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Assessing Your Creative Review and Approval Process

Introduction

All marketing organizations have a review and approval process of some sort, with approaches ranging from informal and ad-hoc to formalized and rigid. Many rely on email for gathering feedback and approvals which leads to unclear feedback and endless email chains - ultimately resulting in more iterations and longer review cycles.

Leading companies actively manage their creative processes in order to reap benefits and optimize asset production. Through online collaboration and proofing, automating tracking and workflows, and streamlining feedback, teams can produce more assets more quickly. This guide has been produced to help you understand the end-end process(es) you currently have in place and isolate where room for improvement may exist.

REVIEW AND APPROVAL SOLUTIONS HAVE THREE BROAD SETS OF FUNCTIONALITY:

- Online proofing
- Workflow management
- Metrics and reporting

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SECTION 1:

Getting Organized

While there are often multiple review and approval (R&A) processes in place within a single company, most workflows fall into one of three main categories. The first step is to determine which of the categories your organization most commonly operates in.

THE THREE MAIN R&A CATEGORIES (TABLE 1) ARE:

- Routine, everyday (quick turnaround, high volume, few people involved)

- Big, complex (high profile, long timeframes, many people involved)

- High-risk (need regulatory, legal reviews, or executive involvement)

Additionally, we know there are out-of-process emergencies, but let's focus on everyday work.

Table 1

In order to get organized, let's first identify examples of projects within your organization that fall into each category — using concrete examples helps to avoid working with hypotheticals.

TABLE 1			
	ROUTINE	**COMPLEX**	**RISKY**
CHARACTERISTICS	High Volume, Short Timelines	High profile, long timeframes	Require regulatory or executive review
EXAMPLE	Weekly refresh of ecommerce page	New product launch (Apple Watch)	Regulated ads (e.g. prescription drugs)
YOUR EXAMPLE			

SECTION 2:

Start at the Beginning

R&A processes logically start when an asset is ready for review and feedback. The hope is that the asset can quickly move through this phase and reach approval as efficiency as possible. Start by capturing information about the commencement of the creative projects in your company.

Table 2

Table 2 summarizes the processes for fictionalized company, using these questions as guidelines.

- **How are projects initiated?** — Are creative briefs used for everything? Is there a project management system in place? What is automated (driven by a system) vs manual (communicated in meetings or one-on-one).
- **Where are assets created?** — Are creative assets produced in-house, or through external agencies? What software authoring tools, such as Photoshop, a video studio, or a web-based CMS (content management system).
- **What starts the review process?** — Are there notifications? Emails? Are files pushed to shared folders (like Dropbox) or forums?

TABLE 2			
	ROUTINE	**COMPLEX**	**RISKY**
CHARACTERISTICS	High Volume, Short Timelines	High profile, long timeframes	Require regulatory or executive review
PROJECT STARTS	Project Management (e.g. Jira)	Creative Brief Review	Creative Brief Review
CREATIVE TEAM	In-house (web)	Agency A, in house	Agency B
ASSET CREATION	Web Content Management System	Photoshop	Video
REVIEW START	Email	Manual (Project Manager)	Dropbox

SECTION 3:

Look to the End

The ultimate purpose of the R&A process is to generate approved creative assets for use. Thus, it's important to understand what's required in terms of approval and delivery. Table 3 looks at the ways in which assets are stored.

- **Where do approved assets get stored?** — A DAM (Digital Asset Management) system, a web CMS, designated networked storage, other?
- **What information is stored with the assets?** — Record of changes and approvals? file meta-information?
- **Who gets notified of approvals?** — Are there project or traffic managers that are kept informed? Are there project management systems that need to be updated?

TABLE 3			
	ROUTINE	**COMPLEX**	**RISKY**
ASSET STORAGE	CMS	DAM	DAM
NOTIFICATIONS	E-commerce	Project Manager	Project Manager
DATA NEEDS	None	Feedback summary	Record of approvals

SECTION 4:

Fill in the Middle

Review processes are usually iterative, and phased (Figure 1):

- Iterative, in that feedback is given on an initial version, and a revised version incorporating needed changes is sent out for approval;

- Phased, meaning the reviewers and approvers change as the project advances. For example, initial feedback might come from creative peers, and circulated to client groups only after approval from the Art Director.

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Figure 1

PROJECT STARTS

Asset(s) Created → YES → Internal Review → YES → Clients → YES → Oversight → YES → Asset Approved → Production, DAM

NO, NO, NO

NOTIFICATIONS

It's also useful to delineate who gives feedback and who can actually approve an asset.

USING FIGURE 1, CONSIDER FOR YOUR NEEDS:

- **Who gives initial feedback?** — Peers, managers?

- **Whose approval is needed before sending outside the team?**

- **What level of feedback do clients give?** — Is it just a yes/no response or more extensive?

- **What internal clients are involved?** — Brand and product teams? e-commerce teams? Country or regional managers? Legal teams?

- **Who can ultimately say 'yes'? Who can only say 'no'?**

Table 4

Focus first on which roles or departments need to be involved, rather than listing individuals. (So, "Legal" is involved, not "Lisa in Legal, Rob in Regulator". Table 4 shows a populated sample table.

TABLE 4			
APPROVAL TYPE	**ROUTINE**	**COMPLEX**	**RISKY**
DEPARTMENTAL REVIEWERS			
PEERS	X	X	X
PROJECT MANAGERS		X	X
ART DIRECTOR		X	X
CLIENT REVIEWERS			
PRODUCT TEAM	X	X	X
BRAND TEAM		X	X
WEB/ECOMMERCE	X	X	X
EXECUTIVES		X	X
EXTERNAL CLIENTS			X
OVERSIGHT TEAM			
REGULATORY			X
LEGAL		X	X
INVESTOR RELATIONS			X
COMPLIANCE			X

SECTION 5:

Estimate Scale

By determining realistic scales and benchmark values, an organization can learn whether current operations are improving or declining, and what room for improvement may exist.

- **How many assets can be delivered per week? Per month?**
- **What is the breakdown between different approval processes?**
- **How many individuals play a role?**
- **How many initiate a review or comment or approve?**

SECTION 6:

Review Metrics

Finally, determine if your organization currently measures metrics on the production process. If your company currently has no means to track asset production metrics or statistics, don't fret. In capturing and measuring metrics, an organization can benchmark historical production, highlight trends and identify room for improvement.

THE KEY UNITS WHEN GETTING STARTED WITH METRICS INCLUDE REPORTING ON:

- **Timeliness** — How many assets meet their due dates? How long until feedback was received?

- **Compliance** — Is the asset on-spec? Did all approvers actually accept the final asset?

- **Delays** — When was the final iteration ready? Did the production process bottleneck?

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What's Next?

Now, use the guide to document your processes. Appendix 1 consolidates all the information that you'll need to capture.

If you want help or have questions, we're happy to be involved - just call your ConceptShare account representative.

Without Conceptshare, companies use manual checklists and rely on email to request reviews and gather feedback. Unlike competitors, Conceptshare integrates proofing and workflow automation to measure and improve creative approval processes.
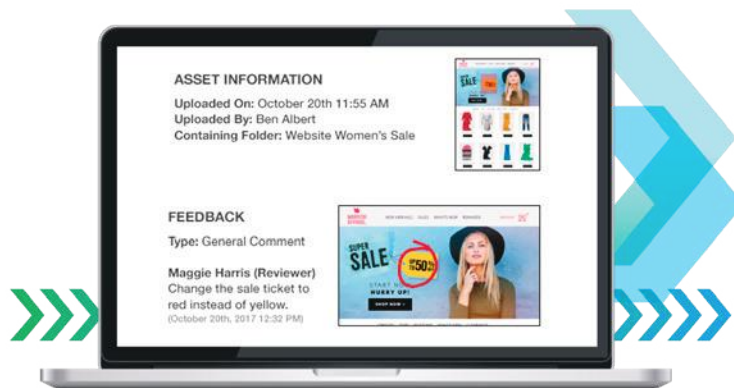
Deltek ConceptShare's online proofing software enables marketing and creative teams to deliver more content faster, and at less cost by streamlining and speeding up the review and approval process.

Appendix 1: Assessment Chart

SECTION 1: GETTING ORGANIZED			
	ROUTINE	**COMPLEX**	**RISKY**
CHARACTERISTICS	High Volume, Short Timelines	High Profile, Long Timeframes	Require Regulatory or Executive Review
EXAMPLE			
YOUR EXAMPLE			

SECTION 2: START AT THE BEGINNING			
	ROUTINE	**COMPLEX**	**RISKY**
CHARACTERISTICS			
PROJECT STARTS			
CREATIVE TEAM			
ASSET CREATION			
REVIEW START			

SECTION 3: LOOK TO THE END			
	ROUTINE	**COMPLEX**	**RISKY**
ASSET STORAGE			
NOTIFICATIONS			
DATA NEEDS			

SECTION 4: FILL IN THE MIDDLE			
APPROVAL TYPE	**ROUTINE**	**COMPLEX**	**RISKY**
DEPARTMENTAL REVIEWERS			
PEERS			
PROJECT MANAGERS			
ART DIRECTOR			
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WEB/ECOMMERCE			
EXECUTIVES			
EXTERNAL CLIENTS			
OVERSIGHT TEAM			
REGULATORY			
LEGAL			
INVESTOR RELATIONS			
COMPLIANCE			

Appendix 1: Assessment Chart

SECTION 5: ESTIMATE SCALE		
NUMBER OF ASSETS PER MONTH		
% BREAKDOWN BY PROCESS FLOW		
SECTION 6: REVIEW METRICS		
% ASSETS MEETING DEADLINE		
AVERAGE TIME TO APPROVE		
AVERAGE WAIT TIME		
% ASSETS COMPLIANT WITH PROCESSES		

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Whether you're an in-house creative team producing content for marketing campaigns or an agency responsible for delivering spectacular digital marketing campaigns for your clients, creative assets need to be reviewed and approved before they are distributed.

Deltek ConceptShare's online proofing software enables marketing and creative teams to deliver more content faster, and at less cost by streamlining and speeding up the review and approval process.

Learn More at **deltek.com/conceptshare**

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