



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.

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.

AGENCY/CLIENT LIFESPAN

1985 **7.2 YEARS**

1997 **5.3 YEARS**

TODAY **-3 YEARS**

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.

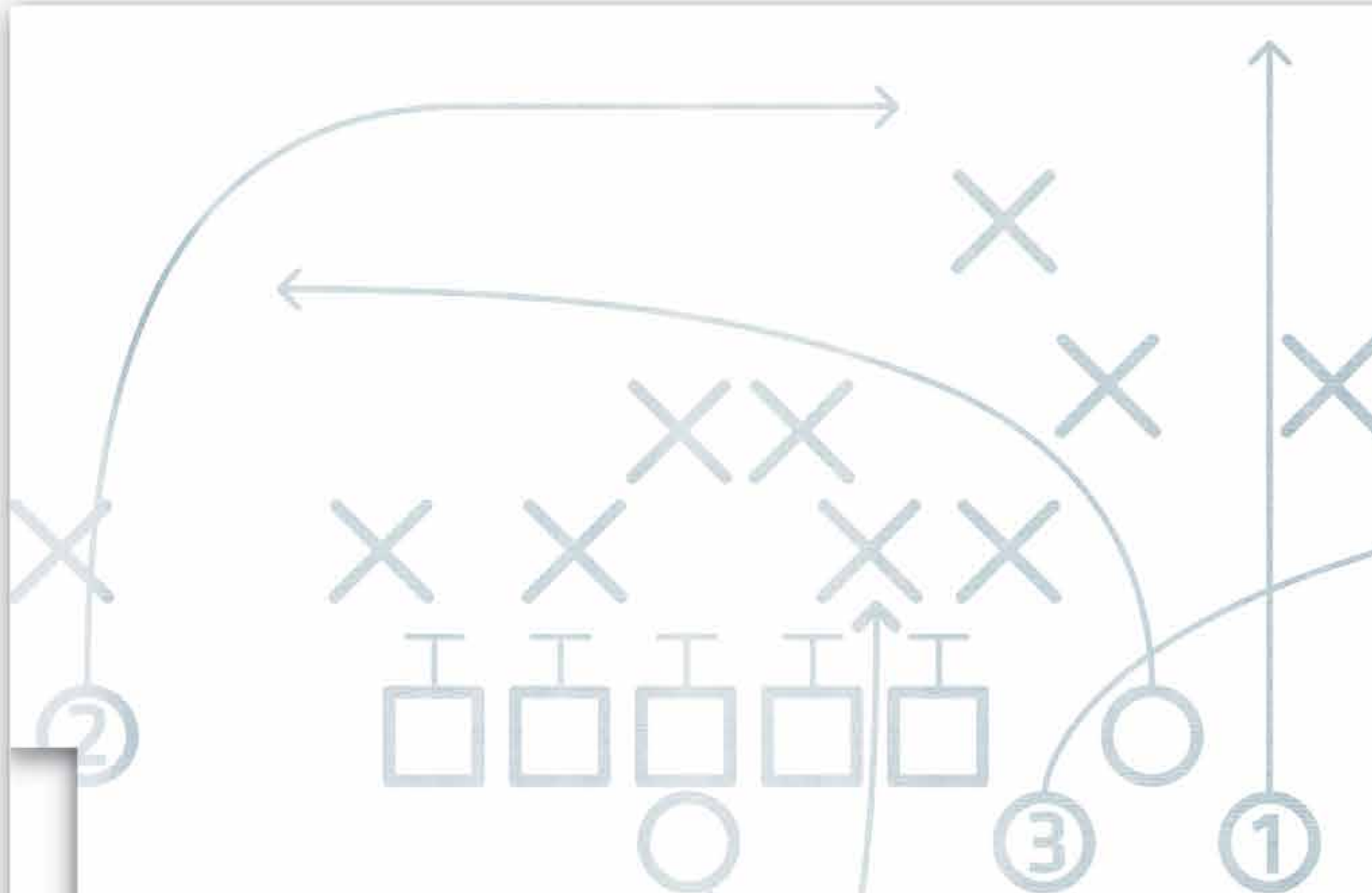
PROOF POINTS *Rules of Client Engagement for Creative Professionals*



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

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.

"I need a partner that's thinking a step ahead of me and is positioning me for that greater success."

— JASON LOEHR BROWN-FORMAN

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 descriptions [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.

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.

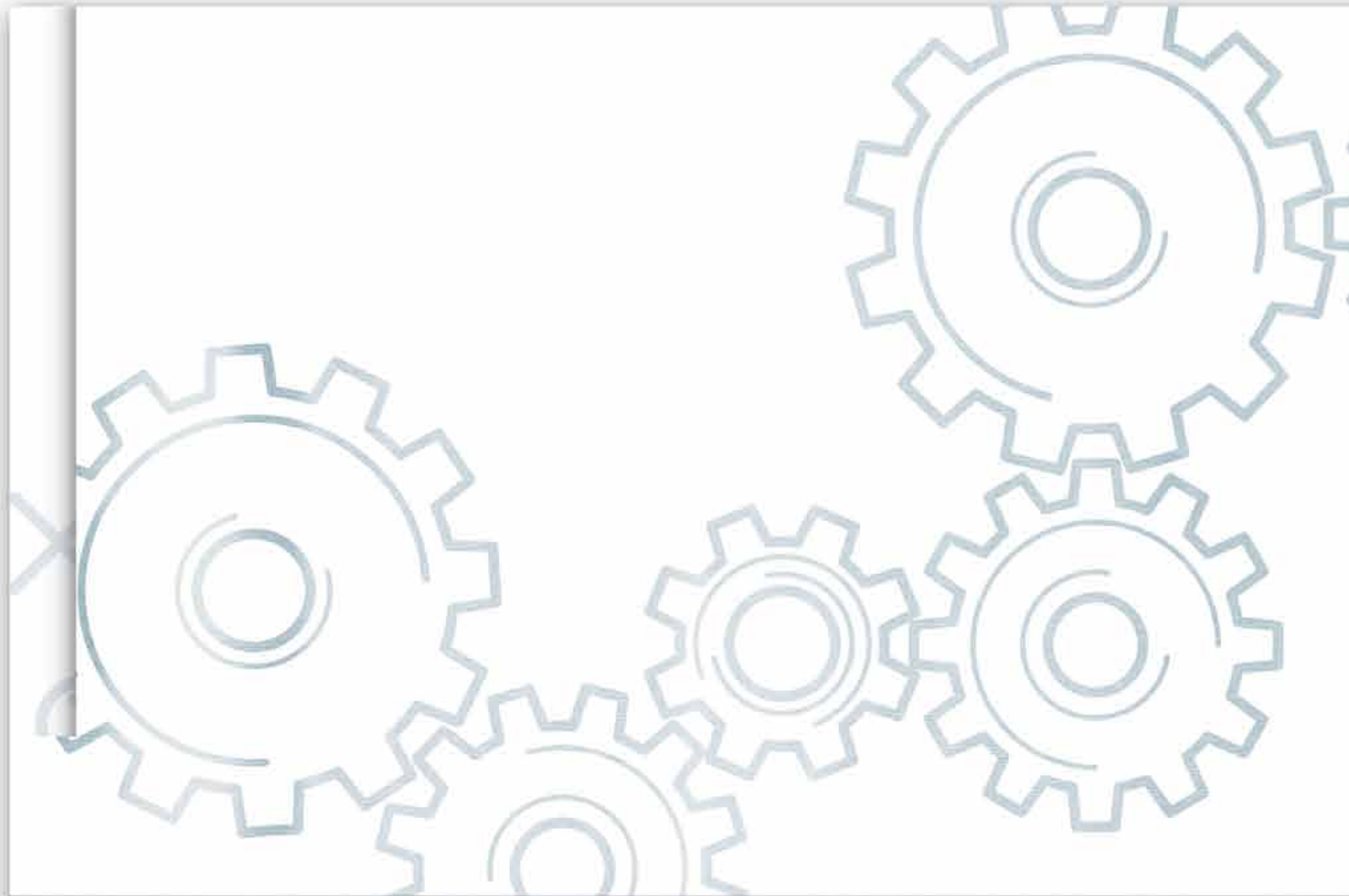
PROOF POINTS *Rules of Client Engagement for Creative Professionals*



BUILD CHEMISTRY

IMPLEMENT PROCESSES

Rules of Client Engagement
for Creative Professionals



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

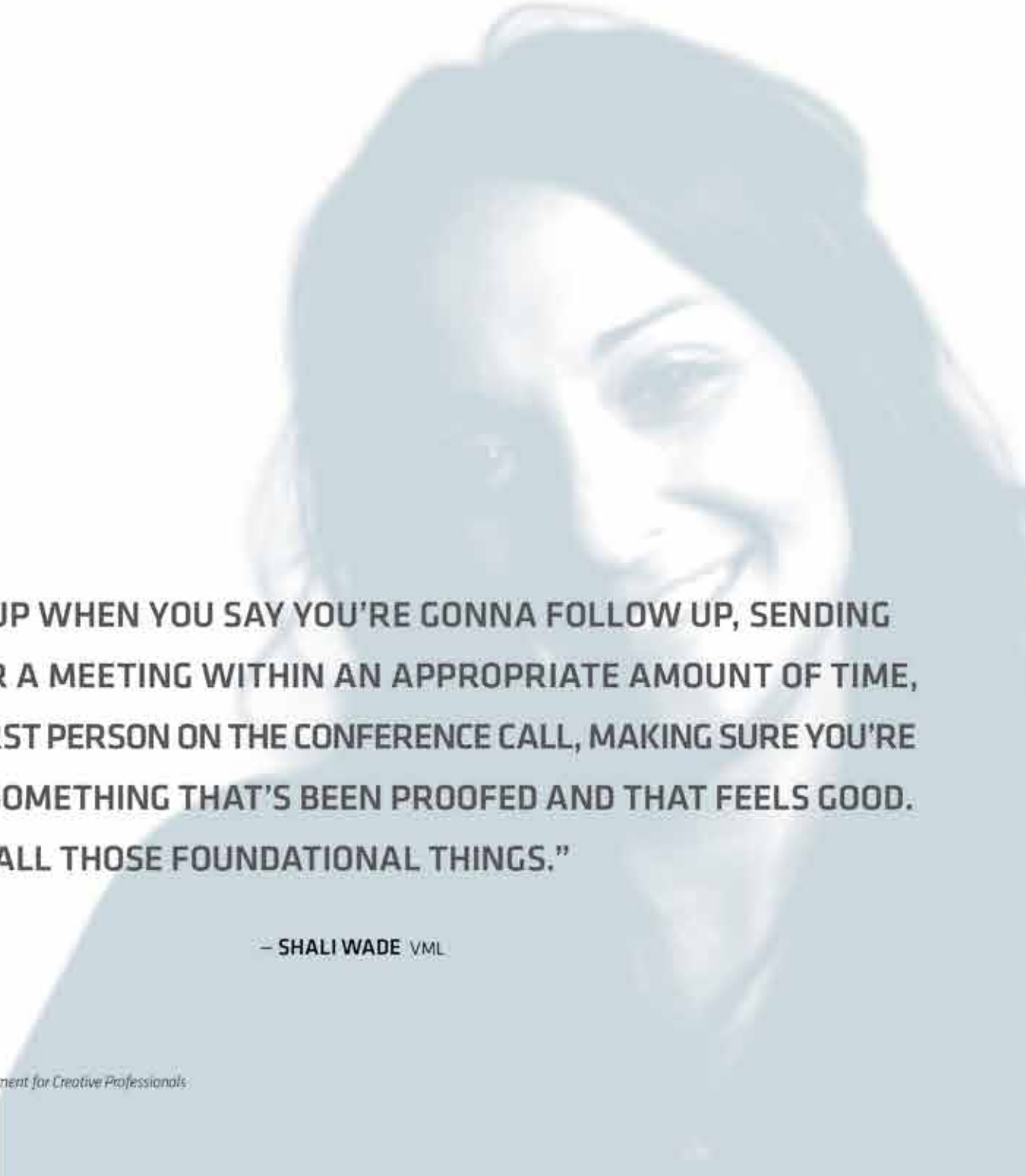
IMPLEMENT PROCESSES

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.

1. CLEAR ESTIMATES EVERY TIME
2. CREATIVE BRIEFS WITH CLARIFICATION ON HOW SUCCESS WILL BE MEASURED
3. PROJECT FOLLOW-THROUGH
4. ANNUAL REVIEW

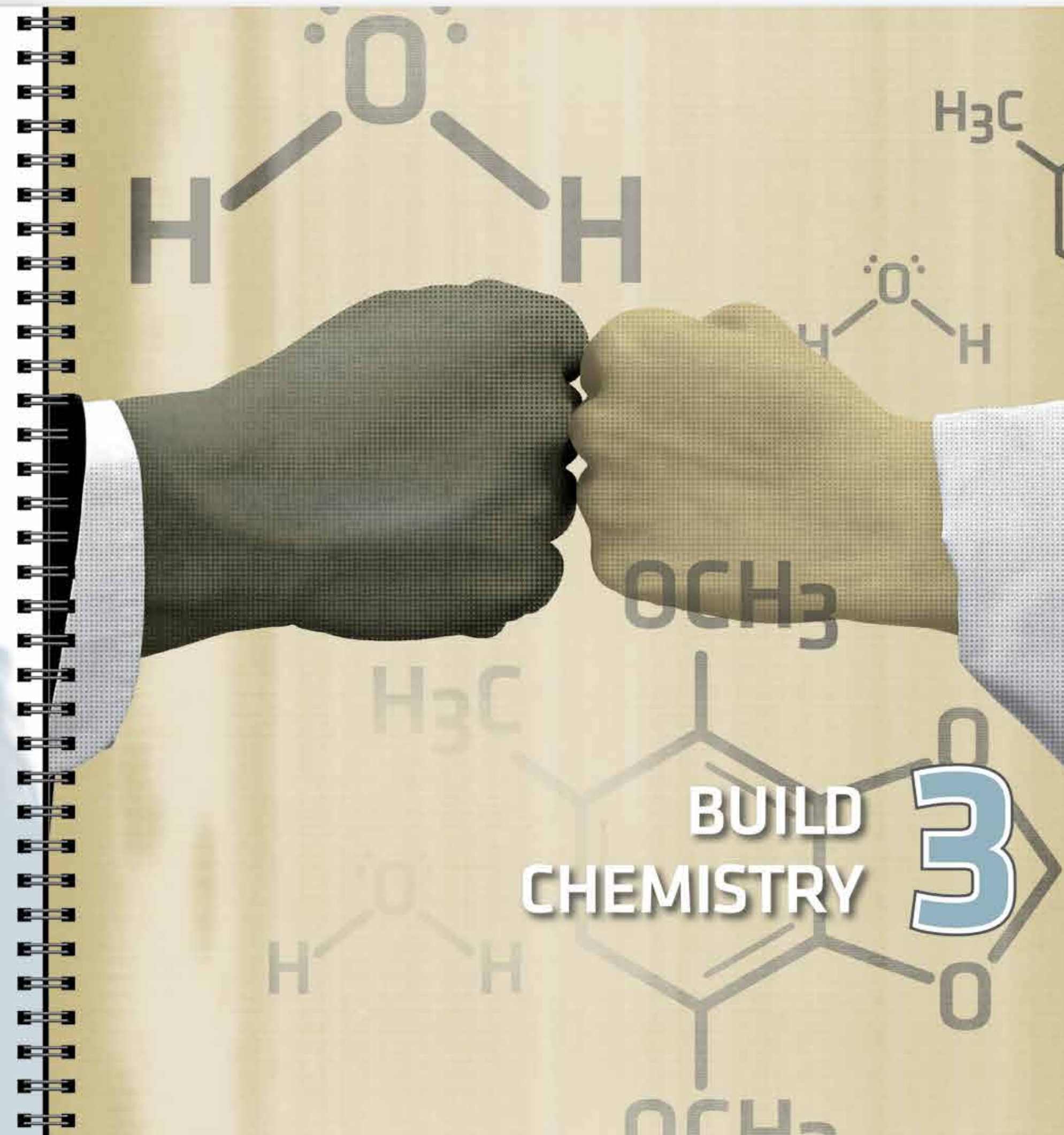
Another method cited by interviewees regarding fostering client engagement and collaboration is to conduct an annual review with the client. Janicki of Carmichael Lynch says, "We sit down and do annual reviews with our clients to try and hear what's not working and address that stuff" (Janicki). Since 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.



“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

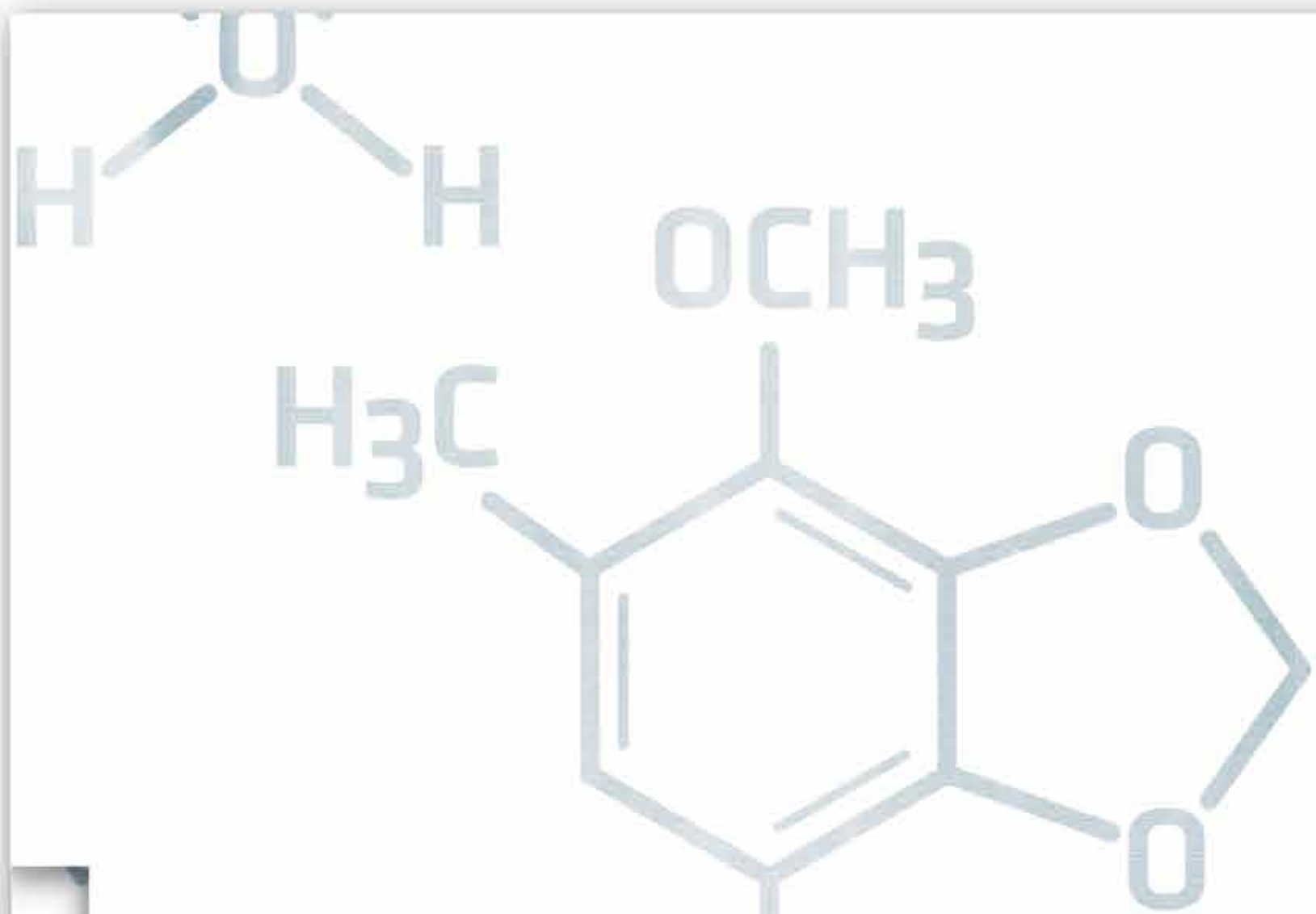
PROOF POINTS *Rules of Client Engagement for Creative Professionals*



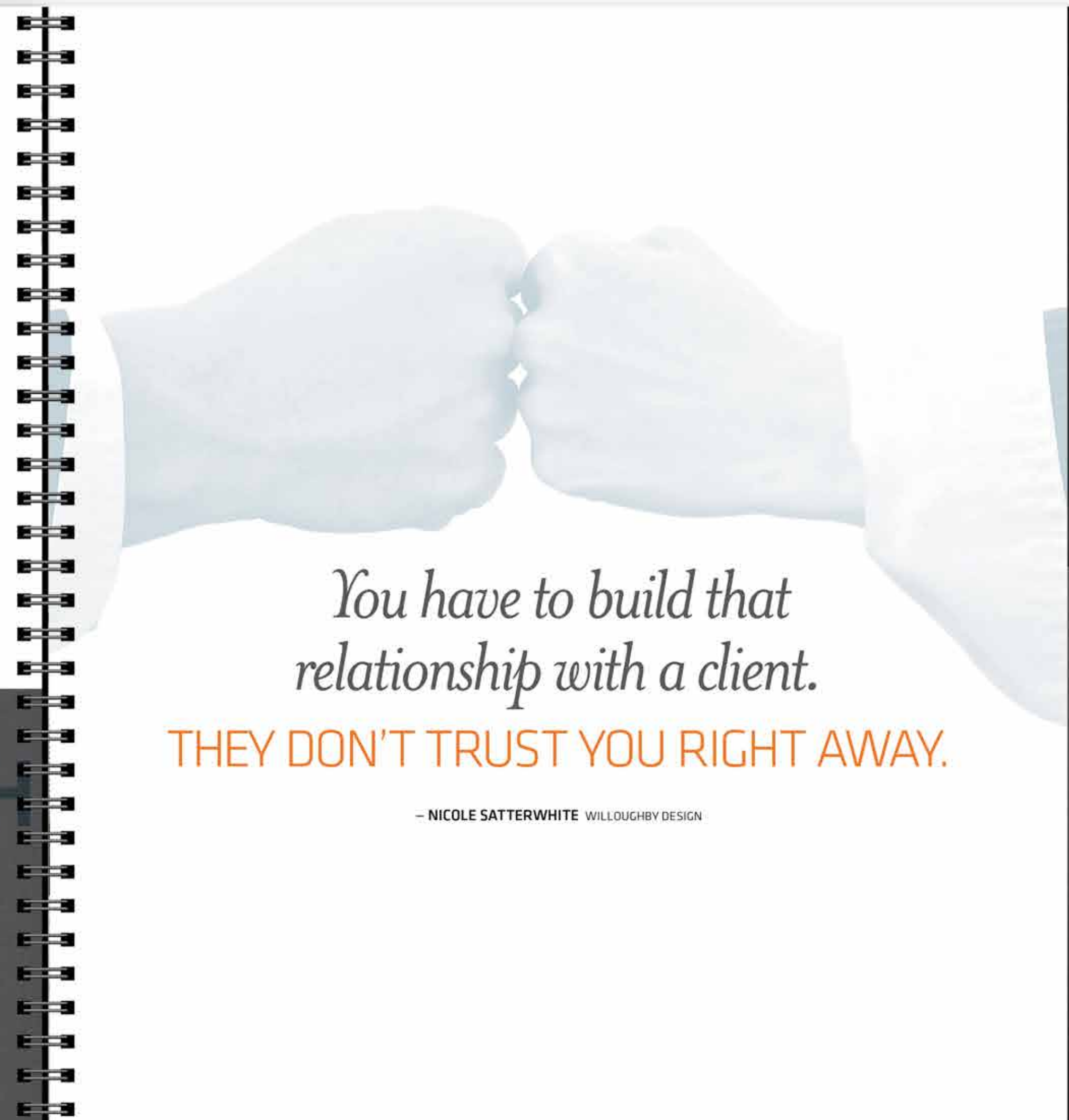
BUILD CHEMISTRY

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

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.

"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.

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).

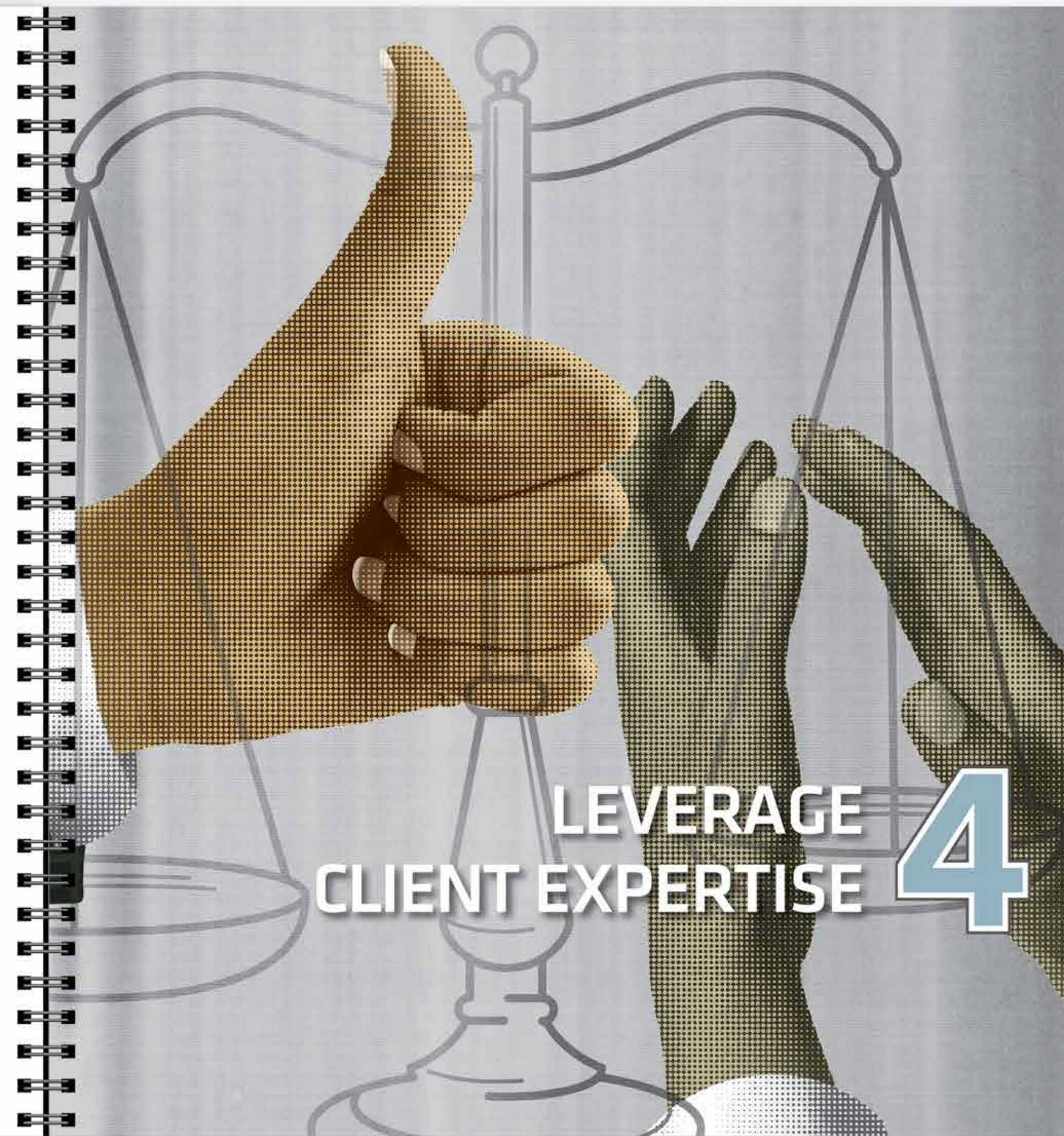
2. SHOW ROUGH SKETCHES

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*



IMPLEMENT A TEAM MODEL

LEVERAGE CLIENT EXPERTISE

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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

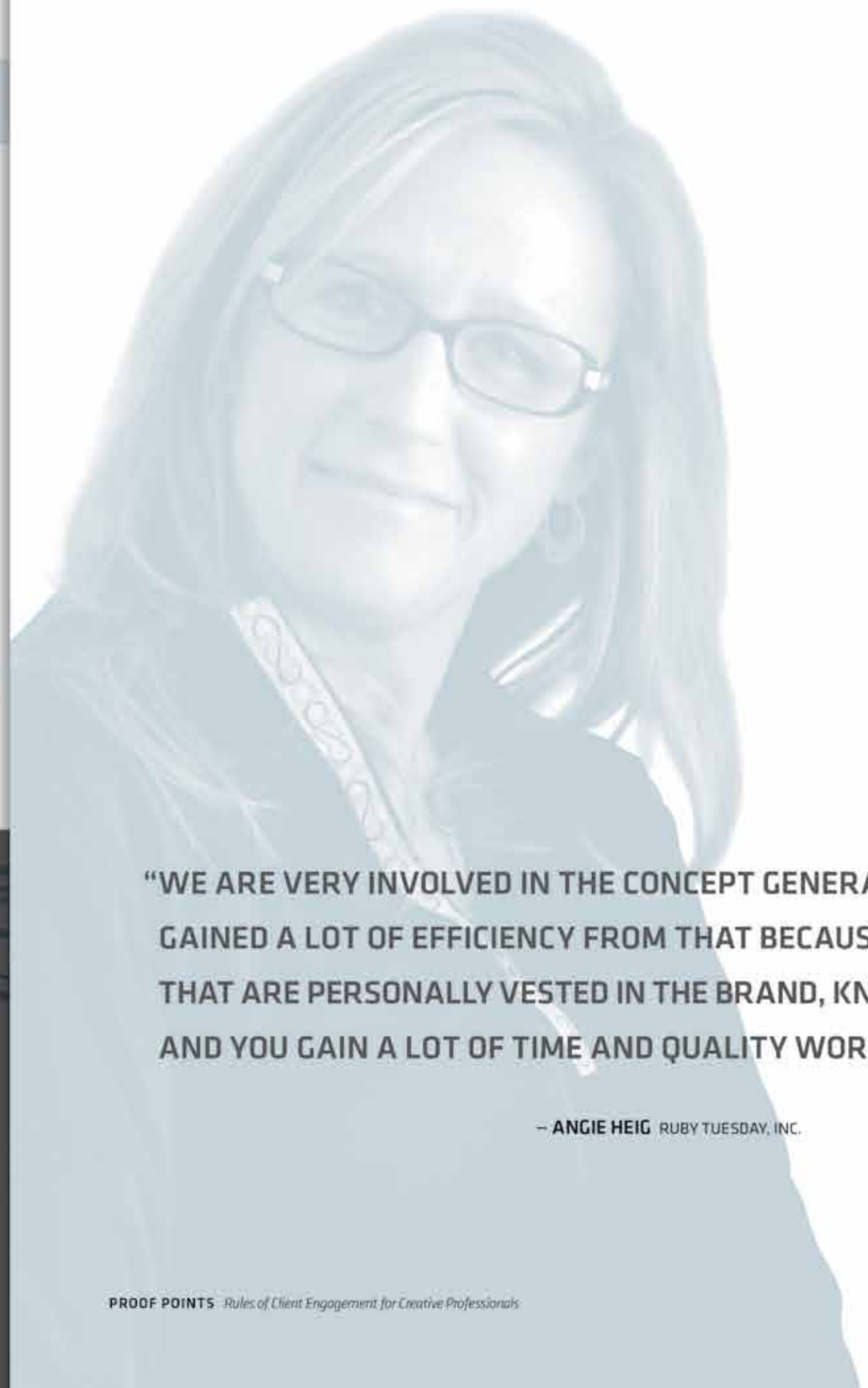
CREATIVE PROFESSIONALS MUST TAKE ADVANTAGE OF THE VAST WEALTH OF KNOWLEDGE their clients possess by listening and learning. Jason Loehr of Brown-Forman states, "The last thing you want is having a group tell you how they know your business and what you can do better" (Loehr). Several of the clients interviewed 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).

"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.

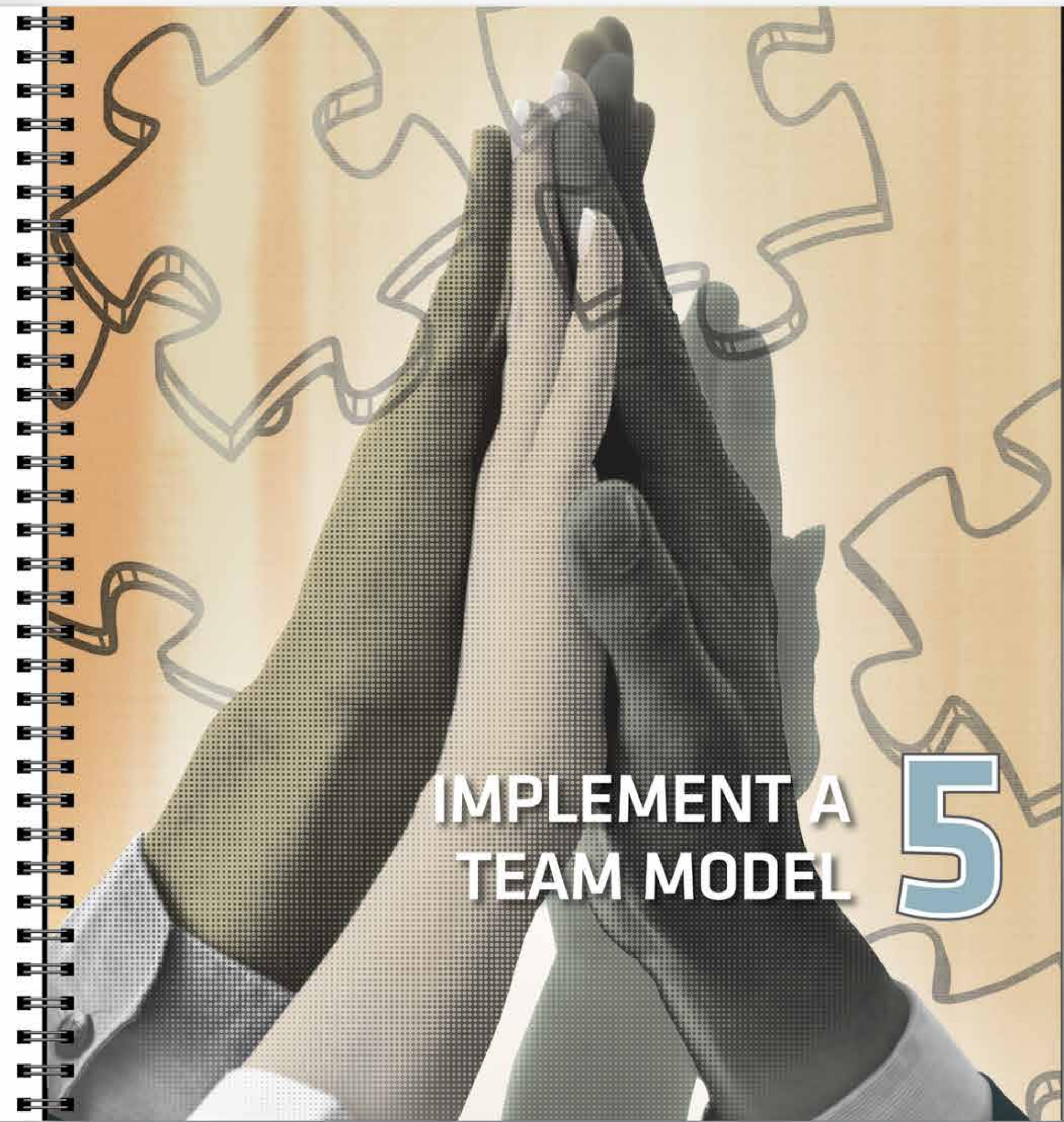
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"WE ARE VERY INVOLVED IN THE CONCEPT GENERATION. I THINK WE'VE GAINED A LOT OF EFFICIENCY FROM THAT BECAUSE YOU HAVE PEOPLE THAT ARE PERSONALLY VESTED IN THE BRAND, KNOW ITS INS AND OUTS AND YOU GAIN A LOT OF TIME AND QUALITY WORK."

— ANGIE HEIG RUBY TUESDAY, INC.

PROOF POINTS Rules of Client Engagement for Creative Professionals



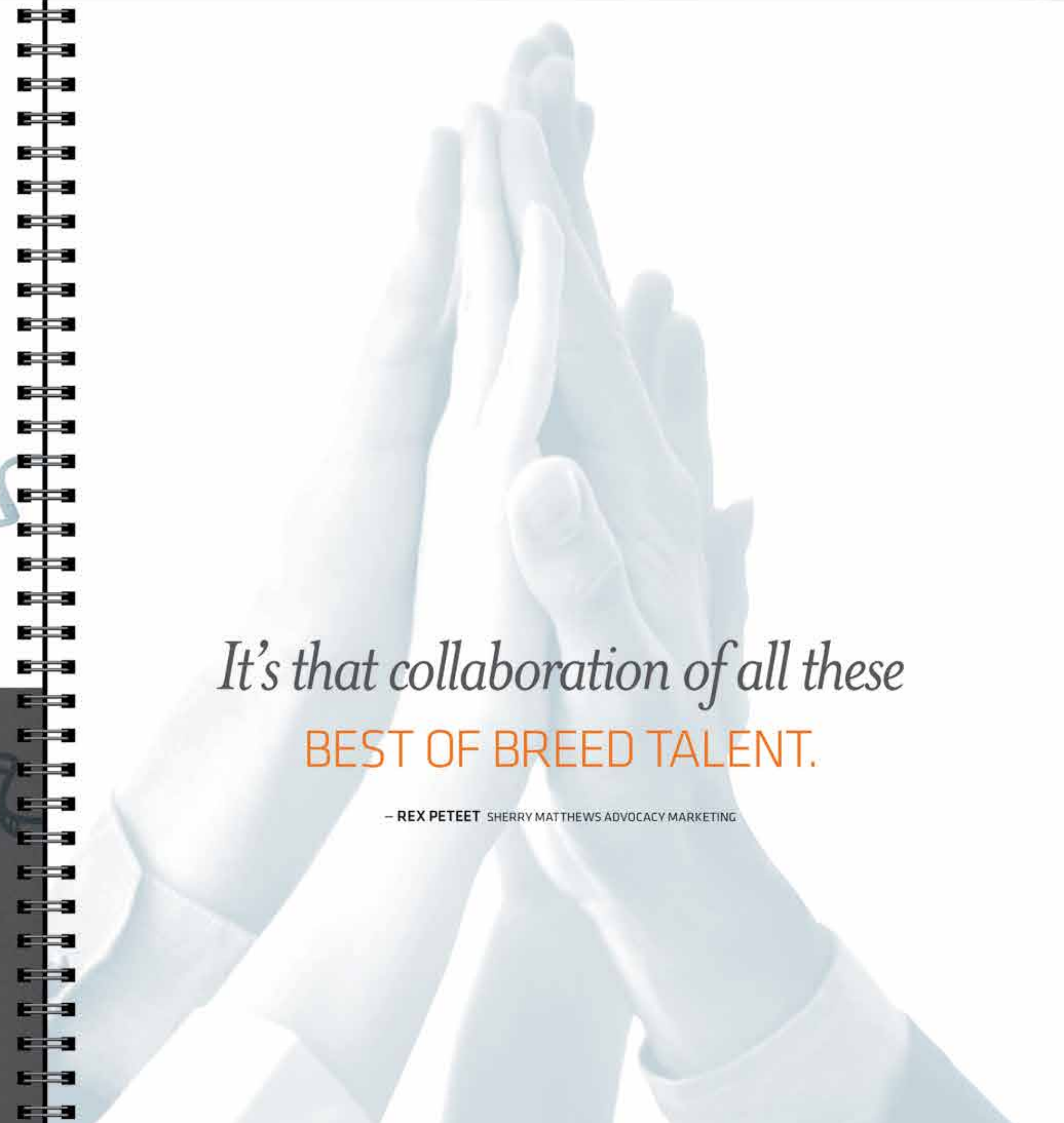
IMPLEMENT A TEAM MODEL 5

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.”*¹¹ (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



*A word of warning
about working remotely*

“THERE’S SO MUCH LOST BY NOT BEING ABLE TO SEE BODY LANGUAGE, FACIAL EXPRESSIONS, READING THE OTHER PEOPLE IN THE ROOM. IT’S LIKE HAVING ONE ARM TIED BEHIND YOUR BACK FOR PRESENTATIONS. IF THEY GO REALLY WELL THEN I THINK IT’S THE GREATEST THING IN THE WORLD. BUT IT DOESN’T GO SO WELL, I THINK, MAN, I WISH I HAD BEEN THERE. I WISH I COULD’VE SEEN [THE CLIENT’S] REACTIONS.”

— REX PETEET SHERRY MATTHEWS ADVOCACY MARKETING

PROOF POINTS Rules of Client Engagement for Creative Professionals



PROOF POINTS

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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
GARMICHAEL LYNCH



JANICKI

NICOLE

SENIOR DESIGN DIRECTOR
WILLOUGHBY DESIGN



SATTERWHITE

Rules of Client Engagement
for Creative Professionals

MAUREEN BARRY
 CHUCK CREASY
 NELSON EDDY
 STEFF GEISSBÜHLER
 ANGIE HEIG
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 JASON LOEHR
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 REX PETEET
 BEN RIGSBY
 NICOLE SATTERWHITE
 SEAB TUCK
 ROY VAUGHN
 PAULO VIEIRA
 SHALI WADE

THE EXPERTS

In order to gain a better understanding of the industry, we interviewed a total of 16 in-depth interviews with professionals from various creative companies. Interviewees were mainly from advertising agencies and design companies in this study, including architecture, digital, graphic design, and branding. They were selected based on their expertise and availability.

STACY JANICKI

Senior Partner
 Director of Account Management
 CARMICHAEL LYNCH Minneapolis, MN

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).

SJ

We trust everyone that's outside the creatives to have an opinion about the work and share ideas early and often.

If you could create your perfect agency, how would the agency/client relationship work?

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, 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. 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.

Stacy Janicki Interview Excerpts

NS

We really have focused our firm on figuring out that brand strategy first to make sure that foundation is made before we start designing.

Does Willoughby Design have a formalized procedure for client engagements through the creative development process?

We have spent the last 10 or 15 years really trying to come up with our process and solidify how we go through the creative process, both internally and externally. So when we write a proposal for a client, we detail out all of the steps with them. 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. We typically have a very large kickoff meeting on the executive level, maybe a half-day or a full-day to just 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.

Is your model unique to Willoughby Design, or is it pretty standard?

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 serving a purpose. And that outset brand strategy really sets the purpose in 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 firms do, but we are pretty heavy on the strategy portion.

Nicole Satterwhite Interview Excerpts

NICOLE SATTERWHITE

Senior Design Director
 WILLOUGHBY DESIGN Kansas City, MO

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.

MAUREEN BARRY
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SHALI WADE

THE EXPERIENCE

In order to gain a better understanding of the industry, we interviewed a total of 16 in-depth interviews with professionals from various agencies at creative companies. Interviewees were mainly from agencies in this study, including architecture, digital, graphic design, and selected based on their

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

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.

How do you feel the agency/client dynamic has changed over the last decade or so?

I would say we are far less viewed as advertising experts and authorities. I think as everyone has gotten an MBA, our lives 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.

Are mistakes more costly now than back when you started?

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. 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. As a result, 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 about meeting short-term success, it pushes you to a place creatively, but that's not gonna necessarily lead to the best work.

How do you handle the after hour, late-night emails, early-morning emails? Do you feel obligated to respond immediately?

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. I remember running into a FedEx station getting something off by the 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 get feedback until that happened. You knew you had a little breathing room. I think clients understand subconsciously that they're in the position to leverage that and say, "Hey, I need XYZ tonight." Or I'll get

Stacy Janicki Interview Excerpts

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?

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.

What level of finish do you show clients for just your initial work? Are they sketches, storyboards, animatics?

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.

Are you looking for that "wow" factor, or is there a specific reason you feel like the client wouldn't understand loose stuff?

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.

Nicole Satterwhite Interview Excerpts

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

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.

Since trust is kind of the ultimate thing needed to develop great creative. Have you ever seen examples of where trust has been undermined, and if it has, can that trust ever be restored?

Well, I think that you have to build that relationship with a client. They don't trust you right away. You have to get to 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.

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THE EXPERIENCE

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a phone call. Like 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." 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.

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

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 smaller clients say that they assume that they're getting 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.

You know, I've heard smaller clients say that they assume that they're getting a B team, but I've never been at an agency where that's ever been approached that way.

MAUREEN

SENIOR VICE PRESIDENT, MANAGING DIRECTOR
GSD&M

BARRY



NELSON

PARTNER, CREATIVE DIRECTOR
DVL SEIGENTHALER

EDDY



Is there anything specific that you do to build that rapport with your clients?

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. 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 country, 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.

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MAUREEN BARRY

Senior Vice President, Managing Director
 GSD&M Austin, TX

GSD&M was founded in 1971 in Austin, Texas, and 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.

MB

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.

How involved do you want the client to be in the actual concept generation?

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, more and more, really don't like that. I have one client in particular where this is actually a hot issue. They have instituted what they call "Coffee Talks," which 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?"

Maureen Barry Interview Excerpts

NE

Because of that, we've gained clients who have heard we collaborate more.

Does your agency have a formalized procedure for client engagement throughout the creative development process?

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, 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. So we 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. Then typically before we get too far

Nelson Eddy Interview Excerpts

NELSON EDDY

Partner, Creative Director
 DVL SEIGENTHALER Nashville, TN

DVL SEIGENTHALER, 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.

MAUREEN BARRY
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THE EXPERIENCE

In order to gain a better understanding of the experience of working with professionals from a total of 16 in-depth interviews at creative companies. Interviewees were matched to companies in this study based on their architecture, digital, graphic design, and branding selected based on their

What do you think?" 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]. In this instance, I'm hearing that loud and clear from the client. 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. 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, and they would say, "Oh, no, no, no. Don't go there because..." Whatever. But to an agency 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.

How often do the creatives that actually create the work engage with the client? Or do they?

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, 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 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. 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. And then more specifically, for presentation of work because those group creative directors have these different teams underneath them, they will often will make the presentation to the client themselves even though they may not have physically done the work like literally wrote the script. 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.

We encourage the idea that there would always be [the] kind of relationship where they could feel free to call.

Maureen Barry Interview Excerpts

along, when everything is just initial, we'll run what we call vectors or directions by the client. And sometimes we'll show them five or six, telling them we're only going to explore three. You know, help us pare it down. And they'll have input that informs us on some things that they liked about it and didn't like about it, some concerns they might have early on. Sometimes we'll keep a direction we think really does the job, but they are little fearful of. We'll continue that one 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. But every once in a while, you've got something you really believe in and keep alive as long as you can. 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 second time they see it 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. So they have a third time for additional input and 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. So within that process, there may be multiple other ways.

Our clients have always had a bigger voice in our agency than the traditional advertising agency, because we come from a PR background.

Nelson Eddy Interview Excerpts

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

Oh, it's rough. For initial stuff, the less they're making decisions on things like color and you know really getting in overly into the graphic treatment. We'll do everything from sketches to sometimes just mood boards, 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. 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. 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.

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

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. I don't know what's 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. They've got some experiences. They've 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. Our clients have always had a bigger voice in our agency than the traditional advertising agency, 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 AEs had the upper hand. Because they control the relationship with the client. In a traditional ad agency, that's almost totally

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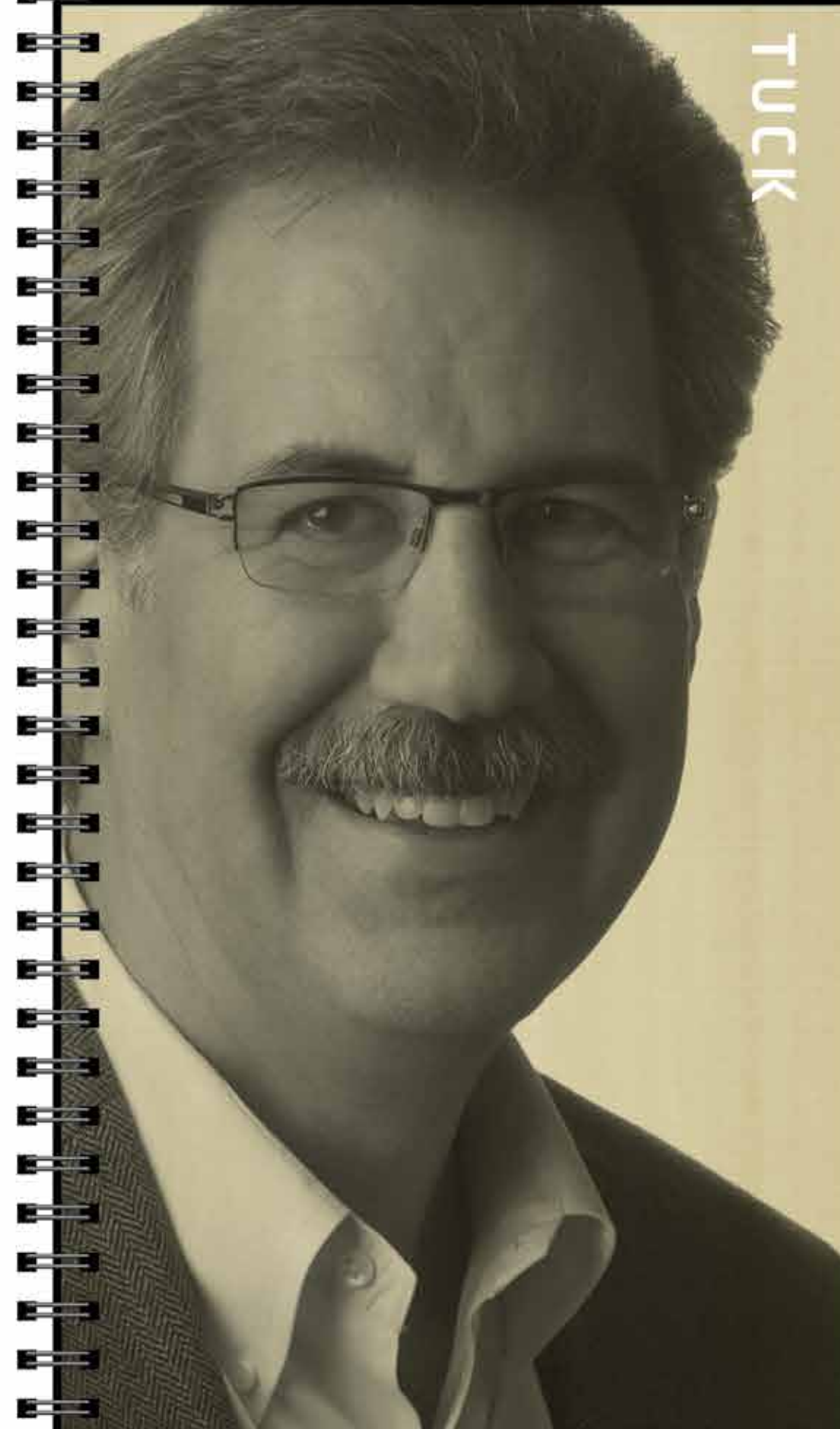
How do you think agency communication has changed?

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. 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, just because of technology, the ability to provide everything electronically to clients, there's just the expectation of speed, everything, everything's gotten shorter. So everything is expected in a much faster turnaround time.

SEAB

PRINCIPAL
 TUCK-HINTON ARCHITECTS

TUCK



DAVID

EVP, CREATIVE EXPERIENCE
 WEBER SHANDWICK

KREJCI



the other way around. The AEs are a conduit, but the creatives kind of command the relationship with the client. We come somewhere in the middle.

How would you say agency/client communication has changed?

It has totally changed it. You see this in how you're talking to the consumer or the end-user and how you're talking with clients. Dialogue is 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. Well, it's not so much people publishing and broadcasting anymore as it is people engaging in community and conversation. So that kind of community dialogue is represented in the client/agency side. 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. 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.

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SEAB TUCK

Principal
 TUCK-HINTON ARCHITECTS Nashville, TN

TUCK-HINTON ARCHITECTS is one of the premiere architectural firms 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. This twenty-person firm was founded by Seab Tuck, FAIA and Kem Hinton, FAIA in 1984 (tuckhinton.com).

ST

My partner and I and maybe a couple of others down there are the only ones that even really sketch anymore.

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

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. 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 building's 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.

Seab Tuck Interview Excerpts

DK

I'd rather show them, a blueprint version of the website, some sketches of the UI as opposed to some finished comp work.

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

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. 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, that kind of stuff that was final when they saw the first blush.

David Krejci Interview Excerpts

DAVID KREJCI

Executive Vice President
 Creative Experience
 WEBER SHANDWICK Minneapolis, MN

WEBER SHANDWICK was named by *PRWeek* as the 2015 U.S. and Global Agency of the Year. 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).

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THE EXPERIENCE

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Do you feel like there's pros and cons to each method, or is there one that you prefer?

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. 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.

How do you feel relationships should work between the firm and the client? Is there a perfect way?

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.

How do you feel working with the clients has changed since you have been in business? Or has it changed?

I've had several people tell me this. I think loyalty is going down. It just went down the tubes.

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, four to six interviews a year, and now we're going to one [or] two a month. So it's just very different.

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.

Seab Tuck Interview Excerpts

In your agency, do the creatives that actually create the work engage with the client?

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.

*"When should we bring in the creative?"
 My response, not intending to be glib, is like,
 "As soon as you bring yourself in."*

David Krejci Interview Excerpts

Would you say that's because account service hasn't lived with it, and they don't quite understand it as intimately as a creative does?

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. That's a different way of thinking than creatives, especially visual creative conceptualizing. So it's just a different way of thinking about creative. 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.

How do you feel like agency/client interaction should work in a perfect world?

The perfect scenario that I see play out 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. 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.

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THE EXPERIENCE

In order to gain a better understanding of the industry, we interviewed a total of 16 in-depth individuals at creative companies. Interviewees were from various companies in this study, including architecture, digital, and graphic design. They were selected based on their

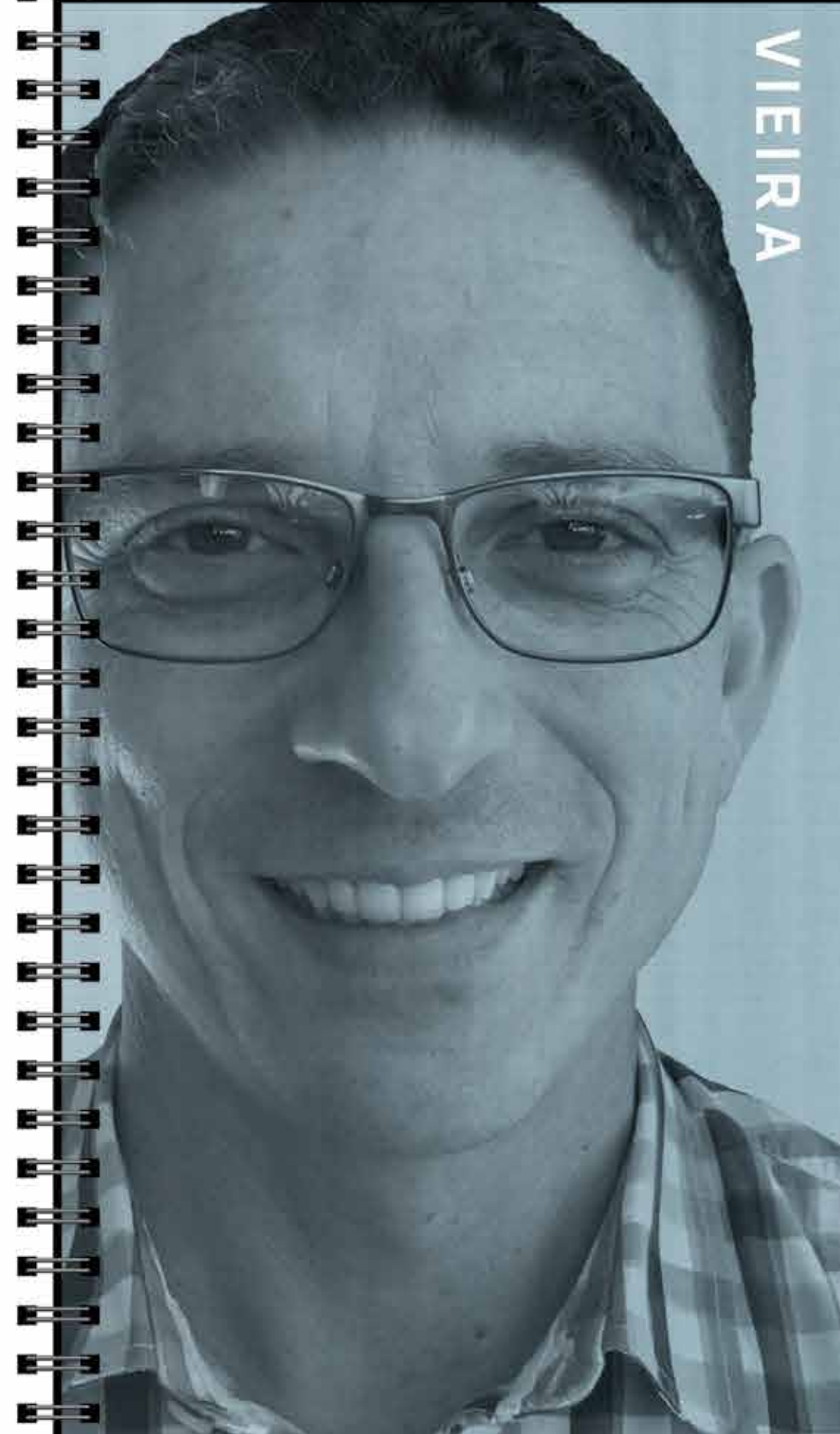
How do you feel communication has changed?

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 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 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.

PAULO

CEO AND FOUNDER
 INTEGRITAS

VIEIRA



ROY

VP, CORPORATE COMMUNICATIONS
 BLUECROSS BLUESHIELD OF TENNESSEE

VAUGHN



Are you familiar with the co-design model of creative development? And how important is that model to your agency?

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. 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 to 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. Let's do prototyping. Let's in fact, even launch this as a minimally viable product and see what the universe does with it. Then we go back and refine it from that point.

You feel like we're not quite there yet, but we're evolving to that state?

I would say that's fair, yeah.
 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. It's been really exciting. So call me in five years, and let's see where it is.

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THE EXPERIENCE

In order to gain a better understanding of the experience of working with professionals from a variety of backgrounds, a total of 16 in-depth interviews were conducted at creative companies. Interviewees were from a variety of companies in this study, including architecture, digital, graphic design, and were selected based on their

PAULO VIEIRA

CEO and Founder
 INTEGRITAS Cedar Park, TX

INTEGRITAS was 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 in 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).

PV

So it is 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.

How do you interact with your clients through the development process? Is there a specific process that is unique to your shop?

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 the scope, or this is not what we do. That makes it a little harder to have the true partnership relationship. So it is 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.

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,

Paulo Vieira Interview Excerpts

RV

Certainly creative can break through, but unless the research supports it, then it may just be a flash.

Is there anything that your agency does that is unique, or do you find that it is pretty standard among all agencies?

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. 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.

Roy Vaughn Interview Excerpts

ROY VAUGHN

Vice President, Corporate Communications
 BLUECROSS BLUESHIELD OF TENNESSEE
 Chattanooga, TN

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 (bcbs.com).

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number one, you're gonna save money. Number two, we can deliver it quickly." 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 dollars. 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.

Do your developers directly engage with the client?

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 able to be released into the wild.

Ideally, the utopic 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 of my developers being called into any meeting with any client and having to worry about what they are going to say or not.

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

In the ideal world, the client would be more involved from 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.

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.

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.

Exactly, it's that experience you grow.

I can guarantee I can give you the best software you can get, but I do not know your business.

Paulo Vieira Interview Excerpts

So, you feel processes are touchpoints to make sure that everybody's on the same page and that you're rooted in a strategy?

Yes, and I'll go even further. 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? 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 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 a fabulously creative idea, but it was only that. It was not supported by strategy. Well, that doesn't fit. But they won't let it go. Well, listen, you failed to recognize the other part of this which is: it's their business. So let's be really creative, take their input, take the data and the research that we have, put all that together and really find a solution worth doing. That's creative.

So let's be really creative, take their input, take the data and the research that we have, put all that together and really find a solution worth doing. That's creative.

Roy Vaughn Interview Excerpts

So how has the dynamic changed? I think on the ad agency's 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, 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. And on the client-side, that's difficult, because now you're managing three agencies as opposed to one.

Do you feel like the size of your account plays into the agency/client dynamic? Or does it not?

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. You're going to get their most appropriate and best for your business. So I think it does have a play. It is important. 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 satisfied with the talent that we're getting. But they also understand who we are better.

Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

Yes, we hire freelancers occasionally for projects. Usually, the project will either require some specific expertise or smaller in scope.

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THE EXPERIENCE

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Technology has allowed us to do our job without ever actually meeting with the client, but do you feel like there's something that's lost with that?

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? 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 way I've been communicating before.

BEN

PARTNER
 SNAPSHOT INTERACTIVE

RIGSBY



JASON

VP, DIR. OF GLOBAL MEDIA & DIGITAL MARKETING
 BROWN-FORMAN

LOEHR



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BEN RIGSBY

Partner
 SNAPSHOT INTERACTIVE Nashville, TN

SNAPSHOT INTERACTIVE was 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).

BR

A cell phone picture of our developer standing in front of a computer screen with code on it with a message that says, "Phil is working on your website," provides that connection.

Do the creatives who produce the work get in front of the clients?

It's a mixed bag a little bit. Everyone that we have in our shop enjoys talking with our clients. We've got developers, animators, and storytellers [who] obviously, want to be in front of the client and tell their story. Then we've got editors and designers as well. But none of our people have any trouble getting in front of a client. They're probably not going to be the lead in pitching the presentation just because that's not their forte. Their forte is creating brilliance, not getting in front of a packed room and giving a formal presentation. So we'll take the load off them just from a comfortability standpoint. But every time we can show their face to the client, we do so, because it provides a human connection between the person doing the work and the person receiving the work. We've found something as simple as a cell phone picture of our developer standing in front of a computer screen with code on it with a message that says, "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 their site. And they know who Phil is, and they know what Phil looks like. It makes the process a little bit easier.

Ben Riggsby Interview Excerpts

JL

To me it's the two C's—communication and candor.

If you could create the perfect agency/client relationship, how would that work?

To me it's the two C's - 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. It's as much making sure that we've got

Jason Loehr Interview Excerpts

JASON LOEHR

Vice President, Director of
 Global Media and Digital Marketing
 BROWN-FORMAN Louisville, KY

BROWN-FORMAN was founded in 1870 in Louisville, Kentucky. Brown-Forman Corporation is 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).

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THE EXPERIENCE

In order to gain a better understanding of the industry, we interviewed a total of 16 in-depth interviews with professionals from various agencies at creative companies. Interviewees were mainly from agencies in this study, including architecture, digital, graphic design, and selected based on their

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

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 track 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. 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.

You've got to be able to balance the friction with the business and be able to support the creative in that process.

Do you feel like your agency does these things?

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. 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 not ticking the creative off enough to where they lose respect for the work that we're doing.

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

Well, I'm sure it has. I'm trying to think just in our time in business. I would say with budgets, 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 maybe 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.

Ben Riggsby Interview Excerpts

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 s*** brief, expect a s*** 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.

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?

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. 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.

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?

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 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.

Jason Loehr Interview Excerpts

How is the big creative agency a dinosaur?

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.

Rather than one spot that is a catch all brand spot, you need 15 spots that are for 15 different segments?

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. 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. It just feels better and feels like a more realistic approach than what we've seen so far.

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THE EXPERIENCE

In order to gain a better understanding of the experience with professionals from a total of 16 in-depth interviews at creative companies. Interviewees were from various companies in this study: architecture, digital, graphic design, and selected based on their

Since trust is key. How do you feel trust can be undermined on either side? And if it is, how can that be restored?

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 can call the shots. 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 we're 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. It's just 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. 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 that 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 are times where we just lose it. But in the end, we do what we say we're going to do.

SHALI

GROUP DIRECTOR, CLIENT ENGAGEMENT
 VML

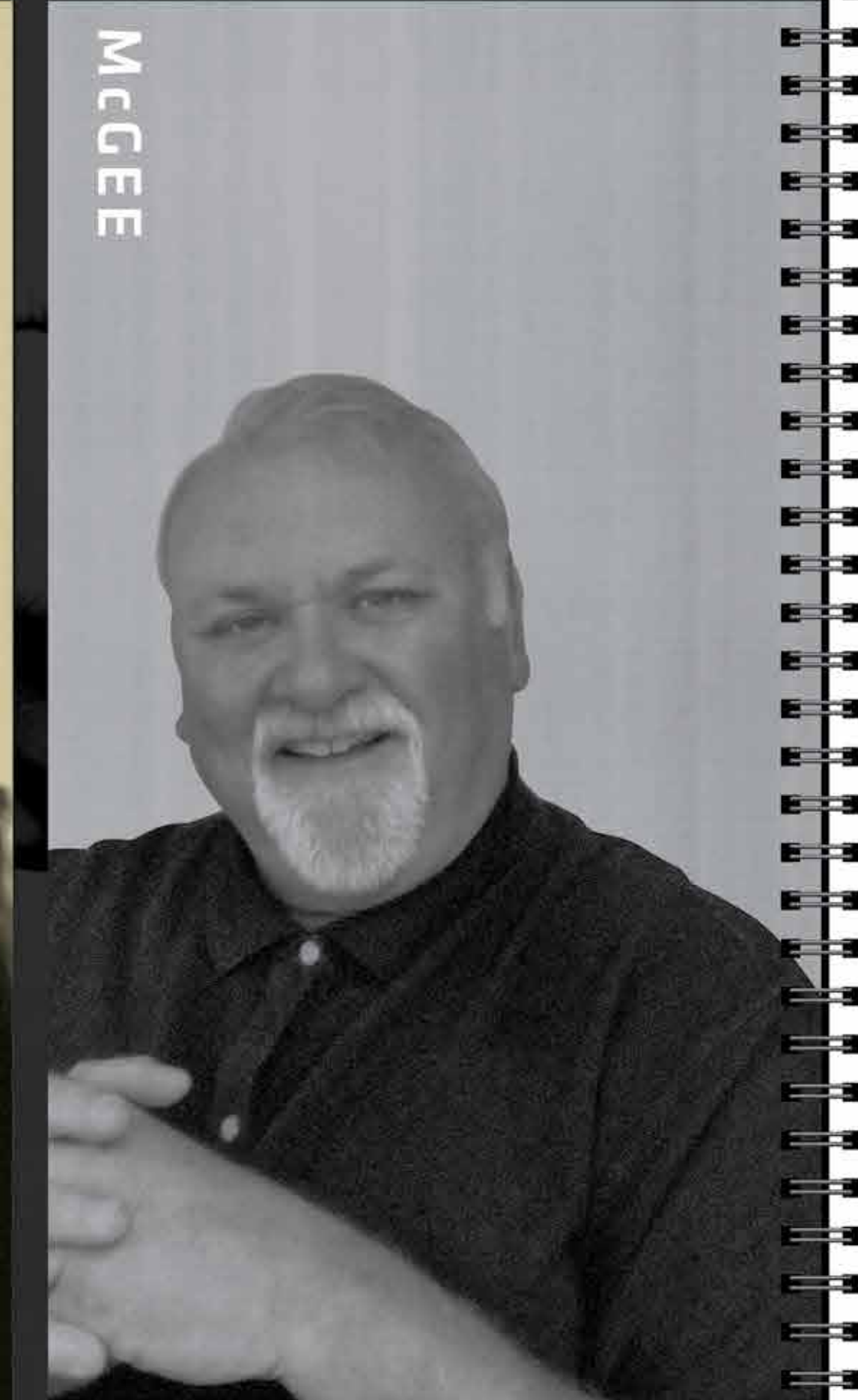
WADE



PAT

MARKETING DIRECTOR
 GREAT SOUTHERN WOOD PRESERVING

MCGEE



Do you feel like maybe quality isn't as necessary as frequency of communication?

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. Then whatever happens in and around that, that's great.

Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

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 set up 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.

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?

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.

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SHALI WADE

Group Director, Client Engagement
 VML, Kansas City, MO

VML was 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).

SW

Our whole philosophy is to try to make sure you have people available to you at all times.

How or when do the creatives engage directly with the client?

From the first day, all the way throughout. 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.

Shali Wade Interview Excerpts

PM

It certainly doesn't have to be finished comps, and it rarely is on the front end.

What level of finish does your agency typically present to you for initial work? Is it sketches, are they full-blown comps, storyboards?

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 a 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 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.

Pat McGee Interview Excerpts

PAT McGEE

Marketing Director
 GREAT SOUTHERN WOOD PRESERVING
 Abbeville, AL

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 employs close to 1,000 people in 15 locations. Their sister company, Greenbush Logistics, Inc., and Great Southern Wood Preserving distributes its product from South America and the Caribbean to 31 states in the eastern United States (yellawood.com).

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THE EXPERIENCE

In order to gain a better understanding of the experience of working with professionals from a total of 16 in-depth interviews at creative companies. Interviewees were from various companies in this study including architecture, digital, and graphic design. They were selected based on their

How do you feel the agency/client interaction should work, if you could design your own agency, how would it be?

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.

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

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.

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?

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.

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.

Shali Wade Interview Excerpts

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.

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 trust be undermined, and once it is, can it be restored?

Um, depends on how egregious the betrayal of trust is. Which is like a screaming fit of the obvious, I suppose. Before we hired our current agency, we actually hired another agency. The agency review team, 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, we thought we knew exactly what was the best choice. But it turned out where even though we thought our current agency 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 our current agency was probably the best selection. However Jimmy Rane, being Jimmy Rane, despite the fact that all of his lieutenants said hire our current agency, he hired the other agency. And he did it for the wrong reason. 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 our current agency ran much deeper than just the storyboards. This agency has a very unusual way of interacting with their clients. They don't listen to them. 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

Pat McGee Interview Excerpts

this word and this word really doesn't resonate well with our customers." They'd say, "That's too bad, that's the word we're using." I mean it was almost their response. So there was immediately a breach of trust along the lines I'm suggesting.

Our current agency has transgressed, not as egregiously as what I'm suggesting with our previous agency. 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 at the same level as it was eight or nine or ten years ago, even though we've almost doubled the footprint. In 2008 we entered a damaged economy, 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 L.A. directors and hire the big fancy production companies, and we've told them several times we've got to find ways to do it [cheaper]. 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. They're good people, and we really like them. We're not anywhere near threatening throwing the account into review, but it's a serious warning shot across their bow. We've got to do more with less money, and you're not helping us. You're hurting us.

This agency has a very unusual way of interacting with their clients. They don't listen to them.

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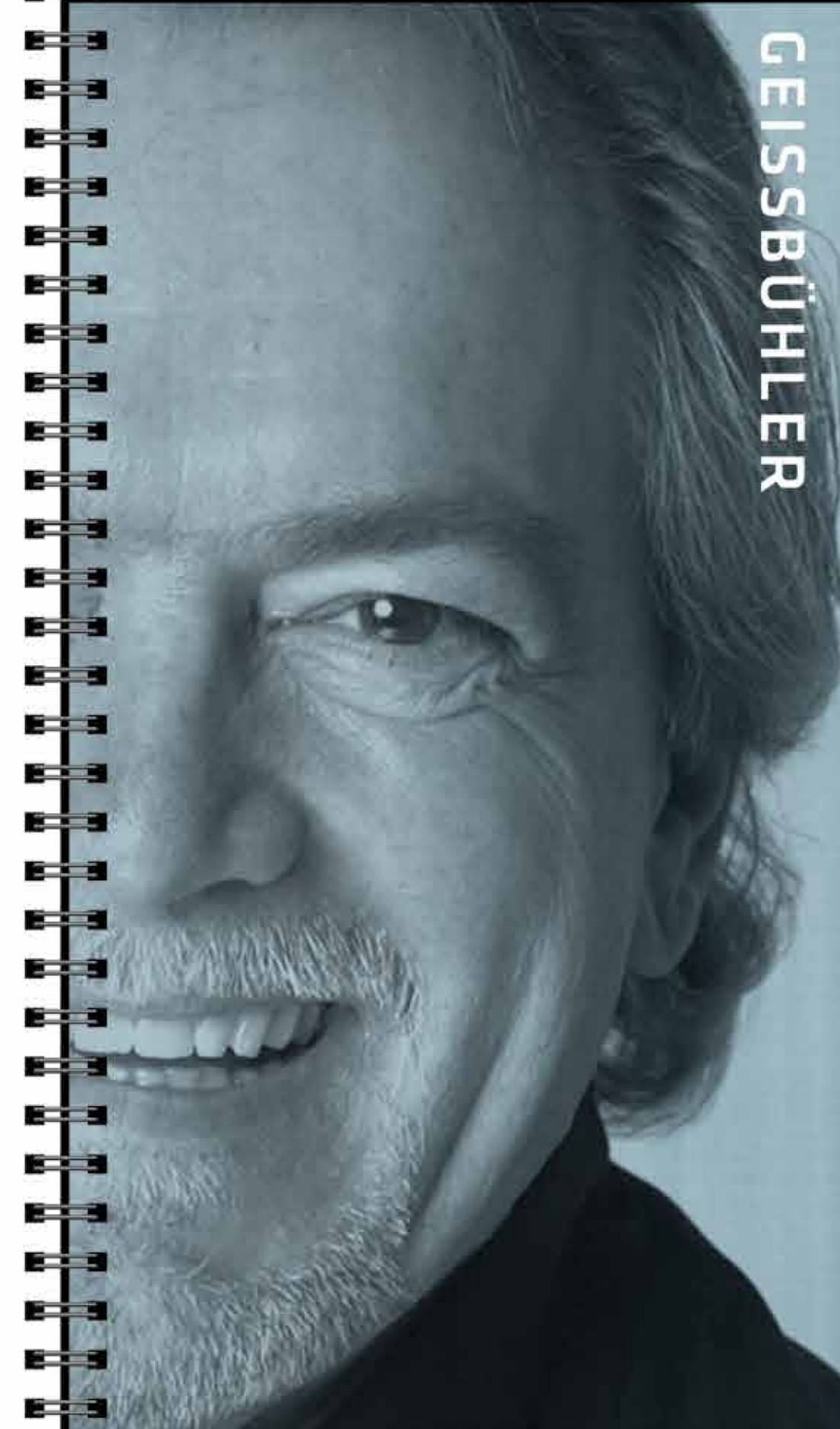
THE EXPERIENCE

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STEFF

PRINCIPAL
 GEISSBÜHLER DESIGN

GEISSBÜHLER



When you have a product that you're not very passionate about, how do you find that passion to make it as good as it can be?

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 [another project], 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. 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.

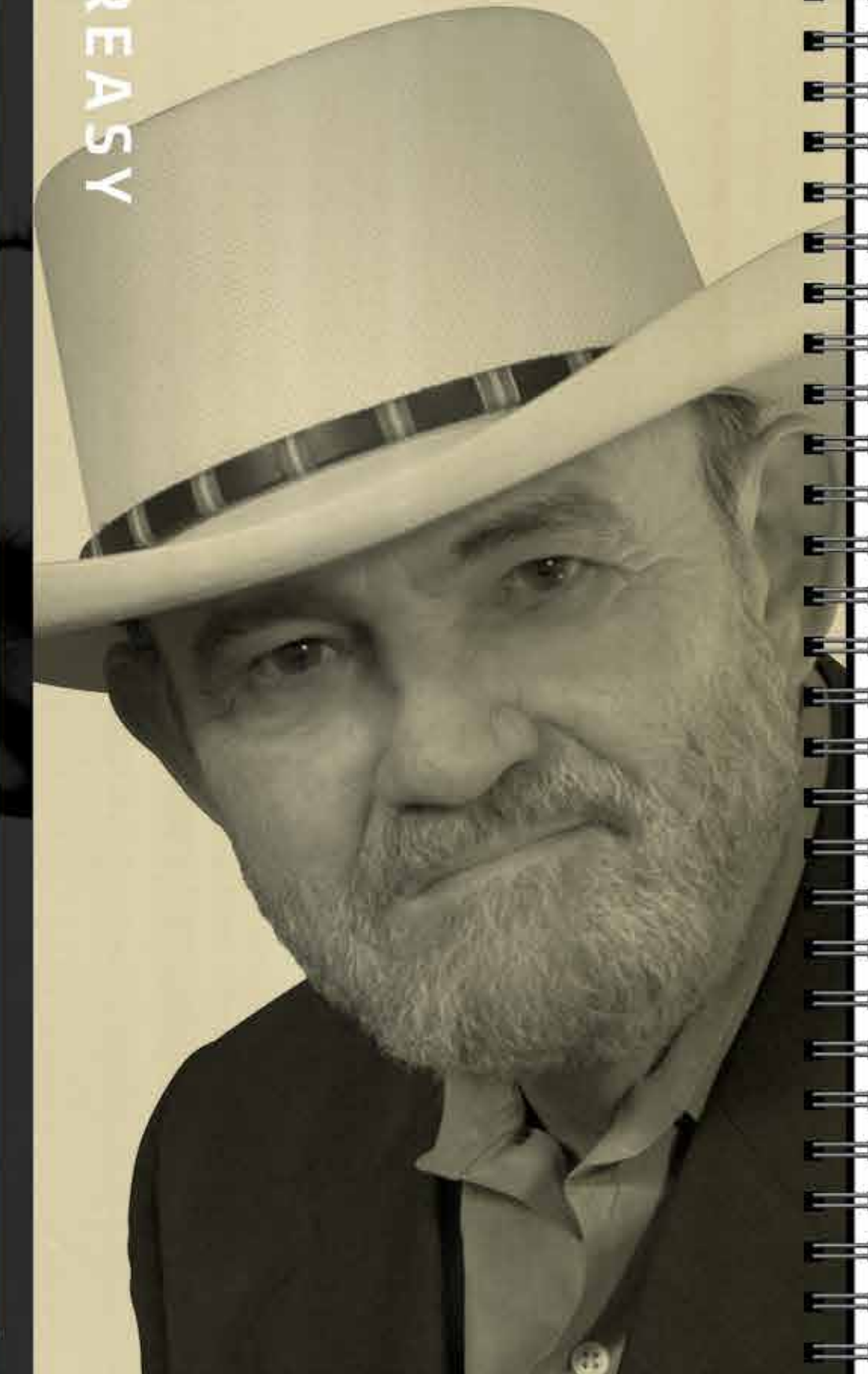
Any words of wisdom about account management?

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.

CHUCK

VP, CREATIVE SERVICES
 NASHVILLE CONVENTION AND VISITORS CORP.

CREASY



Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

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 reasons 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? 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 our agency bought, is a master marketer. And, I'm not easy to impress these days. He's professional in his approach, very smart, and very up-to-date.

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 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, out-of-home, etc.) and try to funnel the sales promotions, dealer collateral, signage, etc. through freelancers.

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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, Los Angeles, and Washington D.C. The NCVV is governed by a 20-member board of community leaders who donate their time for the economic development of Nashville, Tennessee (visitmusiccity.com).

MAUREEN BARRY
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THE EXPERIENCE

In order to gain a better understanding of the creative process with professionals from a total of 16 in-depth interviews at creative companies. Interviewees were marketing companies in this study architecture, digital, graphic design, and selected based on their

then interview employees and the competition and what the competition does and how do they think about the particular company I'm dealing with.

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

Usually, you know, after the initial contact and understanding of what the project is and what it entails, 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.

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?

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.

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.

So you try to keep it as rough as possible initially to give the client the essence of what you're selling?

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. 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.

How do you feel design firm/agency interaction should work in a perfect world?

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 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.

Steff Geissbühler Interview Excerpts

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

Very.

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?

Tight concept sketches are fine with me.

How or when do the creatives that actually produce the work engage directly with you during the process? Or do they?

When the rough direction is being determined, and I prefer them to pitch the comps directly.

How do you feel the agency/client interaction model should work in a perfect world? How do creatives fit into this?

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.

*Listen more, talk less.
 Don't be wed to your first idea.
 Do good work.*

Chuck Creasy Interview Excerpts

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?

Of course! I expect passion from my AEs and an overall understanding and buy-in on the creative that is being proposed.

Do you think the agency/client dynamic has changed in the last decade or so? Specifically how has agency/client communication changed?

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.

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

Yes, it probably does, but a good agency that's "all-in" should not let that affect the work.

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

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.

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THE EXPERTS

In order to gain a better understanding of the creative process, we interviewed a total of 16 in-depth interviews with professionals from various creative companies. Interviewees were from various creative companies in this study, including architecture, digital, graphic design, and advertising. They were selected based on their

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

Absolutely. That's not always possible, of course, if you're dealing with a 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.

How important is it that creatives (designers) engage directly with clients?

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.

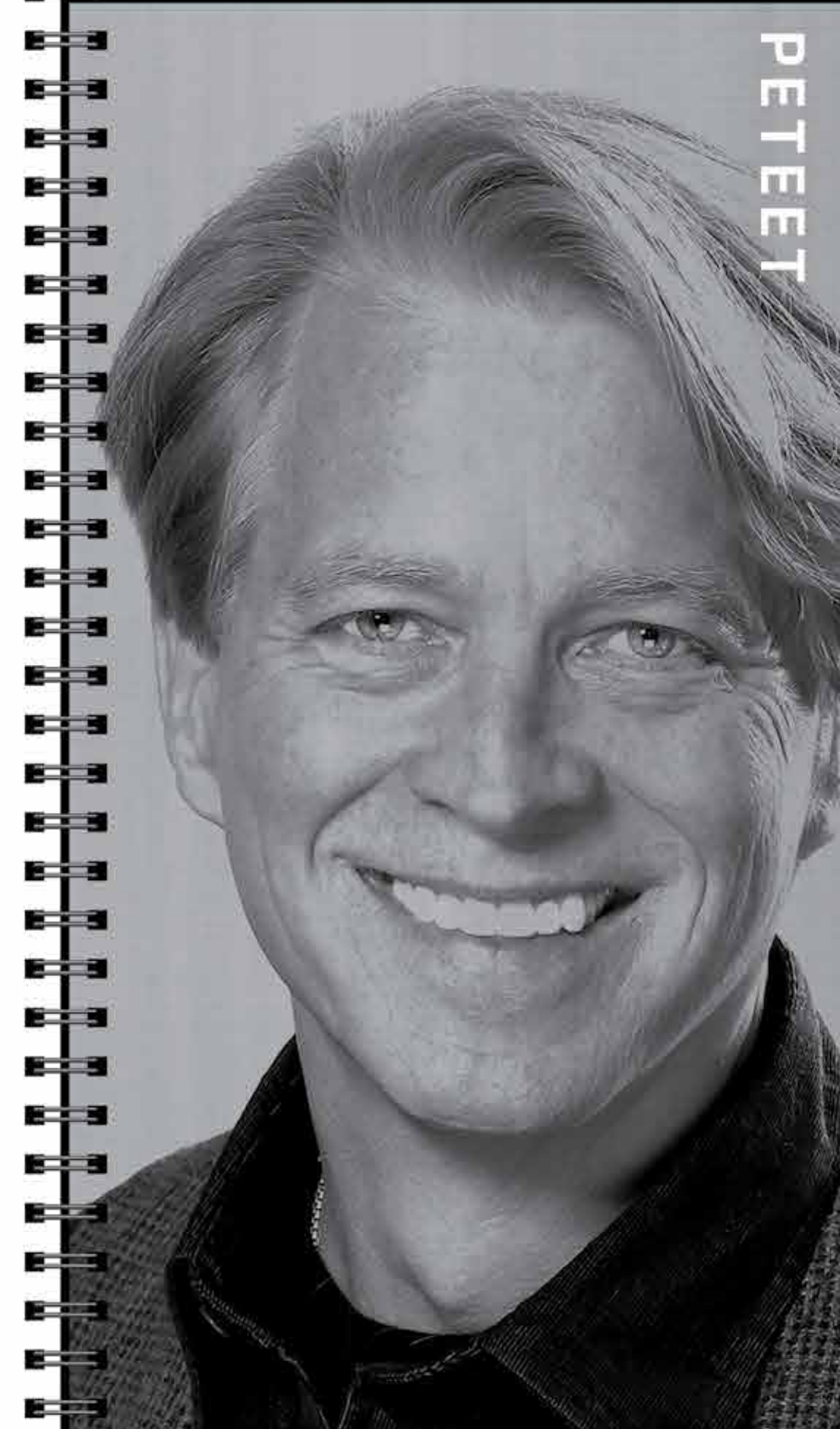
Do you do anything specific to match your account service representative to the client?

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

REX

EVP, CREATIVE DIRECTOR
 SHERRY MATTHEWS ADVOCACY MARKETING

PETEET



ANGIE

VP, MARKETING
 RUBY TUESDAY, INC.

HEIG



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?

I am not. We present to the CEO as a team. Everyone bought in and support the creative with solid strategic thinking.

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

No. Sounds ominous.

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THE EXPERIENCE

In order to gain a better understanding of the creative process, we interviewed a total of 16 in-depth individuals from various creative companies. Interviewees were from a variety of creative companies in this study, including architecture, digital, graphic design, and advertising. They were selected based on their

REX PETEET

EVP, Creative Director
 STUDIO | PETEET DESIGN / SHERRY MATTHEWS
 ADVOCACY MARKETING Austin, TX

STUDIO | PETEET DESIGN is a design consultancy firm 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 work has been recognized by numerous communication publications (spdaustin.com), and in 2015, Rex Peteet received the AIGA Austin Fellow Award (Austin.aiga.org).

RP

Just because we are creative people doesn't mean we're the only guys that have good ideas.

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?

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 we're the only guys that have good ideas.

Just a little kind of sidebar story, when we were doing the Sid Richardson Museum and we were working with the architects - the Bass brothers. We were working with Ed Bass, who to me was one of the neatest, most approachable and creative of the brothers. And there was enough dollars there that we had 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 they wanted the identity of him for the Museum. He was very philanthropic. He was an oil man, 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. He was a horseman, he had a ranch. Plus, he was a very sophisticated art lover. 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

Rex Peteet Interview Excerpts

AH

We've just found a lot of efficiencies with how we've been able to build a better partnership.

What level of finish does your agency present? Are they highly-polished storyboards, rough sketches, or somewhere between?

The storyboard process for us is usually not highly polished. We have done that in the past, 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 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.

Do they show animatics?

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.

Angie Heig Interview Excerpts

ANGIE HEIG

Vice President, Marketing
 RUBY TUESDAY, INC. Maryville, TN

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).

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THE EXPERIENCE

In order to gain a better understanding of the experience of working with professionals from a total of 16 in-depth interviews at creative companies. Interviewees were from various companies in this study, including architecture, digital, graphic design, and branding. They were selected based on their

and ornateness of the 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. 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 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 Sid Richardson had 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. So that's what we did. 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].

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?

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. And those are done really tight in Illustrator and when appropriate, we'll begin to work typography. 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. When I had a full staff of 20 designers, 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 successful, 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. Then once you have that, almost without fail what would happen is there would be other directions 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." 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.

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.

Rex Peteet Interview Excerpts

You said they're a small agency, so do you interact with the creatives who are actually producing the work or are you working with account executives?

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.

Have you been with agencies in the past that had account service between you and the creative department, and did it work or did it not work?

We have, and it did not. 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 passion and sometimes that can be lost in the phone message game.

So it's crazy because [in] my perfect world they would be an extension of our team, and not the agency.

Angie Heig Interview Excerpts

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?

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.

So in a perfect world, you'd have an internal agency that could deliver everything you need.

Yeah.

Do you feel like it's necessary to have trust in your agency to get good work?

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.

MAUREEN BARRY
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THE EXPE

In order to gain a better understanding of the relationship between agencies and clients, we interviewed a total of 16 in-depth interviews with professionals from various agencies at creative companies. Interviewees were from various agencies and companies in this study, including architecture, digital, graphic design, and branding. They were selected based on their

Would you say face-to-face is best way to present design work?

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. Even though you have really good account people that are reading the room and telling you, there's nothing like being there yourself.

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

I'm sure the client thinks that they get the 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. 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 works nights and weekends. I'm thinking about it 24/7. 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.



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?

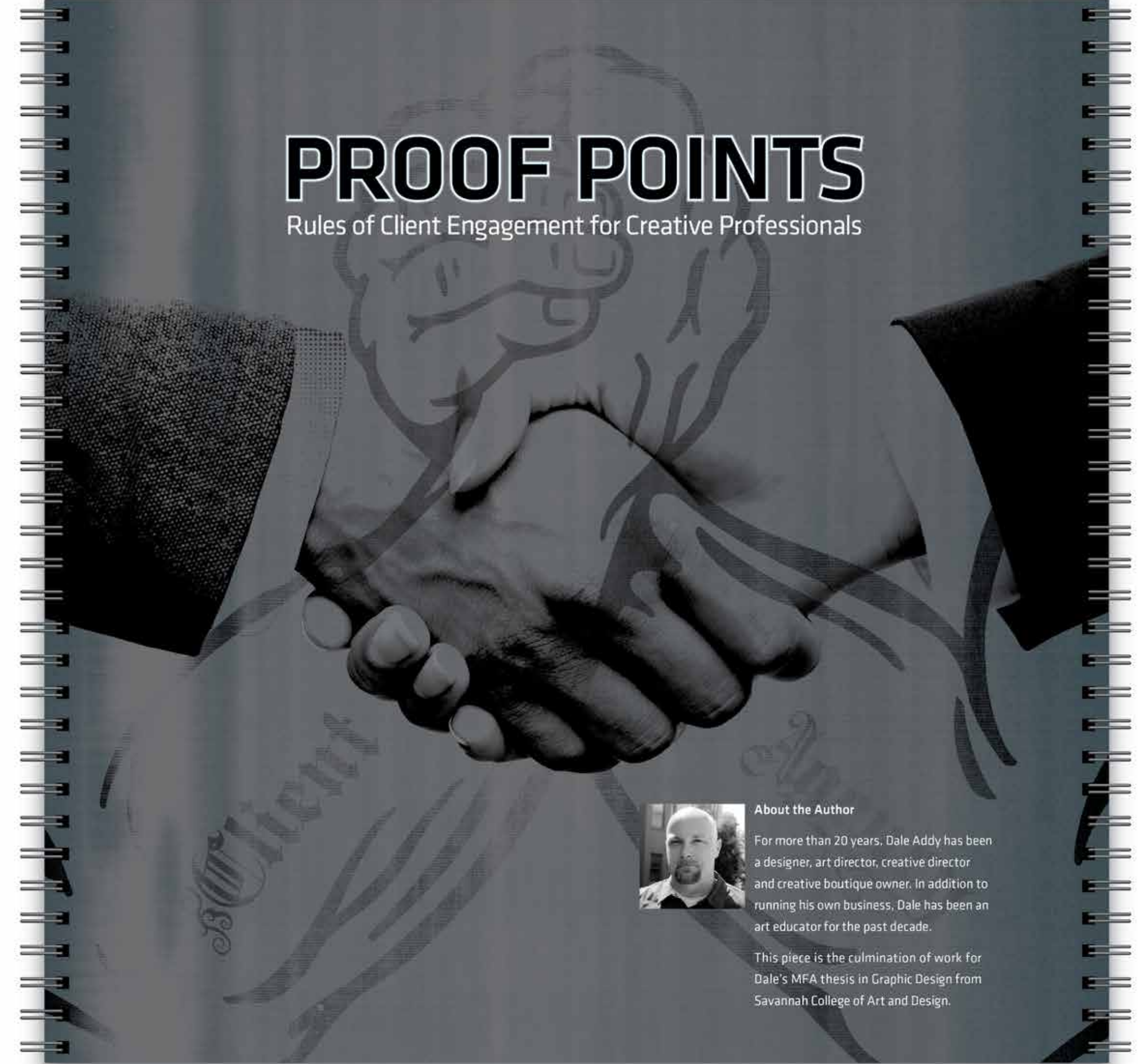
Well, you know that's a good question. I think that's also kind of dependent on where the trust loss came from. Because we all recognize that we're human, so errors occur and that's probably where the trust – unless something really catastrophic and then that would leave it depending on the kind of trust, 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.

Do you ever hire freelancers for creative projects? What is the motivating factor(s) for either hiring them or not hiring them?

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.

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.