots of capable account service people, for any new project that comes in there might be two or three that would be right for it, but there would be one particular person who would be the most right. And so that's the way that we would handle it today. But as you know, it's more about who has the time? Who's not already up to the gills – so a lot of times that trumps everything.

DA: Yeah, you don't have people just sitting around waiting for something to do.

RP: Exactly.

DA: Okay. How do you feel the agency/client dynamic has changed since you've been in the business or has it? And specifically, how has agency/client communication changed?

RP: Well, clients have gotten very smart. You know, that's part of maturing in the business is your clients get bigger and you experience larger and smarter client-side people. And they can be as up to speed on technology as you are. So it's not as mysterious to the clients anymore. I've been in the business long enough to where – and there's still some of it, where there's a little bit of perceived mystique and hocus-pocus magic on the creative side. And it's not so much that way anymore. I mean, more and more, we're dealing with MBA's on the client side. That are more schooled than we are, you know being the dinosaurs that we are, if you been in the business long enough. You know these are all really sharp twenty-somethings that just got out of school and are totally up to speed. So that's been the big thing that I've seen on the client-side as well as just being, particularly with our agency, much more plugged into environmental issues. There's more concern about that, so that's kind of an aspect that runs through. And, of course we're an advocacy agency. You know, obviously we attract that kind of business.

Then I guess on the agency side, the way that we interact there's the ability to communicate moment by moment via email and sending PDFs back and forth. So much of it happens without being face-to-face. We're all moving so fast that's becomes as much the way that you get things done as not done. I'm here in Denver so I never see my clients, and unless it's a major presentation and I'll hop on a plane and head that way. We really tried to use Skype and when we had a Swiss client we did do that with them. But, the technology is still so buggy that a lot times we just said forget it. Here's the PDF and you just take them through slide-by-slide and talk to them on a really good conference call connection. So, it's a lot more across the ether. And, clients are okay with it. It's just such a timesaver.

DA: I hear what you're saying that it seems like you would say face-to-face is best but that can't necessarily always be done anymore. Do you feel like something's been lost in there somewhere?

RP: Yeah, I do. I think, absolutely, there's so much lost by not being able to see body language, facial expressions, read the other people in the room. It's like having one arm tied behind your back for these big presentations. If they go really well then I think it's the greatest thing in the world. But if it doesn't go so well, I think, man, I wish I had been there. I wish I could've seen so and so's reaction to that. Even though you have really good account people that are reading the room and telling you, There's nothing like being there yourself. If I'm gonna live in a part of the country that I want to live in, that makes me happy, that's part of the sacrifice that I have to make.

I sure wish there was technology like Skype or Google chat that really worked. I don't know what your experience has been like...

DA: It's been awful.

RP: You know, send a man to the moon, but you can't get that right.

DA: Yeah, you'll be talking and it'll just freeze up on you. It's terrible. I agree completely.

RP: Yeah. But it'll get better. The other thing I want to add to that is I think being able to work remotely is the greatest thing in the world. Because you get creative talent that you otherwise wouldn't get. Some of the projects that I'm working on right now, the writer is in San Francisco, the animation house is in Atlanta, I'm in Denver. The agency is in Austin and the client is in Austin. And it's that collaboration of all these "best of breed" talents that all come together and it just happens to be on the phone and in the ether. And man, isn't it great that we live in this age to where that's a possibility? I think it's wonderful, but it does have that drawback.

DA: Do you feel like this size of the client's budget plays in to the agency/client dynamic or maybe a better question is do you feel like the client thinks it does?

RP: I'm sure the client thinks that they get short shrift if they don't have deep pockets. I'm sure they think that. But I don't try any less hard as a creative person to solve their problem regardless of how much money they have. I usually take it on as like, okay, that's just another aspect to solving this problem. How can I make it the perfect solution with this particular set of parameters? And I'm the kind of creative person that – I work nights and weekends, I'm thinking about it 24/7. I'm sure you're the same way. I don't go, "oh, his three hours are up, I'm done!" I never do that. And I think that's why clients come back to you – just because of that. Plus they have an experience of working with you – it's not as much about how much money they have to spend. It's how hard you try.

DA: Yeah. And well, you've probably done this too. If it's something you're really excited about, it doesn't matter if it has no budget, you're gonna just kill yourself on it just to almost please yourself more than the client.

RP: Yeah, that's right.

DA: You talked about this earlier. Since you feel like trust is paramount in the development of effective creative, if that trust is ever undermined, can it be restored or what can be done to restore it? Have you have any instances where that's happened, where something skidded off the rails and how do you get it back on the rails?

RP: Ah, yeah, I have had that experience and yes it is possible to get it back on the rails. I assume there are a lot of creatives that are wired the same way that I am. We're all incredibly insecure. And you know we think that this is what we think is going on and it almost never is. But, I've had some come to Jesus meetings with clients where I didn't think they'd ever use me again. I was doing a website, again for a Fortune 500 company, and these guys were under such incredible pressure. This has been a while ago and you know, you've been around long enough [to know] this is all new. We're still making it up. And so there's no exact science, for making these things come to fruition. We had a damn good team [but] there were some moments where I had them talk to me like I wasn't going to work for them again because things were foreign to them, and they were having difficulty wrapping their heads around it. They didn't understand the technology. It was mysterious. But because I didn't freak out and I was calm and measured in my responses, even though maybe I was talked to in a fashion that I didn't think was right, they respected it. And it made the relationship even better because they saw how our firm behaved under fire, under pressure. And you know, we made the deadlines, everybody loved it, it was very successful. But there were some moments where I thought, you know there's no way we get this back on the rails, but we did. So it's a lot about swallowing really hard and shifting to a different gear and not trying to be right. Just trying to keep the eye on what the goal is and solving the problem.

DA: We always want to be in front of the ultimate decision-maker whenever we do a project, but are you adamant about that? And if you can't be in front of the ultimate decision-maker how do you proceed? How do you help arm the folks you are working with?

RP: Hold that thought for a second because there's one other sidebar to the question you just asked. In regards to getting things back on the rail, I have had clients that were disrespectful and continually disrespectful. Even though I needed the business, I walked. Sometimes you just have to. Sometimes you'll bump into that personality type that is just not a nice person. And life is too damn short. You know, I want to be around people that like me, respect me, and love me. That's what makes life rich and wonderful. So I don't swallow hard and shift into different gear unless I think that person, deep down is a good person. So I just wanted to say that.

So ask the next question again.

DA: The next question was, we always try to deal with the ultimate decision-maker but if you can't, how do you proceed?

RP: It happens all the time in the corporate world where they have marketing people that are in between you and the big executive team. Because the executive team perceives that they don't have time. Which expends more time, as you know. It's something that gets off-track because the communication isn't direct or it's misinterpreted. But I guess what I try to do is anticipate what would happen if I was in the room, what would I say about the project? I wouldn't leave anything to chance. I wouldn't say, visualize this. I would actually do that for them so they actually could see it and look at it and touch it. And I would go through the presentation in my mind and build it into my presentation that the marketing person then goes and takes it to the CEO or the CFO or whoever else we'd be presenting to. I always feel a little bit handcuffed when that happens. And that's probably another thing that I wish was different about business. I wish that, and I take some responsibilities for it. I wish that I could be more persuasive sometimes when it really just needs to be presented directly to the CEO – those guys are just, they're just slammed. They have no personal time. They're always on a plane, back-to-back meetings, responding to all those shareholders. I just can't imagine. And so I try to respect it, I try to spoon feed it to them, and put it in the most condensed, easily understood presentation that even if that marketing person wasn't in the room they'd still get it and I guess that's the best you can do. Just to try to make it as bulletproof as possible and just take questions and have the answers right there, written down. That's helped. It's not the perfect solution, but it's the best one I've come up with.

DA: Rex, are you familiar with the co-design model of creative development?

RP: Tell me about it.

DA: Well it's a lot like what you're talking about. It's almost continual client collaboration and then also even bringing in some of the client's users as well to help mold the project. That could be focus groups, it could be in-depth interviews, it could be blog postings, all those kinds of things. Capturing all that end user data and letting that mold the direction of the project. Now it's usually applied to more product design and things like that, but it does have some applications in graphic design. And just wondering if you've had any brushes with that where the end user helps drive the creative process. You know Doritos has done that with the Super Bowl spots.

RP: Yeah. The answer to that, in the advertising world is absolutely. We're constantly doing online testing and focus group testing, in any kind of crowded or populated area like shopping malls or that sort of thing, making calls and getting people to react to things. It most definitely molds the creative that we do. The model for the agency now is that we get RFPs that are really specific in what you do. They're looking at a lot of different agencies so you have to have to go line item by line item, following the rules if you want the business. But usually when we want in the business we take the creative that we want to pitch and start doing focus group testing. Then we start massaging it and being collaborative with the client and the feedback that we're getting from focus group testing. Now we're doing it at the RFP stage. So we're spending so much money and time getting that feedback before the client ever sees it. So I didn't know it was co-designing, but that's part of the process.

DA: So you're actually doing hard-core testing in the RFP phase, that's interesting. That's the first time I've heard that. Typically with RFPs the agency has free reign to do whatever they think is best. I'm not saying that you still don't do that, but it's interesting that you bring in that level of testing on the front end. Talk to me a little bit more about that. Why have you done that? Why do you feel like that's a strategic way to go?

RP: Because there's so many insights that we get from that. You know we're not like anybody else. Particularly in the advocacy world a lot of the end-users of the things that we create are people that are using food stamps, borderline poverty-level. The slice of humanity that doesn't have cars, [they] have to depend on mass transportation. Their grocery store experience is entirely different than yours and mine. A lot of times it's a single mom and there's no dad around. And so there's no way that we could pretend to understand their world. Because the agency has 30 years of experience of doing this type work, we have good gut feelings but we can still be really wrong. And so we give it our best four or five shots and then we take those ideas to them and say, what resonates? What works about this, what doesn't work about it? And man, it just helps you from making a really big misstep.

DA: So it sounds like there's a lot more focus on the front end. The RFP process – not always, but I think in general is more of a beauty contest. Your approach takes it out of that beauty contest phase and is more grounded.

RP: Absolutely. It's all about the idea, and less how it looks unfortunately. And for a graphic designer that is painful.

DA: Yeah, I understand completely. Well, that's all I've got, Rex, unless there's any other pearls of wisdom you want to in part before we go?

RP: So tell me what the next step is, you're just trying to develop a summary of client/agency relationships and how it could be made better?

DA: Yeah, how it can be made better. What are certain groups doing that others may not. Just little things, kind of hints, tips and tricks that can be used to help build a better agency/client interaction model. And from the interviews I've done, I'll be writing my thesis paper over the next few months. And after that I'll be developing a visual thesis. What format that's going to take at this point I don't even know yet. I haven't even begun the process. They want us to write the paper first. So that's kind of where I am – just gathering all this information. And what I will do is take this interview and get it transcribed and then I will send it to you to look over and say, yeah, that's what I meant or that's not what I said.

Appendix M

Nicole Satterwhite

Senior Design Director – Willoughby Design

Telephone Interview

June 4, 2015 at 4p.m. CST

Duration: 32 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does Willoughby Design have a formalized procedure for client engagements or interactions throughout the creative development process?

NICOLE SATTERWHITE: We have spent the last 10 or 15 years really trying to come up with our process for that and really solidify how we go through the creative process, both internally and externally we know what steps constitute that. So when we write a proposal for a client we detail out all of these steps with them. And you do have to change things around [for each] client. But in general our process stays pretty well the same. You meet and greet, you rap, you write the proposal, there's usually a few revisions and then you get the contracts signed. And we typically have a very large kickoff meeting on the executive level. Maybe a half-day or a full-day to glean as much information as we can from them. And then we distill all that information into a brand brief. Once that's signed off by the client, we typically then go into design exploration at that point.

DA: Is there anything about your model that is unique to Willoughby Design as opposed to other agencies or is pretty standard?

NS: We really have focused our firm on figuring out that brand strategy first to make sure that that foundation is made before we start designing. And typically through that part of the process it answers what the design should be. A design is not just to make something look good – it's [about] serving a purpose. And that outset brand strategy really sets the purpose of who we're speaking to, what are we trying to accomplish. The brand personality we need to convey. I don't know that it's that unique to what other firm's do, but we are pretty heavy on the strategy portion.

DA: That makes perfect sense. Do you have any PowerPoint slides or any type of thing that you'd be willing to share with me that you show to your clients to say, here's what you can expect as we begin this project?

NS: I might be able to dig something up. So you're looking for the process that we're explaining to the client?

DA: If possible yes.

NS: Okay. It's typically in a proposal.

DA: I certainly wouldn't want anything that's propriety, but if there is anything that you all use that you wouldn't mind sharing that would be helpful.

NS: Okay, let me look into that.

DA: Great. When do you check in with a client during the creative process? Are there specific steps? You mentioned the brand brief. I'm sure there's are touch points along the way, but can you walk me through how and when you talk to a client?

NS: Definitely – from the get-go or once we start the design process?

DA: I would say from the get-go.

NS: Okay. So as I mentioned we typically have a big kickoff, discussing the strategy and usually there's some back and forth creating that strategic brand brief. We'll do round one. And then maybe it goes back and forth a few times, but it's so information dense that typically we start working within that because it contains things like audience personas and brand positioning and core values, competitive set. So there's a lot of information on this 11x17 sheet. So that's when we'll really start to know that client and have a lot of contact with them. Then after that's signed off, we start our internal design exploration. If we haven't done a significant amount of research during the strategic portion then we really start diving into it in the design phase and the exploration phase. We really want to get to know who we're talking to, what the competition is doing. So we'll do a really large visual audit. For instance, when we signed [on to create] the brand identity for the city streetcar, we researched "streetcar," mile assistant" and "bus assistant" across the country and abroad to figure out best practices. You learn a lot from seeing what other people are doing. And typically we start with the segment we're working on but then get inspiration from looking at different segments that talk to what you're working on. So, round one is exploration. We will come up with maybe three big ideas and present those to the client. And then we have them sign off on the big idea. Then we take that big idea and bring it back in and start to roll that out and refine it. We believe that an identity is not just a logo – it's everything that the consumer comes in contact with. So when we're designing identity it's not just a logo, we show it applied to a lot of different touch points so that the client can see what their entire kit of parts will look like. Once the client signs off on that then we start moving into creating final art, which could be a lot of different things depending on what they need, whether it's starting to program the website or starting to design print collateral. Then we typically – with brand identity that always include developing a brand standards manual. Because depending on how large the client is, sometimes they might have an internal team so we will work with them to develop a brand standard and walk them through how to roll out the brand. Then other times we are doing it ourselves.

DA: How involved do you want the client to be in the concept generation? I guess, how early on do you include them and how early on do you want them to be involved?

NS: I like to get them involved right away because a lot of times they have something in their minds that they think it should be. So we try to extract as much from them as we possibly can. So that's often why we do these big idea boards first or mood boards. Say, okay, is this brand a Crate And Barrel type of feeling? You know, where are we on this spectrum? How modern, how sophisticated, how playful? So we really try to get feelings from them up front because there are just so many options to go down once you start developing an identity.

DA: What level of finish do you tend to show clients for just your initial work? Are they full-blown comps, are they sketches, are they storyboards, animatics? Like where on that spectrum of really loose tissue to almost finished polished work do you show them for initial stuff?

NS: We typically don't just show sketches because we want to show them a little more polished than that. So round one with the big idea is typically creating boards to get that big feeling across. Then we will sketch internally to discuss our ideas. But what we're showing to the client for round one designing inspiration is pretty tight computer renderings.

DA: Talk to me about your rationale for that. I understand exactly what you're saying. Are you looking for that wow factor or is there a specific reason you feel like the client wouldn't understand loose stuff?

NS: Yeah, I think a lot of times the client can't really understand the sketches. I think a lot of times, during that round one design meeting we might sketch there in the meeting, like a

Charrette to kind of say, okay, this isn't working – what if it's more like this? It kind of depends on the client because if there used to buying design a lot and they're used to working with teams like ours, it's kind of a different situation. For instance when we work with Hallmark, often it will be sketches for round one just to get that big idea across. Because they are very visual people and designers themselves so they know how to discuss sketches. So it kind of depends on the client really.

DA: So you would say it kind of depends on the client's, for lack of a better term, their sophistication of understanding how the design process works mainly?

NS: Mmhmm, yeah.

DA: I'm not sure how Willoughby is structured, but do you have account service and creative? So my question is, when do creatives or the folks like you who actually create the work engage with the clients or is there an account service side that is the keeper of the contact? Explain that process to me.

NS: We're fairly small. We have 17 people so everyone here wears a lot of hats and we don't keep our account management separate from our designers. It's very collaborative. Designers are brought in from the get-go because you learn a lot during that strategic phase of it. We do have an account manager assigned to each client to handle those day-to-day communications and depending on the size of the client that might be a specific account coordinator or manager, but if it's a smaller client it might be one the designers that are just handling that day-to-day communication with them.

DA: So basically depending on how big the project is will determine how many people you throw at it, am I hearing that correctly?

NS: Mmm hmm. That's how it is.

DA: Okay, great. Say you could design your perfect agency or your perfect design shop. How would the process work and would it differ from what you're doing now? I guess, how would the engagement process between the client and the designers work if you could, if you could build it yourself?

NS: That's such a good question because I've been here for 18 years. I feel like I have been a large part of building how that works with the client. So I can kind of mold that and knead it.

DA: Okay, so you would say there's really nothing that you would change about what you do now, and if not that's perfectly fine. That's great if that's the case.

NS: I think you always have to be nimble and adapt to specific clients because no two clients are the same and so it's not completely formulaic on how you devise that process for each client. That's kind of tricky, but that's also kind of the fun part in dealing with people because people are just different. You have to adjust to how you work with them. Some want to be very involved, some don't want to be very involved.

DA: Say I walk through the door and I'm looking for a new brand identity. Do you do anything specific to match who will work on my business as opposed to other business? Is it, it is by type of business, do personalities every play into the decision? How do you decide who works on what?

NS: A lot of the time it's determined by style. We have designers that have very different styles here and different strengths. So we try to match as close as possible designers that might be best suited to work on that type of work. Sometimes that doesn't always work because that designer might be booked up on something else, but as much as possible we try to shift people around to work on projects that they're most skilled for.

DA: When you start the pitch, if it's an RFP and you've been asked to pitch, does the client often say, "I wanna know exactly who's gonna work on the business"? So before you can kind of even deem a style do you just say, "Here's our entire team and once we know more we'll decide" or how do you handle that?

NS: They do want to know who's gonna work on it because they too want to make sure that personalities mesh. So we'll typically put at least one or two people from management on that account and then try to match up experience and skill level with that client and we will, as much as possible, try and tell them ahead of time. Once you get into it and we may be bringing in another designer or two that they didn't meet at the very beginning, but they know their core team up front, because they want to know past experience and things like that.

DA: It's all in just about being as transparent as possible on the front end and say, hey, we need a little flexibility, but this is who we perceive to be your core team.

NS: Definitely. We always believe in being as transparent as possible. There's no reason to hide stuff and that just gets you into trouble later. (Laughs)

DA: Exactly. So you've been with Willoughby for 18 years. Do you feel like the client/agency dynamic has changed since you've been there and if so how?

NS: It's changed a lot – I mean the whole industry has changed a lot over the last 15 years. When I first came here I didn't have a computer for the first three months. It was – there was a lot more hand work and mock ups done and things like that. It wasn't as strategically driven then. Our client base has changed a lot over the last 18 years. It used to be a lot more, smaller, local, entrepreneurial clients and now our client base has gotten bigger and more sophisticated. So we've grown with that, developing our strategy and digital skills and it's changed a ton over the last 18 years.

DA: So basically the biggest change between the dynamic now is your clients now are more strategically focused, or you're pushing them to be more strategically focused whereas before it was more just aesthetically focused?

NS: Mmm hmm. They hadn't grown into that. Which I love that direction because then you're doing designs which are purposed. It's not just "oh, this looks good." I think that step was always there in the roots of design, but it just wasn't as – it wasn't stated clearly. It was more of an instinctual thing where a lot of what we do is – some of it's based on instinct, but it's more rooted in raw business strategy now.

DA: How about the way you communicate with your clients? Have you noticed the way you communicate with your clients is different? Was it more face-to-face early on where now it's more email or texting, how does that work?

NS: Well, we don't have a fax machine anymore. So that's changed. (Laughs)

DA: Probably for the best.

NS: Yeah. We would fax things back and forth which when you look back now, it's insane. But it has changed a lot because it allows you to work globally so much easier. I mean, it used to be faxes and you would FedEx designs to a client, where now it's moving so much quicker because you can send them PDFs and you'll get instant feedback. It's just moving a lot faster, which is good and bad.

DA: Talk to me about that a little more, about the good and bad to it.

NS: Well, the bad is that everything is expected to be done so quickly because everybody and their brother has some sort of design program so they think you just press a button and it's done, but you and I know that's not how it works. So technology makes it seem like everything can be done so quickly – where if you're really going to do it right and think through it, you need time to digest it and do it right. But the advantage is before, if a design was due on a Wednesday you'd have to ship it out on Monday night to make sure it had the two day FedEx to get there on Wednesday, whereas now you can just work right up to the minute and then upload your file. So you do gain that time.

DA: So we've bought ourselves some more time, but on the downside clients know that so they expect it even faster, is that correct?

NS: Yeah.

DA: Do you feel like the size of the client's budget or project plays into the agency/client dynamic? I know we don't ever want say that it does but does it? Or does it not?

NS: Oh, I don't think it does that much really. I think that client dynamic sways a lot with whether there's mutual respect there or not. I think that's a bigger issue. When clients are respectful and appreciative that makes you work that much harder for them because they appreciate what you do for them and then that in turn makes us really respect them and who they are. It's not really about the budget, you know.

DA: Yeah, it's just more about having common courtesy and respecting what each other does.

NS: Yeah.

DA: Would you say that's a two-way street?

NS: Definitely.

DA: That kind of leads into the next thing. Since trust is kind of the ultimate thing needed to develop great creative. These folks are trusting us as designers, to watch over their brand and we're trusting them that they're giving us the right information. Have you ever seen examples of where trust has been undermined and if it has can that trust ever be restored? And what can we do to restore it?

NS: Well, I think that you have to build that relationship with a client. They don't trust you right away. You have to get know them and they get to know you – thereby you have to prove to them that you know what you're doing and be able to extract that information that you need from them. I think during the process, mistakes are always going to happen, but it's how you deal with those mistakes that determine whether you keep their trust or not. I mean, we're human so things happen, but it's how you handle that. And there are times when you can completely lose their trust and not gain it back, but I think if you have that transparency and honesty from the beginning and you're an earnest person and you are doing your best work, then you've done a good job of earning that trust and keeping it.

DA: Getting to know them, how do you do that? Is it just time working on the account or is there anything special? Do you physically have off-site meetings where you sit in a room and talk to them for hours and hours on end – is there anything specific that you do to build that rapport?

NS: Yeah, that first kick off meeting that we do with clients really helps to build that because you're sitting in a room with them for between four to eight hours just having this very open and honest dialogue so you really get to know each other during that time because you're all in one room. And we try to make distractions very limited and really focus on what we're doing. A lot of times we will host these at our design barn, which is located out in the countryside outside of Kansas City, and we'll bring executives there and there are really are no distractions. You're in the middle of a cornfield and you're really focusing on the task at hand. Just getting to know them and their business. And then you start to create a friendship with them over time because you do spend a lot of time together, whether that's in person or It can be done via email or talking on the phone, but even with international or clients across the county, it's nice to at least just meet them face-to-face once. And I do think that makes a difference. It's not quite the same to me as video chat though it's a decent substitute – still meeting people in person is always the best.

DA: So, that human interaction, that being in the same physical space, it makes a difference you would say?

NS: Mmm hmm, it does – to at least have that one time to get to know them.

DA: We always say that we want to deal with the ultimate decision-maker in the creative process. Do you all insist on that or are there times when you just can't deal with the ultimate decision-maker and if so, how do you proceed?

NS: I mean, you can insist on that, but it doesn't mean it's always going to happen because sometimes the CEO doesn't want to be [involved]. You can't meet with them. I mean, we really strongly suggest it because you can spend all this time and this work keeps going up the food chain, but if the person at the top hasn't seen it and blessed it, then you could have a whole lot of work wasted, a whole lot of time. So it is important to make sure that top level is involved as much they're willing to be.

DA: If you can't deal with them, are there any strategies you all have developed? Do you try to arm your contact with as much information as possible? Do you build presentations for them? What do you do to help that sales process?

NS: We do, often times if we can't meet with them and our direct client is the one presenting it to them, we will build a keynote presentation that has the design and even talking points for them and put the strategy all together. So that even if they're just reading the script and showing it page by page, we can convey what we need to through them. We've done that quite a bit.

DA: So that leads into the next thing. Are you familiar with the co-design model or co-creatorship model at all?

NS: A little bit. Not very.

DA: Well, it's a lot about getting buy-in early and often. The idea is that the client as well as even their consumers have input into what the design will be. It's almost like sort of open source or beta testing where you throw it out there and let people react to it and then have that drive the creative process. Would you say your agency does some of that?

NS: Yeah, we do some of that and I think a lot of that is done through consumer testing, which we have a lot of different ways of doing that. Sometimes it's literally beating the streets and sometimes it's an online search or working with a big research company to do a national study. But there's a lot of different ways of getting feedback and it just depends on timing and budget. We've worked with a notebook company that didn't have time or budget to do in-depth research and it was a line notebook for teenage girls. So we rounded up our ten best babysitters and friends of friends, teenage girls, to come in and give us their feedback on round one of design. So sometimes you have to be really creative on how you get that, how you use that co-design model.

DA: Sure. So, basically you would say it's very important, but sometimes it's formal, sometimes it's more informal.

NS: Mmm hmm.

DA: Have you ever had an instance where you thought the work was spot on and you've called the target users in and they've said, "No, you're way off base"?

NS: Sometimes and it's a kind of a dangerous territory because one person in a focus group can skew everyone else. So you have to take what they say with a grain of salt.

DA: It's kind of whoever screams the loudest in a focus group, unfortunately.

NS: Yeah. Sometimes you just need to go with your gut and what the research tells you.

DA: That's all I have right now. Have I missed anything? Are there any parting words of wisdom about the creative process and how a client is involved in it or how we as designers and creatives interact with our clients to create the best work possible?

NS: Oh gosh, I don't know. I don't think so. Your questions were really good.

DA: Nicole, thank you so much for your time. I really appreciate it.

NS: You're welcome.

Appendix N

Nelson Eddy

Partner, Creative Director – DVL Seigenthaler

Personal Interview

May 27, 2015 at 11a.m. CST

Duration: 34 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: I'm here with Nelson Eddy of DVL Seigenthaler. We're talking about client engagement. My whole thesis is about ways different disciplines engage their clients. So my first question is, does your agency have a formalized procedure for client engagement throughout the creative development process or any project development process?

NELSON EDDY: Yes, and it's across any development process. One of the things we found out early on was a lot of people when they're pitching business will say, we enjoy collaborating with our clients. Because they know clients like to hear it. And then when it gets down to actually doing the work, they say no, no, we'll show it to you and then you let us know what you think. Because of that over time we've gained clients who have heard we collaborate more. In both just general concepting of like programs beyond ads and in any kind of creative service there were multiple points for client engagements. One of those is from the very front you engage a client on a creative brief or on a project brief of any kind. And that's pretty traditional. Getting them to sign off on it, making sure they've seen it, not just having an AE fill it out, that's really important. Also, we do a lot of brand work where we'll do a brand discovery. And that's to get the client to listen to their audiences as well. Because any feedback or input we get from a client is usually filtered for us [not from] the consumer/end user or if it's an association, the membership. So we do you also try to – when the budgets will allow [include] a heavy research component. Where we're not just hearing from the client but we're also hearing from their main constituents. And not just us hearing, the client is hearing. So their decision-making process isn't based on what looks good or feels good to them. So that's one point. Then typically before we get too far along, when everything is just initial, we'll run what we call vectors or directions by the client. We'll say, here are some avenues of exploration, and certainly timelines of projects will dictate how much we go by. We have a system in place but sometimes we have to shortcut it because it's an, I need this tomorrow kind of thing. And that's usually with clients we've worked with long enough that you already have a great relationship. So traditionally we'll show them directions before we take the next step. And sometimes we'll show them five or six, telling them we're only going to explore three. You know help us pair it down. And they'll have input then and a lot of the interviewing we do at that point goes beyond just picking a direction, it kind of informs us on some things that they liked about it and didn't like about it, some concerns they might have early on. Then we'll go from there. Now sometimes we'll keep a direction we think really does the job, but they are little fearful of. We'll continue that one. Sometimes at no cost to them, just because we believe in it and feel like that's part of what they're paying us for. But our directive is always, give the client what they've asked for and what they're participating in. You've got to do that, but every once in a while you've got something you really believe in and keep alive as long as you can. But at some point you know when to say when. Because a lot of this process is, okay they give their input, they go away, they come back to it and they've had time to think about things. Things that were startling and made them nervous the first time, the second time they see when it's a little more finished. And even on those things we'll ask them, what makes you nervous about it, to kind of allay some fears that they might have. Then when things are still not in their final form we'll come back with, let's say, the three directions and/or another direction that we really believe in. They'll have one more time in the process as we're moving towards final for input. After that, once they've picked a direction – within that direction we might show them a couple of things. So they could have a third time to have additional input engagement. That's the formalized process, but I will tell you there's a lot of informal that goes on. Some clients it's better to get on a teleconference with them and show them a couple of sketches early on before you even get too far down the road, especially if they're new and you don't know yet all of the hotspots – the things that are just anathema, don't go there, before you take it [too far]. So within that process there may be multiple other ways. I think the ability to get on a computer and show people your work right off your desktop with Skype and with other things has made it a lot better. Because we're a multiple office agency now, we've gotten a lot better at using [teleconferencing programs], there are three or four programs we use depending on the client. Like Basecamp, is one that a lot of people use. There's a lot of client collaboration software that aids the process. And with certain clients we'll use those so they can actually check in and see where we are.

DA: Okay. Do you feel like this model is unique to your agency?

NE: I didn't, but I'm beginning to think more and more that it is. And the reason I say that is because you know everybody preaches collaboration, so you just figure everybody's got a system of doing it, but a lot of times that's just people talking the talk and not walking the walk.

DA: Do you have anything formalized, like any PowerPoint slide you could share?

NE: I can look for that. Cynthia probably does. Let me pull something from her.

DA: Thank you. You've talked about this, when you check in with a client development process, you said creative brief and then rough work and then multiple steps as you get towards finish.

NE: Yeah. Traditionally it's three times, but it ends up being more like four because you check in the client when you get the final and there are usually some tweaks you do there. So it's really four different times. And this is all in a perfect world – because we work with some pretty big clients – Jack Daniels or TVA (Tennessee Valley Authority). With them you might get to that initial process and have to make a presentation to four or five or six groups to get input.

DA: So you're making that first step multiple times?

NE: Yes. It's the same steps, but you might just present it to numerous audiences.

DA: And you're feeling you might get a little change from each one?

NE: Yeah well yeah, you've got to help people not get into group-think. I think we've seen an example of that here recently that everybody's gone nuts about – save them from themselves a few times. But yeah, with a big enough audience you tend to see what stuff is just personal preference, what stuff is truly directional and insightful and then what stuff is them living in fear of success sometimes.

DA: How involved would you say you want the client to be in the pure concept generation portion of it? Or do you want them to be at all?

NE: It just totally depends. Usually, when we have client involvement we'll do two brainstorms. And that's not a guise. The reason you do that is because if you have a client involved in a brainstorm, and we tend to do those more with bigger clients. Smaller clients, because they're so busy, there's fewer staff on hand. They've hired you to take care of this, so they want less. But then some of them just really in their marketing departments have a real creative bent and really want to participate in. So you'll do an initial brainstorming. We typically do two brainstorming sessions in a big project anyhow. The first one is just to get input, just to throw stuff out. And it helps if an AE or a client is there to inform us. They're not as good as a classically trained creative person is about not saying, well, you can't do that, but even that's helpful. And then we'll do a more traditional brainstorm for the second. We've gotten all that feedback, we've got some of the client's thoughts. And I think because we don't work in traditional teams here – we'll do logos where everybody works on them. Because were not so silo-ed in teams, it's a little easier for our people to use client thoughts and incorporate them because they've not been set up to be competitive against everybody else. By the very nature of that they're already thinking. At our agency if somebody has a good idea and I can improve on it or help that person improve on it, I'm encouraged to do that. It's like you can share the credit. And you know that takes a special kind of creative because for those who are just trying to build their resume, you know they'll fight that. All input is good. You've got to decide once you've got it what's going to solve the problem the best.

DA: What level of finish do you typically present to a client for initial work?

NE: Oh, it's rough. I mean for initial stuff the less they're making decisions on things like color and you know really getting in overly into the graphic treatment. Unless graphic treatments [are important to the concept] – you know, we'll do everything from sketches to sometimes just showing mood boards, just giving them the impressions of the style and copy and photography. So it can be very conceptual on a mood board or it can be a little more organized if the client handles that better, like some kind of sketch. And which is the challenge of a computer because every sketch you do on a computer looks like it's finished art. And if people think it's finished they start reacting differently than if they know it's initial. You're familiar with this place. I mean, we've done stuff on the computer and then traced it over just to keep people from going into that mode – this is done so I've got to pick colors. So the looser we can keep it and the more conceptual on the front end, they'll actually listen to the concept and not judge it by the final details. Sometimes it's amazing the great concepts that can be killed because someone didn't like a typestyle. It's way too early for a typestyle to kill the concept.

DA: How and when do they creatives that actually create the work engage with the clients or do they? Do you encourage – how do you handle that?

NE: You know, creatives are part of that brainstorming unit – if the client's involved, they're involved. The creatives are there with the presentation of the work, certainly of anything of any size, they're always involved. I dare say the only meetings they're not really a part of is that back-and-forth tweaking that the AE's are the conduit for. Any major presentation of the work a creative or multiple creatives, if it makes sense, are there.

DA: To follow up on that a little bit. Would you be comfortable with the client picking up the phone and calling the creative who's working on a project?

NE: It doesn't matter whether I'm comfortable with it, they'll do it. They do, because they're in the room and they get to know them. A really great copywriter, because clients love to see their thoughts organized, that's amazing to them, will usually build a relationship with a client. I mean a really great art director because they'll make it look pretty and the client loves that, they'll usually have a relationship. The only reason we try to control it at all is to allow the creatives to have enough time to get their work done. In other words, if you've got every client you're working on calling you while you are working on some other project, it's kind of [chaotic] – those kinds of meetings are better scheduled so that, okay, I've got the work in front of me, I'm talking to you. But we don't discourage a client. We tell people when we leave a meeting often, "hey, if something hits you in the middle of the night, pick up the phone and give us a call." And every once in a while they take us up on it.

DA: Say you could build your own perfect agency, how would the client/agency model interaction work? What would be the absolute perfect way to do it?

NE: I think time is the greatest [factor], even beyond budget, because budget is one thing, but time is the greatest limiter of any project. And by that I mean, a client only has so much time to spend on every individual project, especially if they're a big agency or a big company. With big companies, they're working on multiple creative platforms – they've got lots going on. And so they've got a limited amount of time. So you've got to use the time you're with them and engaging them, it's got to be as valuable as you can get it. So in the perfect world, I'd give everybody a 48 hour day, just so we can spend more time, not just doing work, but engaging with clients to do better work. So that's one thing, everybody's time is limited. That's why you come up with processes. And that's why even your best process you have to be adaptable in this world. I think the very best agencies are – it's more about respect. It's AE's respect creatives, creatives respect AE's and both parties respect the client. And all three of those parties respect the end user of the product – they own it. And if you don't think that's so, take a really great product, mess with it and see what happens on the Internet. They'll tell you they own it. And that's not the time to grant them their ownership. The time to grant the end-user their ownership is from the very beginning. So I think that – which is an easy word, respect. It's hard you know because everybody tends to think they can do the other guys job better. Creative people feel they can do the AE's job better, the AE's feel they could do the creative people's job better and the client can think he can do AE and creative work and AE's think they can do the client's job. You've really got to trust each other. You know my perfect agency is where you have that perfect level of trust. I know that's in an imaginary world where – and you had glimmers of that with clients to say, you know, I'm not quite entirely sure, but you've never steered me wrong and I trust you on this. And you've just got to make sure that you've engage them enough that you're not taking them down a path of destruction.

DA: So, that also has a lot of responsibility on the agency too that you have to say, okay, they really are trusting me so I've got to make sure I don't screw this up.

NE: Yes, right. Instead of collaboration it becomes combative. Okay, what's the agency going to try to slip by and do just so they can win awards? They're not really interested in communicating. And then on the other side, okay, they've asked me to do this, do I really have to do that or can I just show them what I want to do? And we've always gone on that philosophy, if you've got a great idea, you're gonna have to sell it and show them what they want and then show them what they need and work with them. If you can't convince them – I mean, they're the ultimate decision-maker.

DA: Talking about account service with clients. Do you do anything specific here to match account service with the client? Is it purely based on the type of business or do personalities come into the decision? Or how do you make those decisions?

NE: There's a couple of ways to make those decisions. One, we've grown to the point where we have some industry groupings. Consumer products have a group here. Professional services, like lawyers, real estate agents and others have a group here. Government relations, I mean, the whole government oriented stuff. So there are several different groups. So certainly if a new client falls within those expertise areas, you're gonna look to account executives who have that kind of expertise obviously. People's availability – you want to give the client the very best service possible and that goes back to the resource that's missing the most, which is time. So who's got time? And then there's always chemistry. You're going to do better work for a client if you're engaged with them and they're engaged with you. So there's a certain level of chemistry, thinking on the same page. You know there's as much art to this business as there is in science and there's as much relationship as there is business. You've got to get inside each other's head because the more you can be in lockstep, the better off you're going to be. And if you don't believe in client collaboration, it's always going to be hard for you to get in that lockstep, I think.

DA: Definitely. Do you think the agency/client dynamic has changed in the last decade or as long as you been in this business?

NE: Oh yeah, we're a different animal. I think the whole cry for collaboration, and I don't know if it's been driven by software that allows that to be easier, where you didn't have to be in somebody's office. I don't know what driven that or it's a perfect storm where people are realizing, okay, the client probably knows the audience better than I do, I need to get them involved in that. They've got some experiences, they seen things that worked and things that didn't work within their industry, which I may not have. So there's a wealth of knowledge there that you need to tap into. I don't know that's been driven by the evolution of just business in general or by software or it's a perfect storm and it's a combination of both. But I've definitely seen more collaboration. Our clients have always had a bigger voice in our agency than the traditional advertising agency would because we come from a PR background. When we really first started a creative emphasis at this agency, if I had, these are poor words but if I had to just paint it black and white I'd say the AE's had the upper hand. Because they control the relationship with the client and creatives were, you know. In a traditional ad agency, that's almost totally the other way around. The AE's are a conduit, but the creatives kind of command the relationship with the client, the AE's aren't [in control]. So they have the upper hand. Well we come somewhere in the middle of, okay, this idea of we got and it is not perfect. Probably quarterly we have conversations with people who are not managing this mutual respect really well. AE's who have gone off the reservation and creatives who have gone off the reservation. It's really hard to hire to that because they're not being taught that yet.

DA: How would you say specifically communication has changed? I mean, when you and I started it was pre-email even and everything was face-to-face, is new technology better, worse, the same?

NE: It has totally changed it. I mean, it used to be and you see this in how you're talking to the consumer or the end-user and how you're talking with clients, dialogue is very much, it's much more a part of everything you do. I think it is highly driven by technology. It used to be you printed ads, you'd run a television spot and it was broadcast to the audience. And I think that was mirrored in how things were creatively, you know, you'd get the input and you'd broadcast back to the client, here's what it is. Well it's not so much people publishing and broadcasting anymore, as it is people engaging in community and conversation. Those are the words [today] – community is a big buzzword. So that kind of community dialogue is represented in the client/agency side in this collaboration that they do. But you're crowd sourcing creative. You're informing your creative by engaging your audience in it. So there's more collaboration at every level. And I do think it's largely driven in technology, where you can instantly respond to a consumer. The amount of effort going into social media now by companies is amazing. In the old days, you'd say, that's a one-on-one conversation. You know? It's getting a lot more granular.

DA: Do you feel like the client budget plays into the client/agency dynamic or do you think clients think it does?

NE: That's that age-old dance you play. Just tell us the budget, let us show you what we can do. Sometimes I think people say, well, if I don't tell him how much money there is, they'll come up with something, they're not limited by the budget. But in the end you are, you've got to be able to produce whatever it is you think of. And I don't think a budget amount limits creativity. You know you can be creative with guerrilla marketing, not everything has to be four-color with a foil and embossing. I mean, we've won regional ADDYs on things that were just really kraft paper and stamps. Creativity isn't limited by budget. And budget is a key component of your communications.

DA: Let's turn that around a little bit. Do you feel like sometimes a big budget can get in the way of creativity? The reason I ask is you mentioned smaller budgets sometimes reading between the lines, it forces you to be more creative.

NE: Um, I don't know that big budgets get in the way. They probably allow you to use more tools at your disposal. So I think the creative process if it's done right is just as engaging. I think where you see more creative in smaller budgets it's figuring out how you're gonna – you've got additional obstacles to provide solutions for, so you're going to have to be more creative.

DA: Since trust is paramount in developing great work, how have you seen trust be undermined and once it is, is there a way to repair that relationship?

NE: I mean trust can get undermined when something doesn't go like you planned. And that can be from multiple of things. For example, we rely on suppliers. If suppliers don't deliver in time then we've got to bear that bad news to the client. And that can undermine trust, "You said last time this was going to be delivered here." It could be totally out of our control, but trust will get undermined. So in those cases you try to be as transparent and explain and over-communicate. I think you can fix a problem as long as the communication channels between you and the client are okay. Once the communication channel gets shut, you've got to do something drastic. And that can be, you've got to change members of your team or they've got to change members of their team or both. And we've been parts of all three of those scenarios. That's if you want to fix the relationship. Sometimes you just have to walk away because the trust has been damaged to the point it can't be repaired. But yeah, there are instances that it's repaired, but the only thing is if communication isn't flowing, if they're ignoring your emails, they're not returning your calls, it's like a marriage, you know? If there's no communication you can't repair it. It's always salvageable if the parties are both willing. They see value in fixing it. And if you've done good work for people it's much easier for both parties to see value in the relationship and therefore commit to doing the hard work. This sounds like a marriage counselor. But doing the hard work it takes to repair it. Unfortunately we've had those situations and sometimes we've been able to repair them and sometimes we haven't.

DA: When you're pitching creative or any work for that matter, are you always able to deal with the ultimate decision-maker? We always say we want to, but are you always able to do that? And if you can't, how do you deal with that situation?

NE: No, you're not always able to deal with the ultimate decision-maker. And we talked about those four areas of collaboration, times when collaboration is natural. If you don't have their involvement early on, in those early stages and the final decision – if you can't meet with the final decision-maker you really have to press upon your point person on the client-side the importance of letting them become aware or informed early on. The tendency of a client is, okay, I've got this big powerful guy who's my ultimate decision-maker, but I'm not going to engage him until I get down to the final. Well, if you want this to go right, engage them early on. Now maybe they'll miss some of the stuff in the middle, but for that first checkpoint make sure they're involved, so they can kinda figure out where you came from. The other thing is building a really good presentation. Where you're not just emailing a PDF of the final work or a .MOV or .MP4 or link, whatever the creative ends up being. You're building it into some kind of presentation. Because usually that presentation, whether they show it or not, it's all packaged together, that end-user or end decision-maker will see it.

DA: Do you feel like that early collaboration almost builds a co-creatorship type thing where the client becomes an advocate for the work?

NE: Yes. The more collaboration you have on the front end, the more – and that's part of the reason why you want that big decision-maker involved too because then they take some ownership. But you're right, even if it gets to the end it almost becomes like this mutual opponent that we're all working together to satisfy. Not that they're in an opposition, but you know what I mean. So yeah, if they're engaged in collaboration early on, they're more predisposed to not leaving you hanging but to put up a fight for you.

DA: One last question. You've talked about it, so obviously you're familiar with the whole co-design model?

NE: Yeah, yeah, yeah.

DA: And it sounds like that's real important to your agency. Can you give me an example of how you've seen it work or an example of how you've seen it skid terribly off the rails?

NE: There's less [a chance] – I would say then from a traditional standpoint [of things] going terribly wrong because it just doesn't happen. If they've got that many checkpoints it's going to stop before it gets [bad]. The only things I could say would borderline go crazy is they get so involved that it slows down the process to the point you're over-fulfilling your budget. You know you're devoting far more time than you should. And that's just [because] you haven't managed the client well. But they've fallen in love with your process. And typically even though that ends up in over-servicing, it also ends up in more business. So you kind of take those lumps with it. Where it's gone really well I think, what I just said, it ends up if clients who feel engaged and enjoying the experience more and you get more business from them. That's where it goes really, really well. The one thing I will say is not every client is ready for that. Some of them don't want to bother. Even though it would make the creative process easier to have them more engaged, it's not in their make-up, it's not in their DNA. People don't come out of business school cookie-cutter, neither do creatives come out of the portfolio center or any place else they go. They've all got personalities. And some of them are just moving [fast] and they just want reports. They want reports and they don't want to get [involved].

DA: Sure. So it's all about reading the client?

NE: Yes. And you have to because they're not all ready for it.

Appendix O

David Krejci

Executive Vice President, Creative Experience – Weber Shandwick

Telephone Interview

May 25, 2015 at 10a.m. CST

Duration: 34 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does Weber Shandwick have a formalized procedure for client engagement throughout the creative development process?

DAVID KREJCI: You know, I've thought a lot about that question because, I think the answer is probably no. We're such a large agency and have so many different types of clients, it would be difficult to put too formal of a process in place for creative development, I guess.

But that said, we make an effort to have a center person who would be the account person, that you reference later on in some your questions, that is responsible for drawing whatever sorts of creative resources are needed for any given assignment. So, in some instances we need creatives for writing and in some instances we need creatives for the designing of a website or the design of a brochure. And those necessitate different sorts of creative skills and it would be that center person, what we call the navigator, to identify what kind of creative resources are needed, at least start the ball rolling. Not in all instances do they even know which type of creative asset is needed, but [we're] looking to them to draw in the right person. The second part for any sort of process, which happens for my experience, you know, half of the time. I would say it's a relatively new thing in our industry whether or not to be working against the creative brief, but so much has changed in public relations in the last 2 to 4 years. Prior to that we weren't really working off too many creative briefs, but now we have to for all the right reasons in that we have so many different skill sets involved that it just saves endless amounts of time and gets everybody on the same page. So when looking for processes, I guess, those would be the two that do exist, the brief, when it happens, and then that centralized person that interprets the client's needs and identifies what creative is required.

DA: Is the navigator different from an AE or account service representative?

DK: It's not at all different, except internally it is to us. And by that I mean, five years ago certainly the term navigator, implied by the title, was to be the person that needs to navigate their way through this maze of what is needed. It was a lot more of a streamlined process because it would have just been public relations – let's talk 10 years ago. Essentially you would listen to the client write a press release and pitch it to the media. So the term navigator wasn't necessary because you didn't need to navigate your way into a strategic planner or a creative director or a designer or a developer or a project manager. It's because of this new influx of so many new roles and skill sets and talents in public relations that we're loosely applying this term navigator. You know "Navigator" is not on a business card, it's not an external word [we use], just how we refer to the new role that the account services person, to use your term, to redefine their role. Because we needed to help them understand what was now required of them in kind of this new era of creatives and public relations.

DA: So basically you're expanding their role a bit, using that term to describe what they do more since the business has changed, is that correct?

DK: Yes, exactly.

DA: All right. During the development of a creative project or any project for that matter, are there certain checkpoints that you have with the client along the way?

DK: We leave that up to two things. First of all, to protect ourselves as we're moving down a path, we want to make sure that the client is signing off on the creative brief and then signing off at stages along the way depending upon what kind of creative assignment. So if it's an assignment where we do what we call a discovery phase – which is what we need to do on larger projects to figure the audience. Or if it's a website, to figure out what kind of server environment and technology environment is required and/or the client has. We need them to sign off on that before we put hammer to nail, as it were. But the second half of it [depends on] what our clients want. So, some of our clients want us to check-in with them with an incredible amount of frequency for a variety of reasons. And others are very hands-off. And I think again that probably goes to our size. We are a large global agency so there are just simply too many different types of personalities [and] client industries involved for us to have one way of doing things. So I guess to repeat, yeah, sign offs on creative briefs, sign offs on the discovery phase, so we know where to move forward, but then it's really up to the client and how they want to use that, that sort of time.

DA: So basically you tailor every experience to what the client wants or expects?

DK: Yes, very much.

DA: How involved or do you want the client involved in the creative concept generation portion of any project?

DK: Definitely want to hear from them when we're working against a creative concept or a creative project, we want to know as much about the industry, we want to know as much about the audience as possible. So one of the sources of that information, of course, is the client. So in that sense we want to know everything that they've got to tell us. We also do our own research through audience insights, comm score, those sorts of things to get information but their information about what they know and believe to be true about their industry and the audience is extremely helpful. As far as the creatives, coming up with the actual creative idea, it's a good question. I would say the way that it usually works out is we present them with it and then react to their reactions. We don't co-collaborate, if that's a redundant word, we don't co-create too many creative ideas with the client, it's more of a reaction to how they respond to our first offering of the creative.

DA: So you take initial stuff, put it out there, see how they react to it and then adjust accordingly?

DK: Yes.

DA: What level of finish do you typically show the client for initial work, sketches, finished comps, storyboards, animatics?

DK: All the above, but nothing, again is the same across the agency. So if we're talking about, we're a PR agency, so we don't do in a sense of advertising, we're not going to present a mockup of a billboard or a creative execution. But we do mockup photos, we mockup websites. We have found that it's somewhat of a treacherous world to get into unless it's a very finished version because our clients look at what we might call a sketch and often take it to be considered more final or more further down the road than we wished. So you're caught in this really challenging predicament of how much time do we spend of up front finishing this so they will understand what it's supposed to say versus are we painting ourselves into a corner because they think that our comps, and our spec work is what we're considering to be final? So it's a personal preference, certainly of mine, that I try to shy away from going too far down that path. And if it's a website I'd rather show them, a blueprint version of the website, some sketches of the UI as opposed to some finished comp work. I don't know if that all makes sense. I'm not avoiding the answer, it just varies so much and I don't think our public relations industry is as familiar with showing the creative before it's done. Therefore, we run into that risk again, as I'll call it, of painting ourselves into a corner. I think [in] the advertising industry the clients are much more mature in understanding what they're being shown is not necessarily final. And in our experience our clients aren't quite thinking in that same way yet. Perhaps because what normally we have shown them from our creative would be our writing – our press release, our annual reports, our writing, that kind of stuff that was final when they saw the first blush.

DA: That makes perfect sense. So basically, if I'm hearing you correctly, your personal preference would be to show rougher stuff but you don't feel like your clients quite understand this isn't final, this is just directional? Is that a correct statement?

DK: Yes, that's correct. And then you've got to do all this re-explaining and trying to back away from something that wasn't necessarily final. Or the worst thing that happens is they thought it's final and then they looked down upon your work because it's not as refined or as perfect as they thought it would be. It's not something you can't get out of, but sometimes it becomes uncomfortable because what they thought was final, you never intended [to be], and then they somehow think less of your work.

DA: How or when do the creatives that actually create the work engage with the client or do they in your agency?

DK: They do. I would say five years ago they didn't, hardly ever. It was very rare to get creative in the room talking to clients. But it has been an intense amount of effort to get creatives at the table at the first instance. And so if an account services person says to me personally, "When should we bring in the creative?" My response, not intending to be glib, is like, "As soon as you bring yourself in." We've just found that there's so much more success when the creative is there to listen to the client needs and to develop a relationship with the client as well. And this has been somewhat of a challenge because the account person is typically the one, of course, that carries that relationship and needs to very seriously understand the client, the politics and the industry. Sometimes the creative is coming at it from the outside and there's this tension of, I hope the creatives doesn't misunderstand the client or doesn't say something that makes us look like we don't understand the industry or the business. But we're getting away from that a little bit where there's more trust to bring creative in as early as possible.

DA: Does that go for all levels of creative or is it just mostly just senior creatives?

DK: Yeah, just senior, I would say, pretty much just senior. And the bigger, more important factor, which I'm sure you'll appreciate, is getting the creative to sell and/or share the work with the client. I think it's absolutely fundamental to success. When you have that account person, no offense to them, but an account person trying to sell creative, it almost never goes well.

DA: Sure, I understand completely. Would you say is that because maybe they haven't lived with it and they don't quite understand it as intimately as a creative does?

DK: Well, that might be part of it but I think there's an interesting phenomenon in public relations right now, which is the account services people, like myself, so I'm not criticizing anyone, and I'm rooted in the written word. You know, I'm an English major, most of the account services people are journalists, either journalist majors or communications majors and that's a different way of thinking then creatives, especially visual creative concepting. So it's just a different way of thinking about creative and they don't necessarily see or understand creative in the same way that, what I'm going to go so far as to call a true creative does.

DA: If you could build your own agency, how do you feel like that agency/client interaction should work in an absolute perfect world? And how do, how would the creatives fit into that?

DK: Another great question. I... The perfect scenario that I see play out – I guess that's the same thing is when there's an intense amount of trust between the account person and the creative. So not even getting at the client part of your question yet. But if there's a deep level of trust between the creative and the account person, and it doesn't happen as often as anyone wishes, that's the first starting point. That would be my dream. So then you bring that to the client and he/she sees that trust and can build upon that confidence and then the relationship just takes off from there. So if those two people have a solid respectful relationship then the client is going to be able to take advantage of that. So the dream state I would say would be an agency where those two people are in lockstep always and essentially functioning as one entity for the client.

DA: Do you see that happening more or less than it used to or is it something that's still just kind of a dream out there for all of us?

DK: Well, it's a brand-new thing in PR to have creatives. You know, three years ago I don't think we had a single creative director in our entire agency – and if not three, certainly not four or five [years ago]. So it's happening more and more, but we've still got a long ways to go.

DA: Does your agency to anything specific to match your account service reps with the client? Is it simply by type of business, do personalities come in to play? How do you decide who works on what accounts?

DK: First and foremost it's industry expertise. So matching a healthcare expert with a healthcare client. I'd say that's 98 percent of the consideration. Then that pairing is made and then if it's not working because of personality, we will change. But we don't look at a client and say, well, he's demanding this way, let's assign him this type of person. We really put the preponderance of attention on the industry. Secondly, I suppose this also considerations for geography, regional. You know if the client is in Detroit, maybe they want an account person that's in Detroit, maybe they don't, but that's part of the consideration.

DA: This is sort of a follow up question to that, I've heard this a lot from other folks I've interviewed. The pitch process – when you're pitching new business, are clients expecting to meet with the folks who will ultimately work on their business or are they a little more flexible with that or how does that work in your agency?

DK: I'd say 9 out of 10 times they, especially a client or a professional that has done this before – by done this I mean put out an RFP and had people pitch to them – they all say, I want to meet the team that's going to work on my business. Don't bring me four senior people from across the globe to impress me with their pitching ability and expertise. I want to meet the person that's going to work on the account. They say that before we even walk in the room. Which obviously is an important thing to say before we get there. But they're smart enough to know that there is a chance that if they don't say that they're going to get a different group of people. So we, even if they don't say that, we bring the team that is going to work on the account as far as we know at that early stage anyway to the room and so that we can say that in the room. Because we have found it's such a prevalent request and desire from clients and for good reason, right? They should be able to make their important decisions by having the most amount of information possible and that is clearly a part of it. In fact, we just had somebody that we were pitching last month, we pitched them and we made it to the next round and they actually came to our office so they could not only meet more of the team and more of the junior team, but also see the environment in which we worked. You know they wanted to have a full understanding of what we were like, including all of the people and junior people that we couldn't bring to pitch.

DA: Interesting. How do you feel like the agency/client dynamic has changed in the last decade or so or since you've been in the business?

DK: I want to say it's more demanding, more is expected. I think the reason is there's – public relations used to have a more finite or smaller number of competitors. Because when I started the business 18 years ago, it was largely you're pitching the media, you're writing news releases. So our competitors were other PR firms across the space. Now we pitch against ad firms, marketing firms, digital firms, small or large. And our clients now get a wider array of choices and probably a more complicated array of choices because they have to make a decision, well, do I want a more ad-centric firm that's highly creative? Or do I want a more PR-centric firm that's grounded in intense, awesome media relations expertise? Or do I want a pure digital firm, because everything is digital now? It's harder for them to make a choice and it's harder for us because we're up against so many different types of agencies. I think it's more challenging for the clients because they're always asking themselves was that the right choice, is this the best option? I have so many other options to choose from. But it keeps us on our toes, so I think it's great and I think clients deserve to have that kind of choice, but I do think it's a bit more stressful and challenging for any agency.

DA: Do you feel like agencies in general have evolved their service offerings?

DK: Yes, that's for sure. I think it's not just the PR industry that's brought in, you know, strategic planning and creatives, it's the advertising agencies that have brought in more communication skills. It's the digital agencies that are broadening their array. I won't go so far as to say we're all melding into the same sort of thing, but Weber is fond of calling itself an engagement agency and not a PR agency. And I think everybody considers themselves to be something like an engagement agency, meaning we're not just doing PR or advertising or anything. We are simply trying to engage an audience in the [way] they feel/think/act based upon the content and the way that we're engaging with them.

DA: Do you feel like clients have a little shorter trigger to pull the account nowadays, or has it always been stressful as it's ever been?

DK: I haven't seen a change in that, in changing agencies. I haven't seen a quicker trigger, no.

DA: How would you say specifically that agent/client communication has changed? You know, with email, social media, has that affected the way you all communicate?

DK: Well, let's see, when I started email – God, this makes me sound so old, kind of just becoming the way to communicate. So I started at Weber Shandwick in '98 and obviously email was largely the way that we were communicating with clients already back then. That hasn't changed at all. The first and most fundamental way of communicating is still certainly email with the clients. Obviously things like Skype and other video conferencing and Join.Me and other sources – ways of sharing big documents and presentations. And I've said video conferencing has increased, not to the level that I would have suspected. A surprising number of our clients still have very tight IT security, for better or worse, security measures that disallow them to use things like Dropbox or Skype to share files and video, but email being number one. Number two, it's probably just a personal preference, but I really appreciate text messaging. So if I'm working with a client for considerably enough time, that becomes a different type of communication and a more immediate, less formal, but a deeper state of the relationship with the client would be, in text.

DA: I noticed you seem to be on the road quite a bit so obviously face-to-face is still a big portion of the way you all interact. Would you agree with that?

DK: Yes, it certainly is. The reason I'm on the road is less because of the reason you suggested. It's because I do a lot of training around the globe. So that training is, of course, is face-to-face. As far as when you're managing a client, I don't know if it's increased or not? I think it's probably decreased because of money for one thing, the economy. And number two – the notion that it doesn't matter where you work really is largely true. I mean, some clients definitely that face-to-face relationship and I personally love it. I think there's nothing better to do than to have that. But I think there's a reliance on technology to keep it as close as possible while keeping costs down and meet with the client whenever you can and where if that's once every three months face-to-face, that's great. Some of it depends on the client, of course, their preference. That's an interesting question. I don't think there are any clear answers.

DA: Do you feel like the size of the client's budget plays into the agent/client dynamic?

DK: Honesty, I would say not where I'm at, this specific office that I work in, the Minneapolis office of Weber Shandwick, we have accounts large and small and they're staffed in the same way. Obviously not to scale in the same way. But I don't think there's much of a difference. We try to treat all of our clients the same way and give them the amount of attention that their resources can bear. If there is a difference it's simply based up on the amount of time one can spend, not the quality of the talent that is being spent on that time, if that makes sense.

DA: Do you feel, do the clients know that/believe that? Have you heard any comments where the client said, "Well, we're a small client?"

DK: Yeah, I hear that a lot. Especially because Weber is – there's different ways to measure, but we're the largest PR firm in the world and we will say that, but when you say that smaller clients assume that they get pushed to the back. If we're pitching [against] a smaller agency, we hear that a ton, like help us understand, we know that we would be a small fish in the big pond, but assure us that we will get the attention that we're paying for. So we know that that's a thought in their head and we do everything we can to assure them legitimately that that's not the case, and that they will get the kind of attention that they deserve.

DA: Do senior partners interact with pretty much every client, or are they off doing other things?

DK: Yes, they do. They're there with a lot of the clients.

DA: You mentioned earlier the whole thing about trust kind of being the most important thing. Since trust is paramount in developing effective creative or any project for that matter, it doesn't matter if it's creative or whatever it is, how have you seen that trust being undermined or how can it be undermined? And if it happens, is there any way to repair that?

DK: When I've seen it get undermined, it's pretty simple. It's feeling of being threatened by the other guy. So the creatives thinking that their creative work is going to be threatened by the account person or vice versa. I guess that's kind of the definition of trust is that you don't think that way, right? But making sure both sides understand that it should be symbiotic, that they need each other is the way to repair that. And I've seen it on a handful of occasions where that does erode, where it appears that the creatives do not trust the account person to tell them all that then need to know to succeed or call them into meetings when needed or the account person doesn't trust the creatives to know the business well enough to have done his or her due diligence and understanding of the client and the research needed to not say something askew in a client meeting. Working with them so that they both understand how it's to their benefit to work together as opposed to feeling like, oh, if only I didn't have to deal with this side I could really make this project sing, if only the account person wasn't always in my way. Or, switch sides, it's the account person saying, if only the creative would have understood better I wouldn't have to always be explaining things to him or her. Somehow getting them to see – the way that we try to do that is [to show] examples of success. If we do identify there's a problem to say, look how these guys did it, look at the great work that it produced.

DA: So it's just working as a team and not fighting each other, believing in the value of each other basically.

DK: Yeah, it's a leap of faith because neither side is ever gonna fully understand what the other side does. They can intellectualize it, they can appreciate it, but no creative fully understands what it's like to have the personal relationship with the client for five years, right, and a hundred dinners, and 10,000 emails. And no account person is going to fully understand exactly what it takes to get good creative. You have to lie that down and say, I understand that I will never fully grasp that but – it's leap of faith. I trust this person implicitly and together we'll march forward and make something awesome.

DA: When you're pitching work of any type are you always able to deal with the ultimate decision maker? Or if you can't, how do you deal with that process? How do you proceed?

DK: You don't always get to. We've had instances where we're told by the layer underneath the ultimate decision maker, "We've been given full authority to make the decision and then we will give our decision up to that person." So then we focus our attention on that second layer. Sometimes we just simply never get to see that person and all we can do is our best and hope for the best. But I would say nine times out of ten, yes, we are dealing directly, at least getting an opportunity to converse with and present to the ultimate decision maker. I would add that you're using the singular [decision maker], and rarely is it singular. There are usually a number of people making that decision, especially in a public company. There are times in a private company where the founder – the person that started the business is the ultimate one and only decision maker, but even then he or she is relying on his or her team to give them enough intelligence to make an informed decision.

DA: Like a board of directors, is that what you mean?

DK: Yeah, yeah.

DA: You mentioned this earlier, are you familiar with the co-design model of creative development?

DK: Yeah. Yes, I am.

DA: Okay. How important is that model to your agency and do you have examples of where it has worked or hasn't worked or – just give me some insight of how you do it.

DK: Yeah, it's not as important as it will be, and it's not as important as I wish that it would be. I don't know if you agree, but one way to talk about it would be user-experience design. It's kind of a, somewhat of a parallel. I know it's not exactly what you're talking about. But we have for years been involved in situations where I would call it client-centric design, where the client wants it to look like this, the client wants it to feel like and sound like this and that's not really how it should be because it's the user that matters. And so if you're talking about a website, we make sure that they're trying to design a website with the user in mind, not the preference of the client. So when you talk about co-creation like you are, it's kind of the same thing. We like to launch things and put things out there and let the users play with and define and decide what it can and couldn't, shouldn't look like. I don't know if that's exactly what you mean, but largely we're kind of still stuck in the world of too much inward looking "I want it to look like this" while we're trying to push the boundaries of thinking that way and saying let's talk to the audience and let's do prototyping, let's in fact, even launch this as a minimally viable product and see what the universe does with it and then we go back and refine it from that point.

DA: So you feel like we should be more that way and maybe our business isn't quite there yet, but we're evolving to that state?

DK: I would say that's fair, yeah.

DA: All right. That's all I have David, unless there's any other words of wisdom you want to impart before we go. Is there anything you feel like we've missed or anything you want to mention.

DK: No, I mean, I love talking about it so I appreciate the opportunity. The only underscoring I would say is that we are in an evolving industry where we're still learning how to apply some pretty awesome well-founded creative processes – the creative directors, and the strategic planners, and audience insights and applying them to our industry system. It's been really excited. So call me in five years and let's see where it is, you know?

Appendix P

Roy Vaughn

Vice President, Corporate Communications – BlueCross Blue Shield of Tennessee

Telephone Interview

July 2, 2015 at 10a.m. CST

Duration: 47 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does your agency that you work with have a formalized procedure for client engagement and interaction throughout the creative development process?

ROY VAUGHN: They do. Typically they'll provide a document on the front end that's a creative brief that outlines the specific opportunity that we're working on together. It is their understanding of it, so we then of course make any revisions back and forth. So it's trying to get to a common understanding of what the objectives are, what the requirements are, what the timeline is, and the approximate resources required. It usually starts that process. And then once we have that common understanding then we move forward.

DA: Is there anything that your agency does that is unique or would you find that's pretty standard among all agencies?

RV: It's fairly standard. Well let's put it this way, I think it's standard among the more successful agencies, the ones who have proven to be successful over the long term. Just because you're dealing in creative services doesn't mean there shouldn't be discipline as part of it. In fact I think more discipline is required because the judgments that come in purchasing creative services dictate that when you present creative you need to have a point of view. That can in fact be supported by best practice data, relevant information that demonstrates that it's not simply a good idea, it's a good idea that can be effective.

DA: Yeah, so a good idea rooted in research to back it up?

RV: Absolutely. Certainly creative can break through, but unless the research supports it, then it may be a flash. It's about what you accomplished, right? So I think it's common among those that are successful – that have proven that they can sustain their model. The other part is, because again of those dynamics that I mentioned, I think it helps everyone in the process. I think it helps the creative talent, I think it helps the clients, I think it helps everyone in the process to have some sort of model. Now, I've seen the models look differently, but the basic elements are the same.

DA: You think basically it's just that touch point to make sure that everybody's on the same page and that you're rooted in a strategy and not just, hey, this looks good?

RV: Yes and I'll go even further. You and I have been at it long enough to have seen people who take shortcuts, even people who take shortcuts in organizations that have those processes, right? So you got somebody, and it's a tight deadline, you're working to try to help him/her out and do the best that you can. And when you don't use the process it can take longer, it can be more frustrating and the product might not be as well understood. Perhaps it is a very effective idea, but that common understanding is important. How many times have you ever had what I call the "I'll know it when I see it" client? So it's the worst thing you can have, right? It's the worst possible scenario you can have. And that's a person you rarely satisfy, or if you do, you don't want to work with them again. And they may not want to work with you again, because their perception is you didn't deliver. So unless you have a common understanding, unless you have something that you can take back to them and say, "Now remember it's rooted in this, this is what we agreed upon. Now, is there something that's changed or is this what was said?" And on the flipside, on the client side, even when I was in the agency world working with our own creative people, I will tell you that there are times when we had creative folks who doggedly clung to an idea that they had that was a fabulously creative idea, but it was only that. It was not supported by strategy, it was something that maybe they'd been thinking for some time and finally they saw an opportunity to use it. Well, that doesn't fit, like that doesn't help. Right? But then they won't let it go. Or the one that says, "well I'm only going to do this." Well, listen, you failed to recognize the other part of it, which is: it's their business. So let's be really creative, take their input, take the data that we have and the research that we have, put all that together and really find a solution worth doing. That's creative.

DA: Yeah, right.

RV: Isn't that right? So I've had frustrations on both sides. But I can also say that when I was in the agency side, we had great concepts, supported by strategy. And let's say you did take a shortcut, or even if you didn't, and you have someone who is hard to please, the "I'll know when I see it" client, it can be frustrating. But you get in more trouble if you don't have that touchstone you can take back to them and say, "Now remember, we had these conversations, here's why we did this, and you agreed at the time. Let's play a game of what's changed. Help me understand why you can't get there."

DA: When does your agency check in with you during the creative development process? Are there specific touch points or is a kind of haphazard? Walk me through that process.

RV: No, there are specific points. The statement of work is the first. Then, a creative brief follows. They'll introduce or they'll state the creative need within the brief where they discussed the dynamics. Or one is a statement of work that describes the project parameters, timeline, all of that. Creative brief, virtually, immediately follows. Then, the next step is their presentation of creative concepts. They're not finished creative, but they're far enough along that the copy is close, the visuals are close, and the creative elements are all fairly close. Then we provide input from there. Then depending on the campaign or the need, they seek our feedback on everything from photography to director recommendations. You know, we want to choose this director for this video asset. It's a pretty structured process with distinct points at which we provide input. So they say, "Here's our recommendation." Let's say a director. "Here's the past work, this is why we think this director's the right one." And then we move forward execution-wise. We also try not to be too overbearing in the process, right. So one of the things that I love is for our community impact campaign, for instance, they'll shoot in a bundle. What we'll do is shoot a video and photography at the same time. So typically, these are events or organizations with which we're working throughout the community. So, all the assets are being captured at the same time. And it's very authentic from that standpoint. But we get some input on, the photographer, the director, how we want to execute this. We have some very specific points. And (laughing) while we have the opportunity to provide input, we also try not to restrict it. Because you know how often have you been in that situation where something presents itself that makes you just say, oh wow, look at that? You know? Usually it's still that "ah-ha" moment that comes within that framework and it works fine, but sometimes the idea changes. You know?

DA: Okay. Well to that point. How involved do you want to be in the concept generation of the work?

RV: Uh, not. (laughs). No, when I say that, what I mean is that we've all got enough to do, and so we're focused on being professional clients. And what I mean by that is we should be highly involved on the strategy component of it. We should provide input on the original creative concept. But we hire our agencies because they're excellent at what they do. And so we don't want to be so involved that it restricts their thought. Now, it has to fit who we are. I know I'm preaching to the choir, but so many people think of brand as the visual element. And brand is about how you behave as an organization. And people begin to attach those visual elements to you as a company, but it's really about your performance and your behavior. And then what you attach to that. So from our standpoint the questions are: Is that authentic? Is that who we are? Does that really represent who we are? That's more important to us. Certainly the visual and the creative execution is important, but it's always through the lens of the question: Did that really represent who we are? And for us that authenticity is huge. So we try to be professional clients, but what does a professional client mean? It means giving them latitude to do their work well, making sure they have the right amount of resources to do it and trying to be realistic on deadlines. Hopefully, if you interview our agencies on the other side, they'd tell you that. We give them the adequate number of resources and the amount of resources to do the job effectively. We want them to have a satisfying relationship with us because we think that produces better work.

DA: You mentioned this a little bit, what level of finish do they typically show you? You said it was pretty highly polished, but is it's like full-blown comps, is it storyboards, animatics?

RV: Usually, yeah, it can be all the above. Usually the end product looks fairly close to what they present.

DA: Okay. Have they or would they ever show you sketches?

RV: Sure, yeah. Absolutely.

DA: And in what setting would that be? Would it be, "Hey here's a couple other things that are not fully developed. We want to run them by you?" Or how would that process work out if they were showing you stuff that was pretty rough?

RV: Let's say our last community impact campaign for example. They presented three concepts. I know them well enough to know that the first one was their recommendation. (laughs) Right? But they were all excellent. They all could work, which is a huge test. For me it's, wow, what a great problem to have. We've got three here we could actually pick. So they'll provide three options typically. If it's more than that, it gets crazy, because it becomes the tyranny of choice. You don't really want to do that. So we typically see three options. And they'll always have a point of view about what they think the best option is. Which is what we expect them to have. And, at the end of the campaign they had put together a TV [commercial] for our community impact and they gave us two options for the closing of the spot. They said, "This is the concept you approved, but here are two options for the close. We like number one, but we wanted you to see both. The second one more closely mirrored what was actually presented, but the first one, because of that creative process, was what we felt like we could do after we saw what we had. And this is a stronger close." And I said, "Yeah, I agree with you."

DA: Do you ever interact with the creatives that actually produce the work, the line art director, the line copywriter, that actually make the work? Or are you always dealing with a little higher up on the creative food chain?

RV: The writers, the art directors and the artist are involved.

DA: Okay, so they are involved?

RV: They're in the meeting. They're in the original meetings, and they present the work.

DA: So it's not like there's a wall between you and the folks that are actually creating the work?

RV: No, no. And it's funny – we have great conversations. I mean, the interaction I think, helps them, it helps us too.

DA: How do you feel the agency/client interaction model should work in a perfect world? Are there ways that it could be better, I guess, or ways that you think that, man, I wish that it worked like this maybe a little more so?

RV: There are two answers to that. There are – if I could – and I used to have this perception. I think people sometimes assume that people in corporate positions, and corporate departments, are always fully-staffed, they assume it's a cushy deal. I say that nothing could be further from the truth. So there are times when – let's say on the public relations agency front, and going back to trying to be a good client – there are times when I actually suffer a fair amount of guilt and shame because the days are crazy. There is not enough time to answer emails, not enough time to take all the calls, not enough time to be in the meetings, not enough time, it feels like, to do the work sometimes. So, sometimes, I feel like I'm not having the right conversations with some of the principals there. It's happening, you know, in other parts of our team, and I kind of default. I mean I want that interaction. I think it's important for them; it's trying to be a good client. Because we've all had bad clients and you don't want to be that. So, from that standpoint, we have speed and volume issues all the time. Everything has sped up and the volume is crazy. And so the dynamics of why you have an agency in the first place, I think, are always going to be pretty much the same. You need specific expertise and good agencies can deliver, can concentrate talent and expertise in a way they can deliver efficiently. So they can do it in such a way that I don't have to assemble that team and I can use it when I need it. And I can use portions of it. And that's what makes it economically viable.

DA: Okay.

RV: So I'm buying shares of their talent. And they've gone out and assembled a talent that we, frankly, couldn't do. Now, are they deploying it properly on my account? Are they delivering it? That's what they have to do on their side, it's that delivering expertise that frankly is so hard. We've built teams here, but they have a different purpose. They're more focused on long-term needs. But this is specific expertise. And the other is you hire agencies to expand your capacity. So it's easier to scale up and back on an agency than it is to scale up and back on full-time employees. So these are the two basic dynamics of why you need agencies, why companies need and employ agencies. And certainly, there are others but these are the two basic elements.

DA: Sure.

RV: So how has the dynamic changed? I think on the ad agencies side, I think what everyone has experienced is – and this comes with the advent of digital too or the growing importance of digital – is you see a lot more niche agencies. So you're much less likely to have a complete full agency relationship. So, for instance, let me tell you what that looks like. So, let's say you have a relationship where you hire the ad agency for strategy and creative. You hire a media-buying agency that's specific and you also have a digital agency overlay on top of that. So, it's much different than a one-stop shop. I'm not saying that those relationships still aren't out there and don't occur, but there's more slicing of the pie based on distinct functions than there has been. And on the client-side, that's difficult, because now you're managing three agencies as opposed to one.

DA: Sure. Do you feel like the retainer model is still viable or is it going more project work or little bit of both?

RV: It's a little bit of both. It should all be based on reality. You have people who have retainers and never service – and that doesn't work, and they won't be in business long if they continue to do that. By the way on the client-side, if it isn't based on reality, then I'm not sure I like it either because I don't want anybody looking over at us saying they're killing us. Right, they're just killing us. And that leaves a degradation of relationship and service. So it has to be reality-based. It has to be fair for the agency and for the company. On the flipside, the responsibility of the agency is; is the work being done at the right level? And is the work being done at the highest level of competency and at the lowest cost to the company? Again, the highest level of competency the job requires. I'm not saying that you have to put a bunch of low-priced people on it, that's not what I'm saying. What's appropriate for the job, because if I've got somebody who's truly expert in it, I'd rather pay someone more to do a job efficiently than to have someone flounder on it for a long time and not get what I need, right?

DA: Okay. Does your agencies, do they do anything specific to match account service reps with your business, is it by the type of business, do personalities ever get involved?

RV: I think it's a judgment call on their part. I mean certainly experience within the sector, within your business means a lot. And there are times when it can be consumer product experience, but they come from a totally different industry, they can apply the dynamics and we're fine with that. But a lot of it has to do with their judgment on who's the right fit for our culture and the people we have, so it's a lot of times a judgment call on their part. And some of it is gut. I'm sorry.

DA: So it does come down to that kind of right fit for the culture as well?

RV: It does.

DA: And some of it's personality then?

RV: Oh, yeah. There are some real judgments here, but culture's a big deal. First of all, I think you choose your agency partner because you're comfortable with them, right? And then it becomes up to them to say, "here are the right people we think will be great for you."

DA: Sure. When you go through the RFP process, do you insist on meeting the people that will be working on your business, should they get the work?

RV: Absolutely.

DA: All right. Why's that important to you?

RV: Because you really want to know who's going to be doing the work, you really want to understand who they are, if, in fact, you feel like they're a fit as well. And gosh, relationships mean everything. This isn't easy stuff. You know? But it can be really, really, really satisfying and fun at times, but not always easy. And you want to know, you want to be able to size up who you've got with you. And that's really, really important. For all the changes, it's still about relationships and knowing that you can count on that person. Can I trust them? Because the other part of a client/agency dynamic is answering this question, "Can I count on them to help us reach our business goals?" Look, can I break it down to a human level? And this isn't just me speaking for me. Clients want also, individually as people they want to be successful. Right? So, in addition to looking for someone who can help them achieve the company goal, because they really want to be successful, they also look for the right person they feel comfortable with? So there are a lot of levels at which you make those decisions.

DA: Sure. How do you feel like the agency/client dynamic has changed since you been in the business or has it changed at all? Is it still pretty much the same, just different tools? What's your feeling on that?

RV: I don't know. I think the basics are the same. You know the tools have changed. I mean, again, I think the speed of business has picked up over time and that might lead to more volatility. As people get more pressure, it's important how they respond to [that] pressure. So I think that can have a play or can have an impact on what's going on, but the basics are still the same.

DA: Sure. Do feel like there's more pressure on agencies and clients both to show results to the point that there's not as much leeway, or has it always kind of been that way?

RV: I think there's more pressure to show results, absolutely. To a degree, it's always been that way. Some clients are more sophisticated than others, right? But if we're all doing the right things, we ought to be able to succeed. You want to be able to say you achieved these results and if you can't, then you need to structure it differently.

DA: Do you feel like the size of your account plays into the agency/client dynamic? Or does it not?

RV: Oh yeah, I think so. If you're a significant enough client that is important to that agency, you're not gonna get the B-Team (laughing). Right? You're going to get their most appropriate and best for your business. So I think it does have a play. It is important. So, what does that mean from the agency side? You know, and there is part of that. I will tell you this. We, at one point, some years back, thought we needed to have the regional office of a multinational working with us. It didn't work so well. And we changed to one of the larger agencies headquartered in Tennessee. They do business nationally from Nashville and do excellent work. They have attracted people who've been very successful in larger markets, so we're really, really satisfied with the talent that we're getting in our business. But they also understand who we are better.

And we don't feel that, because we're not with a multinational, we're getting something less. That's not the case, at all.

DA: Sure.

RV: So, do we feel more important with local agency? Do we feel better understood? Do we feel like the relationship's better? Absolutely. Absolutely.

DA: All right. You hit on this a little bit earlier about trusting the people you're working with and can I count on them? I think everyone would agree that trust is kind of the big factor in developing effective creative.

RV: It is.

DA: If there's ever a breach in that trust, can it be restored and what can be done to restore it? Do you have any thoughts on that?

RV: It depends on how it's breached. You know and so I would give that caveat. I think it depends on the strength of the relationship if something like that occurs. I think it just depends on the individuals involved frankly. It's like the standard that people should use for crisis management. So you're certainly judged on the front end of the crisis, but you're judged more, however, on how you respond to crisis. And if your response is thorough, thoughtful, appropriate, then you get to move forward and people forgive you. And if you don't, then you don't move forward. So I think a lot of it has to do with the individuals and what the nature of the breach might be. But, you know, in the end, we're the client who approved it. Right? They didn't put a gun to our head. We worked on it collaboratively. We worked on it as partners. And we're not going to throw them under the bus, we're gonna treat them just like they worked here. And if that didn't work, let's figure out what will work. But by the way, they developed it based on our input and our involvement all the way along. So why should they get the horns? I mean, if anybody's going to get horns, we'll get it together, we'll figure out how to move on.

DA: Roy, are you the ultimate decision-maker in the creative development process with your clients?

RV: For some aspects of what we do, yes. Let me give you community impact for instance. Community impact is something that our CEO is vitally interested in. And when I say, "vitally interested," I mean it's important to him, it's important for him for it to be done well. But he didn't see the creative and it goes on air next week. (laughing). So, either he's really going to love it or really not. No, I think he's going to be great with it. And that goes back to the confidence that you have in knowing what we're trying to do as a company. I'm kidding around, I'm a little nervous. I'm actually really not. But there's a little bit of risk there. But he's also the same person who said, "Shit, man, go do, go do it." You know? But we're all in it together, right? What's being produced does, though, I know, reflect those conversations that he and I and others have had along the way. So I don't think it's a lot of risk. In fact, I think it's beautifully executed and he's going to love it. But you know what, part of our joke on community impact is that we have an audience of one. We have a target of one. Right? So while we're gonna reach millions, we've got a target of one. And he's got to feel really good about this. Or else, it gets a little hot around here. (laughing) So that's been kind of the running joke, just remember, we've got a target of one here, right, okay? Just remember that. And that goes back to the media platform that I mentioned, the Better Tennessee. We're producing an actual magazine that goes to influencers around the state. It is supported through a really strong online media platform complete with a lot of social and by the way, we're driving the community impact advertising to BetterTennessee.com. We're driving all that community impact advertising back to that website to illustrate to people what we do in the state. So part of it is how we are getting across to influence those people who have either direct, potentially direct or indirect influence on our business. And those people are brokers, the group administrators – the people who actually make the decisions at client companies, our provider networks, every elected official in the state and civic leaders around the state. We've got a list of 50,000 that was the initial list that we tend to directly. We'll continue to expand it, but that was the initial. But the joke was that even if it's going to be going to this many people, the target is one, right? But the beautiful part is it is supported by research, we are doing all the things that we need to do and that we would normally do. And we can demonstrate that to him. But there's some beautiful organic stuff happening. He's getting notes from former board members, from customers and from providers saying, "I had no idea what you we're doing, oh my gosh." You know, like I said...(Laughs) So, organically he's getting the right kind of feedback, which is great.

DA: Yeah. Well that actually leads to the next question. Are you familiar with the co-design model of creative development at all? Have you ever heard that term?

RV: No.

DA: Okay, well it's basically kind of what you're talking about, that sort of grassroots. Where the client and agency work closely and they also bring in their target audience or their user groups through either surveys or online responses or things like that. So how do you all...?

RV: That's actually what we've just been through.

DA: So you've been doing it all along basically. How do you, how do you interact directly with your target audience or your user groups?

RV: Well, we have several ways. One is we have something called "Blue Voice," it's an online panel that goes across our key audiences. We have an online panel of providers, an online panel of small business owners and group decision-makers to larger groups and brokers. And we're constantly trying to get feedback. And we do on the creative process here. We're doing it that way. Then we also have in-person focus groups on some of those. We're also seeking direct feedback as we move along with that Better Tennessee platform, direct input in that way. But we use a combination of online and in person, so quantitative and qualitative.

DA: So do you do it just mainly for testing? Or do those conversations ever drive the creative at all?

RV: Oh, they do, they help drive it as well. I mean, if we pick up something there, we can act on it.

DA: Well, that's all the questions I have unless you have any other words of wisdom to impart before we call it a day?

RV: I don't know about that.

DA: All right. Well, Roy, thank you.

RV: Hey, I've enjoyed catching up with you too.

Follow-up Question

DA: Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

RV: Yes, we hire freelancers occasionally for projects. Usually, the project will either require some specific expertise or smaller in scope.

Appendix Q

Jason Loehr

Vice President, Director of Global Media and Digital Marketing – Brown-Forman

Telephone Interview

June 29, 2015 at 6p.m. CST

Duration: 35 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does your agency have a formalized procedure for client engagement throughout the creative development process?

JASON LOEHR: Well, how best should I frame this stuff because we work with about 16 different agencies. They have different capacities and some AOR (Agency of Record), some above the line, some below the line. The biggest one I work with is our media agency of record globally which is MediaVest out of New York. They work with us on about ten markets outside the US.., and including the U.S.

DA: Okay. We're really talking about creative development. So it would be agencies like Arnold or others that develops the actual work.

JL: Yeah, there's Arnold, Weiden, FCB, and Fallon are probably the biggest ones. As far as having a formalized procedure for client engagement – I would say that there is a general set-up of expectations on the kind of the process, if you will, for bringing it to life. So, you know, it's more of an outline than a formalized waterfall approach. You know, there are at least a series of steps that we're looking to take with each of the initiatives in getting to the creative output.

DA: Okay. So you would say it is a waterfall approach?

JL: No, I don't – it's set up at the high level as a waterfall approach, but I think that in reality it's a little bit more agile in how we operate around it.

DA: Would you say that any of your agencies have a very unique process or are they all pretty much about the same?

JL: Yeah, I think they're just pretty consistent overall. I mean, there's some marketing speak and how they spin it, but at the end of the day, it's pretty consistent across the board.

DA: Okay. Kind of walk me through the process a little bit. When do the agencies check in with you during the creative development process? Is it the creative brief and then first pitch or is there, are there steps in between?

JL: Sure. Well, the focus that we've been trying to drive is to align the media agency, the brand, and the creative agency together so they're basically a three-legged system. So that way there's good collaboration between them with the goal to have creative presented that has an idea towards the distribution that would be associated with it. And likewise, the planning in the media side has always been in recognition of the potential creative that would fulfill it. So, as you look at the check-ins, the briefing is probably the initial one and then once the brief is complete, we'll circle back with, I'd say a couple of rounds of just back and forth based on the review of the brief. Then you see the first responses and then typically that with, you know, an intent behind [the thinking]. --Audio drop out 4:11--

DA: All right. So we kind of got cut off there. You were talking about how all your agencies, your branding, your media, your brand, your creative agency all working together. You get the brief, you check in a couple times basically before the initial pitch.

JL: Then we, you know, the pitch goes through and then there's a couple of rounds of back and forth and that typically will lead to something similar to the actual final output.

DA: How involved do you or the folks at Brown-Forman want to be in that concept generation portion of the work? Or do you?

JL: Well, really the goal is to frame up the opportunity of the problem statement in great detail and then get the hell out of the way. Okay, that's why you're bringing on those partners is to bring their intellectual horsepower and why we're paying them to be that partner to drive that creative is to download to them the challenges and opportunities and then look to them to say, all right, you've seen all this. Synthesize it and tell me what you think is a good alternative going forward.

DA: Do you feel like you guys internally might be too close to it or is it just not your job or talk to me about that a little bit.

JL: Well I think that there's definitely a situation where we're very close to the potential problem, but it's the lens that we look to them for in terms of shedding a new light on it, and frankly, we're paying them for the creative horsepower. I mean, that's what they're recognized for, that's what we're missing. So while we have creatives on our staff, it's a matter of getting an outside perspective and building on the collective knowledge of what they've seen not only from us but from other competitors or other folks outside our of industry which I think we'll gain more from.

DA: All right. What level of finish do the agencies usually show you for initial work? Is it rough sketches, is it animatics or storyboards or rip reels or how far do then go for initial stuff?

JL: Kind of a combination across those, but in many cases you're looking, at least in the initial stages more of the storylines and the storyboards. For some of it there may be a couple of samples if it's more of a content-heavy experience, but for the most part they're just trying to set the stage and then be able to finish it with more detail going forward.

DA: Okay, So is it, are they polished computer comps, is it kind of storyboard artist renderings?

JL: Yeah, it's more of the digital storyboards, I think are probably the more consistent one.

DA: All right. How or when do the creatives who actually produce the work – the line art director, the line copywriter, do you engage with them during the process, or do you?

JL: There may be some back and forth. I think that it's more of like a pulse that you're looking to get. You aren't trying to be overly involved in that process. You're kind of looking for it to bring the end result to life. So, it's just more of pulses. So you're just trying to look for them and look to see if they have feedback or they're trying to get a read from you on, have you guys thought about this? Or, you know, it's... I don't think it's something that we're actively trying to drive. It just more of if they're looking for us to provide maybe north to south type things. So, you know, do this versus this. We might try to at least provide some perspective on that, but we don't want to overtake that by any means.

DA: Sure. But you do have conversations with the folks actually doing the work, not just the creative director level or account service or anything?

JL: More on the account side, I think, just because that's where the relationship starts and typically that's were most of the legacy is. Plus, you also want to position it to where – I mean, I've worked around enough creatives to know that they're a sensitive lot. You want to walk gingerly around that as well.

DA: Sure.

JL: So, I think you want to respect the process and respect the people, but also at least give some perspective of quote/unquote reality at times, if you will because it can get a little hazy.

DA: So basically your main interaction would be with you account service reps at those agencies then.

JL: Yeah, typically that's in the focus around an STC or a single throat to choke, that's typically the best way to do it.

DA: Okay, if you could create the perfect agency/client relationship, how would that work to you? Are there things that you're maybe not doing now you think could be better or just give me, in your own words, the absolute best way that a client can work with an agency or an agency can work with a client.

JL: To me it's the two C's of communication and candor. You know, communication in the sense that we're communicating in some senses, over-communicating in other senses. Just providing FYIs, but at least providing a regular focus on communication and getting the word out to folks. And from my perspective, that communication and candor, the candor is more important because what you're communicating is really critical and that's typically a reflection of the culture of the organization from what I've experienced in my career. Brown-Forman is a fantastic company and a very nice company. There's a lot of respect for our organization, which is always appreciated. But part of that is, I think at times we're a little too nice and so agency management hasn't been a big thing. And part of that is the candor in knowing feedback is important, so provide the feedback and understand what creative critique is, but understand that it's also not a personal thing, it's a business thing. And people are almost nice to a fault. They're so reflective of people's thoughts and where they're at that they sometimes will lose sense of, we're paying them a lot of money to help us with this. So you can't always think that they've nailed it from the beginning. So that candor is super important in terms of that communication cycle. If those two things are going, I think those are the foundations for building out a fantastic relationship and, it's as much making sure that we've got feedback going not only between us and the agency, but also back from the agency to us. And that's where I think that at times it's a matter of we've got to make sure that we're getting called out on our own if we're not living up to expectations or it's the whole "garbage in, garbage out" perspective. If you're giving them a shit brief, expect a shit plan. So, you've got to be able to have some accountability not only for what's happening with the partner, but also with yourself and that's kind of in the process that we've been working through right now with MediaVest. Disrupting the way that we do the briefing because we've gotta be able to hold ourselves accountable as much as we do the agency partner and if we're not giving them the best input we can't expect word-class outputs.

DA: Yeah, my background is in creative and I would prefer to have somebody tell me they hate it than to tell me they love it when they really don't So, I understand what you...

JL: Right. Or they love it, they say they love it in a meeting and then completely undress it as soon as you walk out the door, and it's like...

DA: Exactly.

JL: What is that doing for us?

DA: Yeah, like you say, communication and candor is by far the best way to work. So do you feel like you have that with your agencies now or you're getting there?

JL: I think it's a mixed bad. There have been some positives. It varies so dramatically across the brand and since we've just had some changes from the leadership side. They'll be taking on some new forms, but personally I think with some of the brands [it is] whatever that agency says is gospel and we don't really want to push back because it was a reflection of previous administrations, and so now that we've got a new one, I'm hoping that will evolve as well.

DA: Does your agency do anything to match who works on your business, from an account service representative side, is it by business type, they have liquor experience or do personalities ever come into play?

JL: For me personally, I care more about the personality than I do anything else. I am one that I will err on the side of chemistry much more so than capability. Capability you can learn, the chemistry is that – you've either got it or you don't, and if you don't, it can be a disaster. So, personally I will lean a hell of a lot more on the role of the chemistry than I will the capability itself.

DA: So, if I'm reading between the lines, it sounds like there have been issues in the past.

JL: Oh, yeah. There have definitely been issues and that's one of those that you've gotta get sorted and, you know, that's where your account lead is critical. And what I've experienced on the media agency side that led to us getting into a review last year. And completely disrupting and changing up the team because what I saw immediately was (A), an agency that kind of didn't give a shit and just mailed it in, and then (B), the chemistry with the group to where when they would present stuff back there was no respect in the room for what they were presenting by the team on the Brown-Forman side. So it was kind of a double-edged sword. So, we had to completely disrupt that team and I think the end result was very positive, but it certainly wasn't easy getting there.

DA: Yeah, wow. You never want to see that kind of situation, but I understand what you're saying. All right. How do you feel the agency/client dynamic has changed in the last decade or so, or however long you've been in this business?

JL: You know, it's changed in a way that, God, it's so all over the place, to be totally honest. For me personally, I have such a respect for it because I've lived on the agency side and now on the client side, so I feel like I've at least got a pretty good handle for that. Personally, I think a creative agency is a dinosaur that's walking around. From what I see in terms of just the landscape of media, they are not revolutionizing, they're evolving, but they are not revolutionizing. And that evolution is okay, but revolution is going to either overtake them or sink them, to me it's the idea of what we're paying in some cases for fees and what we're getting out of that is just, it doesn't sync up. So I think you've started to see a couple things. One is a focus more and more on project by project instead of the building in an AOR and setting up a fee and all of that just because the economics of it don't work and frankly the outputs don't really match that narrative. And then on the flip side to that, you've got agencies that are spending so much time outsourcing their own work that I don't know if they really are paying attention to what that overall experience is and what they might be missing out on.

DA: Okay. Talk to me about what you just mentioned. That they big creative agency is a dinosaur, why?

JL: Because they're not realistic as of where media is being consumed and at what level that it's changing. So as an example, I might pay an agency, I don't know, $800,000 to produce a 30 second or 60 second spot. That one spot is one thing and in the context of TV, sure, but the role of digital and the fact that – I need to create more spots for very narrow targeted niche segments. That doesn't fit to where – to me it's the idea of the agencies are built for one-size-fits-none whereas media is moving to a very specific, very targeted, very engaging opportunity that we have got to take advantage of.

DA: So rather than one spot that is a catch all brand spot, you need 15 spots that are for 15 different segments?

JL: Right. And I also need them with greater frequency. Because with Instagram, I could post every three minutes if I wanted to, but I know that's not what I'm gonna do. But, in reality, I could boost this out to this audience in this market at a different time than this other one. And, it's just the scale of that is just not how agencies are built. And the single best one model that

I've seen of late is what Relevant 24 is doing based on a credit system, so you're buying credits and then you expel those credits for, I don't know, one credit equals an Instagram post or three credits equals a seven-second Vine. So, it's a more creative approach to it and you have a more deeply involved team and it just feels better and feels like a more realistic approach than what we've seen so far.

DA: This is kind of off topic, but sort of similar. You say frequency and how we need to be pumping out more and more work faster, kind of the down side of that a lot of times is quality. Do you feel like maybe quality isn't as necessary as frequency of communication?

JL: Well to me, where you find quality and quantity together is in the question of relevancy. And so I think that the quality may not have to be super high as long as it's got a positive relevancy score associated with it. So, I think quality is absolutely still critical, but it's kind of that whole notion that time – speed, quality and whatever and pick two. We're in a position now where we've gotta be – it's a scary scenario. We've gotta be timely. We've gotta be relevant and we've gotta be on brand. And so those are the things that we've gotta look to continue to focus on and then whatever happens in and around that, that's great.

DA: Okay, so basically you would say that things are just moving so quickly now that you need a really agile agency to be able to move with you.

JL: Right, I need a quality, I need a partner that's thinking a step ahead of me and is positioning me for that greater success. Because if they're gonna wait on me to brief them in on some of these things, we're gonna be in a bad place.

DA: Brown-Forman, obviously you're a huge account for any shop, but do you feel like the size of the account's budget plays into the agency/client dynamic at all?

JL: It plays a factor, but to me, in having had to deal with this in my agency days. Yes, there are gonna be those clients that are whales that bring in a ton of money that are total assholes to work with and they really can be just totally disheartening to work with. Versus, my biggest thing when I'm working with our brands and our leaders on the brand is, hey, don't be a dick client. Like be cool, be on the level, be a partner. And if you do that those agencies will go above and beyond. And plus I will have to admit that we are definitely in an enviable position because if you're working on toothpaste or you can do a little something for Jack Daniels. I'm gonna win nine times out of ten and I've seen it happen. And likewise, and honestly that also goes from a client partner perspective when it comes to the media partners because I can tell you that there are certain media partners that we would do a lot of work with that we keep coming back to because we get good results from them, but we've build those relationship. We had a flight that was supposed to end on one channel during a sport's playoffs, it was supposed to end after the first round. And it's the damn finals, and I'm catching a spot here and there and I'm, like, "What the hell?" And it's because if you treat them well with respect and you go out of your way to work with them as a partner and vice versa, things happen. You can't put that down on paper in terms of that specific value, but, you know what, for me when I'm in New York and I visit some of these guys and I'm, like, well, it's my pleasure and I'll bring them an engraved bottle of Woodford or whatever, it's like those things go a long way.

DA: Yeah, definitely.

JL: It's like you've only got so much time to work with in the world, you only have so much work that you can do and it's like well, you want to do it with people that you like.

DA: Yeah, I agree. And then also, like you were saying, you've got the cool brands to work on.

JL: Right.

DA: If you had to choose between health care and Woodford or Jack Daniels or anything else, you're gonna pick the liquor brands every day, all day.

JL: You know, having lived that myself, it's definitely different.

DA: Well, it's a good thing though. You're on the good side of it so.

JL: Yeah.

DA: I think you would agree that the development of good creative comes out of trust between the agency and the client.

JL: Mmm hmm.

DA: I'm just gonna assume that. So if that's the most important thing. If that trust is ever undermined, can it be repaired? Have you seen places where that trust has skidded off the rails or undermined and what have you done to help fix it, or can it be fixed?

JL: I think that it can be fixed. It's just it takes a lot of work and I don't know that it works every time, but I think that it's definitely possible, but it really takes effort on both sides which is not always easy to sell in. But I think it's something where if both are interested in making the change, then yes, it can happen.

DA: Okay. That's where that candor comes in, I assume.

JL: Exactly. And you've got to admit on both sides. You know, like I've done this, you've done this, let's go.

DA: If something like that were to happen, something bad were to happen, somebody makes a mistake, what's the worse thing that can happen?

JL: Oh, well, I mean, you lose the – the business is over.

DA: I mean, what's the worse thing an agency can do should something bad happen, I guess?

JL: Is to just – is to be above it and think that they're not responsible. Basically being the opposite of humble and listening and thinking you guys are out of your mind, you know. You guys are wrong.

DA: So, Humility, admitting when you make a mistake and moving forward from there basically is just what's important.

JL: That's critical.

DA: During the creative development process, are you the ultimate decision maker or do you sell it to a board or higher up the food chain or how does that work?

JL: Basically, it's at the individual brand level. There's a global brand lead for each of the different brands and I'm there as a consultant/adviser and have the perspective of the media and from the creative point of view. And basically I'm there to help provide guidance to both sides more than anything else. So I'm not necessarily Switzerland because I'm erring on the side of the brand every time, but I'm definitely there to just make sure that things are in good place.

DA: Okay, what do the agencies do to help sell up the food chain? Or are the agencies always there when they're selling the project? Are they always able to get in front of the ultimate decision maker is the question?

JL: I think that it's they're gonna sell in the best when they sell it in through the brand rather than trying to subvert them because I've seen it happen on both sides and it's not good.

DA: Okay. Do you mean where the agency's gone around their contact?

JL: Right. Or they've gotten a bad response on the initial and then go to the level above and it just not pretty.

DA: Oh, yeah, I can see how that would not be good. So basically they felt like their initial idea that got shot down was the best so they went around contact and tried to sell it up the food chain?

JL: Right.

DA: Wow, yeah. That's not good. Yeah, I can see how that could be a bad thing.

JL: Oh, yeah.

DA: My last question, are you familiar with the co-design model of creative development?

JL: The co-design?

DA: It's basically heavy interaction between client and agency and then also relies heavily on end user or your consumer input. That could be focus groups, intercepts, it could be – you know, feedback on – through chat rooms or anything.

JL: It kind of sounds like some of the stuff that we're trying to do in general. That's where the goal is to have one brief that we work from that the media agency, the brand team, and the creative partners all have together. We're looking to the insights from groups from media agency, the creative agency and any of their partners in that mix to synthesize, to bring us a collective set of insights that lead to those results and those suggestions and those creative outputs. So, it's basically done in conjunction that the brief is not something that we create on our own, but it's actually done with those three groups together to get to that brief. We may lead with like a perspective, and this is kind of the first step, but then we know we're gonna look to the larger group to really hone it all in together.

DA: Sure. How do you get feedback from your consumers?

JL: A variety of things. We do formal research that we'll do with studies whether it be on package design or creative, extensive social listening with partners like Princeton Hexagon. We get a ton of emails, comments, quotes, everything back to the social channels directly as well as through our websites. And then a lot of consumer interaction at our physical presences, which includes our distilleries and other activities that we do that maybe on-site at different locations with the brand.

DA: Okay. So you would say you have heavy interaction with your user groups?

JL: Oh, yeah.

DA: All right, now's your chance. If you could impart words of wisdom, not just Brown-Forman agencies, but agencies in general on how to work with clients, what would you tell them – if you could lay out the three things to always do or never do, what might those be?

JL: The first one would be to be transparent, which is easier said than done. But if you're gonna farm this out to someone else and you know that going into it, be upfront about it. That's the whole notion of a full-service agency at times is hilarious because they don't do half the shit. They're gonna outsource to a third party partner anyway. So be transparent in the process. Establish a culture of rapport, candor, and communication both within the organization as well as in the client relationships. And then the third one is just have some perspective and just appreciate and have an interest in understanding the culture that you're working with at the client. And likewise, bring that client into your culture so at least you can do some of that cross-pollination so that way you're at least providing perspective at any opportunity.

DA: That's great. Have you been through any RFPs in the last year or so?

JL: A couple, here and there.

DA: How important is it to you to meet the people that are actually going to be working on your business in that RFP?

JL: It's critical – absolutely critical. Like when we did the media review, I was like, I want to know who the people are that are gonna be on this account. Because if you're doing a pitch and I know that, I know that organizations have pitch teams. Totally cool, but I want to know who the people are that are on this. And I can tell you the greatest thing that we did in the media review, which was a pretty exhaustive experience, but we did chemistry sessions both in the U.S. and in London with the international teams. And the chemistry sessions were basically just a conversation and we outlined some of the things that we wanted to cover, but it was really low key and the crazy thing was we got through that process and it was immediate consensus on who we knew the leader was coming out of the discussions. We could immediately tell. When you have a nice laid-back setting like that as you're doing the sessions, to me those are so critical because you start to learn the nuances and you wonder, can I work with this person? Can I get on with this person? If it's a time of challenge, is there gonna be respect enough to actually get this done? Critical. And that to me, again, that's why the chemistry piece – the capabilities are one thing, but it's like if they're hungry and they respect you and they at least – like the last thing that you want is going in and having a group telling you how they know your business and what you can do better. It's the idea of like listening. One of the greatest quotes that I've heard was you've got two ears and one mouth, so use those ratios appropriately. And, you know, put a focus on that.

DA: That's great. Any other words of wisdom you'd impart?

JL: I think that's all I got. That's all the wisdom.

Follow-up Question

DA: Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

JL: We do hire freelancers where we need some additional support on projects or potentially specialist needs, e.g. video production shoot, 3D, etc. From a hiring perspective, if we see opportunity to hire we typically like to have an understanding of that going in as it helps to setup the expectations on how we are evaluating them and their work, process, presence, communication skills, etc. If they do great work and have a great impact on us and their partners, then we do what we can to look at hiring them.

DA: Do you feel like freelancers can handle the strategy portion of the business? Or would you feel more comfortable with an agency in that capacity?

JL: Agencies bring more resources to the strategy discussion for sure. Would look to them more than an individual freelancer when it comes to strategy work.

Appendix R

Pat McGee

Marketing Director – Great Southern Wood Preserving

Telephone Interview

June 16, 2015 at 2p.m. CST

Duration: 77 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does the agency you work with have a formalized procedure for client engagement and interaction throughout the creative development process?

PAT McGEE: Yes and no. First of all, let me tell you. We're working with Brunner, In Atlanta, and Brunner is the former Compton Riley agency that was acquired by Brunner. And they're pretty formalized, for sure, in the traditional sorts of ways. When it comes to client engagement through the creative development process it is formalized on the front end only and I'll try to explain what I mean by that. We will, in most instances, give them a formal brief and the brief that we use is one that is very typical in that it addresses the basic situation, the mandatories, what the big idea is that you're trying to communication. So they get formal input from us on the front end. From that point until concepts are presented the only engagement we'll have is if they ask a question in clarification of something we've told them. Otherwise, quite honesty, it's a bit of a black box from the point of briefing the ad agency until concepts are presented and, well, I was about to revert into my agency head, but I'll go ahead and say this for whatever it's worth. I don't think that's very unusual. Not sure that's the best way to do it, but that's the way it's done.

So it's formal on the front end and then there's virtually no interaction until concepts are presented unless they need to ask a question to clarify something we have told them.

DA: One thing that kind of struck me with that. Now you present them with the brief?

PM: Yeah.

DA: Okay, because that's a little out of the ordinary, wouldn't you say?

PM: Well, no. I mean, look at it this way. Let's say we've got a new product we're launching. There's no way they can brief us. They'll have no familiarity with the new product. So, no – I don't think that's unusual at all. Let's take it one step prior to the creative process to address this question you're asking. If there's an initiative or if there's a strategy, or a tactic that they want to initiate that is purely driven by their analysis of the situation. In other words, it's an agency proactive strategy or tactic, then, yeah, they would come and brief us. But we're into the third year of this working relationship with the ad agency and it's more likely that we would come to them and say we want to put more emphasis on a certain element of our product line, here are the reasons why and this would be driven by corporate objectives. And part of this involves either new inroads into new geography as it related to our channel of distribution or it could relate to a new product being introduced into existing channels. In either case, whether it's the new geography or whether it's a new product, we have to brief them.

Now, when it comes to media, because I'm looking at this strictly from – your question addressed the creative development process. If they think there are new media approaches that are warranted, well then they're gonna brief us. They're gonna say here's what you're doing, here's where we think you're missing opportunities, and here's the new approach. But generally, it'll be us briefing them.

And let me just say one thing, I know this is a real long-winded response to the first of many questions here, but the other thing is prior to any sort of formal briefing, us to them or them to us, there's all kinds of interaction because we are working very closely with them on strategy development. There's a lot of work that goes on prior to any sort of creative project being initiated. So a lot of that strategy and it's very collaborative, by the way, as you might well imagine. I'm an ex-agency guy, the Chief Marketing Officer James Riley is an ex-agency guy. We have had Ricky Perkins working as a consultant with us for a while, ex-agency guy. So when we get together with the ad agency it's not quite like a typical client getting together with the ad agency.

DA: Sure.

PM: It just doesn't work anywhere the same. Other than we do follow their SOPs (Standard Operating Procedures) and procedures, which I think is what your question was originally asking for. So, it's kind of convoluted and long-winded answer to a simple question. (Laughs)

DA: No, no. That's fine. And I think that makes perfect sense, especially given your experience on the agency side. You know how the game works and you know what they need and you know how to give it to them. So, that's perfect.

PM: Yeah. And that's exactly what happens and really fortunately we've got an agency that doesn't bristle up when we ex-agency guys start talking ad agency stuff. They actually really appreciate it and respect it. And we respect the creative process. We're not trying to – even Ricky Perkins wasn't trying to play creative director from the client perspective. We played it according the rules, but the relationship is not typical.

DA: Okay, that's great. You've kind of addressed this, the second question: When does the agency check in with you during the creative development process? It sounds like you said earlier they really don't beyond the brief unless there are questions, is that...?

PM: Yeah, that's right. Let me think if there's some exception to that. I feel sure that there is. Now in fairness to them, on several occasions with major campaign elements in development, they won't show us where they're going with the creative, but there might be a meeting called, in fact, this has happened several times, where we'll go to Atlanta and they test drive a strategic direction with us. The strategist down there is Louis Sawyer, Compton Sawyer Riley I think the agency was called previously, and so he was one of the principals with the previous incarnation of the agency. Very smart, articulate, strategic guy. One of the best I've ever been around. And he will start outlining a slightly different strategic direction and knowing what I know about how the processes works internally, I just know the strategy he's test driving with us is probably something that they're basing their creative on. You can just sort of feel it. And we'll agree or we'll disagree, or we'll say, "Yes, we agree, but here's a few things that you haven't take into consideration." And they need to take all of that, to the extent that this has bearing on their creative process. I'm sure that they're making alterations to the creative approaches we have not seen, but I know are under development. So, yeah, there is a check-in point along the way in the creative development process but it really has more to do with the strategic direction upon which the creative is being built as opposed to seeing, you know, thumbnails or headlines and that sort of thing.

And I'm thinking back over, over three years. They will also on occasion, share headlines with us, less so thumbnails as headlines. So we have seen some of that just as a check and balance to make sure that they are heading in the right direction. But that doesn't happen every time, but I'm saying that has happened. So there's a little bit of all that going on.

DA: How involved do you want to be in the concept generation portion of the work?

PM: Don't wanna be. I think that's the province of the agency and I think clients are best kept out of that and we pretty much stay out of it. We let them come back to us with whatever they want to show us. They can be as daring as they want or they can be as conservative as they want and we'll push them in one direction or another based upon how daring or not they've decided to be. But we do not want to be involved in concept generation.

DA: Okay. What's your rationale behind that and why not? The reason I ask is most clients are chomping at the bit to get their ideas out.

PM: Yeah, I think that's an outgrowth of James and I both being agency guys and we understand what motivated creatives and we also know what de-motivates creatives and I think he and I just naturally play it accordingly. Now, I'll tell you something, I've always done and when I start working with creatives that are new to me or we're new to each other. Because the power of the spoken word coming from a client is over-exaggerated sometimes, or it's reacted to more than it should be sometimes. But even back in my ad agency days, and this might be just somewhat unique to me, I don't know if it is or not, I'll just say it, but I'll oftentimes try to express a strategic concept in creative terms. In other words, In trying to get the creative, the copywriter or the creative director in sync with the strategy, I will make a comparison to some creative work in the past or I might even throw out a line, but I don't mean for the line to be taken literally or that the line is *the line* that should be used. I'm using it as a way to get the creative director or the copywriter to see the strategic direction, but to do it in picture terms or to do it in words as opposed to research and using a bunch of marketing lingo.

DA: Yeah, that makes perfect sense. What level of finish does your agency typically present to you for initial work? Is it sketches, are they full-blown comps, storyboards? How far or how shallow do they go with the actual finish of the presentation boards?

PM: With James and myself, it can be pretty sketchy. It certainly doesn't have to be finished comps and it rarely is on the front end. It'll be sketched, headlines. They might do kind of a picture board, you know, that has images that – photographs stolen off the internet that kinda sets the scene the way they roughly envision it (mood board). Or if they're using a, certain sort of a film technique or animation technique, they will have clip or two using that technique that they'll show us so that we can get in sync with them in picturing how the thing would play in our mind's eye. For example, a campaign that we ran last year that was a mixture of – using building plans that are available for download on our website as a way of motivating the consumer to get off their ass and get involved in weekend projects. Make an Adirondack chair or make a, make a bench surround for your Green Egg grill – that sort of thing. So the television spot would show a guy kind of gazing into the backyard and instead of seeing literally the Green Egg and a pressure-treated pine bench build itself around it, what he's actually seeing are, I would call them blueprints except everything is a yellow print with us. So what he's seeing is the yellow print animation of the thing in the backyard and it kind of comes together and it builds until you finally see what he's imagining and then it dissolves into the actual piece that he's seeing. So it's a matter of taking the consumer through the journey of imagination realizing that there is a place that they can turn to make what they're imagining reality and then seeing the reality itself. That type of animation might be demonstrated to us. But it's very sketchy with us, but once again they know they're dealing with ex-agency types and quite the contrary with our owner because we are a privately held company and Jimmy, you remember those Yella Fella television spots? Well, that guy, that cowboy is the owner of the company, Jimmy Rane. He's the 100% owner and that also explains the bad acting, right? But that's a whole other conversation. I guess that's one of the reasons why I was put there to try to get him out of that yellow damn cowboy suit and do some real advertising for a change. But he, on the other hand, needs to have something that's very descript and we've done some of all of this. We've done finish comps, we've done storyboards, we've done animatics, and he needs it because he is more of a literal thinker and he needs to see it almost in the way it's gonna play. And it's not that he's a dumb guy. He's very smart. But he just needs to see it in more descript term. So, once again long answer, but for the concepts to be reviewed and thinned out and adjusted, of which there is a lot of that done, it can be done in very sketchy headline form with us, maybe with a little help envisioning certain film techniques, but by the time it gets presented to the owner, because he's the one that's actually gonna make the decision as to which concept gets approved for production. We'll make a recommendation, but he's gonna be the one that makes the decision because he's that kind of guy. For him it has to be very button-up, formal form.

DA: Okay, let's talk about the creatives that actually produce work. Beyond the creative directors, we're talking the line art directors and copywriters, the folks that are pen to paper. How often do you engage directly with them or do you? Or is it mainly just management types?

PM: They'll bring the copywriter in, the creative director will bring the copywriter in to help pitch certain concepts and thus the copywriter will get the benefit of our direct feedback. That happens quite often. So that's not unusual at all and it's usually a copywriter just because that's the way it seems to work with Brunner.

DA: All right. In a perfect world, how do you feel like the agency/client interaction model should work? And is this something you feel like the way you're doing it now is perfect or how could you improve upon it? Just give me your thoughts about the way it should work.

PM: Well, it depends on skill sets. I don't think there's any one way it can work best. I really don't. I think you have to take into account the level of sophistication of the people on the client side. Let's assume that we're working with a good solid ad agency, one that's got, good to above average to excellent talent. Let's keep the palookas out of the conversation here. So we got a good ad agency, then what you gotta have is a good client and good clients come in many shapes and forms, thus there's not one correct answer. But I think if you've got enlightened clients who understand the creative process and who understand how to work with an ad agency, and that does not require you be an ex-ad agency guy, though it helps immensely. I think you would agree. If that's the case, the way I think it works best if is there is a lot of interaction with the client, a lot of interaction. If Brunner invited us to participate in brainstorming sessions, I think the work, personally, would be better quicker. Maybe ultimately better, but certainly better quicker, but it is not feasible for us to do that. We're not a marketing department of dozens of people. We're a marketing department of about six. And I'm on the road a lot. I have many other responsibilities other than interacting with the ad agency on campaigns. And it's not feasible for me, or James to be there when they need to have a brainstorming session. Nor have they invited us. I don't think that's part of their working model and that's okay because we can't afford the time to do that anyway. So we save a little time on the front end, we probably waste a little bit of time on the back end when they go a bit off the mark, but that's the way we do it. Now I'll give you another example. There's a younger guy in the marketing department who hasn't been around the block as many times as we have, number one, and number two, probably doesn't understand the creative process – he's not internalizing it to the extent that he should. He's more of a – he'll actually sit down because he's got, what's the design program that replaced Quark? InDesign?

DA: InDesign.

PM: He'll actually sit down with InDesign and comp something up and say it ought to go something like this. And, of course, that infuriates the ad agency and we tell him, well, you know, that's not really what you're supposed to be doing. You've gotta find other ways to motivate the ad agency and blah, blah, blah. And, by the way, your work sucks, which we've had to say in more polite terms on an occasion or two. But, you know, I'm 65 years old, I'm not the future of that company, so I'm not going to be the ad manager. I'm more valuable doing some other things for the company. Nor is James. James is, I think he's 60, or maybe he's turning 61 this year, and, you know, so he's not gonna be around 10 or 15 years from now. But Rob will be and so we're trying to coach him up. But if you just take my skill level, my talent set, James' skill level and talent set and Rob's skill level and talent set and imagine that each of us is a different client entirely, you'd have to have a totally different way of working with each of us – me more so than even James, the Chief Marketing Officer. You could invite me into a creative session and, because this happened at Carden & Cherry all the time, and I'd throw mud on the wall right along with Gil Templeton and he appreciated it because he had a lot of respect for my creatives intuition, I guess you might say. And he knew that he could take a rough idea that I might throw out and make it better, make it sing and he wasn't ashamed to do that. So maybe I could work with Brunner like that and I certainly could do it better than James because James doesn't have that same creative bent and it couldn't happen with Rob at all. Because he's not showing signs that he gets it. Yeah, I'm just being frank with you.

DA: Sure, of course.

PM: So, all that to say there's not one-way to do it.

DA: Did Brunner do anything specific to match whatever account people you have on your account or was it by business type. Did personalities ever come into that equation at all? How did they decide who works on the Yellawood account?

PM: Well, that's an age-old question and it's always a good one. Kind of from top to bottom, one of the main reason we hired Brunner was because of Louis Sawyer. He is the strategist on that side. Brilliant guy. I mean, just brilliant. Just to be vain for a second, I always thought I was pretty damn good until I got around him, then I thought, "Holy shit, man, I should have understudied this guy when I was 35, 40 years old." I mean, he's just brilliant. And he had direct category experience with us. Not with pressure-treated wood, but Sawyer Compton Riley was the agency of record for Hardie, which is that cement composite material that is used for siding on homes. It's also use as backer-board if you put ceramic tile on your floors and that sort of thing. It's a building material that was branded and it took off and dominated the category. And here we are, we're a branded building material that dominates the category. So it was a perfect match. He understood the channels of distribution and brings a lot to the party. So, that played into it. They assigned an account executive that was just – he was like a journeyman level account manager. They corrected me. They taught me – it's not called account executives anymore, it's account manager. And I said, "Geez, that makes us sound like we're just, a cow in the herd that has to be rustled or something." That has to be managed, you have to manage us and they quickly said, "That's right. That's the way we look at it." And I said, "Okay. I understand." But anyway, he didn't have that kind of experience, but he was a super detailed guy and super buttoned up and then he resigned and went away, and they put a rookie guy in on our account and that wasn't working at all. And then they brought a woman in who was equal to the first guy, very buttoned up. So I guess they're matching the strategic – they offered a good match at the strategic level first and then they're putting a very sharp, young account managers on our [business] because we do a lot of stuff. I mean, we churn out a ton of stuff and some of it's down and dirty. In fact, I guess most of it is kind of down and dirty. We have 14 plants across the country and each operates as a separate P&L, and each one of those is almost like a separate client to me and I'm the account executive working with them. And I turn around and then orchestrate everything through the agency and then work with them – it can be something as down and dirty as a giveaway promotion for Fourth of July, retail-type stuff. Fourth of July sale, and they need some newspapers ads and a radio spot and this, that, and the other thing. So it can be, stuff like that, it's not all branded advertising on television. We do that, we do a lot of that, but we do way more dealer support type work and you gotta move a lot of volume of work very quickly through just a few resources. So it's gotta be buttoned up.

DA: Do you think the agency/client dynamic has changed since you've been in the business and if so, how?

PM: (Clucking) (Deep exhale) Ah – again, I gotta divorce myself here, you know. I'm trying to, trying to look at it from the client perspective.

DA: You have a very unique perspective, so I'm fine with you looking at it from both sides if you want to.

PM: Yeah. Well as soon as you asked the question my immediate response was no, it hasn't really changed much at all. And I don't think it has. I really don't think it has. Even in my answers you're hearing, maybe from a slightly different perspective, the same type of dynamics that we've been talking about forever in the agency business. So I'd have to say it largely has not changed. I'll give you an example of one area for me where it has changed immensely, but this is a very specific. This is a very specific response to a question that was fairly general. And the answer to the general question was I don't think it's changed much. But here's the specific situation that I have found very challenging, very rewarding to me after being 65 years old and having done this stuff for a long, long time it kind of gets perfunctory and old, okay. And I'm sure you've experienced that.

DA: Yeah.

PM: You see the same situations time after time after time after time and you hear the same, you know, make the logo bigger, make the logo smaller, move it to the left, move it up, move it down and, you know, it's almost like there's nothing new you haven't heard. With all that said, we had to get Jimmy Rane out of the yellow cowboy suit because he was infatuated with it. He's a big western fan. He has kind of a John Wayne complex. He works hard and I think most of what he does isn't a lot of fun and when he got to dress up in a yellow cowboy suit and go out for ten days of shooting in Monument Valley with 40 extras and horses and guns, you know, all that sort of thing – lights, camera, action. He enjoyed it. And he's come right out and said, "Man, it's fun." And he thought it was doing great because, and in a manner it was. The awareness of the brand was through the roof. I mean, in our little area of coverage, it's only a handful of points less than brands like Nike and Coca Cola.

DA: Wow.

PM: Well, don't be that impressed. There's no other pressure-treated pine manufacturer out there advertising to the consumer. We're it. Now the number two brand if you look at awareness is literally, quote unquote, whatever brand it is that Home Depot carries and that is because nobody – can you tell me the brand that Home Depot carries?

DA: No, I have no idea.

PM: None.

DA: No.

PM: Nobody does. And that's their brand, it's an OEM brand that they created and it's called Weathershield. It has a little Weathershield tag on the end. Where if you walk to the other end of the 2x4x8, it's Yellawood. Because we're one of the main suppliers to Home Depot, but nobody knows what that brand is, so don't be too impressed 'cause there's nobody out there advertising to compete with our brand. So, despite the fact that the awareness numbers were extremely high, if you look at the purchase funnel with awareness at the top and at the bottom it's like the skinny part of the funnel at the bottom is intent to purchase the brand. You start with awareness and you move down to intent to buy the brand. Where we started with 88 or 90% awareness, when you got down to intent to use the brand it was something like 15%. It was not commensurate with the awareness that we had. Plus we realized that we were losing the association with certain things. The consumer was losing the association with the tagline, "If it doesn't have that Yella tag you don't want it." They were also starting to lose the association with the color yellow and when that happens I would assure you the brand the company spent 40-something years creating is rapidly going the way of Clabber Girl or Burma-Shave. It's one of those giant brands that disappeared. So we hired a company called Marketing Evolution and they are a marketing mix modeling company. You have to get on their website and kind of read deeper to find out what they're all about. What they do is through the use of statistics and through the use of primary research, surveys, they can predict the point at which another dollar spent, on television for example, will result in a diminishing return. And consequently you should take that dollar and spend it somewhere else. And they do it with a high degree of reliability and correctness. This is the type of research that the Proctor and Gamble brands do, McDonald's, Nike. This is what the big boys do. And here we are with a budget that's a fraction of that and we engaged with them. It was unusual to them to even take on a client like us, but we've been doing it for – we're into the fourth year now. But we were able to make the case and present it to Jimmy that despite that fact that the awareness was so high, the campaign, the "Yella Fella" campaign was not generating results where it matters, which is intent to buy the brand. This is kind of an interesting twist. How had the client/agency relationship changed? Well, we are as collaborative with Marketing Evolution as a research partner as we are with Brunner as a strategy component and a creative component. And so what you have is a three-headed monster. You've got the ad agency, you've got the client, and you've got this marketing mix modeling company, all collaborating in their area of expertise to deliver a campaign that is marking improvements, maintaining the very high awareness, but increasing the effectiveness of that advertising through research and adjustments to everything from the media selected to the creative. Because we can test one bit of creative against another and which one performs the best at the intent to purchase the brand level. We can also predict through this modeling which medium has the greatest impact on certain parts of our audience. For example, we don't just advertise to consumers, we're also advertising to pro builders and we're advertising to dealers, you know, there's a business-to-business component. And surprisingly outdoor advertising, which is a consumer medium, by and large, is the most effective medium for pro builders. It's not television, it's not trade advertising, it's outdoor, and we would never have known that had we not engaged Marketing Evolution. So for us, the way that we interact with the ad agency is largely the same. When you introduce Marketing Evolution into the picture, it has altered that interaction model considerably.

DA: Are you seeing that more? I guess it used to be where the agency kind of handled all the research and all the media and every piece of it. Are you seeing it more now where agencies are focusing just on the advertising and then the strategy may go elsewhere and media may go elsewhere or is that just unique to this one group?

PM: Well, they're not actually placing any media.

DA: Sure.

PM: They're just, on a real time basis, they're telling us when to shift spending from television into other media. But, you know, yes, it has changed the dynamic because, I can see Brunner getting a little bristly because Marketing Evolution is making pronouncements about the performance of the media strategy which Brunner is responsible for and the creative which Brunner is responsible for. So they're being judged via this very empirical process but they're troopers and they're pros and they're not letting it interfere with anything. But it has shifted the dynamic in the entire planning process, for sure.

DA: How do you feel like agency/client communication has changed? What I mean by that is back when I started in the business in the early 90s, we didn't even have email then. It was all faxes and FedEx.

PM: Right, right.

DA: How has email and video chat and all that kind of stuff – has that affected how you work with your agencies?

PM: Completely. There's virtually no similarity between the way it used to be done and the way it's done now. I don't need to go into the pros and cons of email because we all know what they are. And certainly a lot of it's good and a lot of it's bad. Video conferencing, we actually don't do a lot of that. We've done some because I'm in Nashville, the corporate headquarters is in

Abbeville, Alabama, the agency is in Atlanta and the main office of the ad agency is in Pittsburgh, which became very important to us when we expanded into the northeast three years ago and almost doubled the geographic area that we covered. So that Pittsburgh office became very important to us. But the video conferencing is – if it ever gets to be good then I think people would use it a lot more than they do, but as long as there's a lag we just shy away from it. We do phone conferences all the time, as I assume everybody does. Email, you know, right now with my computer problems, I feel almost disembodied from my entire work existence. That's how dependent we are on email, but let me think, beyond that.

DA: Well, let me rephrase the question a little bit. Do you feel like that has made the client/agency relationship be a little colder or is it just another tactic? I'm a firm believer that face-to-face is always the best way to do business, especially when you're a creative. I think the absolute worse thing you can do is shoot off a PDF and just let it go into a black hole. So I guess what I'm asking is how do you feel like... How do you rectify that situation on your end?

PM: Well I go down to Atlanta probably on average every six weeks to meet with the agency. I used to do it a lot more than I'm doing now since Rob is the more junior person has been given more of the reins of managing the ad agency. But during planning time or any significant event that involves the ad agency, I'll reengage with them. So we get plenty of face time with them. Therefore, when we're interacting via phone or email, we just all know each other. And I can make a snide comment via email and they know I'm kidding because they know my twisted sense of humor. So, if you didn't have a lot of face time I think this reliance on phone conferencing and email would result in a colder more dysfunctional way of trying to accomplish work. But we're not affected by it because we are in Atlanta a lot, when they go to Abbeville I'm called into Abbeville. So I'm seeing them in Abbeville, I'm seeing them in Atlanta and/or I'll see them in Pittsburgh or on many occasions on the road at one of our 14 plant locations. So there's a lot of face-to-face interaction with the ad agency for us.

DA: So you've built those relationships strong enough that...

PM: Oh absolutely. I know the creative director, the copywriter, several of the artists, the strategists, the top media person in Atlanta, the buyer in Atlanta. I know the buyer in Pittsburgh. I know the creative director in Pittsburgh. I know the owner in Pittsburgh. I know...yes, the relationships are solid and deep. And honestly I would have to agree with you, I think that is the only way that you can make email interaction and phone conference interaction work to good advantage, because it's buoyed up by solid relationships that are built on face-to-face interactions.

DA: Do you ever feel like the size of the account plays into the agency/client dynamic?

PM: Mmmmm. Yessssss. Well, yes, but I'm going to put a different spin on your question too.

DA: Okay.

PM: The size and the location of the agency, also has something to do with the way they react. You know, the budgets we're dealing with for advertising and some of the related marketing is only in about the $10 million range. So you're not talking about a $40 million type of budget here. However, when I was in the ad agency business, then and now, $10 million is still a budget that almost any ad agency will go after – it's a good little piece of business, I guess what I'm saying. Brunner has larger clients but not many, maybe one larger than us. I'm talking about the Atlanta office. Which is only by the way something like 25 people. Now, Brunner in Pittsburgh is probably twice as big as somebody like Buntin. There are probably 200, 250 people in Pittsburgh. Brunner will fall prey every now and then to doing things a certain way because it's easier to deal with big decisions involving bigger hunks of the budget then numerous smaller decisions that only impact smaller amounts of the budget, if that makes sense. And the best example I can give you is it always seems like it happens with media. Here's a perfect example. Two years ago we did a whole new ad campaign that was the second television-based comprehensive campaign that we had done since we got away from the cowboy. We produced a small handful of television spots, something like four or five and we probably spent $600,000 on producing four or five television spots. Which in the Nashville Carden & Cherry days was an incredibly large budget. We were doing TV spots, you know the Purity stuff – It'd come in at $50,000, $60,000, $70,000, that type of thing. With my ad agency, when we did the television blocking, content management stuff, we did a 60 and six 30s that was $400,000 and I thought that was an incredibly large budget. But for Brunner and for the other Atlanta ad agencies, and we had a short tenure of experience with Fitzgerald in Atlanta, to them $500,000 for one 30 second spot is no big deal. And the agencies of the ilk of Brunner and Fitzgerald, they don't seem particularly inclined to shop around to find a production company that is $200,000 as opposed to one that is $350,000, when the difference in quality between the two might be minor in our eyes and probably falsely much larger a deal in their eyes. And it has to do with the big city ad agency syndrome, the LA syndrome. I think you know what I'm talking about.

DA: Yep.

PM: You know if you're not working with a director from LA on the production then the production isn't any good. In my opinion, that never was true and it never will be true. So the ad agency had a tendency to go in that direction because of what and where they are and sometimes their decisions are based on the fact that we're spending potentially millions connected with one or two relatively small decisions as it relates to media. So, that would be my thinking along the lines of that question.

DA: I think you would agree trust between the agency and the client is paramount in the development of good creative. So how have you seen or how can that trust be undermined and once it has been undermined, can it ever be restored? Or what can be done to restore it?

PM: Um, depends on how egregious the betrayal of trust is. Which is like a screaming fit of the obvious, I suppose. Before we hired Brunner, we actually hired Fitzgerald – the agency review team of which the screeners were Ricky Perkins, James Riley and Pat McGee. And we got it down from a long list to a short list and from a short list to the pitch list. And the pitch list, I think it was four agencies that pitched. And there was a slightly larger team that was going to do the evaluation of the ad agencies, involving some of the senior management at the company. That's kind of risky because you know James, Ricky and I thought we knew exactly what was the best choice. But it turned out where even though we thought Brunner was going to be the best selection, all of the other non-marketing types that were involved in the agency review of the four agencies, they all agreed that Brunner was probably the best selection. However Jimmy Rane, being Jimmy Rane, despite the fact that all of his lieutenants said hire Brunner, he hired Fitzgerald. And he did it for the wrong reason. He was absolutely enamored with their creatives. And this was spec creative, by the way. He was enamored with the spec creative they were going to do for us. And he overruled all of us and our reasons for hiring Brunner ran much deeper than just the storyboards. So Jimmy turned it – even though we said to the agencies it wasn't going to be a beauty contest, Jimmy turned it into a beauty contest. He hired Fitzgerald. Fitzgerald has a very unusual way of interacting with their clients. They don't listen to them.

DA: (Laughter) You know, that's a novel approach.

PM: Oh yeah, it's, I was, I mean, I was flabbergasted, absolutely flabbergasted. They didn't want input from us. They had all the answers. If they said this was the creative to do, that was the creative to do. They didn't like us saying, well, you know, you're using this word and this word really doesn't resonate well with our customers. Or that's too bad, that's the word we're using. I mean it was almost their response.

DA: Wow.

PM: So there was immediately a breach of trust along the lines I'm suggesting with Fitzgerald and we tried to work around it because we're good troopers and we try to be good clients and we were in this new relationship and we were giving them the benefit of the doubt. And then the second thing happened, Ricky, who was still a very engaged partner [in the] process at that point in time. And he was behaving himself, by the way, even though he's a creative, he wasn't playing creative with them, he was playing well in the sandbox with them. But because they knew he was a creative, very publicly in one meeting, even though he was not transgressing in the manner they suggested, they shut him down very harshly and very abruptly in a meeting one day right in front of a whole bunch of people. As you can imagine, it didn't sit well with Ricky Perkins. But it didn't sit well with me and it sure as hell didn't sit well with James Riley and we fired them. So that became a trust situation that was irrevocably, incontrovertibly damaged.

Brunner has transgressed, not as is egregiously as what I'm suggesting with Fitzgerald, in kind of small ways. Not listening to us when we say let's find some ways to cut down the production budgets on these television spots. Our budget is the same as it was eight or nine years ago or ten years ago, even though we've almost doubled the footprint. And that's just the idea of building – in 2008 we entered a damaged economy and it's still damaged, even though the building trade is swinging back. It's swinging back very, very slowly and conservatively, so budgets haven't increased. And they still want to hire the LA directors and higher the big fancy production companies and we've told them several times we've got to find ways to do it and they haven't done it. That's just one example. So that's a betrayal of trust in a manner of speaking. Well, we just did the agency review and we dinged them and we dinged them really hard. And they're good people and we really like them and we're not anywhere near threatening throwing the account into review, but it's a serious warning shot across their bow. You need to listen to us, guys. We've got to do more with less money and you're not helping us, you're hurting us. Another example. I'm involved in a project where, believe it or not, we as a company have never targeted builders. Our distribution, it goes from us to a dealer and a dealer could be Home Depot or it could be here in Nashville Walker Lumber, you know over on Thompson Lane at the tunnel there. It could be a small lumberyard and building materials retailer. It could be somebody like that. Walker sells primarily to pro builders and then some dealers sell quite a bit to consumers, just like Home Depot does. And then many, and most sell to both. At any rate, we have always advertised to the consumer, the end user and we've always interacted with dealers, but we've never interacted or advertised or even had a marketing outreach of any sort, with pro builders. And the reason is there are many companies in our business that would sell direct, they would go around their dealers and sell direct to the builder. So any approach to the builder on our part might appear like we're going around our dealers. And so it was paranoia and we just avoided it. Well, we're over it now and I am in the process of putting together a huge game-changing marketing program all designed to target the pro builder. And part of it involves a launch and a website. I wanted it launched last fall. And early last summer I started telling the ad agency, hey look, the elements of this program are not robust enough for us to launch and do so successfully. We need more and better. And I raised this concern on probably three or four occasions and the response coming back was always, well look, let's just get the basics in place. We'll open up with a Phase 1 launch and we'll come back with all these improvements in Phase 2. And I, I'll share the blame, I kind of went, well, you know I don't really agree, but I kind of let it slide. Until finally I had a heart-to-heart with them one day and I said, "Guys, I think we're gonna fail if we launch and we don't have these other elements." And I said, we've got to have them. And then that delayed the whole thing a year. So that's a trust issue because they weren't listening. I had some good reasons why I was raising those objections. They didn't respond to it, they dismissed them. And even though I came back at them three or four times, they were dismissing them and I didn't stand on somebody's desk like I should have and raised hell. And we've lost a year. They lost trust with me, and James too, because James agreed with me. That's repairable. So there are two real-life examples. One that hit the wall completely and one that they're being dinged, they're being dinged hard. They dropped the ball and they know they should have heeded – I shouldn't have to preach and pound a desk to get them to see the logic of what I was saying.

DA: We talked about this really early on, you said that the ultimate decision-maker is the owner. How does the agency help you proceed beyond just doing fancier boards, or do they? I know it's a little bit different for you because you come from the agency background, but do they help by putting together presentations to help you sell it with their strategy and everything involved? Or how does that work?

PM: Oh yeah. They'll help with presentations built around the idiosyncrasies of the owner. They come to Abbeville and the owner, being the owner and the chief executive officer of the company; he relates more to the graybeards, you now, Louis Sawyer, the strategist. And Louis is very generous with his time – as well he ought to be because he's under a huge retainer. But he'll drop what he's doing and he'll go to Abbeville to sit down with Jimmy and explain certain things and he'll – Louis participates in the key presentations. They're actually very good about going the extra mile to make sure that their ideas and our ideas jointly are presented in a manner in keeping with what's appropriate for Jimmy. And then they react to all sorts of other political and nuanced situations. Because you have 14 plants that are 14 profit centers out there. And each General Manager is running his own show in a certain part of the country. It becomes very difficult to do anything cookie-cutter. And Brunner is very good about accommodating all of these idiosyncrasies across the country. So they're very accommodating in that regard.

DA: Okay and last question. Are you familiar with the co-design model of creative development? Have you ever heard that term?

PM: No, I'm not.

DA: Okay well it's pretty much what you've been talking about this whole time.

PM: Oh, okay. I did know there was a fancy term for it.

DA: Yeah, there's a fancy term for it. But the idea of agencies and clients all working closely in a team environment and even more so to where you even pull in consumers to some point. Now that could be through focus groups, obviously, but also other things like online ratings and things like that. How important is that stuff to you all? Listening directly to the consumer? I'm sure it's important, but how you go about doing that, I guess, is the question?

PM: Oh, it's critical. It's critical. Everything I said about Marketing Evolution. Now it also involves our business-to-business audience, but that's all consumer-based. And that's all done through consumer surveys and online testing where our audiences are literally answering questions, looking at creative and looking at examples of the very things that we're trying to gain insights on. So we are very research-oriented, always have been. Working with not only Marketing Evolution but primarily one other research organization and we've done focus groups, numerous focus groups on all sorts of topics. So it's, bottom line extremely important to us and we integrate it totally into our planning and execution activities.

DA: Now does that ever apply to product development or product innovations beyond marketing?

PM: Occasionally and I can give you one example. Let me say this first, our company is horrible at research and development and product development. We are terrible at it. Abysmal, and we don't do it. (Chuckles) The way we work with Home Depot. Every two years, and this is typical, not just us, this is what they do with all of their brands that they sell. Every two years, they bring you in to make a huge dog and pony show presentation. And one of the things they always ask for [is], what new product developments do you have that you can share with us? And we never have any. And so in the several months leading up to the Home Depot meeting, we've got a bunch of guys who are not creative, you know they're good lumber guys and good product guys, I guess you might say, but they're not creative thinkers. They're not product developers, but develop a product, they will do and it gets pitched and hardly ever sees the light of day. I'm in the process of hiring somebody right now that is, amongst many other responsibilities will be involved in the ongoing product development and he is for his own company right now anyway. But I'll give you one perfect example. Home Depot asked us to test pressure-treated wood that has colors, stain if you will, that it's pressure treated right into the wood. You know when you stain your deck by buying a bucket of stuff from Home Depot all you're doing is sort of sloshing it on the outside. And through the process of pressure treating, just like the preservative chemical, the stain can actually be driven right into the core of the wood. So that if you cut a 12-footer and you cut an 8-foot board off of it, if you look at the cut end, it's stained. Whereas if you have a 12-footer and you stain it and then cut it, well you're looking at a raw exposed [end], it's got the preservatives in it, but it doesn't have the stain obviously on the butt end. So anyway, they wanted us to test an infused color, which we had developed years earlier and never introduced on a widespread basis, for bunch of reasons, not the least of which was Home Depot wasn't interested in it. And not that they're the only person we sell to, but it's a big part of our business and it affects the economics of those kinds of decisions. So we did so in the Kansas City area and in Oklahoma and Colorado. In those markets, the further west you go you see less pressure-treated pine and you see more and more cedar and in some cases redwood being used for decks and that sort of thing. And the stain can make pressure-treated pine look like cedar. And you know pressure-treated pine holds up just as well as cedar. But when you've got people that are used to seeing cedar, that's what they want. So we tested it in those areas for Home Depot and it tested extremely well. And those stores, those Home Depots stores have converted entirely too an infused color pressure-treated Pine and sales remaining just as strong, if not better, than what they were before. So that's just one example of some consumer testing that we did to benefit Home Depot.

DA: Great. Well, that's all I've got unless you think there's anything else that you need to tell the world about agency/client interaction that I might have missed?

PM: Yes, and this is very important. I'm gonna tell you what my father told me when I was in college and it's too late for you, but if you can help spread the word. Do not get involved in advertising.

DA: (Laughter) All right.

PM: Run screaming in the opposite direction. Go to school, work hard, get a law degree, get a finance degree, do anything except advertising. (Laughs)

DA: Exactly. I would agree with your dad.

Follow-up Question

DA: Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

PM: We do hire freelancers and have some dedicated freelance help now. In fact, I was a marketing freelancer for three years before they hired me.

Our reason for having freelance help is totally selfish – not unusual for a corporation, huh? We do it to save time and to save money. Our agency is a larger firm headquartered in Pittsburgh. The office we work with is in Atlanta, but on both geographic points on the compass, we are greeted with big city/big agency fees. So, we use graphic designers and one copywriter for the non-strategic, more tactical and day-to-day projects. There's also a turnaround time issue with bigger ad agencies. If you asked them to cough, it would take a week to ten days to get it. It's just the nature of the beast.

Why would we accept the large fees and service? Good question, Dale. We did a very extensive and textbook perfect ad agency review. One criteria we rated very high in our examination of candidate agencies was the marketing strategy support we wanted in our agency. We got it in spades. Louis Sawyer, who was an owner of the Atlanta agency that Brunner bought, is a master marketer. And, while I'm not so vain as to think there are many better than me, I'm not easy to impress these days. He's professorial in his approach, very smart and very up to date. And, he was the marketing mastermind behind James Hardie brand being established as the undisputed leader in its category.

We also use marketing mix modeling in our research, brand tracking and ROI computations. They are a very specialized firm and while not a "freelancer" in the way you mean it, it is a specialized firm that makes a unique contribution to our overall marketing efforts.

So, long story short, we pay for the big hitting strategic services (B2C, digital, TV, OOH, etc.) and try to funnel the sales promotions, dealer collateral, signage, etc. through freelancers. This includes some of the B2B work where most of the B2C efforts go to the agency.

Appendix S

Chuck Creasy

Vice President, Creative Services – Nashville Convention and Visitors Corp.

Email Questionnaire Interview

June 29, 2015

CHUCK CREASY: Let me preface these answers with the fact that I'm an ex-creative director and agency owner and a long-time veteran of the agency/client wars. So much of this really doesn't apply as I basically head up an in-house shop. But I do go outside from time to time. I'm probably a bit tougher on our outside agencies' creatives as I've been there and done that.

DALE ADDY: Does your agency have a formalized procedure for client engagement and interaction throughout the creative development process? And, is it a model/philosophy that is unique to your agency?

CC: No, we do not. Really depends on the project. I have close interactions with creative on all projects. Our agencies are very flexible and let me determine [the] process for each project.

DA: When does your agency check in with you during the creative development process?

CC: On initial concept thinking, then once a direction is determined, throughout production.

DA: How involved do you want to be in the concept generation portion of the work?

CC: Very.

DA: What level of finish does your agency present to you for initial work – sketches, finished comps, storyboards, animatics, etc? And, what level of finish do you prefer?

CC: Tight concept sketches are fine with me.

DA: How or when do the creatives that actually produce the work engage directly with you during the process? Or do they?

CC: When the rough direction is being determined and I prefer them to pitch the comps directly.

DA: How do you feel the agency/client interaction model should work in a perfect world? How do creatives fit into this?

CC: I feel my involvement on the front-end is critical. I want the creatives involved intimately throughout the process. Great ads are produced by the creative team once they have proper input from the client and other agency departments.

DA: Does your agency do anything specific to match your account service representative to you or your business? By type of business? Do personalities play into the decisions?

CC: Of course! I expect passion from my AEs and an overall understanding and buy-in on the creative that is being proposed.

DA: Do you think the agency/client dynamic has changed in the last decade or so? Specifically how has agency/client communication changed?

CC: Yes, absolutely. I think the client is much more involved now with the process. Usually that's a good thing, but can tend to hamper great creative at times.

DA: Do you feel the size of the account's budget plays into the agency/client dynamic?

CC: Yes it probably does, but a good agency that's "all-in" should not let that affect the work.

DA: Since trust is paramount to the development of effective creative, how can that trust be undermined, and what can be done to restore it?

CC: If the agency doesn't listen and insists on a creative direction that is not on strategy. Listen more, talk less. Don't be wed to your first idea. Do good work. It usually speaks for itself.

DA: Are you the ultimate decision maker during the creative development process? If not, how do you proceed and how does your agency help you sell the work up the ladder?

CC: I am not. We present to the CEO as a team. Everyone bought in and support the creative with solid strategic thinking.

DA: Are you familiar with the co-design model of creative development?

a. How important is the co-design model to your agency?

b. Do you have an example where it worked or didn't work as planned?

CC: No. Sounds ominous.

Appendix T

Angie Heig

Vice President, Marketing – Ruby Tuesday, Inc.

Telephone Interview

June 26, 2015 at 8:45a.m. CST

Duration: 25 minutes

(Interview has been edited slightly for clarity)

DALE ADDY: Does your agency have a formalized procedure for engagement and interaction throughout the creative development process?

ANGIE HEIG: No, it doesn't necessarily. I think it might be helpful context to know how our advertising agency is different than what some might be more accustom to who would have those kind of procedures in place. So it's a different model. The advertising agency really only has about four people. When a need arises that would require talent outside of what those individuals provide to us on a regular basis, they will bring them in and compensate them [on] a retainer based fee, but it allows us to get to a point where we're not paying near as much as we would in a very traditional agency scheme that would have some more formalized processes. So, the short answer is no. The longer answer is no because we have developed a partnership such as that.

DA: So when you're working on a project with your agency are there specific steps where they check in with you through the creative process? Is it creative brief and then work, or how does that work?

AH: So there is a loose process we go through. Similar to what you would expect. We usually develop the brief. Ruby Tuesday develops the creative brief, we will share that with the agency, and they will give us input on that brief. And the reason we develop the brief is we're closest to the details contained within a project, so it's hard to impart that knowledge and then ask them to develop it. So we give them all of the details and then what they do is enhance it if needed to make the brief a little more creative, perhaps. We all come to alignment on the brief. And if we're talking about traditional advertising, going to television, let's say. What happens after the development of that brief that's aligned, we will work in tandem [developing] a shot [list], a storyboard, and a script. The storyboard is to help us accomplish what we're going to be shooting, let's say, or what we're going to be showing if we've already shot some of the things. Once we have a storyboard we feel good about and a script that we're feeling great about, we [collect the footage] if we have the footage already completed. If we didn't, then we would go shoot, and then proceed to that next step, which is our editing phase. And in that editing phase we typically see between four to eight different cuts of the spot before we send it on to test. So [from those] four to eight, we'll pull it down to two and then what we often do is send two spots into our communication group because traditionally we use a group called Asymmetrics. We submit our ads to Asymmetrics. It takes about 48 hours or so for us to get our results back. We have our research team who will dive into those results, share with both us as well as the advertising agency what's good, bad or indifferent from those two different spots. If necessary, we will make revisions based on that feedback, re-edit, re-cut – make sure we made notable progress before we go to traffic. Does that make sense as far as kind of the continuum?

DA: Yes, it does. So you all are heavy on the research and the testing side to make sure you're hitting all the hot buttons along the way.

AH: Exactly. A key for us to have consumer input all along the way so that we can make sure that we're spending our money the most wisely before we put it into market.

DA: Okay. How involved do you want to be in the concept generation portion of the work?

AH: We are very involved in the concept generation. I would say it's different in different industries, but for food, and in particular, casual dining is a competitive environment, what we really try to do is plan out at least one year in advance. We understand we can be more fluid than that and we often are, but we'll plan one fiscal year in advance and we usually do all of that internally. So again atypical from, a normal kind of agency relationship where they're doing the concepting. We'll actually think of the ideas and to the point you made, Dale, earlier about our immense confidence in consumer feedback, we will test all of our concepts that we've generated either internally, typically just internally – we'll sometimes engage the agency to help us develop some concepts that we put out into copy testing before we ever bring it back and say well, here's then what that promotion would look like and then we develop the brief after we've had feedback from the copy testing.

DA: Okay, so you're testing even before concepts. You're testing what your promotional scope is going to be, then you're testing copy points based on that, then you're testing the creative after that fact. Am I hearing that correctly?

AH: Yeah, let me do a continuum that is inclusive of that. So we will meet as a team, we talk about the opportunities for the year that we see could be promotable type events that we could talk about given this current business environment and competitive environment. Once we have generated, lets say a list of 20-30 things that we think could be included; we'll develop what we call internally "concepts" [which are] literally two or three sentence [descriptions]. Often we try for those concepts to be representative of what a 15 second ad would be. We run 100% 15 seconds so it makes sense for us to content test, things that could eventually become advertisements. So we test those, come back with results, review. Kind of rack and stack both from a consumer standpoint as well as what we think the financial impact would be. Following that rack and stack we'll figure out what our calendar would be, and then we start the briefing, copy testing in market testing – if that makes sense?

DA: When your agency is showing you storyboards concepts for different spots, what level of finish do they usually present? Are they highly polished storyboards, are they rough sketches, are they somewhere between, just scripts? How does that work?

AH: The storyboard process for us is usually not highly polished. We have done that in the past, Dale, so I mean I could speak to how we have in the past, but today's world is we're all moving so quickly and there's cost involved in that. We have artists who come in to actually do more of a polished sketching either in written or electronic form. It just, it seems inefficient for what [we're] trying to achieve because ultimately we're gonna hold the film to the standard that we want. So, you know, they are in rough sketch form when they do a storyboard.

DA: Do they show animatics?

AH: No, we have done animatics when we were with another agency as we were developing this. The animatics would have been what we're doing right now from a communication as the concept testing and/or what we're doing to test the spot before we go to air. We've just found a lot of efficiencies with how we've been able to build a better partnership with the current agency's new model. So we don't do animatics very much at all. It's been several years.

DA: You just feel like it moves quicker skipping that step?

AH: Yeah.

DA: You said they're a small agency, so I assume that you're interacting with the creatives that are actually producing the work. You're not dealing with account executives and then going to creatives, or how does that work?

AH: Nope, you're exactly right. We have a copywriter who we work with directly. We have a creative director who we work with directly. We have an executive producer who we work with directly, and then we do have an account person who really kind of helps organize all of the principals or projects that are going. So that's our core team. But we're never going through an account person who then relays a message to the creative director who then relays it to the creatives on our team, you know. We don't have that kind of communication challenge.

DA: Okay. Have you been with agencies in the past that had that and did it work or did it not work?

AH: We have and it did not, Dale. I think it's just our business. We don't have the luxury of time on our hands, so we need to move fast and with, with passion and sometimes that can be lost in the phone message game.

DA: So it just kind of slows the process down. How, if you could work out the perfect world of how the agency/client interaction model should work, how would that be? Do you feel like it's what you're doing now or are there things that could be better?

AH: You know, I think what we're doing now is pretty close to perfection, if that could ever exist. The only thing that would be able to make it a little better is if they were closer to our business. So it's crazy because [in] my perfect world they would be an extension of our team, and not the agency. So almost, as you know all too well what we've done with our creative outside of the advertising, is pulled it all in-house. And I think we've gained a lot of efficiency from that in lots of different ways by doing that because you have people who are personally vested in the brand, know its in and outs and you'll gain a lot of time and quality work.

DA: So in a perfect world you'd have an internal agency that could deliver everything you need.

AH: Yeah.

DA: Okay. The next question doesn't really matter because you don't have account service folks since it's a small agency. It was does your agency do anything specific to match account service reps to your business? But it sounds like since they are so small and lean, that's kind of a moot point.

AH: Well, the only thing I guess I could add to that is we have had – this is a new model for that group as well. So, this is our second account person. When we recognized there was an opportunity to enhance our skills that we needed there, which was just somebody to organize. We don't need two producers – we need somebody who was that perfect, blend of the creative, the producer and the copywriter, which would be the account person, right. Because they could speak to all three of them – so we have gone through that. But it's also the model that we have.

DA: Okay, so basically from time-to-time, you'll evaluate if the team is working properly and what changes need to be made, am I hearing that right?

AH: You are.

DA: Great, okay. All right, do you think that the agency/client dynamic has changed in the last say 10-15 years?

AH: Oh, for sure. I think the clients have realized that there was more neediness to the agencies than what was necessary for getting quality work. And I think that the perfect example of that is how we have just decided to develop our business and quite frankly how a lot of – what I know anyway – brought things in-house to gain efficiency knowing that though it's important to have agencies, people that are outside of your business to bring a point of view that is different than what you've become blinded with or have blinders on to. That – and I don't know how to say this, because I don't want to say that advertising agencies are no longer needed because they certainly are. I think it's the way that they were doing business, big staffs, lots of people that you had to go through to get a little bit of work done. We've all realized it's totally inefficient from a fiscal standpoint and from a time standpoint.

DA: Okay, so you feel like the leaner shops that just kind of bring teams together as need be are better, I guess, more effective than the big behemoth agencies with multi-layers?

AH: Yes, I do. Unless those big behemoths have tiny teams where you're not having to – I have been in the day of having account services then they talk... it just, it becomes really difficult and frustrating because you feel like you need a trafficker for your message within the agency versus really all we need to traffic is our spot, you know? (Laughs)

DA: Do you feel like the size of your account or an account plays into the agency/client dynamic at all?

AH: I think it probably does. Because the size of our staff in support of our brand as well as the size of our budget I think plays a tremendous role, you know. We're in it to make money the same way they are, so I do absolutely know that it has an impact.

DA: Okay. So based on just production value you mean, or is it, is it based on the amount of service you receive?

AH: I think it's based on the amount of service. So if you don't have a lot of money and we know all we're doing is traditional advertising and it's only 15 second ads that we're gonna do five times a year. I mean, it's hard to show how we're gonna make that a really profitable investment for some of those bigger agencies. It takes a lot more for them to just break even in that kind of account because we don't have a lot of money to spend in other areas.

DA: Okay. So then you're saying the bigger agencies might get frustrated or take a pass once they see the size of the budget? I don't understand exactly what you're saying there.

AH: I think that that does weight into it, the amount of the budget that you have to spend with them is absolutely influential.

DA: Since I think we can all agree that trust is kind of the biggest factor when you're developing good creative – you have trust your agency, your agency has to trust you. Do you feel like there are times when that trust can be undermined and what can be done to restore it?

AH: I don't know about the trust factor. Are you asking if we feel like in bigger agencies we don't have trust? I'm sorry. I want to make sure I'm following through.

DA: No, that's okay. Let me ask you this though do you feel like it's necessary to have trust in your agency to get good work?

AH: Oh, absolutely. I think the only way that you get really amazing work is by having fantastic partnerships. It's moving beyond being an agency and being the partner.

DA: Okay. And if, if for some reason something goes haywire or something has happened and you feel like you've lost that trust with the agency is there any way it can be restored? Or is it just time to change the agencies, I guess is the question?

AH: Well, you know that's a good question. I think that's also kind of dependent on where the trust loss came from. Because we all recognize that we're human, so errors occur and that's probably where the trust – unless something really catastrophic and then that would leave it depending on the kind of trust, right. If they're sharing our secrets with a competitor clearly that's altogether different than if there's just something that goes wrong on, let's say, traffic, right. I don't want to try to undermine traffic being in the wrong spot, as not being a big deal but I think it kind of depends on the level of it. Recognizing we're humans and as long as we can learn from the mistake which is the same kind of philosophy we have internally for our team. We become better and stronger together.

DA: That's great. That's exactly what I was looking for there.

AH: Good.

DA: When it comes to selling the spot or ultimate approval of a spot, are you the ultimate decision maker or do you go to a board? Who is the ultimate decision maker, and if it's not you, how does your agency help you sell the artwork up the food chain?

AH: That's a great question. So once we get the spot back in. So in how that continuum I spoke [about]. Once we get the test results back and we feel good, the "we" I speak of in this scenario is myself, our head of consumer insight and right now it is our interim CMO. So collectively between the three of us are always involved every step of the way through the process. Once we feel really good about it, that's with regard to the test results, we communicate that with the agency, make sure they tell us of any concerns that they have, are they are in agreement? We take the spot and our recommendations our CEO, our president and our CFO, what we would consider our C-team leadership. J.J. is our CEO, is usually the one who have input one way or the other to say modifications or not. He gives us his feedback. Either, "Hey, it's good to go." "Did you think about A, B, or C?" Right? And then we move forward.

DA: So J.J. is the ultimate decision maker, but he consults with the other C-level folks to make sure everyone's cool with it.

AH: Yes. Ultimately, I would say he trusts the leadership in marketing, which are myself, John and Glen – C-level marketing and consumer insight. And then relies upon us for our recommendation and then further collaborates with his team. I mean, he's ultimately the decision maker, but we're bringing him recommendations.

DA: Okay. Are you familiar with the co-design model of creative development?

AH: If I am, I don't think I've heard of it talked about that way.

DA: Well actually, I think you are because it's a lot like what you're doing, working closely with the agencies to develop concepts and then tons of consumer testing. So you guys are doing it, you just didn't even realize there was a name for it. (laughs). Which is good.

AH: Right.

DA: It's just a way of agencies and clients working very closely together throughout the creative development process, and then working closely with your consumers to help drive that creative. So it sounds like you do all of that. How important would you say that is? It sounds like it's vastly important, but I want to hear it from you. Is it something new that you're just starting doing in the last few years? Or is it something that's kind of been ingrained in the Ruby Tuesday model from Day One?

AH: Oh, I would say it's not been ingrained. It's been what I've been accustomed to since I started being involved in marketing. Goodness. Maybe it is. I would say at today's Ruby Tuesday, it is part of who we are. I can't imagine doing it internally and it not being just a wholehearted partnership. And that's relying upon the creativity of people outside but also relying upon the talent of the people that we hold inside to help bring those ideas to fruition.

DA: That's all the questions I have unless, is there anything else you feel like you want to add that we missed? Or any ways you feel agencies and clients can work together that people can learn from the Ruby Tuesday model?

AH: No, I feel like I articulated it pretty well. We really enjoy the partnership we have now. We had an opportunity to change it just two months ago and we didn't even engage in the RFP process because we are appreciative of where it's at now.

DA: Thank you so much Angie, I appreciate your time.

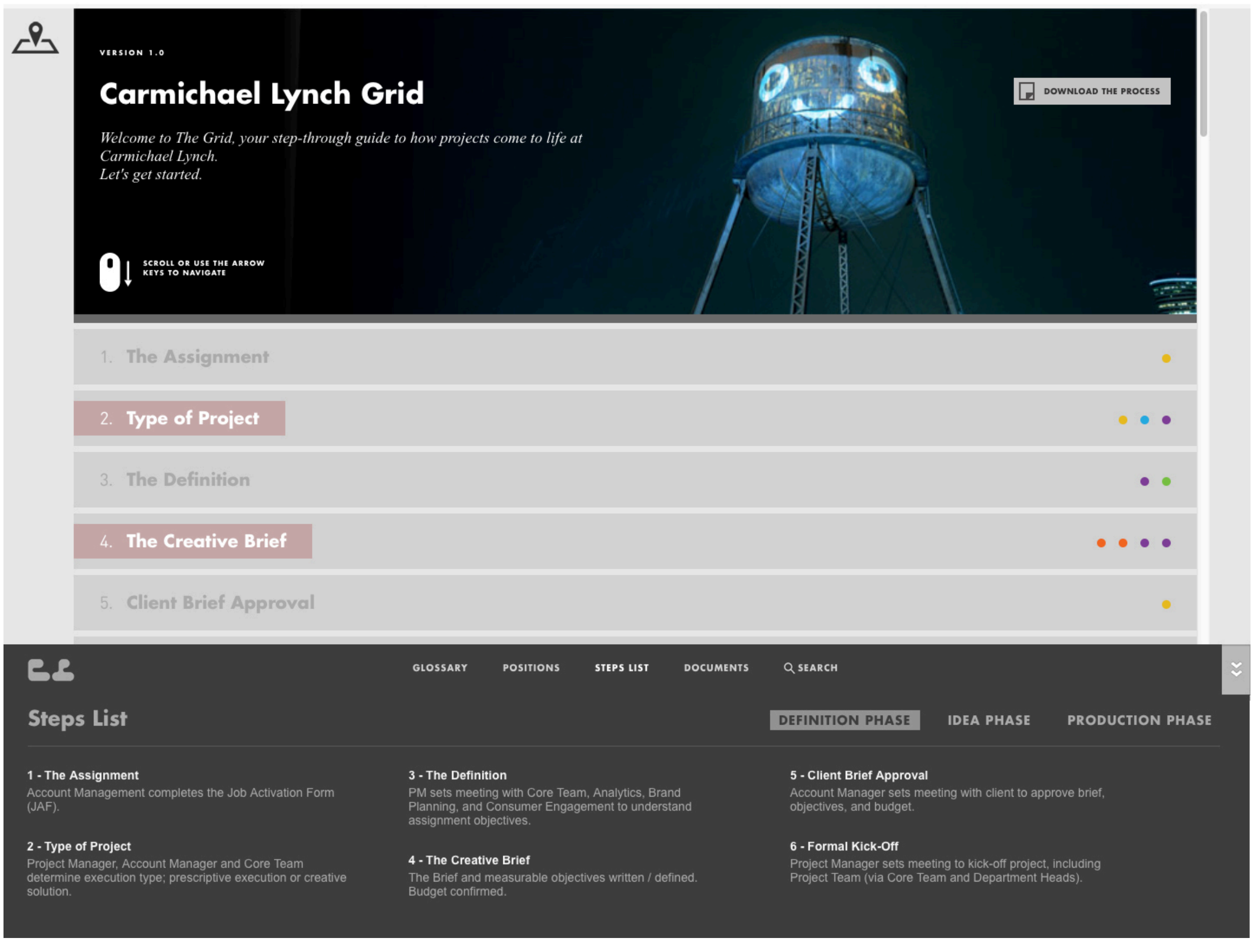
Follow-up Question

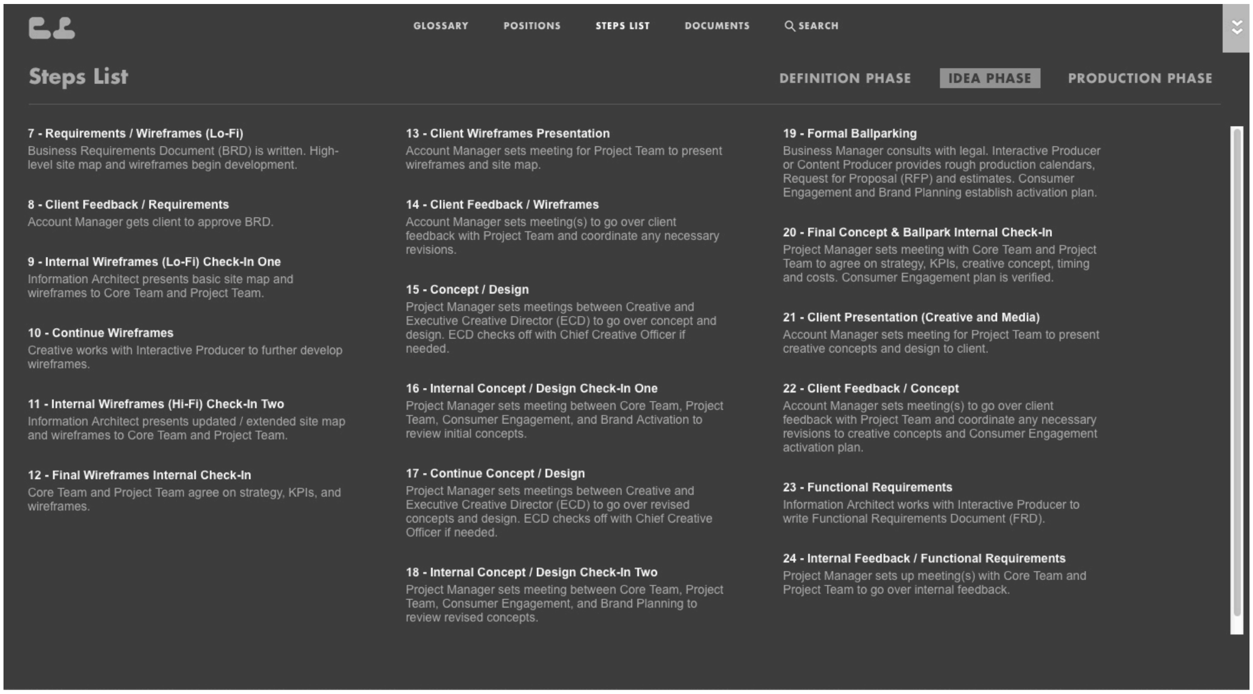
DA: Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

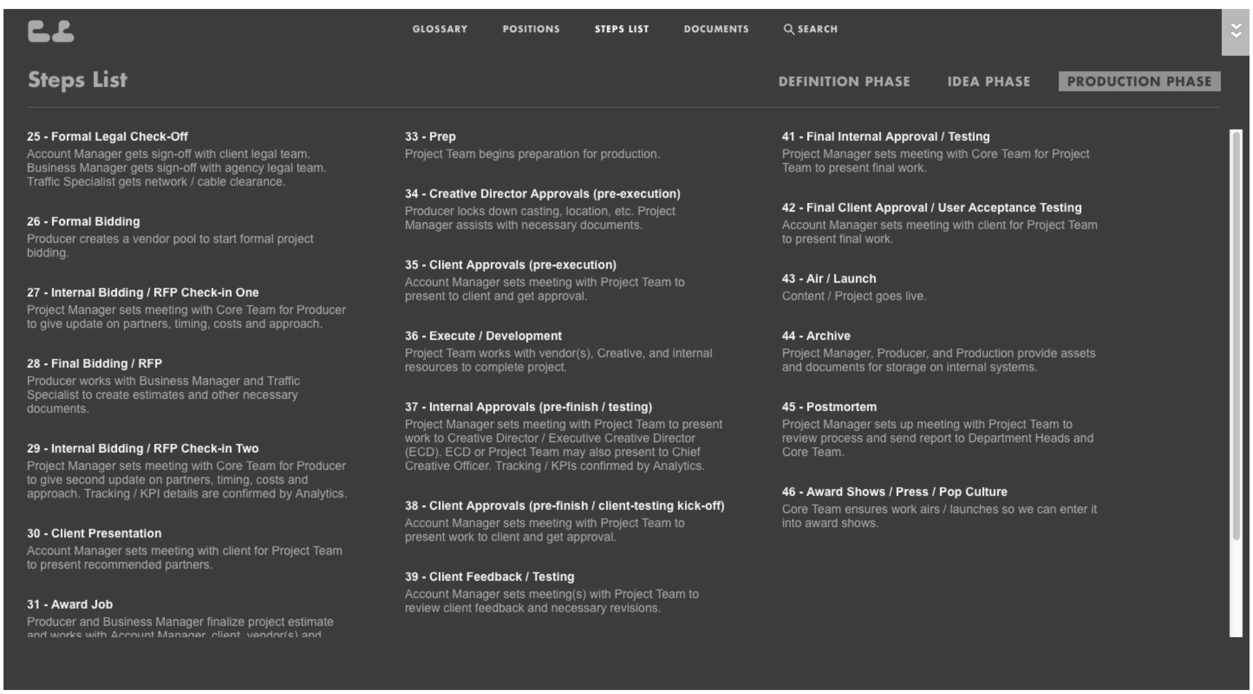
AH: Yes, we do hire freelancers for some creative projects. The rationale for hiring them ranges but is largely based upon resource strain internally and/or the need to have outside perspective to broaden the creative lens.

Appendix U

Carmichael Lynch Grid – Project Management Flow Chart




GLOSSARY
POSITIONS
STEPS LIST
DOCUMENTS
SEARCH
Steps List
DEFINITION PHASE
IDEA PHASE
PRODUCTION PHASE
7 - Requirements / Wireframes (Lo-Fi)
Business Requirements Document (BRD) is written. High-level site map and wireframes begin development.
8 - Client Feedback / Requirements
Account Manager gets client to approve BRD.
9 - Internal Wireframes (Lo-Fi) Check-In One
Information Architect presents basic site map and wireframes to Core Team and Project Team.
10 - Continue Wireframes
Creative works with Interactive Producer to further develop wireframes.
11 - Internal Wireframes (Hi-Fi) Check-In Two
Information Architect presents updated / extended site map and wireframes to Core Team and Project Team.
12 - Final Wireframes Internal Check-In
Core Team and Project Team agree on strategy, KPIs, and wireframes.
13 - Client Wireframes Presentation
Account Manager sets meeting for Project Team to present wireframes and site map.
14 - Client Feedback / Wireframes
Account Manager sets meeting(s) to go over client feedback with Project Team and coordinate any necessary revisions.
15 - Concept / Design
Project Manager sets meetings between Creative and Executive Creative Director (ECD) to go over concept and design. ECD checks off with Chief Creative Officer if needed.
16 - Internal Concept / Design Check-In One
Project Manager sets meeting between Core Team, Project Team, Consumer Engagement, and Brand Activation to review initial concepts.
17 - Continue Concept / Design
Project Manager sets meetings between Creative and Executive Creative Director (ECD) to go over revised concepts and design. ECD checks off with Chief Creative Officer if needed.
18 - Internal Concept / Design Check-In Two
Project Manager sets meeting between Core Team, Project Team, Consumer Engagement, and Brand Planning to review revised concepts.
19 - Formal Ballparking
Business Manager consults with legal. Interactive Producer or Content Producer provides rough production calendars, Request for Proposal (RFP) and estimates. Consumer Engagement and Brand Planning establish activation plan.
20 - Final Concept & Ballpark Internal Check-In
Project Manager sets meeting with Core Team and Project Team to agree on strategy, KPIs, creative concept, timing and costs. Consumer Engagement plan is verified.
21 - Client Presentation (Creative and Media)
Account Manager sets meeting for Project Team to present creative concepts and design to client.
22 - Client Feedback / Concept
Account Manager sets meeting(s) to go over client feedback with Project Team and coordinate any necessary revisions to creative concepts and Consumer Engagement activation plan.
23 - Functional Requirements
Information Architect works with Interactive Producer to write Functional Requirements Document (FRD).
24 - Internal Feedback / Functional Requirements
Project Manager sets up meeting(s) with Core Team and Project Team to go over internal feedback.


GLOSSARY
POSITIONS
STEPS LIST
DOCUMENTS
SEARCH
Steps List
DEFINITION PHASE
IDEA PHASE
PRODUCTION PHASE
25 - Formal Legal Check-Off
Account Manager gets sign-off with client legal team. Business Manager gets sign-off with agency legal team. Traffic Specialist gets network / cable clearance.
26 - Formal Bidding
Producer creates a vendor pool to start formal project bidding.
27 - Internal Bidding / RFP Check-in One
Project Manager sets meeting with Core Team for Producer to give update on partners, timing, costs and approach.
28 - Final Bidding / RFP
Producer works with Business Manager and Traffic Specialist to create estimates and other necessary documents.
29 - Internal Bidding / RFP Check-in Two
Project Manager sets meeting with Core Team for Producer to give second update on partners, timing, costs and approach. Tracking / KPI details are confirmed by Analytics.
30 - Client Presentation
Account Manager sets meeting with client for Project Team to present recommended partners.
31 - Award Job
Producer and Business Manager finalize project estimate
33 - Prep
Project Team begins preparation for production.
34 - Creative Director Approvals (pre-execution)
Producer locks down casting, location, etc. Project Manager assists with necessary documents.
35 - Client Approvals (pre-execution)
Account Manager sets meeting with Project Team to present to client and get approval.
36 - Execute / Development
Project Team works with vendor(s), Creative, and internal resources to complete project.
37 - Internal Approvals (pre-finish / testing)
Project Manager sets meeting with Project Team to present work to Creative Director / Executive Creative Director (ECD). ECD or Project Team may also present to Chief Creative Officer. Tracking / KPIs confirmed by Analytics.
38 - Client Approvals (pre-finish / client-testing kick-off)
Account Manager sets meeting with Project Team to present work to client and get approval.
39 - Client Feedback / Testing
Account Manager sets meeting(s) with Project Team to review client feedback and necessary revisions.
41 - Final Internal Approval / Testing
Project Manager sets meeting with Core Team for Project Team to present final work.
42 - Final Client Approval / User Acceptance Testing
Account Manager sets meeting with client for Project Team to present final work.
43 - Air / Launch
Content / Project goes live.
44 - Archive
Project Manager, Producer, and Production provide assets and documents for storage on internal systems.
45 - Postmortem
Project Manager sets up meeting with Project Team to review process and send report to Department Heads and Core Team.
46 - Award Shows / Press / Pop Culture
Core Team ensures work airs / launches so we can enter it into award shows.

Appendix V

Standard Architectural Contract – American Institute of Architects (AIA)

DRAFT

AIA® Document B101™ – 2007

Standard Form of Agreement Between Owner and Architect

AGREEMENT made as of the day of in the year
(In words, indicate day, month and year)

BETWEEN the Architect's client identified as the Owner:
(Name, address and other information)

and the Architect:
(Name, address and other information)

for the following Project:
(Name, location and detailed description)

The Owner and Architect agree as follows.

ADDITIONS AND DELETIONS: The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

DRAFT

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User Notes: (683037676)

TABLE OF ARTICLES

ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Article 1 and in optional Exhibit A, Initial Information:
(Complete Exhibit A, Initial Information, and incorporate it into the Agreement at Section 13.2, or state below Initial Information such as details of the Project's site and program, Owner's contractors and consultants, Architect's consultants, Owner's budget for the Cost of the Work, authorized representatives, anticipated procurement method, and other information relevant to the Project.)

§ 1.2 The Owner's anticipated dates for commencement of construction and Substantial Completion of the Work are set forth below:

.1 Commencement of construction date:

____

.2 Substantial Completion date:

____

§ 1.3 The Owner and Architect may rely on the Initial Information. Both parties, however, recognize that such information may materially change and, in that event, the Owner and the Architect shall appropriately adjust the schedule, the Architect's services and the Architect's compensation.

DRAFT

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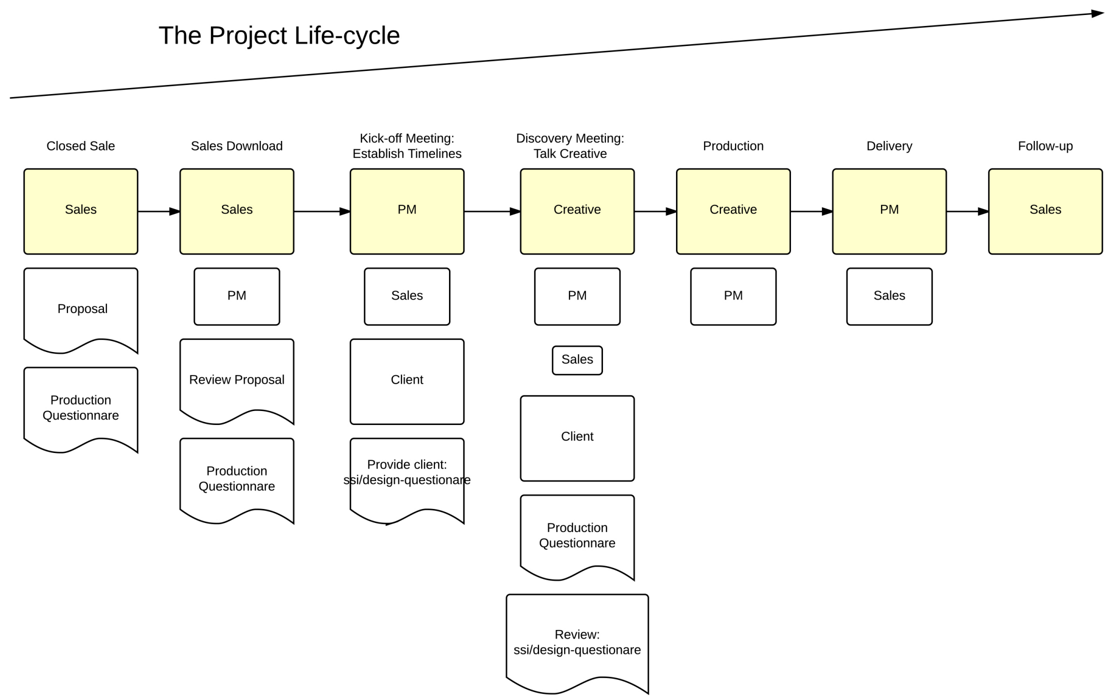
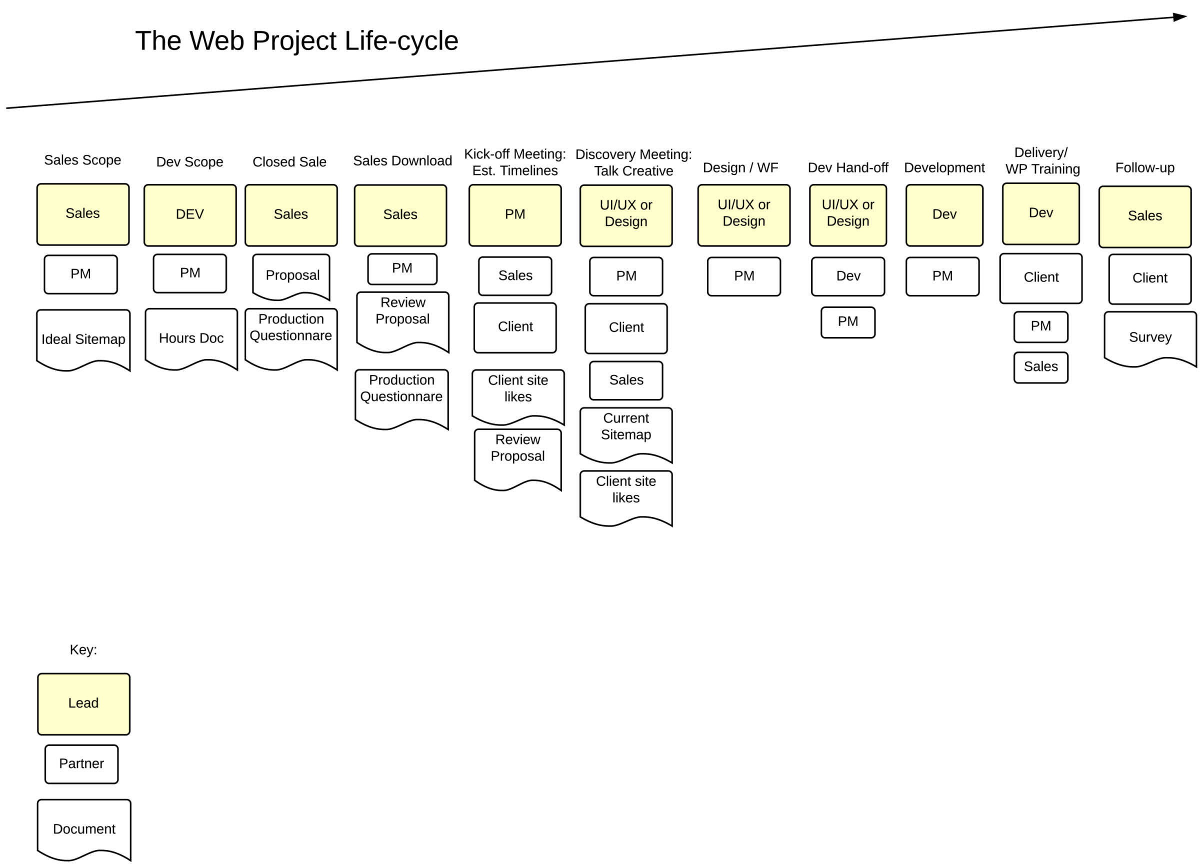
User Notes: (683037676)

Appendix W

Project Lifecycle – SnapShot Interactive




The Web Project Life-cycle
Sales Scope
Sales
PM
Ideal Sitemap
Dev Scope
DEV
PM
Hours Doc
Closed Sale
Sales
Proposal
Production Questionnare
Sales Download
Sales
PM
Review Proposal
Production Questionnare
Kick-off Meeting: Est. Timelines
PM
Sales
Client
Client site likes
Review Proposal
Discovery Meeting: Talk Creative
UI/UX or Design
PM
Client
Sales
Current Sitemap
Client site likes
Design / WF
UI/UX or Design
PM
Dev Hand-off
UI/UX or Design
Dev
PM
Development
Dev
PM
Delivery/ WP Training
Dev
Client
PM
Sales
Follow-up
Sales
Client
Survey
Key:
Lead
Partner
Document

Appendix X

The DVL Quality Assurance Process – DVL Seigenthaler

Appendix Y

Visual Thesis

For my visual thesis, I developed a program called “Proof Points – Rules of Client Engagement for Creative Professionals.” The objective of this communication is to give creative professionals, boutique agency professionals or design students, who are considering a freelance career, the tools they need to succeed in today’s highly competitive creative industry. The goal is to present these client engagement strategies in a way that is easily understood and can be emulated in order foster a greater agency/client relationship. The “Proof Points” program consists of three components: a video presentation, a physical printed piece, and a current creative business issues blog.

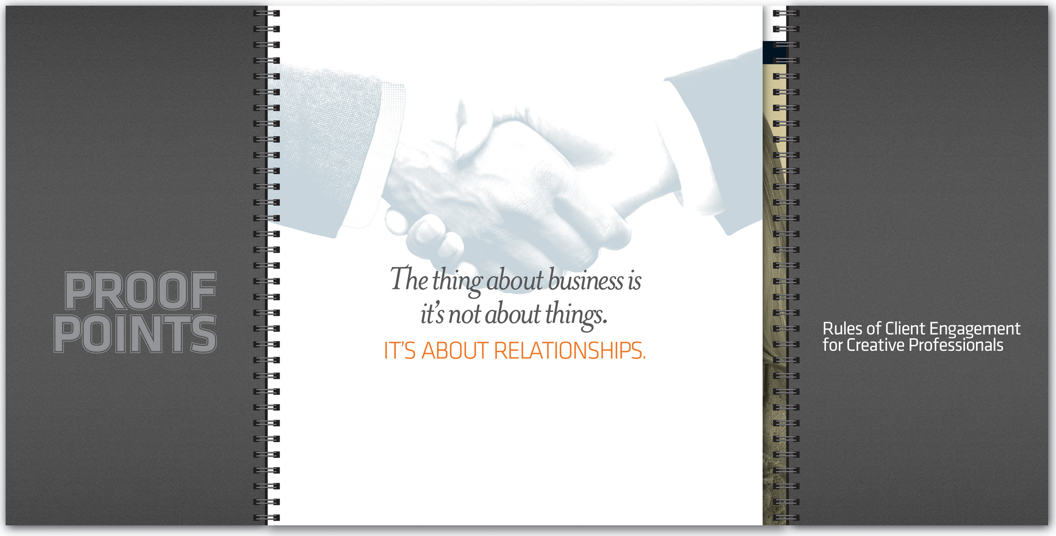
Proof Points – Video Presentation

The “Proof Points” video is a 15-minute presentation given to a group of design students interested in running their own creative business. The presentation took place on October 28, 2015, at Belmont University in Nashville, Tennessee. The full presentation can be viewed at the link below.

https://youtu.be/WgKYLhP5550

Proof Points – Print Piece

The print component of the "Proof Points" program is a 132-page plus cover Wire-O bound piece. This piece presents the current state of agency/client relationships along with the five "Proof Points." The back of this piece includes excerpts from all 16 interviews conducted during the research phase of this thesis.

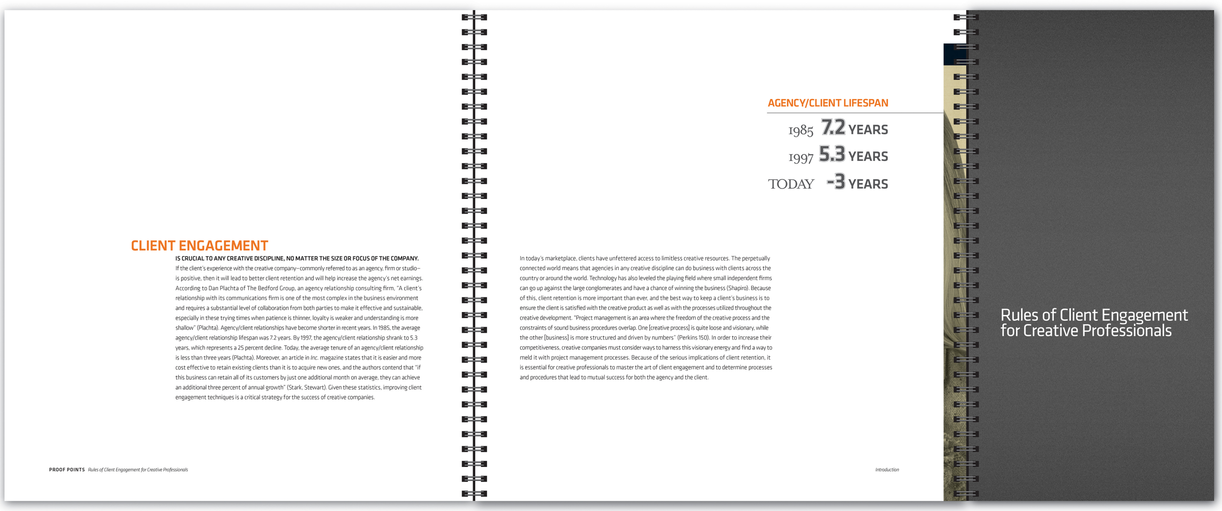


PROOF POINTS

The thing about business is it's not about things.

IT'S ABOUT RELATIONSHIPS.

Rules of Client Engagement for Creative Professionals



CLIENT ENGAGEMENT

IS CRUCIAL TO ANY CREATIVE DISCIPLINE, NO MATTER THE SIZE OR FOCUS OF THE COMPANY. If the client's experience with the creative company—commonly referred to as an agency, firm or studio—is positive, then it will lead to better client retention and will help increase the agency's net earnings. According to Dan Plachta of The Bedford Group, an agency relationship consulting firm, "A client's relationship with its communications firm is one of the most complex in the business environment and requires a substantial level of collaboration from both parties to make it effective and sustainable, especially in these trying times when patience is thinner, loyalty is weaker and understanding is more shallow" (Plachta). Agency/client relationships have become shorter in recent years. In 1985, the average agency/client relationship lifespan was 7.2 years. By 1997, the agency/client relationship shrank to 5.3 years, which represents a 25 percent decline. Today, the average tenure of an agency/client relationship is less than three years (Plachta). Moreover, an article in *Inc.* magazine states that it is easier and more cost effective to retain existing clients than it is to acquire new ones, and the authors contend that "if this business can retain all of its customers by just one additional month on average, they can achieve an additional three percent of annual growth" (Stark, Stewart). Given these statistics, improving client engagement techniques is a critical strategy for the success of creative companies.

PROOF POINTS *Rules of Client Engagement for Creative Professionals*

AGENCY/CLIENT LIFESPAN

1985 **7.2** YEARS

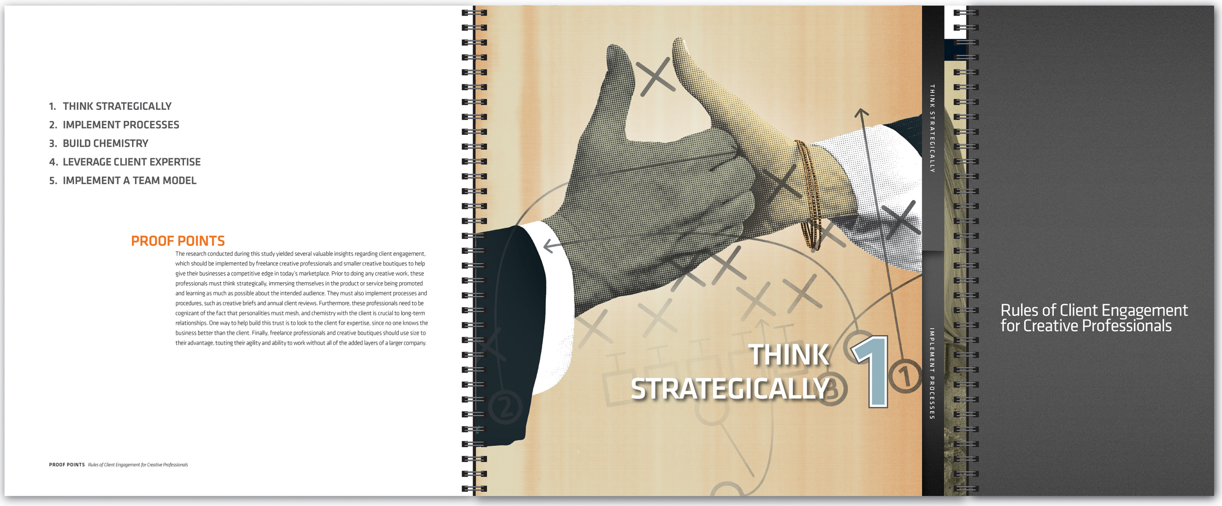
1997 **5.3** YEARS

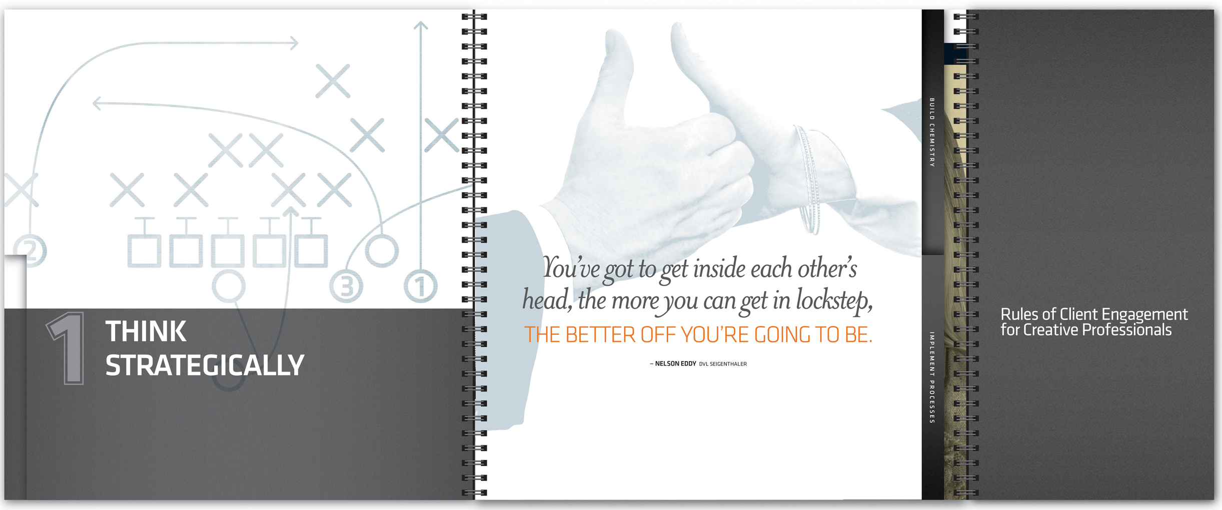
TODAY **~3** YEARS

In today's marketplace, clients have unfettered access to limitless creative resources. The perpetually connected world means that agencies in any creative discipline can do business with clients across the country or around the world. Technology has also leveled the playing field where small independent firms can go up against the large conglomerates and have a chance of winning the business (Shapiro). Because of this, client retention is more important than ever, and the best way to keep a client's business is to ensure the client is satisfied with the creative product as well as with the processes utilized throughout the creative development. "Project management is an area where the freedom of the creative process and the constraints of sound business procedures overlap. One [creative process] is quite loose and visionary, while the other [business] is more structured and driven by numbers" (Perkins 150). In order to increase their competitiveness, creative companies must consider ways to harness this visionary energy and find a way to meld it with project management processes. Because of the serious implications of client retention, it is essential for creative professionals to master the art of client engagement and to determine processes and procedures that lead to mutual success for both the agency and the client.

Introduction

Rules of Client Engagement for Creative Professionals


1. THINK STRATEGICALLY
2. IMPLEMENT PROCESSES
3. BUILD CHEMISTRY
4. LEVERAGE CLIENT EXPERTISE
5. IMPLEMENT A TEAM MODEL
PROOF POINTS
The research conducted during this study yielded several valuable insights regarding client engagement, which should be implemented by freelance creative professionals and smaller creative boutiques to help give their businesses a competitive edge in today's marketplace. Prior to doing any creative work, these professionals must think strategically, immersing themselves in the product or service being promoted and learning as much as possible about the intended audience. They must also implement processes and procedures, such as creative briefs and annual client reviews. Furthermore, these professionals need to be cognizant of the fact that personalities must mesh, and chemistry with the client is crucial to long-term relationships. One way to help build this trust is to look to the client for expertise, since no one knows the business better than the client. Finally, freelance professionals and creative boutiques should use size to their advantage, touting their agility and ability to work without all of the added layers of a larger company.
THINK STRATEGICALLY 1
THINK STRATEGICALLY
IMPLEMENT PROCESSES
Rules of Client Engagement for Creative Professionals


1 THINK STRATEGICALLY
You've got to get inside each other's head, the more you can get in lockstep,
THE BETTER OFF YOU'RE GOING TO BE.
– NELSON EDDY DVL SEIGENTHALER
BUILD CHEMISTRY
IMPLEMENT PROCESSES
Rules of Client Engagement for Creative Professionals

"I need a partner that's thinking a step ahead of me and is positioning me for that greater success."

– JASON LOEHR BROWN-FORMAN

THINK STRATEGICALLY

IN THE PAST, FREELANCE CREATIVE PROFESSIONALS HAVE FOCUSED MAINLY ON AESTHETICS. However, it is now imperative to think strategically and get to know the target audience. As Pieter Jan Stappers from Creation & Company explains in his book *Open Design Now*, "The role of designers is becoming more varied: part creator, part researcher, part facilitator … part process manager" (151). As part researcher, creative professionals must make an effort to obtain an in-depth understanding of the audience or user group to whom the work is targeted and understand the factors that go into the purchasing process (Sinek). Not all research has to be expensive and conducted by large research firms. As Satterwhite of Willoughby Design states:

> "*We've worked with a notebook company that didn't have time or budget to do in-depth research … [the product] was a line of notebooks for teenage girls. So we rounded up our ten best babysitters … teenage girls to come in and give us their feedback … Sometimes you have to be really creative on how you get [insights].*" (Satterwhite)

Creative professionals must put aside their own assumptions about a product or service and engage with the intended audience in order to develop an effective strategy for the creative task at hand.

In addition to research, testing is also an important step in the creative development process. In the world of Web and app design, usability testing is an expected and necessary step to be included in the project development (Martin, Hanington 195). Testing also has a place in other design disciplines, such as advertising and graphic design. Ruby Tuesday tests all of their annual promotions for effectiveness with their core user group. Angie Heig states, "We develop what we call internally 'concepts.' These are literally two or three sentence decriptions [each] … [we] content test rather than [test] finished advertisements" (Heig). Everyone interviewed for the study agrees the most effective way to conduct testing is at the concept or directional level. It is never a good idea to test final creative pieces. As Stacy Janicki of Carmichael Lynch explains, "If you ask someone [in a focus group] – 'Do you like the ice cream television spot?' They'll say, 'Well, I don't see anyone eating it. And they're not smiling. And no one told me it was just five grams of fat in a serving" (Janicki). Janicki's point is that testing the final creative product is too subjective, and by its very nature, testing is asking a person to find something wrong with the final product. Testing should be conducted early on in the process at the directional level to give creative professionals a chance to revise the work to have stronger impact on the target audience.

PROOF POINTS *Rules of Client Engagement for Creative Professionals*

Think Strategically

BUILD CHEMISTRY

IMPLEMENT PROCESSES

Rules of Client Engagement for Creative Professionals

1. CHECK OUT EXISTING MATERIALS
2. FOLLOW GRAPHIC STANDARDS
3. RESEARCH THE AUDIENCE/USER GROUPS
4. KNOW THE COMPETITION

In today's technologically-savvy world, creative professionals must also think strategically in terms of producing work that will be used across various platforms. An example of this is how Web designers must consider how their designs will translate into print or into an experiential environment. In contrast, a print designer needs to think how a concept would play out in a Web-based video or mobile application. This concept is often referred to as being "T-shaped," meaning the creative professional is highly skilled in a particular medium or expertise, but also has a keen understanding of how that skill works across the entire marketing landscape (creativegroup.com). This is not to imply the creative professional has to be able to complete every step of a project. The designer simply needs to know how it all fits together and how to assemble the right parts.

PROOF POINTS *Rules of Client Engagement for Creative Professionals*

IMPLEMENT PROCESSES 2

BUILD CHEMISTRY

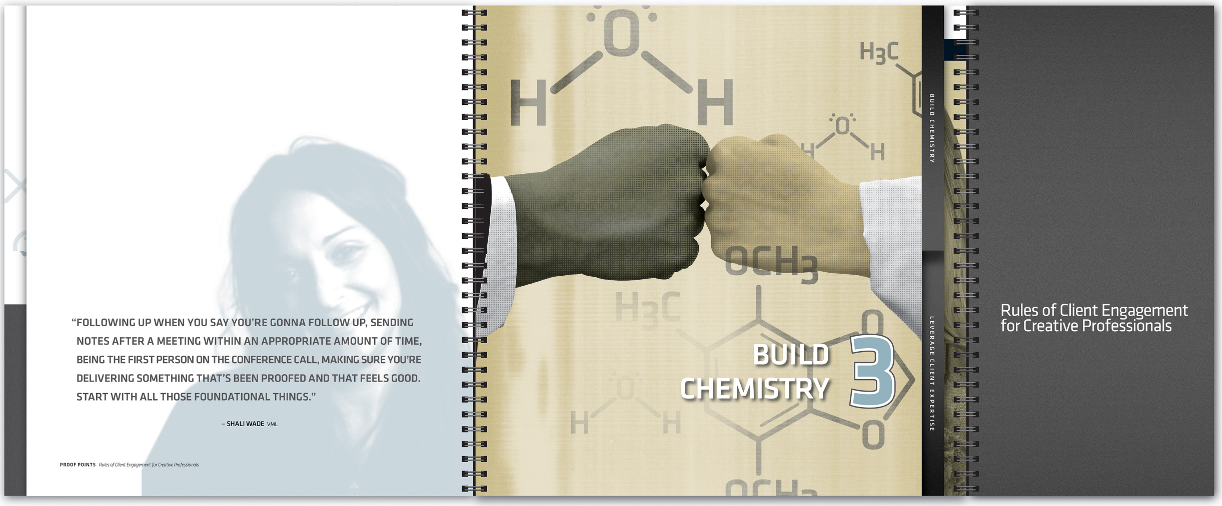
IMPLEMENT PROCESSES

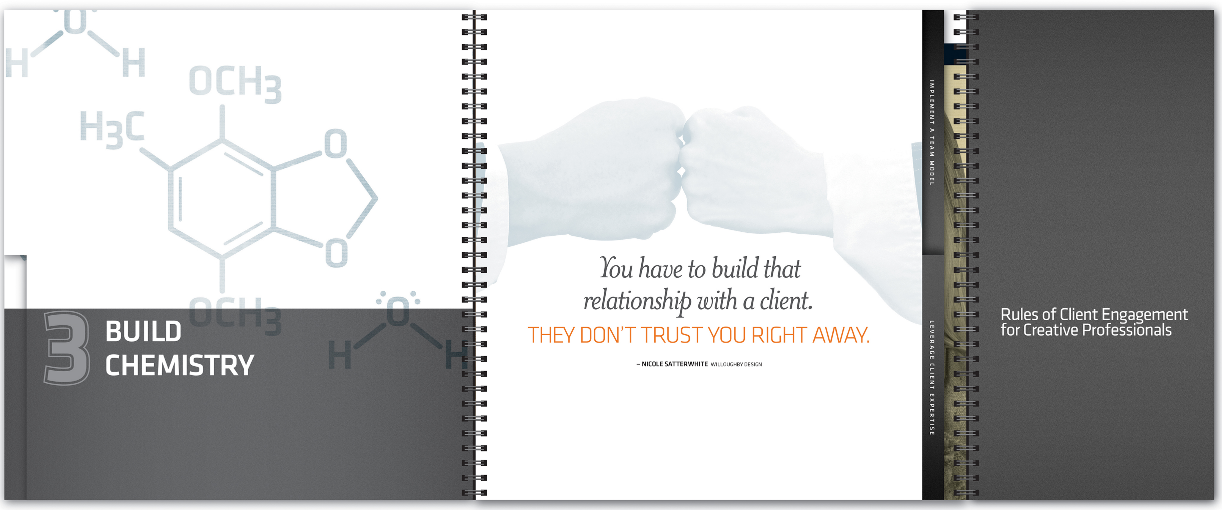
Rules of Client Engagement for Creative Professionals

Addy 322


2
IMPLEMENT PROCESSES
Just because you're dealing in creative services doesn't mean there shouldn't be
DISCIPLINE AS PART OF IT.
— ROY VAUGHN BLUECROSS BLUESHIELD OF TENNESSEE
BUILD CHEMISTRY
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals


1. CLEAR ESTIMATES EVERY TIME
2. CREATIVE BRIEFS WITH CLARIFICATION ON HOW SUCCESS WILL BE MEASURED
3. PROJECT FOLLOW-THROUGH
4. ANNUAL REVIEW
IMPLEMENT PROCESSES
ALL CREATIVE PROFESSIONALS CAN BENEFIT FROM THE PROCESSES USED BY LARGER COMPANIES.
Based on the interviews of the creative companies, examples range from a formal contract for project development to step-by-step processes for creative development. One of the very basic processes that freelance professionals should utilize is the creative brief, which is the first step in development and is used as a guide throughout the process. The brief is used to judge the validity of the concepts generated to make sure they are on strategy and on target. It also gives the client an understanding of the creative development process and the steps required to produce the work. Such transparency helps increase collaboration and builds trust between the creative professionals and their clients. Regular touch points may be as simple as a daily call to check in with the client (Vieira). It could also be a standing meeting to review everything in the creative development pipeline (Rigsby). As Maureen Barry from GSD&M states, "During the process, mistakes are always going to happen, but it's how you deal with those mistakes that determine whether you keep [the client's] trust or not" (Barry). If a creative company is open and transparent about their processes, there is a better chance of the company continuing a client relationship despite making an occasional mistake.
Another method cited by interviewees regarding fostering client engagement and collaboration is to conduct an annual review with the client. Janicki of Carmichael Lynch says, "We sit down and do annual reviews with our clients to try and hear what's not working and address that stuff" (Janicki). Since it is more cost effective to keep an account than to search for new business, annual reviews are a proactive way to help counter problems before the account falls into jeopardy. Such transparency between the creative company and client helps both parties determine what processes and procedures are working, what is not working, and what changes need to be made. This type of honest and open dialogue between the creative company and the client serves to strengthen the business relationship. It is also a good idea to conduct creative audits internally and with the client upon the completion of any major project, using the goals spelled out in the creative brief to determine if the project was a success or to develop improvements for the next project.
PROOF POINTS Rules of Client Engagement for Creative Professionals
Implement Processes
BUILD CHEMISTRY
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals


"FOLLOWING UP WHEN YOU SAY YOU'RE GONNA FOLLOW UP, SENDING NOTES AFTER A MEETING WITHIN AN APPROPRIATE AMOUNT OF TIME, BEING THE FIRST PERSON ON THE CONFERENCE CALL, MAKING SURE YOU'RE DELIVERING SOMETHING THAT'S BEEN PROOFED AND THAT FEELS GOOD. START WITH ALL THOSE FOUNDATIONAL THINGS."
– SHALI WADE VML
BUILD CHEMISTRY 3
BUILD CHEMISTRY
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals


3 BUILD CHEMISTRY
You have to build that relationship with a client.
THEY DON'T TRUST YOU RIGHT AWAY.
– NICOLE SATTERWHITE WILLOUGHBY DESIGN
IMPLEMENT A TEAM MODEL
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals

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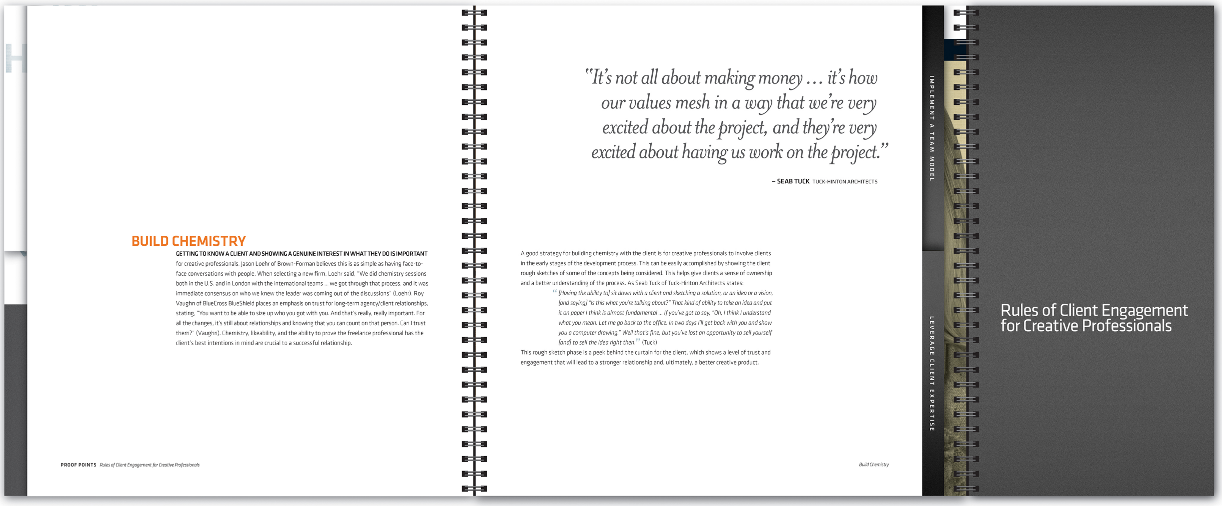
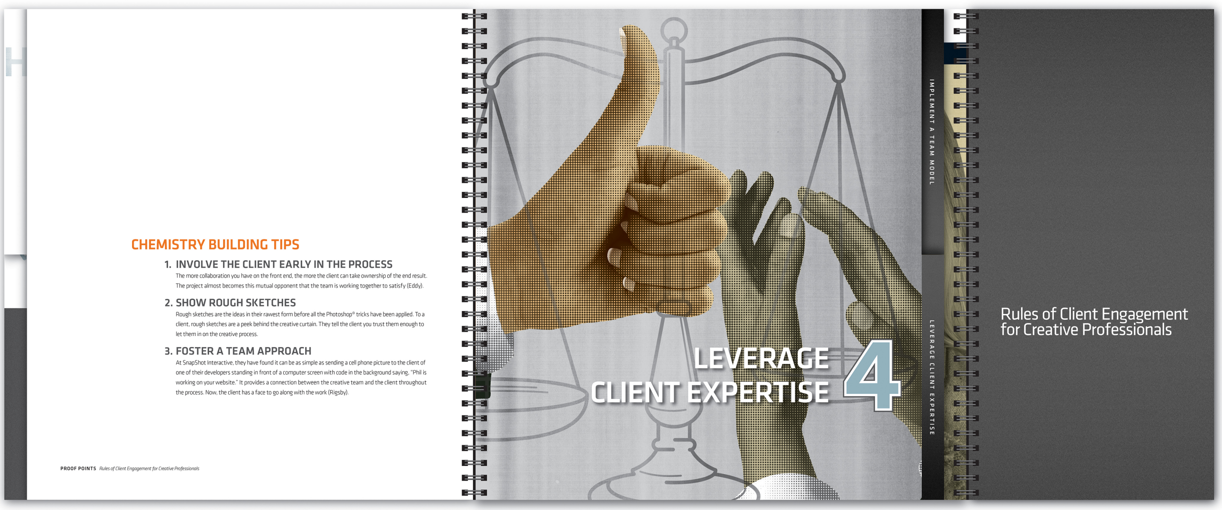
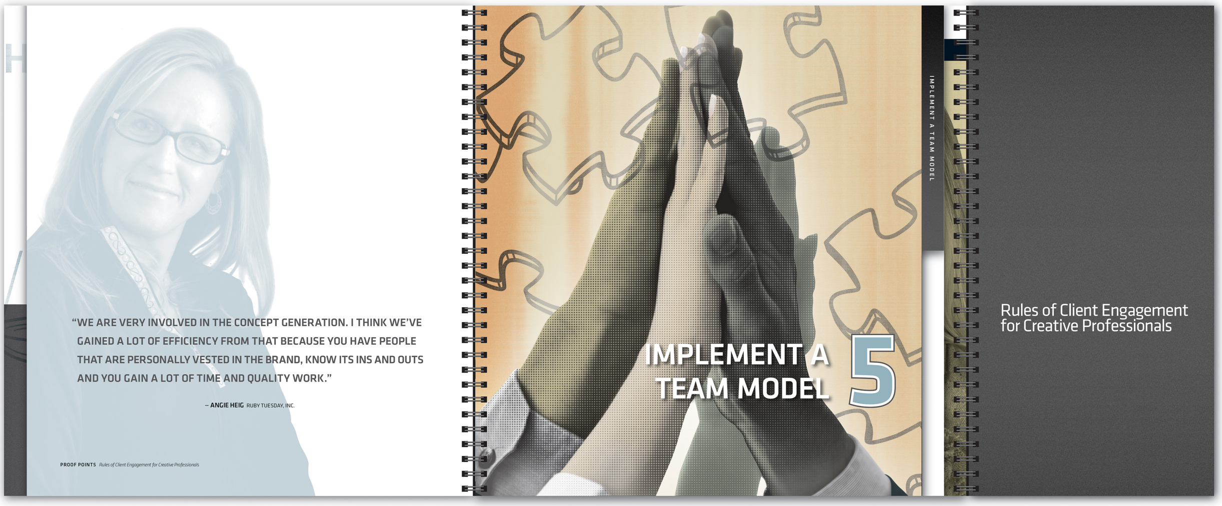
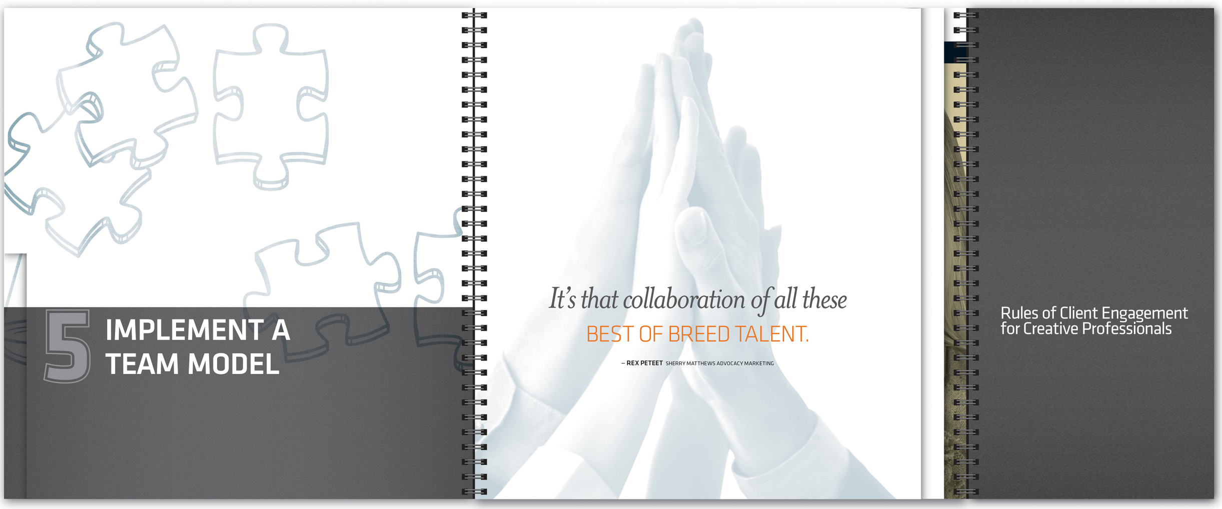

BUILD CHEMISTRY
GETTING TO KNOW A CLIENT AND SHOWING A GENUINE INTEREST IN WHAT THEY DO IS IMPORTANT for creative professionals. Jason Loehr of Brown-Forman believes this is as simple as having face-to-face conversations with people. When selecting a new firm, Loehr said, "We did chemistry sessions both in the U.S. and in London with the international teams … we got through that process, and it was immediate consensus on who we knew the leader was coming out of the discussions" (Loehr). Roy Vaughn of BlueCross BlueShield places an emphasis on trust for long-term agency/client relationships, stating, "You want to be able to size up who you got with you. And that's really, really important. For all the changes, it's still about relationships and knowing that you can count on that person. Can I trust them?" (Vaughn). Chemistry, likeability, and the ability to prove the freelance professional has the client's best intentions in mind are crucial to a successful relationship.
PROOF POINTS Rules of Client Engagement for Creative Professionals
"It's not all about making money … it's how our values mesh in a way that we're very excited about the project, and they're very excited about having us work on the project."
– SEAB TUCK TUCK-HINTON ARCHITECTS
A good strategy for building chemistry with the client is for creative professionals to involve clients in the early stages of the development process. This can be easily accomplished by showing the client rough sketches of some of the concepts being considered. This helps give clients a sense of ownership and a better understanding of the process. As Seab Tuck of Tuck-Hinton Architects states:
"[Having the ability to] sit down with a client and sketching a solution, or an idea or a vision, [and saying] "Is this what you're talking about?" That kind of ability to take an idea and put it on paper I think is almost fundamental … If you've got to say, "Oh, I think I understand what you mean. Let me go back to the office. In two days I'll get back with you and show you a computer drawing." Well that's fine, but you've lost an opportunity to sell yourself [and] to sell the idea right then." (Tuck)
This rough sketch phase is a peek behind the curtain for the client, which shows a level of trust and engagement that will lead to a stronger relationship and, ultimately, a better creative product.
Build Chemistry
IMPLEMENT A TEAM MODEL
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals


CHEMISTRY BUILDING TIPS
1. INVOLVE THE CLIENT EARLY IN THE PROCESS
The more collaboration you have on the front end, the more the client can take ownership of the end result. The project almost becomes this mutual opponent that the team is working together to satisfy (Eddy).
2. SHOW ROUGH SKETCHES
Rough sketches are the ideas in their rawest form before all the Photoshop® tricks have been applied. To a client, rough sketches are a peek behind the creative curtain. They tell the client you trust them enough to let them in on the creative process.
3. FOSTER A TEAM APPROACH
At SnapShot Interactive, they have found it can be as simple as sending a cell phone picture to the client of one of their developers standing in front of a computer screen with code in the background saying, "Phil is working on your website." It provides a connection between the creative team and the client throughout the process. Now, the client has a face to go along with the work (Rigsby).
PROOF POINTS Rules of Client Engagement for Creative Professionals
LEVERAGE CLIENT EXPERTISE 4
IMPLEMENT A TEAM MODEL
LEVERAGE CLIENT EXPERTISE
Rules of Client Engagement for Creative Professionals


4 LEVERAGE
CLIENT EXPERTISE
Great ads are produced by the
creative team once they have
PROPER INPUT FROM THE CLIENT.
– CHUCK CREASY NASHVILLE CONVENTION AND VISITORS CORP.
IMPLEMENT A TEAM MODEL
Rules of Client Engagement
for Creative Professionals


LEVERAGE CLIENT EXPERTISE
CREATIVE PROFESSIONALS MUST TAKE ADVANTAGE OF THE VAST WEALTH OF KNOWLEDGE their clients possess by listening and learning. Jason Loehr of Brown-Forman states, "The last thing you want is having a group tell you how they know your business and what you can do better" (Loehr). Several of the clients interviewed also cite the fact they felt like their creative partners did not listen to them. Chuck Creasy of the Nashville Convention and Visitors Corp bluntly states, "Listen more; talk less" (Creasy). Nicole Satterwhite of Willoughby Design admitted that clients have become increasingly savvy and sophisticated, and are more engaged with the creative development process than ever in the past (Satterwhite).
PROOF POINTS Rules of Client Engagement for Creative Professionals
"These guys are living and
breathing their business."
– REX PETEET SHERRY MATTHEWS ADVOCACY MARKETING
Given this, it is important for creative professionals to take a step back and listen to clients before starting any work. As David Krejci of Weber Shandwick states, "We want to know as much about the industry, we want to know as much about the audience as possible. So one of the sources of that information, of course, is the client" (Krejci). Nelson Eddy of DVL Seigenthaler reiterated this sentiment stating, "The client probably knows the audience better than I do … there's a wealth of knowledge there that you need to tap into" (Eddy). By taking this knowledge and using it to develop powerful creative deliverables that resonate with the intended audience, the creative professional will be viewed as a strategic partner and trusted marketing advisor – not simply a tactician hired to carry out a client's orders.
Leverage Client Expertise
IMPLEMENT A TEAM MODEL
Rules of Client Engagement
for Creative Professionals


"WE ARE VERY INVOLVED IN THE CONCEPT GENERATION. I THINK WE'VE GAINED A LOT OF EFFICIENCY FROM THAT BECAUSE YOU HAVE PEOPLE THAT ARE PERSONALLY VESTED IN THE BRAND, KNOW ITS INS AND OUTS AND YOU GAIN A LOT OF TIME AND QUALITY WORK."
– ANGIE HEIG RUBY TUESDAY, INC.
PROOF POINTS Rules of Client Engagement for Creative Professionals
IMPLEMENT A TEAM MODEL
5
IMPLEMENT A TEAM MODEL
Rules of Client Engagement for Creative Professionals


5
IMPLEMENT A TEAM MODEL
It's that collaboration of all these
BEST OF BREED TALENT.
– REX PETEET SHERRY MATTHEWS ADVOCACY MARKETING
Rules of Client Engagement for Creative Professionals

IMPLEMENT A TEAM MODEL

WHEN ASKED SPECIFICALLY ABOUT FREELANCE TALENT, EACH OF THE CLIENTS INTERVIEWED said they use freelance professionals for certain tasks. However, they prefer larger agencies for integrated campaigns and more high-profile projects. These clients reported using freelance professionals when the scope of a project was small, budgets did not warrant engaging a large agency, and when there was no need for strategies to be developed. Clients trusted the individual skills of freelancer professionals, but they trusted agencies for more complex projects with multiple deliverables.

Despite this feedback, freelance professionals should not be discouraged. As an increasing number of professionals leave large agencies to work on their own, a new model has begun to take shape – the team or virtual agency model. As Cameron Foote states in *The Business Side of Creativity*:

> “*It is possible … to have writers in New York working with designers in Los Angeles; production people in Chicago working on projects for a client in London… Technology makes it possible for creative individuals to work easily outside the traditional work environment.*” (12)

In the team approach, highly specialized professionals ban together to produce creative work for a client.

ASSEMBLE A TEAM OF THE BEST MINDS TO COMPLETE THE TASK AT HAND.

For instance, a freelance team consisting of an art director, a writer, a producer, and a director could be pulled together to work on a television campaign. If a client needs a full campaign across several media channels, a freelance strategist or account manager could be added to the team. The purpose of the team model is to assemble just the right resources for the task at hand and nothing more. “It really comes down to placing a premium on speed, thrift, simplicity, and restraint, and then using those principles to shape our approach to problem solving and decision making” (Ward 217). This collaboration of talented individuals allows a client’s needs to be fulfilled just as a large agency would but without all of the overhead costs.

The team model has challenges of its own. For example, the various creative professionals needed for any job must be sourced, and they must have the capacity in their schedules to take on the newly proposed project. Also, since the talent is often in different locations, collaboration is not as easy as in the agency model where everyone is under the same roof. However, technology does help alleviate some of those issues. Even with these challenges, the team approach can be a very effective model, which allows the “best of breed” talent to work together on a project without being in the same location at the same time (Peteet).

Rules of Client Engagement for Creative Professionals

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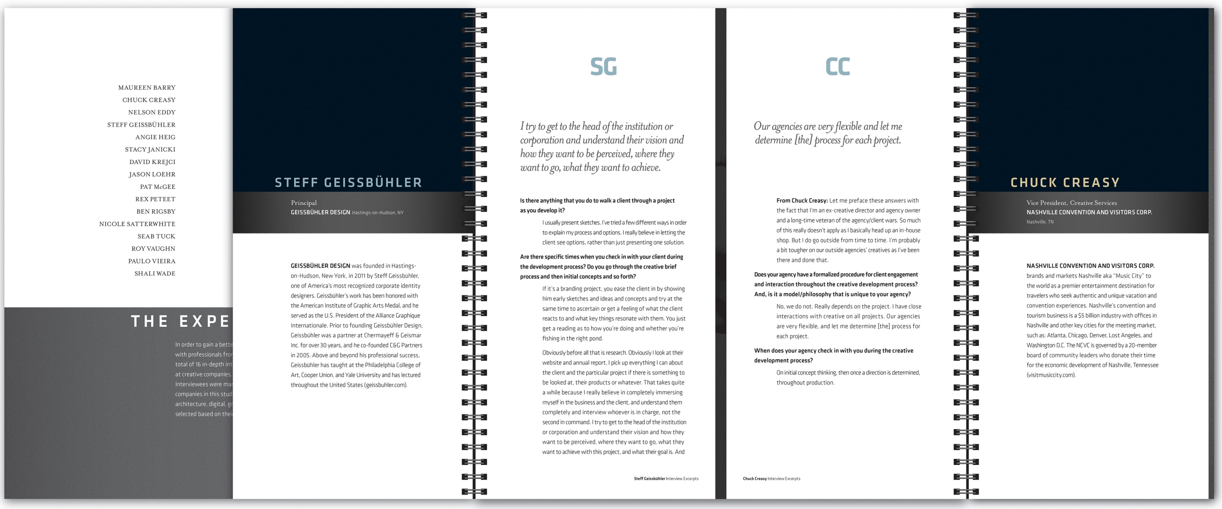
THE EXPERTS

Rules of Client Engagement for Creative Professionals


MAUREEN BARRY
CHUCK CREASY
NELSON EDDY
STEFF GEISSBÜHLER
ANGIE HEIG
STACY JANICKI
DAVID KREJCI
JASON LOEHR
PAT McGEE
REX PETEET
BEN RIGSBY
NICOLE SATTERWHITE
SEAB TUCK
ROY VAUGHN
PAULO VIEIRA
SHALI WADE
THE EXPERTS
In order to gain a better understanding of client engagement, in-depth interviews were conducted with professionals from creative companies as well as from client-side marketing departments. A total of 16 in-depth interviews were completed. Eleven of those interviews were with professionals at creative companies, and five interviews were with clients in corporate marketing departments. Interviewees were management level executives from cities across the country. The 11 creative companies in this study encompassed five different creative disciplines, including: advertising, architecture, digital, graphic design/branding, and public relations. These creative agencies were selected based on their size, notable work they had produced, and their reputation in the industry.
STACY
SR. PARTNER, DIR. OF ACCOUNT MANAGEMENT
CARMICHAEL LYNCH
JANICKI
NICOLE
SENIOR DESIGN DIRECTOR
WILLOUGHBY DESIGN
SATTERWHITE
Rules of Client Engagement for Creative Professionals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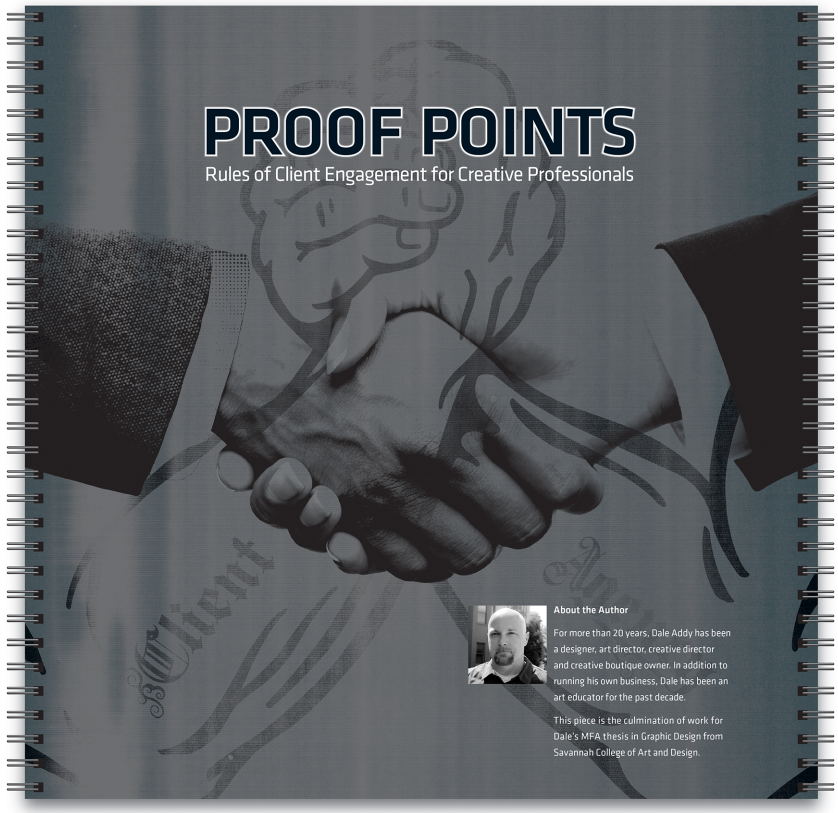
BEN RIGSBY
NICOLE SATTERWHITE
SEAB TUCK
ROY VAUGHN
PAULO VIEIRA
SHALI WADE
STEFF GEISSBÜHLER
Principal
GEISSBÜHLER DESIGN Hastings-on-Hudson, NY
GEISSBÜHLER DESIGN was founded in Hastings-on-Hudson, New York, in 2011 by Steff Geissbühler, one of America's most recognized corporate identity designers. Geissbühler's work has been honored with the American Institute of Graphic Arts Medal, and he served as the U.S. President of the Alliance Graphique Internationale. Prior to founding Geissbühler Design, Geissbühler was a partner at Chermayeff & Geismar Inc. for over 30 years, and he co-founded C&G Partners in 2005. Above and beyond his professional success, Geissbühler has taught at the Philadelphia College of Art, Cooper Union, and Yale University and has lectured throughout the United States (geissbuhler.com).
SG
I try to get to the head of the institution or corporation and understand their vision and how they want to be perceived, where they want to go, what they want to achieve.
Is there anything that you do to walk a client through a project as you develop it?
I usually present sketches. I've tried a few different ways in order to explain my process and options. I really believe in letting the client see options, rather than just presenting one solution.
Are there specific times when you check in with your client during the development process? Do you go through the creative brief process and then initial concepts and so forth?
If it's a branding project, you ease the client in by showing him early sketches and ideas and concepts and try at the same time to ascertain or get a feeling of what the client reacts to and what key things resonate with them. You just get a reading as to how you're doing and whether you're fishing in the right pond.
Obviously before all that is research. Obviously I look at their website and annual report, I pick up everything I can about the client and the particular project if there is something to be looked at, their products or whatever. That takes quite a while because I really believe in completely immersing myself in the business and the client, and understand them completely and interview whoever is in charge, not the second in command. I try to get to the head of the institution or corporation and understand their vision and how they want to be perceived, where they want to go, what they want to achieve with this project, and what their goal is. And
Steff Geissbühler Interview Excerpts
CC
Our agencies are very flexible and let me determine [the] process for each project.
From Chuck Creasy: Let me preface these answers with the fact that I'm an ex-creative director and agency owner and a long-time veteran of the agency/client wars. So much of this really doesn't apply as I basically head up an in-house shop. But I do go outside from time to time. I'm probably a bit tougher on our outside agencies' creatives as I've been there and done that.
Does your agency have a formalized procedure for client engagement and interaction throughout the creative development process? And, is it a model/philosophy that is unique to your agency?
No, we do not. Really depends on the project. I have close interactions with creative on all projects. Our agencies are very flexible, and let me determine [the] process for each project.
When does your agency check in with you during the creative development process?
On initial concept thinking, then once a direction is determined, throughout production.
Chuck Creasy Interview Excerpts
CHUCK CREASY
Vice President, Creative Services
NASHVILLE CONVENTION AND VISITORS CORP.
Nashville, TN
NASHVILLE CONVENTION AND VISITORS CORP. brands and markets Nashville aka "Music City" to the world as a premier entertainment destination for travelers who seek authentic and unique vacation and convention experiences. Nashville's convention and tourism business is a $5 billion industry with offices in Nashville and other key cities for the meeting market, such as: Atlanta, Chicago, Denver, Lost Angeles, and Washington D.C. The NCVC is governed by a 20-member board of community leaders who donate their time for the economic development of Nashville, Tennessee (visitmusiccity.com).


PROOF POINTS
Rules of Client Engagement for Creative Professionals
About the Author
For more than 20 years, Dale Addy has been a designer, art director, creative director and creative boutique owner. In addition to running his own business, Dale has been an art educator for the past decade.
This piece is the culmination of work for Dale's MFA thesis in Graphic Design from Savannah College of Art and Design.

Proof Points – Design Issues Blog

The Web component of the "Proof Points" program consists of a blog that addresses current issues related to running a creative business. This component allows the program to evolve over time and to quickly address any topics that may arise in the future. Included in the blog are the full interview transcripts from the research phase of this thesis as well as the five key findings.

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