

White paper

# 4 ways to fix your broken creative review and approval process

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The review and approval stage is a critical part of the creative process. So why is getting feedback and final sign-off such a challenge for most creative teams? This white paper discusses the main issues that most teams face when reviewing creative projects and provides tips on how to fix a broken creative process.

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You've brainstormed ideas, sketched out concepts and finally completed a solid first draft of your client's campaign. Guess what? You're not even close to being done.

According to a recent Hightail study, only one-third of creatives think that the first draft gets a project to more than 75 percent done. Everyone else knows that multiple rounds of feedback from team members, account managers and clients are the key to developing a final version that will meet the project's goal.

The review and approval stage is a critical part of the creative process. So why is getting feedback and final sign-off so difficult for most agencies?

**Reason 1:** Reviewing images and video in email means feedback is disconnected from the visuals

**Reason 2:** When creative reviews happen over status meetings, someone must spend additional time recapping the meeting so team members have a record

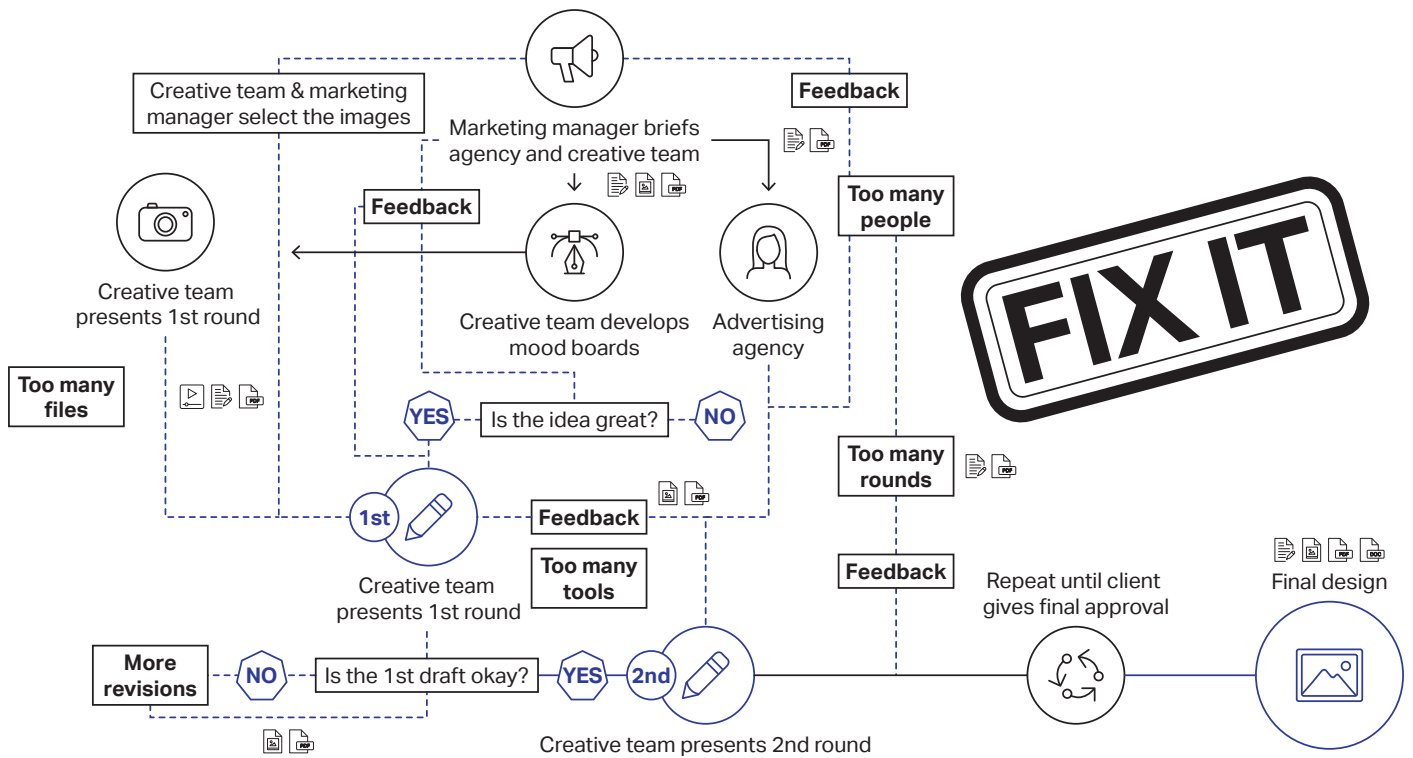
**Reason 3:** Key approvers are often left out of the creative process until the last minute

**Reason 4:** Clients can waste precious review time providing feedback on an older version

Luckily, there are ways to fix these bad habits of a creative review process:

1. Get out of email
2. Cut down on meetings
3. Make it easy for approvers to say yes
4. Automate version control





## Why a broken process is a problem

The fact that one-third of creative projects are late or over-budget illustrates the serious issues with the creative process. The problem can be pinpointed to the review and approval stage, which 77 percent of creatives call “stressful” in the Hightail study.

It’s not surprising that mistakes, delays and indecisions occur during creative reviews. Creativity is not a linear process and ideas are often scrapped if things aren’t working out as expected. Creative teams tend to be fluid with shifting personnel according to the needs of a project and relying heavily on specialists and contractors. Many agencies feel that clients don’t understand the review and approval process and struggle to contribute in effective and meaningful ways.

With these factors affecting the review and approval process, agencies can no longer continue to rely on generic communication and project management tools for taking creative from concept to completion. Let’s look at the four main ways creative teams reviews go wrong without tools purpose-built for the creative process.

### Reason 1: Inbox overload

#### Email is the enemy of creative reviews

Email certainly has its place in the business world. But when it comes to creative collaboration, it creates a challenge for reviewers who are trying to communicate their opinion on a file. In fact, some creative teams still print out creative files for review to capture precise feedback instead of email.

According to the IDC and McKinsey Global Institute, 28% of the average employee's workweek is spent managing email, and 20% of their time is spent searching for and gathering information.<sup>1</sup> This adds up to a significant amount of business inefficiencies caused by managing work in email. Additionally:

- Inboxes are full of distractions, resulting in frequent context switching.
- Feedback is disconnected from the visuals when reviewing images and video in email
- Feedback from multiple reviewers needs to be collated and it is often repetitive.

## Reason 2: Meetings madness

### The boardroom is a blocker to progress

Organizing multiple reviewers to get together and comment on creative work involves a lot of administration, internally and externally. Agency teams are often working with multiple clients and clients are often tied up in meetings that involve other marketing teams, which makes arranging meeting times like finding the missing piece of a puzzle.

Even when the team is gathered, a lot of time is wasted. According to a Harvard Business Review report, 71 percent of meetings are considered unproductive.<sup>2</sup>

Yet so many creatives still believe that face-to-face is the best way to get feedback. Here's why they think this is unproductive:

- Getting everyone together for creative reviews slows project progress.
- Recapping the meeting so that team members have a record takes up additional time.
- Providing regular status updates for creative teams and managers wastes a lot of time.

## Reason 3: Approval anxiety

### Advance to no-go

Some call it "the agency's nightmare." Team members spend weeks getting to a final version with their direct client who then says, "Now I just have to run this past my boss." No wonder the Hightail study found that more than 85 percent of creatives believe that getting clear, final approval on work is a challenge.

And it is not getting easier. In the Hightail study, more than half of agency professionals said that creative projects are becoming more stressful because more people are getting involved in the review and approval process.

How did something as simple as giving the green light become such a hassle?

- Approvals can often be ambiguous. Does "I like it" mean it is ready to ship?
- Key approvers are often left out of the creative process until the last minute.
- Approvers often need to access visual content on mobile devices.
- Sixty percent of creatives think that critical project stakeholders lack sufficient oversight.<sup>3</sup>

<sup>1</sup> Michael Chui, James Manyika, Jacques Bughin, Richard Dobbs, Charles Roxburgh, Hugo Sarrazin, Geoffrey Sands, and Magdalena Westergren, McKinsey Global Institute, The social economy: Unlocking value and productivity through social technologies (2012) <https://www.mckinsey.com/industries/high-tech/our-insights/the-social-economy>

<sup>2</sup> Eun, Eunice, Noonan Hadley, Constance, Perlow, Leslie A. Harvard Business Review, Stop the Meeting Madness (2017) <https://hbr.org/2017/07/stop-the-meeting-madness>

<sup>3</sup> Hightail State of Creative Collaboration Survey 2017

## Reason 4: Vexing versions

### Losing control with each new file

Every creative project will go through multiple rounds and revisions. Tracking three different versions of a file can be tricky, especially if new client stakeholders come in with a strong opinion in the supposedly last round of creative review.

Providing uncontrolled access to multiple versions can be problematic and time consuming in the end.

Here's why each new version increases the chances of a project going awry:

- Updated versions require the client to access a completely new file or link.
- Clients can waste precious review time providing feedback on an older version.
- Approving an outdated version could mean the wrong creative going to market.

## Four ways to fix the review and approval process

### 1. Get out of email

Because the average inbox is full of distractions, it is hard to focus on creative reviews. Especially when reviewers have to switch back and forth between the visual work they are reviewing and the email where they are writing comments. They also waste time describing which visual elements they're discussing and create potential for confusion if descriptions aren't precise enough.

With multiple reviewers, feedback is often repetitive if they cannot see what others are saying, plus someone must collect, collate and make sense of all the comments.

Using dedicated, cloud-based creative review and approve technology, such as [OpenText™ Hightail®](#), instead of email will allow clients to focus on creative reviews in a distraction-free environment. Adding comments directly on images and timestamped on videos gives reviewers the ability to provide precise feedback without writing lengthy descriptions.

When reviews happen in one shared space, feedback is automatically collated and it cuts down on repetitive comments by multiple reviewers

### 2. Cut down on meetings

Finding a time for everyone involved in a creative project to meet and discuss the work holds up progress and dampens momentum. Meetings are widely considered to be unproductive and waste valuable time for all attendees. And because there is no automatic record kept, the project manager must spend time writing recap notes to ensure there is a history of who made key decisions and why. Regular status meetings intended to keep stakeholders up to date are another drain on resources and don't provide 24/7 visibility.

Enabling creative reviews to take place digitally allows reviewers to access content on their own time so feedback can be provided asynchronously. Each reviewer can deliver their comments more efficiently while contributing to a single system of record. When project stakeholders and final approvers have ongoing visibility into the creative process, it cuts down on the need for time-sucking status update meetings.



### 3. Make it easy for approvers to say yes

Approval should be a binary go/no-go decision. But when it comes in written form alongside other conversations, it can lead to ambiguity. If a stakeholder likes a draft, it isn't the same as wanting to see it go to production. A key issue for approvers is that they are often the last to see the creative, usually as deadline approaches and the team wants them to rubber stamp their work. Another challenge is having stakeholders who are often off-site, as they require fast and effective access to visual content on mobile devices, where downloading files isn't practical.

Approvals should be treated separately from feedback. While a stakeholder can comment on what they think of the work, giving it the green light needs to be a specific and unambiguous action. The latest creative and conversations and context around it should be accessible in one place, so approvers have oversight throughout the project and not just at the end. It is critical that images and videos are instantly accessible as previews and streams, even on mobile devices—without having to download first.

### 4. Automate version control

Whether a project will be a quick three-draft turnaround or drag into v.32, teams cannot rely on each person on the agency and client sides to always have the correct version. If a client accidentally digs up and reviews an older version from their inbox, not only have they wasted their time and delayed the project, but some of that new feedback might be relevant and still need to be reviewed.

If the final approval on a project is not definitively tied to a specific version, there is a risk that the wrong creative could be sent to production. Version control should be an automated process, where an agency team and clients will always access the latest version with one unchanging link. Previous iterations are archived but remain accessible so reviewers can look back at the evolution of the project and see why changes were made and who suggested what.

Approval should be applied to a specific version of the file so if a mistake is made it is clear who was at fault.

To find out how Hightail Creative Collaboration can help creative teams fix a broken creative process, visit [www.hightail.com/creative-collaboration](http://www.hightail.com/creative-collaboration)

### About the Hightail State of Creative Collaboration Survey 2017

1,040 people, who work on creative campaigns and programs in both creative and non-creative roles, responded to an online survey conducted by Market Cube, a research panel company. All respondents are involved in the creative collaboration process, 18 years of age or older and work at companies with 20 or more employees, as managers or above. The survey was conducted in February 2017.

### About OpenText

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