Top 5 **Must-Haves** to Run Creative Services Better

The key capabilities your team needs to execute – flawlessly.

The results are in: Creative services leaders just like you have spoken.

While 2022 will bring about (even more) change, one thing is for certain: creative services teams are laser-focused on

+ *Building processes to fulfill a high volume of ad hoc requests – fast!*
+ *Managing the capacity of their resources and maximizing output*
+ *Tracking current (and upcoming) commitments, and reporting their production*

But you and your team can't ace these objectives without **the right systems**. This cheat sheet is designed to help you identify the tools you and your team need to execute flawlessly in 2022, as well as evaluate how your current solution stacks up.

Must-have #1:
Intelligent Intake Systems

❓ Do you have the right processes set up to field, prioritize, and route all the creative asset and/or brand review requests that come through to your team?

Are these requests centralized, or do they come in from a myriad of channels (email, text, chat, etc.)?

Does everyone on your team have the information they need to fulfill each request – or are they operating in a vacuum?

➕ Make sure your current system makes it easy to view and entirely fulfill ad hoc requests.

The work request module housed within *Welcome* helps your team automatically collect and intelligently route every request that comes through to your team.

Easily create custom, dynamic request forms for all types of requests, ensure the right information is submitted, and create rules to intelligently route those requests to specific individuals or teams to triage — to accept, decline, or prioritize — accordingly.

⇕ Requested By	⏷ Submitted Date
Liam Meyers	Oct 25, 2022
Claire Scott	Sep 12, 2018

Local campaign to drive regional sales and revenue launch

Priority: Medium   Assignees

Accept Decline ⌄ •••

Requested by Liam Meyers on Oct 3, 2022 01:15 PM

Need help to fund and organize a regional campaign for a 3-city race ev somewhere along the coast of California.

Goal: drive regional awareness of Swift shoes
Budget: $250,000
Timing: Between Oct 3 to Nov 25

Must-have #2:

Integrated Workflows & Task Management

? **Is your team centralizing work requests in one location?**

What tools are they using to complete work? Is there a standardized delivery vehicle, and/or how manual is your current process?

Is your team spending more time executing the work...or simply tracking it all?

+ **Free your team from 'work about work' by automating as much of it as you can.**

Once a request is accepted, it's simple to get started on fulfilling it in *Welcome*.

Assigned team members can initiate a Task, Campaign, or Event directly from the request, and assign a specific workflow for completion (and the original requester can follow your team's progress along the way).

For each task, team members can leverage a shared workspace to collaborate on new assets together. And once complete, assets are automatically delivered to the stakeholders who need them.
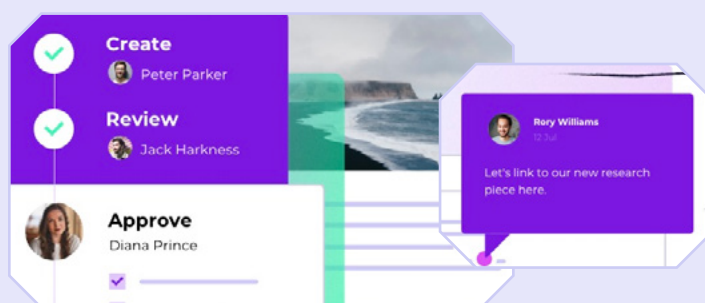
Must-have #3:

Visual Capacity Planning

? **Are you able to monitor all the various projects your team is working on at a given time? Are you able to spot bottlenecks before they present an issue?**

How would having at-a-glance views into your team's capacity affect your ability to shift projects, reallocate work, and (most importantly) maximize the amount that your team is able to accomplish?

+ **Embrace systems that make it easy to always keep tabs on your team's capacity.**

You know better than anyone that running a Creative Services team means optimizing resources.

Welcome offers a variety of ways to view your resources, including Kanban boards and capacity planning visualizations. It's easy to see who's over-committed and who has additional bandwidth.

And it's easy to drag-and-drop projects to reassign work and balance the load –ensuring no one is overworked and that every project gets tackled on time.
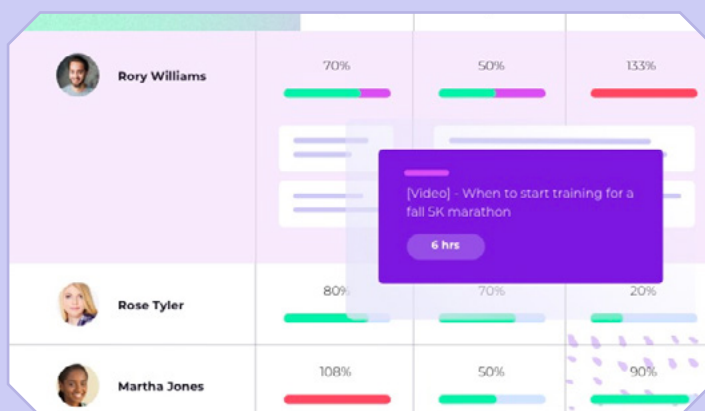
Must-have #4:

## Scalable Processes for Brand Compliance

? **What's the point of spending hours conceptualizing and designing amazing campaign assets...if they end up being off-brand?**

Does your current process have checkpoints in place to ensure all creative requests are formally approved against documented brand guidelines?

+ **Create an easy-to-repeat workflow to ensure all work is quickly, yet thoroughly, reviewed before it's pushed out into the world.**

In *Welcome*, teams can import custom brand guidelines and natively incorporate them into workflows, ensuring nothing is overlooked or misinterpreted.

Put dedicated steps in place to review every creative asset against standardized criteria (e.g. brand color, tone/voice) – ultimately streamlining the approval process for both reviewers and designers.
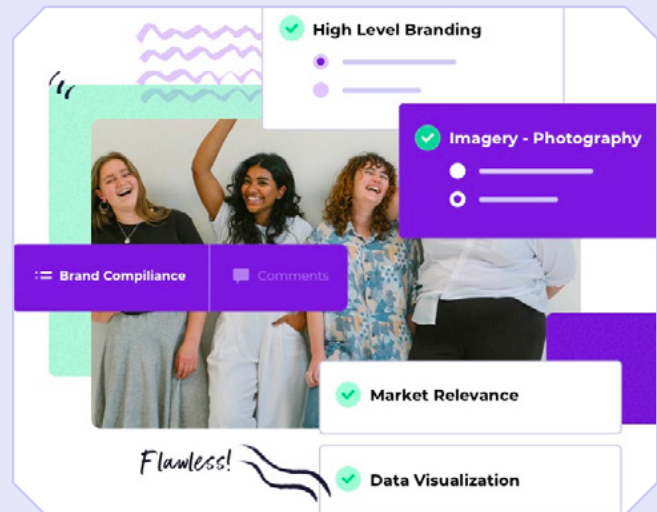

Must-have #5:

Shared Digital Asset Management

? **Does your team have visibility into existing creative and/or brand assets that can be reused?**

Where do all your assets live, currently?

Would being able to pull from a brand library accelerate your team's ability to fulfill requests and execute projects?

+ **Speed up execution by gathering all your content and assets into one DAM, and one DAM only.**

Within *Welcome*, the Library serves as a central repository for all completed content and brand assets.
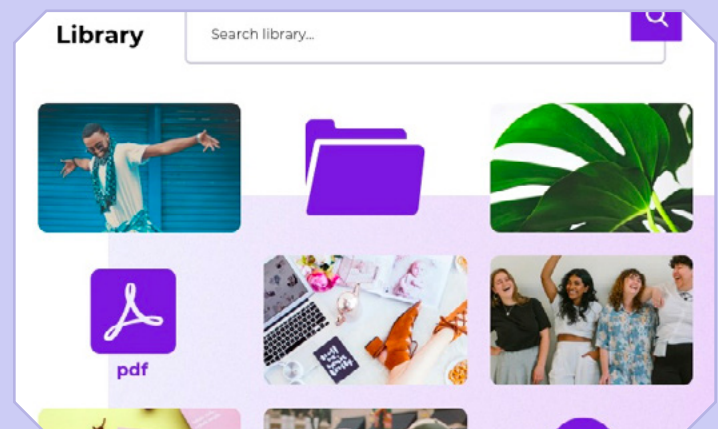
This not only allows creative service teams to repurpose existing resources to accelerate their work, but also share approved content with other stakeholders who need to access and use these assets.

"Welcome is the hub of our brand ecosystem, for all of our creative services globally, helping us orchestrate and deliver exceptional brand experiences."

Read the case study ›

Panasonic   CONAGRA BRANDS   JPMorgan Chase & Co.   AMERICAN EXPRESS

Ready to learn why the world's best creative services teams have made *Welcome* their home for marketing?

Visit welcomesoftware.com to learn more or click here to get started today — for free!

Try for free