

IN-HOUSE CREATIVE INDUSTRY REPORT

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Expand Your Team.

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Our goal is to benchmark the operations of creative teams and in-house agencies to gain insights into industry standards and best practices that will support you in driving your business decisions and validate the direction of your department to upper management. We encourage you to share the findings among your colleagues and industry peers.

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About the Report

The BOSS Group and Cella are thrilled to bring you the 2018 In-House Creative Industry Report, which benchmarks the in-house creative community and reports on strategies that leaders can use to guide the path of their departments/agencies. Benchmarking will help identify gaps in an organization and generate potential paths and solutions, but personal, innovative thinking and institutional knowledge should not be eliminated from the process.

We hope the data and insights included in this report continue to provide a source of validation and direction, contributing to a more effective and efficient operating model. The report is published annually, and we welcome your insights and ideas to help us continually improve the report.

The In-House Creative Industry Report was first published in 2010 following a collaboration between InSource and Cella based on the shared goals of providing in-house creative leaders with a resource to support and inform their decision making, as well as tracking and reporting industry trends.

Survey Respondents

More than 425 leaders from creative teams and in-house agencies responded to our survey conducted in January 2018. These leaders represent Fortune 1000 companies, as well as middle market and not-for-profit organizations and span multiple industries including, but not limited to, banking/financial services, consumer products, education, health care, manufacturing, technology and software. More information about the demographics of our survey respondents is available in the Appendix.

Perspectives from the Field

Included in this report are four Perspectives from the Field articles written by in-house creative leaders on shared challenges and goals across the industry.* We asked these leaders to share their stories covering in-house transformation, branding in-house creative departments, global considerations for expanding an in-house agency, and content management and automation principles.

www.cellaconsulting.com/Content-and-Community/Perspectives-From-the-Field/

Resource Links

■ [New Resource Links for 2018](#) ■ [Previous Resource Links](#)

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* The opinions expressed in these articles are those of the writers and do not necessarily reflect the views of The BOSS Group or Cella.

Executive Summary

Survey Evolution Goals

It's hard to believe we've been publishing the In-House Creative Industry Report for eight years. Loyal followers of the report have likely noticed that each year our report has grown—sometimes in page length and always in number of questions (this year 125 were included!). We recognize that this growth comes at the expense of the time of report respondents, and we've been fortunate to experience strong participation year over year despite this. That said, we recognize it's time to retire some questions—potentially bringing them back every other year to confirm steady state. This will allow us to add new questions and go deeper on the latest trends and areas of interest such as agile, account and project management practices and emerging technologies without requesting even more time of survey respondents.

Year-Over-Year Surprising Changes

More in-house agencies (IHAs) than ever (83%) indicated that they report into marketing, communications or another department/division that is a strategic alignment for in-house agencies. Being aligned within these divisions typically creates greater opportunity to partner earlier in the project lifecycle and support Tier 1 projects.

There was a 10% increase in more flexible schedules with 70% of teams able to either on a regular or ad hoc basis work a non-standard schedule. Likewise, the ability to work remotely has continued to grow (pg. 13).

The number of projects mega teams (50+ team members) complete each year had a clear majority response for the first time with 30% of teams responding they complete more than 8,000 projects in a year. The remaining 70% of mega teams' responses came in across the full spectrum of ranges (pg. 30). That said, the sample size of this audience is small, (23) therefore this response tells us more about the varying levels of project complexities these teams likely work on than it identifies a norm.

There was a significant increase in the percentage of in-house agencies providing banner ads and other artwork for website use (from 2% to 85%), as well as in teams creating HTML emails (3% to 66%) (pg. 32). This increase has us stumped; it seems more likely that teams overlooked the specifics of the question choices in the previous year than an increase this substantial occurred, especially given the basic capability of providing Photoshop graphics for use on digital platforms.

New and Notable Benchmarks

This year three new questions were included in the survey, and topics ranged from the IHA's level of strategic partnership, level of effort across Tiers 1-3, and the background of IHA leaders.

Responses that we found noteworthy include:

- 14% of IHAs indicate that on the scale of order taker to strategic partner, they identify as an "organizational strategic partner," in which they are primarily a Tier 1 agency and are considered a key stakeholder in marketing and branding initiatives (pg. 11)
- The amount of time spent on Tier 1 projects was not disproportionately higher than time spent on projects of lower complexities (pg. 30). One potential factor is that while Tier 2 and Tier 3 projects may not be creatively complex, that does not preclude them from requiring significant amounts of time.
- Approximately 40% of teams consider themselves to be more print-based, and almost as many consider themselves equally split between print and digital projects. The remaining 23% identify their teams as primarily digitally-focused (pg. 33).
- 35% of teams providing video services are shooting in 4K (pg. 35).

Other Points of Interest

- More teams (43%) are being asked to benchmark their costs against those of an external agency (pg. 15); potentially related is that fewer IHAs are finding a benefit of a chargeback funding model to include value recognition (pg. 18).
- Again this year we see a surprising amount of confidence in the available talent in the marketplace (pg. 24). This may be due to the low number of openings in-house agencies have each year as attrition remains incredibly low (5%) for most teams, and thus the endeavor of finding candidates is infrequent and therefore not considered painful.
- Only 14% of IHAs do not support social media in any form (pg. 33).
- 7 out of 10 IHAs now provide video services—this is up from 5 out of 10 in 2015 (pg. 34). Approximately 40% of teams have at least four people providing video capabilities.

HIGHLIGHTS FROM THE 2018 REPORT

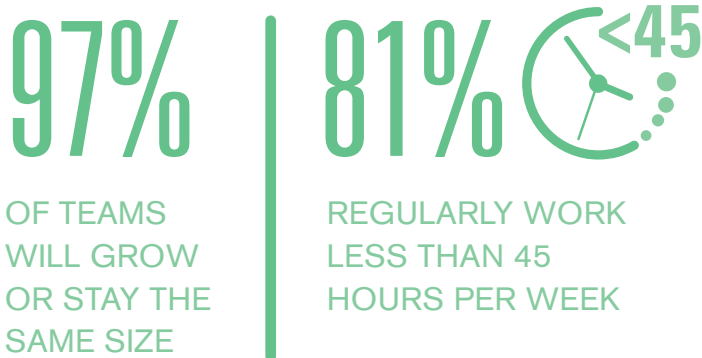
434 IN-HOUSE CREATIVE TEAMS ARE REPRESENTED



CREATIVE LEADERS



CREATIVE TEAM MEMBERS

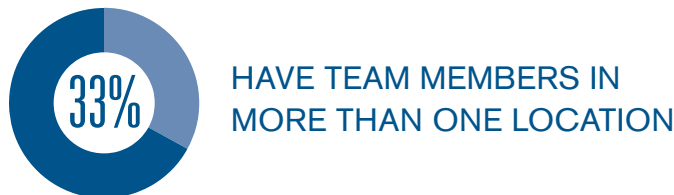


77% of in-house teams partner with external agencies

43% HAVE HAD TO PROVIDE COST COMPARISONS BETWEEN EXTERNAL AGENCIES



CREATIVE LEADERS



ONLY 10% SPENT MORE ON PRINTING YEAR OVER YEAR



66% COMMISSION CUSTOM PHOTOGRAPHY AT LEAST ANNUALLY

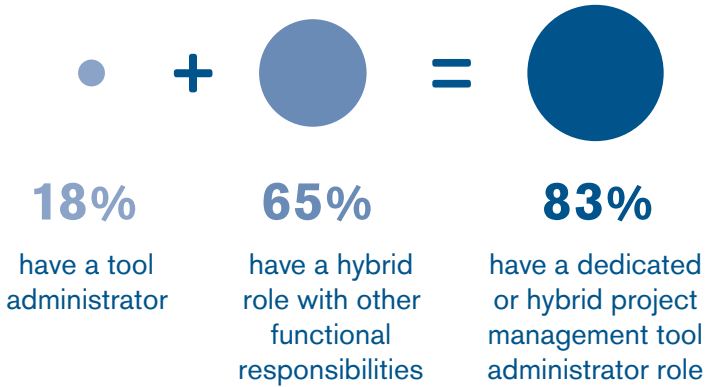


ALMOST 2/3 ARE CONFIDENT IN THE JOB MARKET FOR JOBS SIMILAR TO THEIR OWN



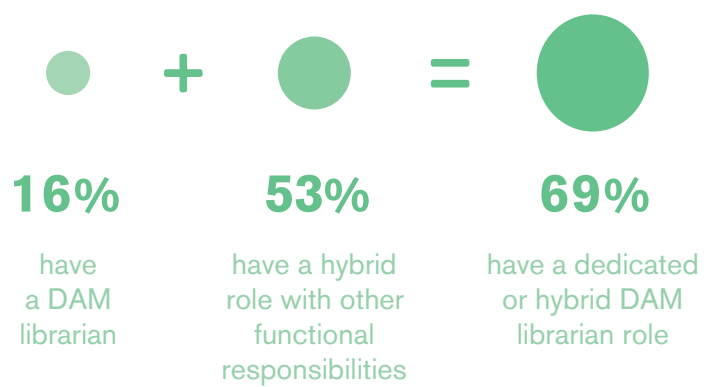
31% OF THE FORTUNE 500 PARTICIPATED

Do you have a dedicated resource managing your project management tool?



91% IDENTIFY BRAND KNOWLEDGE AS PART OF THEIR VALUE PROPOSITION

Do you have a dedicated resource managing your DAM system?

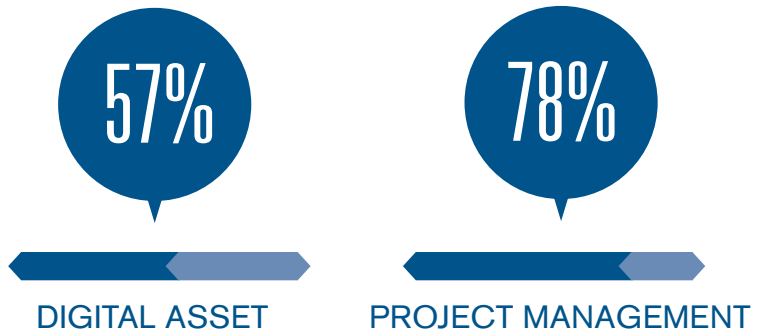


83% OF IN-HOUSE TEAMS SUPPORT ADVERTISING

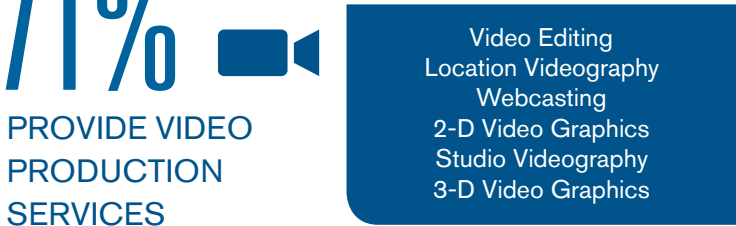


85% PROVIDE GRAPHIC CONTENT FOR SOCIAL MEDIA

How many utilize management systems?



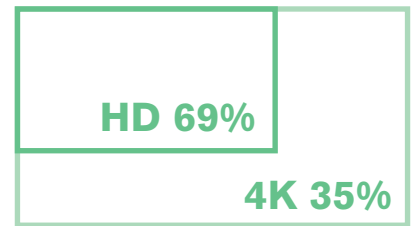
71% PROVIDE VIDEO PRODUCTION SERVICES



53% have dedicated account and/or project managers

85% have some level of processes documented

69% USE HD RESOLUTION TO SHOOT AND EDIT IN, WHILE 35% ARE USING 4K



\$81-100 MOST COMMON BLENDED CHARGEBACK RATE

PERSPECTIVE FROM THE FIELD

Block Kryptonite, Enhance Superpowers

In-house transformation. Value-seeking. Driving efficiency. Generating creative power. All major initiatives in our industry over the past 5-10 years.

If you're a leader of any sized in-house agency (IHA), you know that the in-house movement has made tremendous advances the past decade. We're more business-focused; we have improved workflow processes, organization and talent; and we're functioning more collaboratively within our teams and across the industry. Not least, our creative power is skyrocketing! You also know the concept of transforming a creative service-bureau into a fully functional (and valuable) IHA is at once exciting and frightening. However, what you may not have heard as much about: we're living on the edge.

If we're going to truly and collectively smash through the barriers and perceptions of old, we have to continue making major advancements and improvements in our mindsets, our habits and our perspectives. And that starts with acknowledging our Superpowers and the alternatives to those powers—our Kryptonite. Because the same habits and skills that make us powerful as an industry can do us in.

IHA Superpowers Bind Us All

As in-house agencies, we share these significant strengths:

Proximity: We're on the inside—close to all the people, products and processes that make our companies great.

Longevity: The average turnover in our business is only 5%. That longevity translates into incredible smarts and experience.

Institutional Knowledge: The fact that we're close to the business and have teams who have worked at our companies for many years gives us unmatched knowledge about how things work. That's a great Superpower!

But Don't Forget About Kryptonite

Beware, our strengths, over-expressed, can become our weaknesses. We don't want to let our weaknesses stagnate and begin to define us.

Myopia: If we're too close for too long, our frame of reference shrinks. We must take great care in IHAs to ensure we see outside-in views as clearly as our inside-in proximity provides.

Dysfunction: The longer we stay in one place, the more likely it is that junk will collect. This is not to say that all long-standing items, habits or people—the results of longevity—are bad. Quite the contrary. But habits, processes and capabilities must not stand idle, or they become junk.

Institutionalized Thinking: A great example of institutionalized thinking is in the movie "The Shawshank Redemption," a brilliant story about people with great institutional knowledge, in this case of a prison, who are ultimately incapable of functioning outside that institution. We must always bring an outside-in perspective to our in-house teams, and never become institutionalized.

Here are my suggestions to avoid these Kryptonite traps. The solutions are simple, though not easy:

1. Protecting against your IHA's Kryptonite and fostering its Superpowers requires full commitment, complete honesty and daily vigilance. That translates into open, clear-minded and brave leadership—leaders who know that creating change creates discomfort and resistance. Brave leaders persevere anyway.
2. You need an objective, well-articulated vision and value statement for your IHA. "Better, faster, cheaper" isn't enough. Becoming THE group that changes stakeholder behavior around strategic imperatives—that's more like it.
3. Operate like fiends. Collaborate wildly. Stomp out inefficiencies. Prioritize your strategies and your projects. Build advocacy and educate often. Bring outside-in views to your company—always.

Is this all it's going to take? Of course not. It takes daily, clear-eyed persistence in a variety of focus areas. But if we collectively stomp out our Kryptonite and expand our Superpowers, the sky's the limit.

What propels your team forward? What holds it back?
I'd love to hear from you and swap stories.

ABOUT THE AUTHOR

WAYNE BARRINGER

Wayne is the head of Boeing Creative Services - a 150-person in-house agency with offices in Seattle, LA, St. Louis and Chicago. Before he led a full-scale turnaround of the IHA at Boeing, he consulted on and led successful transformations at external ad agencies and PR firms in the Pacific Northwest. He has served on the adjunct faculty at three major universities and has delivered keynote presentations at some of the industry's biggest events, including HOW Design Live!, IHAF Annual Conference, ANA In-House Agency Days, Creative Operations Exchange, and multiple corporate events.

Survey Results

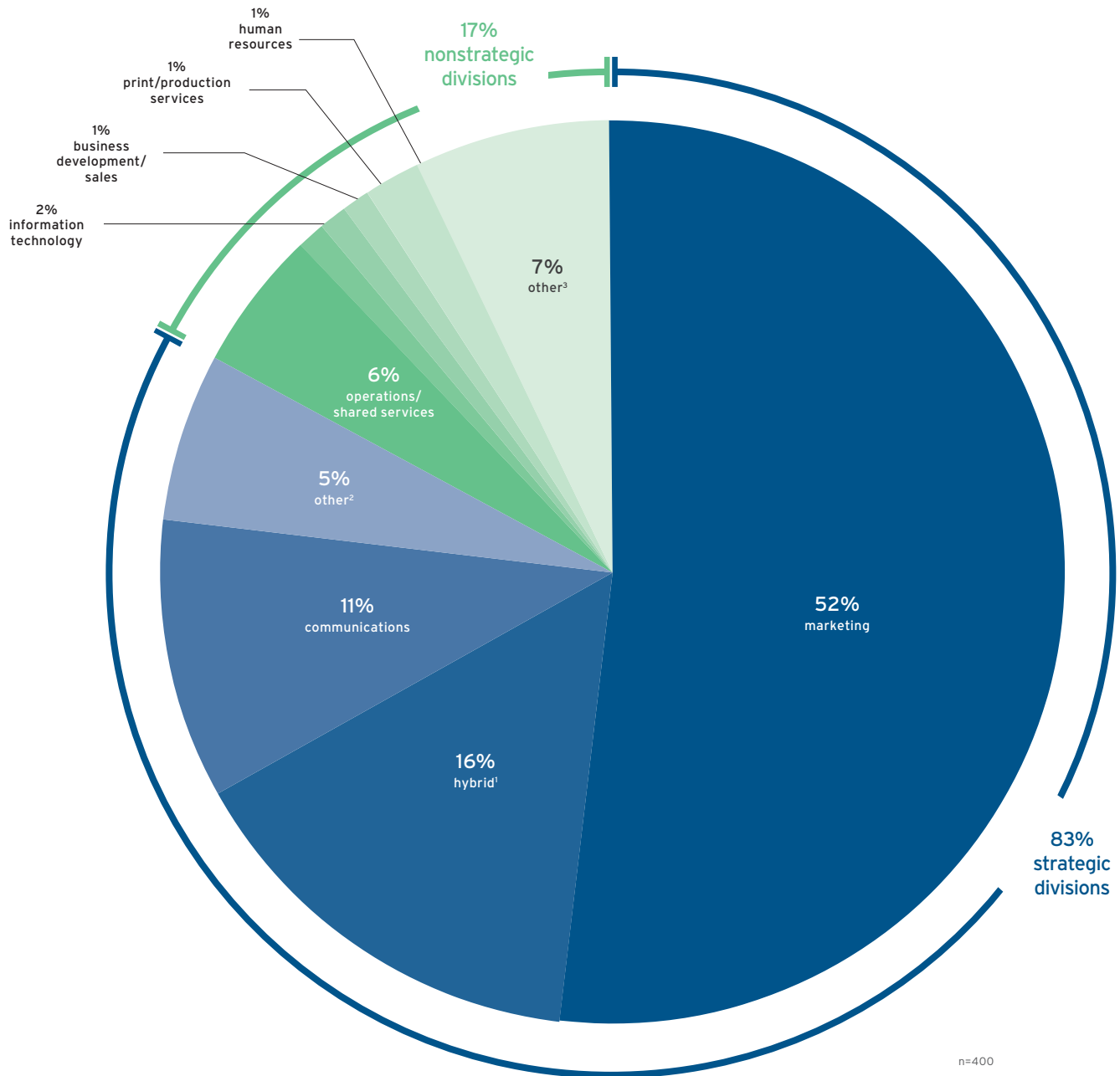
Department Organization

Eighty-three percent of responding creative leaders indicated their department reported through a strategic, value-adding department such as marketing, communications, advertising, brand or some combination of those divisions. When the creative team is positioned within one of these divisions, the organization is more likely to be considered strategic and value-adding. In contrast, when a creative team reports through a shared-services division, the department is often viewed as a commodity, which makes it more difficult to succeed in becoming a strategic partner. It is possible to overcome the disadvantage of not being aligned with the marketing (or a like) department; it just requires the creative team to create a brand for itself outside of its "home."

Leaders of in-house groups regularly face ongoing competing priorities, leaving them without adequate time to develop their leadership teams. It is important that leaders prioritize professional development for themselves and their direct reports to ensure the ongoing growth and success of the team members and group.

DEPARTMENT ORGANIZATION

Q: Into which division does your creative team/in-house agency report?



¹ Hybrid of two or more: advertising, brand, marketing, communications and/or sales

² Other includes advertising, brand and public affairs

³ Other includes but is not limited to: R&D, procurement, legal, finance, misc. executives

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

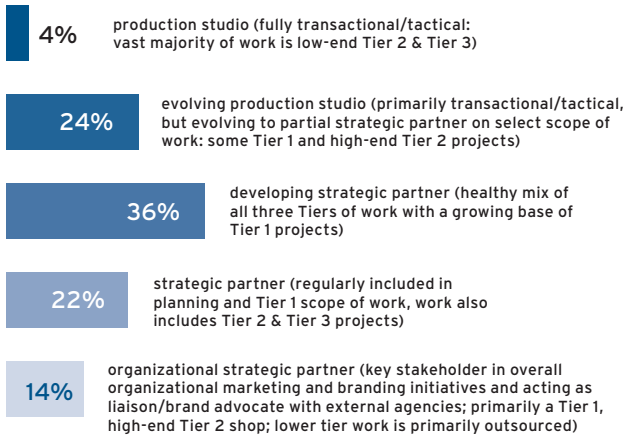
The Missions of In-House Creative Teams
bit.ly/2p17IPB

What it Means to be a Creative Center of Excellence
bit.ly/2p0XNjv

Three Things You Can't Do Without—Mission, Vision and Values Statements
bit.ly/2tY7fAP

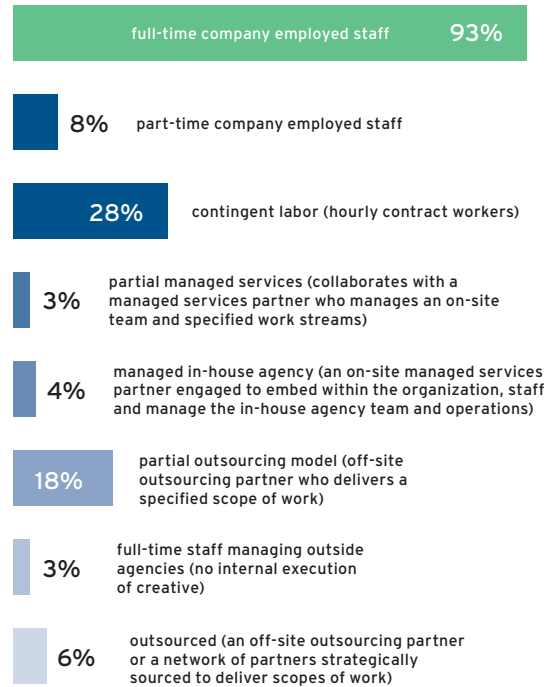
Our Invisible and Sometimes Forgotten Clients
bit.ly/24rPcvE

Q: On the scale of order taker to strategic partner, objectively where does your creative team/ in-house agency fall?



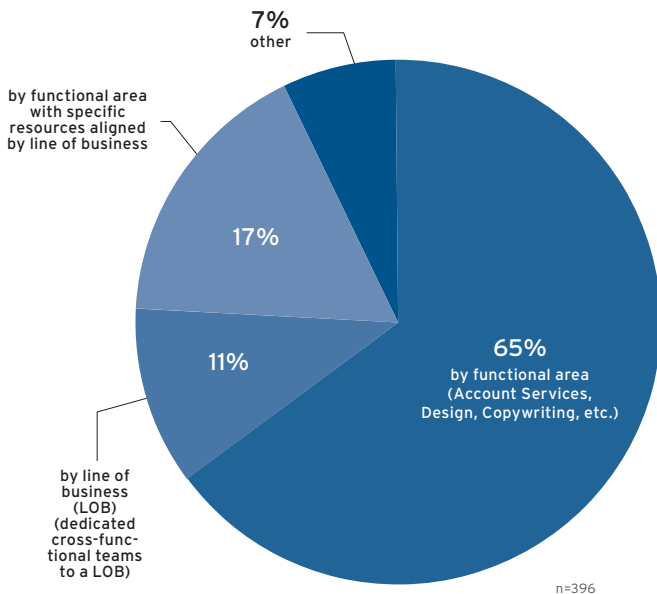
n=397

Q: Which best describes your creative team/ in-house agency's staffing mix? (select all that apply)



n=398

Q: How is your team organized?



n=396

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

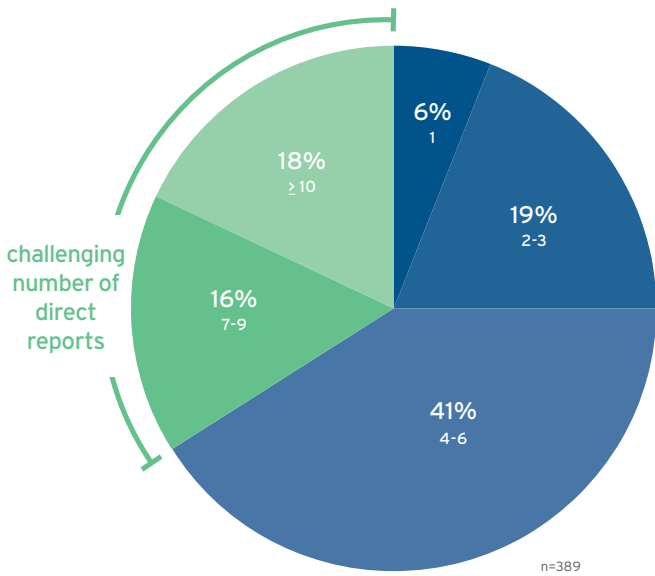
RELATED RESOURCES

Drivers to Rethinking a Creative Team's Makeup
bit.ly/1S5QQ0B

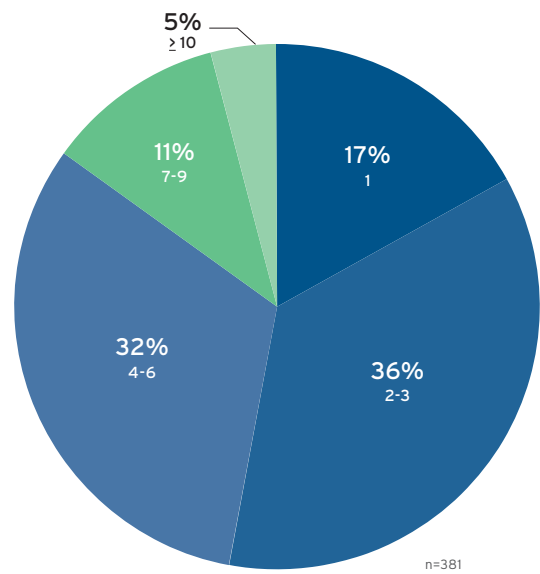
Key Operational Considerations Ahead of Remodeling Your Team
bit.ly/2FGSIll

DEPARTMENT ORGANIZATION

Q: How many direct reports does the senior-most creative leader have?

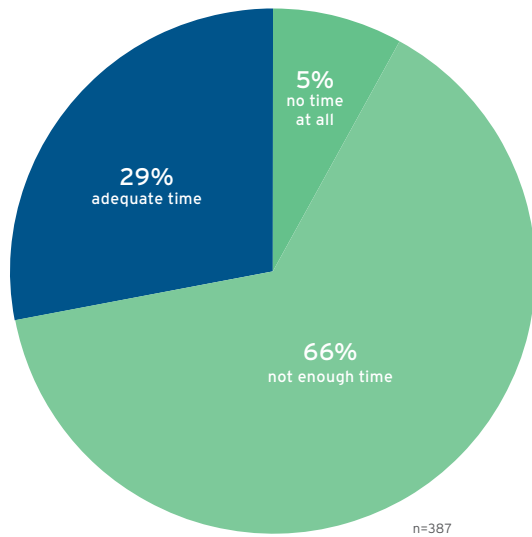


Q: On average, how many direct reports do first/ front-line managers have?



→ Heads of in-house creative agencies and teams continue to take on a significant number of direct reports, though continue to be kinder to the managers who report to them who, on average, have fewer direct reports.

Q: Do you have adequate time to provide your team coaching and development?



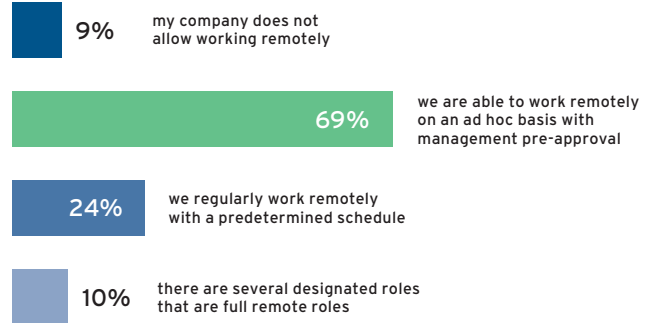
*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

Q: Which of the following best describes your group's ability to practice flex-time?



n=389

Q: Which of the following best describes your group's ability to work remotely? (select all that apply)



n=384

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Key Remote Work Management Principles
bit.ly/2pnd4mN

Overcoming Remote Workforce Challenges to Help Your Team Thrive
bit.ly/2IAcfz0

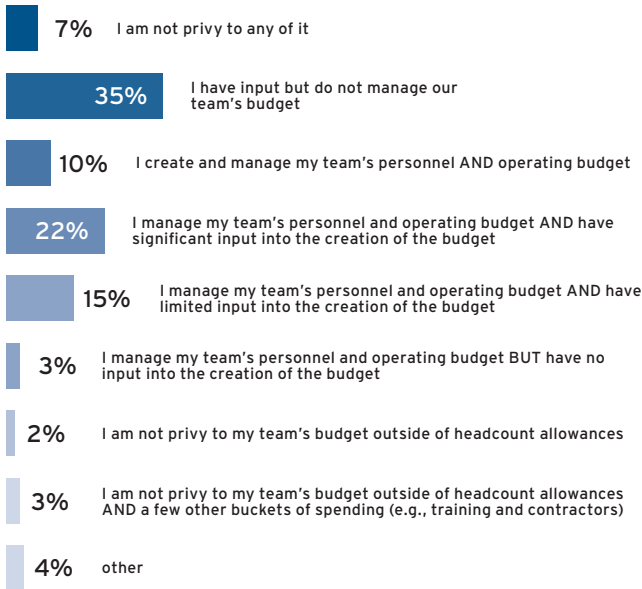
Department Funding

Regardless of an in-house agency's financial model, proving the group's value is a constant expectation. Tangible results stem from managing your group's budget and demonstrating cost savings against external agencies—in addition to providing on-time, high-quality creative.

Instituting a chargeback funding model is a natural evolution for an internal creative organization and an important step in eliminating a number of challenges common to “free” creative services. Typically, this shift is due to several factors, including department size, project volume/workload, resourcing and competition with outside agencies. This evolution requires many organizational changes that include standardization of processes and procedures, internal marketing activities, realignment of resources and improved project management. Moving to a chargeback model signals the team will operate more like a creative agency in both business operations and creative direction.

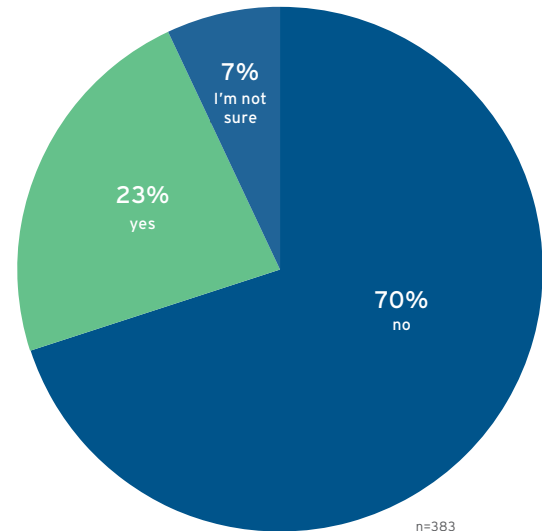
Being a cost center (non-chargeback department) can be a great thing – the creative leader can focus on the value of the creative that his or her team is creating and won't be burdened by financial pressures. However, the most significant challenges for non-chargeback departments still remains affecting client behaviors.

Q: Which of the following best describes ownership of your department's overall budget?



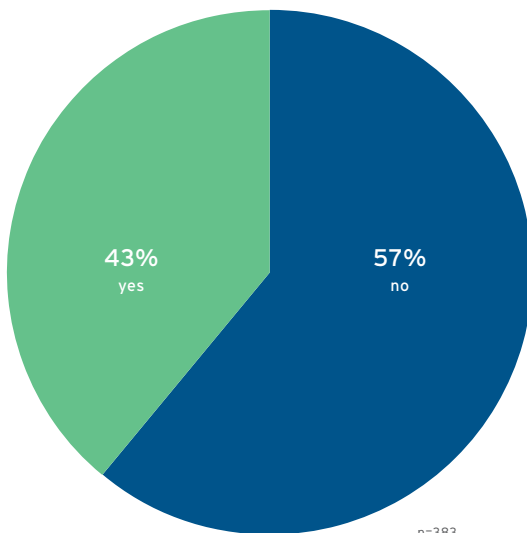
n=382

Q: Does your creative team work with an aligned procurement partner who specializes in optimizing your company's creative/marketing spend?



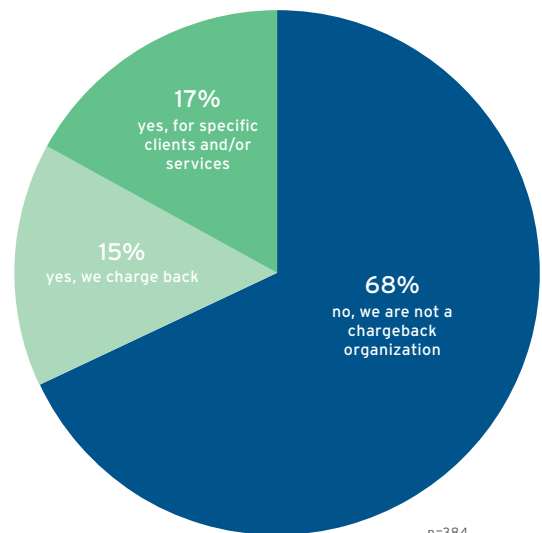
n=383

Q: Have you ever been asked to provide a cost comparison between your in-house team and comparable external agencies?



n=383

Q: Is your department a chargeback organization for creative projects (not including any pass through costs)?



n=384

→ The smaller a creative team/in-house agency, the more likely they are to not charge back. Case in point: only 27% of departments with fewer than 30 team members charge back, whereas 65% of teams over 50 charge back.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

How to Calculate Cost Savings
bit.ly/1n1kAzi

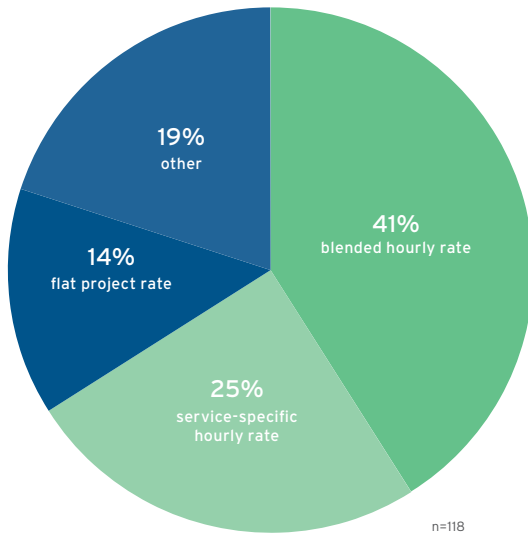
Challenges to the Cost Savings Metric
bit.ly/1QBAN5N

The Appeal of a Hybrid Funding Model
bit.ly/15JDtfy

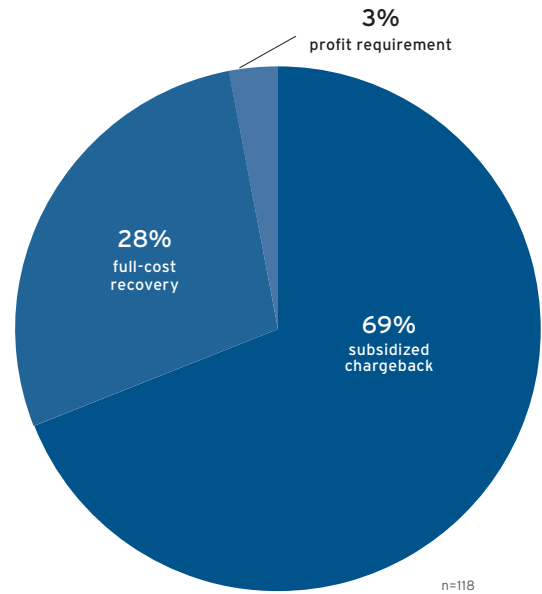
Don't Let Your Funding Model Run Your Creative Team
bit.ly/2FZY9bJ

DEPARTMENT FUNDING

Q: What is the most common method used to charge clients?

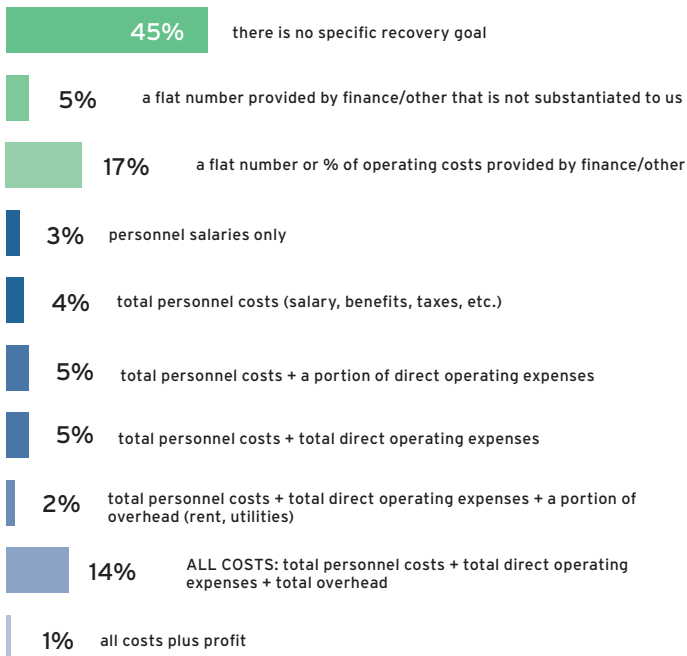


Q: Which most accurately describes your chargeback model?



→ Almost two-thirds of chargeback teams recover through an hourly model.

Q: What costs are you required to recover through your chargebacks?



n=118

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Building a Chargeback Model
bit.ly/2oikZPI

Determining Your Chargeback Rate
bit.ly/10DrrDy

Q: What is your blended hourly rate for creative services?

ANSWER OPTIONS	<\$50	\$51-\$65	\$66-\$80	\$81-\$100	\$101-\$120	\$121-\$140	\$141-\$160	>\$160	n=
Blended Hourly Rate	13%	21%	17%	27%	8%	6%	6%	2%	48

→ While the \$81-\$100/hr was the most frequently selected response, half of respondents indicated a chargeback rate below that range. Of the teams charging less, almost 75% are subsidized chargeback teams.

→ Teams with higher chargeback rates tend to work for Fortune 500 companies, be located within high-cost areas and are required to recover a larger percentage of their total costs.

Q: What is your hourly rate for the following services?

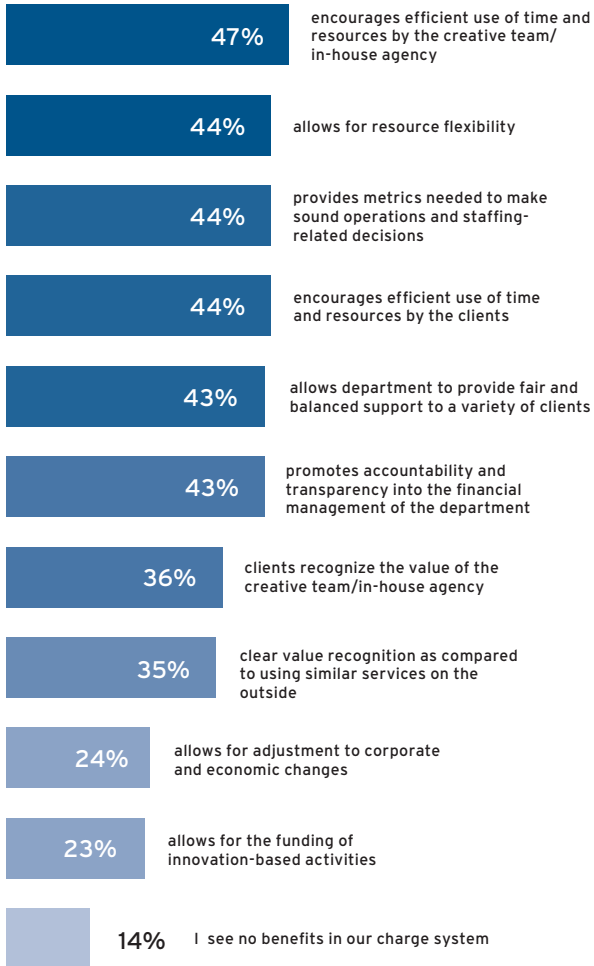
ANSWER OPTIONS	We don't charge for this	<\$50	\$51-\$65	\$66-\$80	\$81-\$100	\$101-\$120	\$121-\$140	\$141-\$160	>\$160	n=
Account management	57%	0%	10%	14%	14%	0%	5%	0%	0%	21
Project management	44%	8%	8%	12%	16%	4%	4%	0%	4%	25
Production design	7%	19%	11%	26%	22%	7%	4%	0%	4%	27
Graphic design	11%	14%	11%	25%	21%	7%	7%	4%	0%	28
Web/Multimedia design	13%	8%	13%	17%	21%	13%	8%	4%	4%	24
Creative direction	38%	12%	4%	12%	8%	8%	12%	4%	4%	26
Copywriting	24%	10%	5%	19%	24%	19%	0%	0%	0%	21
Copyediting	29%	5%	14%	24%	10%	19%	0%	0%	0%	21
Proofreading	26%	4%	26%	30%	4%	9%	0%	0%	0%	23
Print procurement services	39%	9%	13%	17%	13%	0%	4%	0%	4%	23
Video production	5%	5%	20%	20%	20%	10%	15%	5%	0%	20

NOTE: ADDITIONAL RESPONDENTS CHOSE "WE DO NOT PROVIDE THIS SERVICE;" THOSE RESPONSES WERE ELIMINATED TO FOCUS THE RESULTS ON RATES.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

DEPARTMENT FUNDING

Q: What are the key **BENEFITS** your department experiences as a result of charging your clients for services? (select all that apply)



n=110

Q: What are the key **DRAWBACKS** that your department is experiencing as a result of charging your clients for services? (select all that apply)



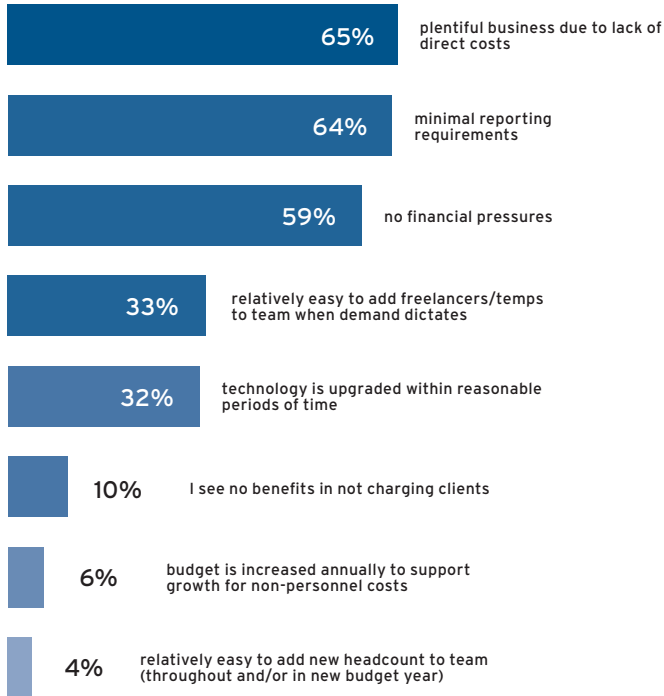
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*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

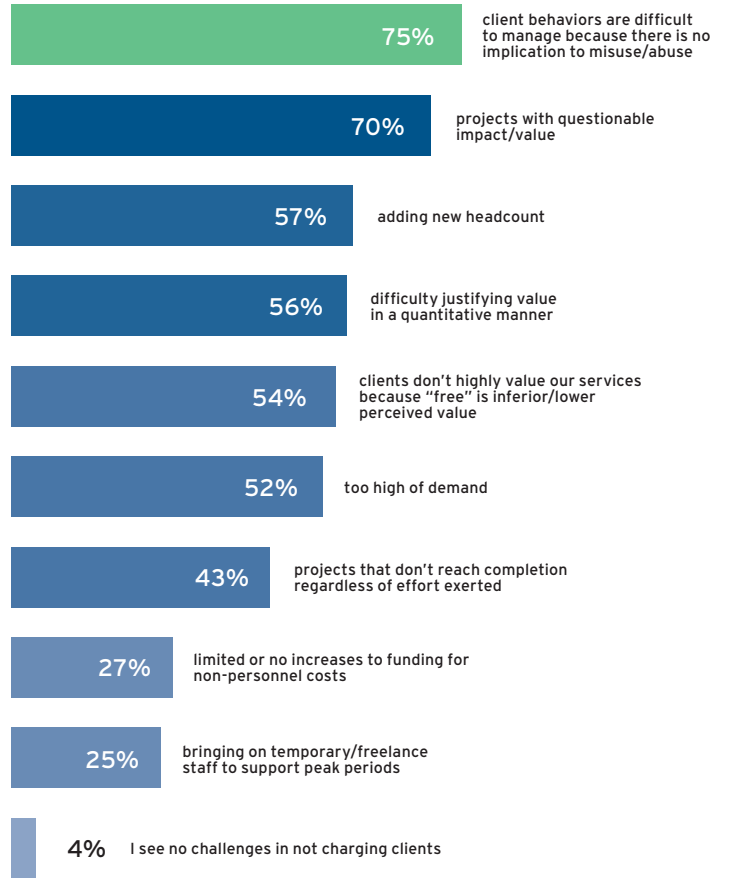
Chargebacks:
A Double-Edged Sword
bit.ly/17Zf4C2

Q: What are the key **BENEFITS** your department experiences as a result of **NOT** charging your clients for services? (select all that apply)



n=246

Q: What are the key **CHALLENGES** that your department experiences as a result of **NOT** charging your clients for services? (select all that apply)

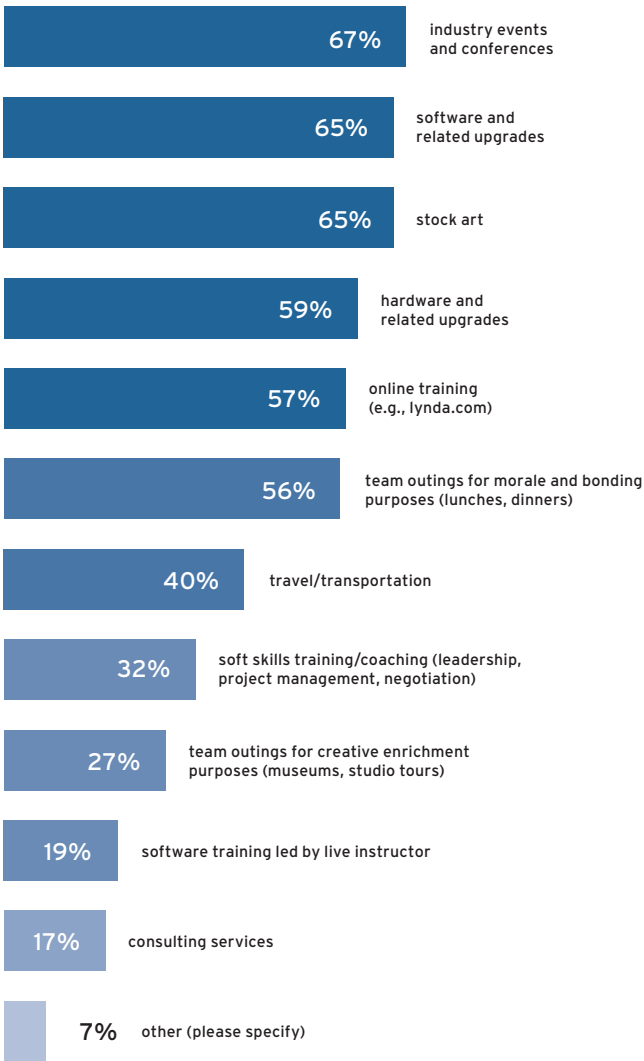


n=252

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

DEPARTMENT FUNDING: NON-PERSONNEL BUDGET

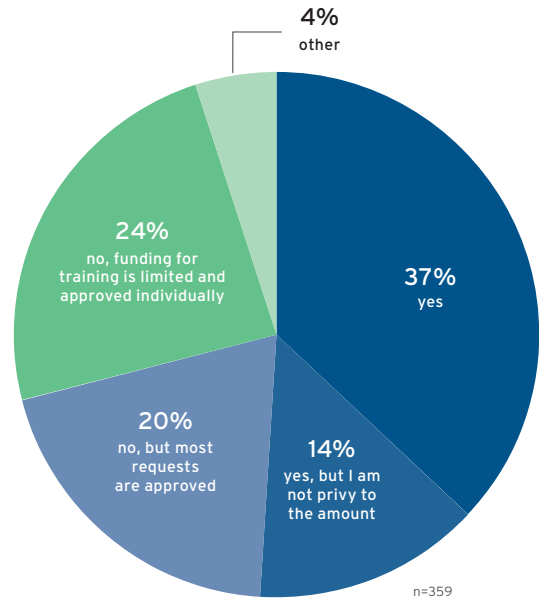
Q: How do you use your non-personnel/direct operating budget? (select all that apply)



n=355

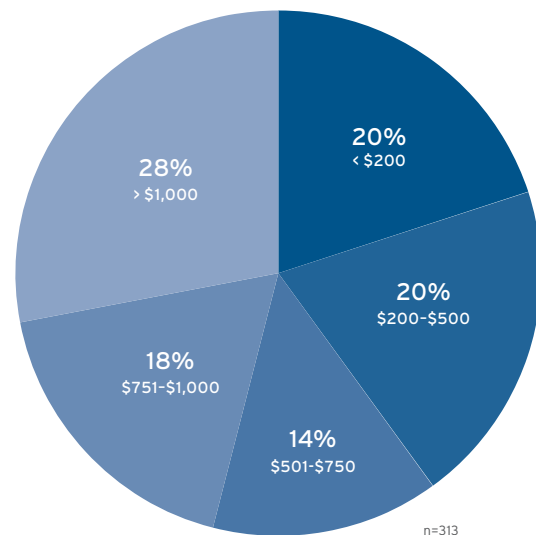
→ 4 out of 10 creative leaders find their non-personnel budgets to be inadequate.

Q: Does your team have an established training budget each year?



n=359

Q: What is your annual training budget per individual?



n=313

→ In 2018, creative leaders are reporting an increase in training dollars per team member for the first time in several years.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

Turnover Disrupts Team Performance; Stay Ahead of It

Due to the lack of qualified, available talent in the marketplace, it's possible that your team members are being proactively recruited. Developing a talent retention strategy must be your top priority.

Discussion Takeaways

At our recent series "Retaining Team Members in a Tight Talent Market," we met with more than 45 in-house creative leaders to discuss strategies to retain their top talent. Here's what they shared: **Creative leaders are...**



Streamlining job descriptions to ensure team members are working on the tasks that drive the most value for the organization and job satisfaction for the individual



Developing Subject Matter Expert roles that allow for promotion without taking on direct reports and create additional value to the organization



Promoting innovative thinking through "Innovation Summits" and other non-project specific opportunities to encourage out-of-the-box thinking and creativity



Finding creative, no-cost professional training opportunities—such as inviting Adobe or other vendors to come onsite to train team members



Creating new virtual platforms for remote team members to bond and collaborate with their peers



Getting more involved with the creative community—to build their personal brand and their teams' brands in order to make their group a desired destination for current and future team members



Focusing on building a desirable culture and having fun at work (while getting the job done, of course)

ALMOST **50%** of creative leaders believe there's enough qualified talent to choose from when hiring new team members, however this just isn't true.¹

2.3% unemployment rate among college graduates, with the overall rate at 4.3% – the lowest since before the recession.²



In addition, the percentage of people quitting their jobs has been steadily growing.²

CreativeExecs[®]
roundtable

CreativeExecs Roundtables are hosted by The BOSS Group and Cella and bring together creative executives for moderated peer discussions on topics tailored to the unique challenges facing leaders of in-house creative departments. Each year, we host a spring and fall series in six cities across the U.S.

¹ The BOSS Group and Cella Consulting, LLC 2017, In-House Creative Industry Report, May 2017

² United States Department of Labor Bureau of Labor Statistics, Current Population Survey, May 2017

Department Resourcing

Creative leaders must be careful in demonstrating a desire to grow their team. Too often a desire to grow a team can be viewed as “empire building;” leaders must be prepared to substantiate headcount requests based on business need. In addition, leaders need to be prepared to promote the adoption of new processes and tools to support the growth in order to grow in a mature, scalable manner.

Ensuring you're appropriately staffed is a constant balancing act creative leaders face on a day-to-day basis. Flexible staffing models and principal partnership agencies continue to provide creative teams and in-house agencies support during peak periods without increasing staff size. Including a budget that allows for flexibility is critical – in fact, your budget may be better spent in not hiring an FTE and instead using the same funds to pay several temporary workers during peak periods.

Managed
In-House
Agencies
and Studios

cella

Helping large companies and their creative leadership teams overcome the obstacles that impact their ability to manage the flux of creative work, add headcount and adapt to changing demands or dynamics of the organization is Cella's specialty.

We build and manage embedded, dedicated and highly flexible creative team/ in-house agencies for clients who seek the value that a best-in-class, in-house creative team can provide while maintaining the benefits of working with a third-party provider. Our solution drives a transparent partnership with our clients, and we continuously work together to optimize and evolve our team's performance and capabilities in alignment with your organization's expectations.

Cella teams can fulfill the following workforce needs:



IN-HOUSE AGENCIES



PRODUCTION STUDIOS

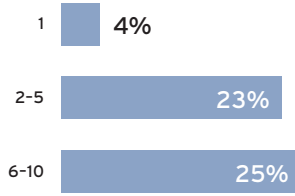


FUNCTIONAL TEAMS

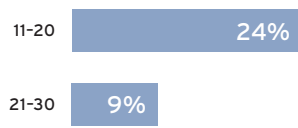
Q: How large is your creative team/in-house agency? (combined FTEs and contingent workers)

2017

SMALL TEAMS
52%



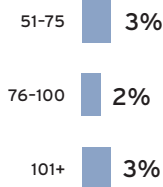
MID-SIZE TEAMS
33%



LARGE TEAMS
7%



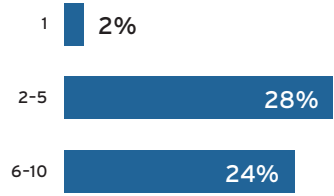
MEGA TEAMS
8%



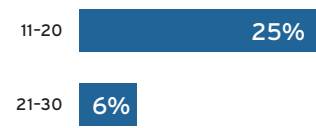
n=310

2018

SMALL TEAMS
54%



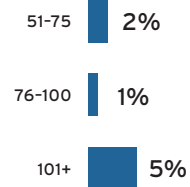
MID-SIZE TEAMS
31%



LARGE TEAMS
8%

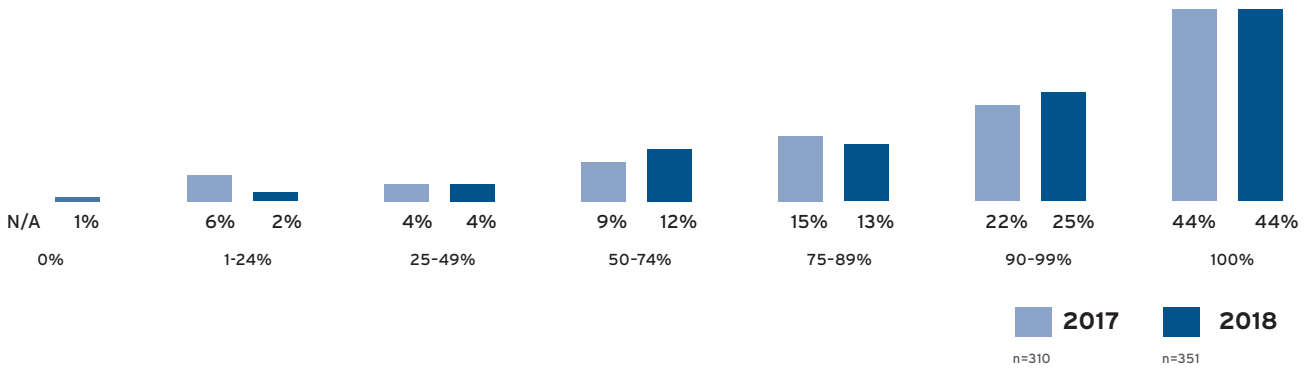


MEGA TEAMS
8%



n=352

Q: What percentage of your full-time team members are FTEs of your company? (versus sourced staff)



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Don't Let Growth Become Your Kryptonite
bit.ly/QdmCw6

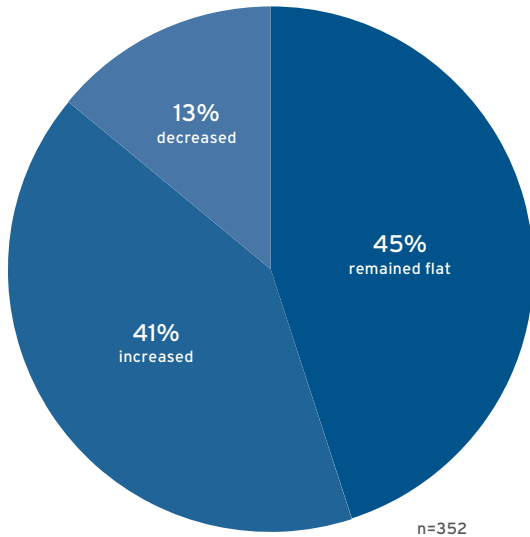
The Practical Tactical Side of Growth
bit.ly/1hGtjwG

Managing People in a Growing Organization
bit.ly/1KQ7wbH

Don't Become a Victim of Your Own Success
bit.ly/2pkV902

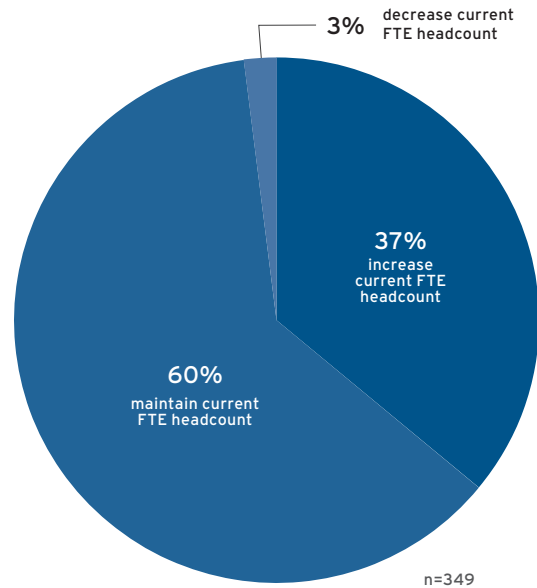
DEPARTMENT RESOURCING

Q: How did your full-time team size change between 2016 and 2017?



→ 86% of teams stayed flat or grew in size in 2017.

Q: What are your full-time hiring plans for 2018?



→ 71% of teams experienced an attrition rate of 5% or less; depending on team size this may be too low for teams hoping to bring in new skill sets, experience and/or styles.

Q: What is your perception of the available talent in the marketplace right now?

Answer Options	There's an abundance of highly qualified talent	There's enough qualified talent to choose from	There's limited qualified talent	Having trouble identifying qualified talent	Response count
Graphic design	19%	53%	24%	4%	339
Digital design	12%	50%	32%	6%	330
Mobile design	7%	39%	45%	9%	311
Developers	10%	41%	37%	12%	302
Account management	14%	58%	24%	3%	301
Copywriting	8%	48%	36%	8%	318
Editing/proofreading	8%	59%	31%	3%	311
Project management	11%	57%	27%	5%	318
Traffic coordination	8%	51%	35%	6%	311

WHEN RESPONSES WITHIN MULTIPLE CATEGORIES WERE CLOSE, MULTIPLE RESPONSES WERE IDENTIFIED AS A MAJORITY RESPONSE.

n=342



According to the U.S. Bureau of Labor Statistics, the number of job openings and hires continued to climb upward in 2017. As in 2016, job openings exceeded hires. With the unemployment rate for professionals with a BA or higher degree at a low 2.2%, the perception that there is limited qualified talent may be more real. – The BOSS Group

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

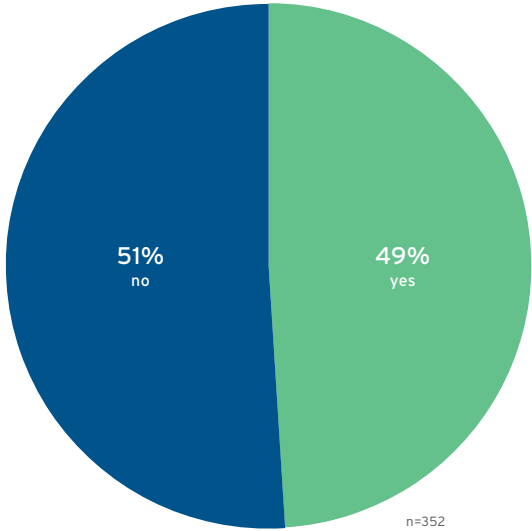
Make Your Group a Destination
bit.ly/1NPeE65

"It's Impossible to Fire Anyone Here"
bit.ly/1VILsA1

Build a Cultural Safe House For Your Team
bit.ly/2HMq5x0

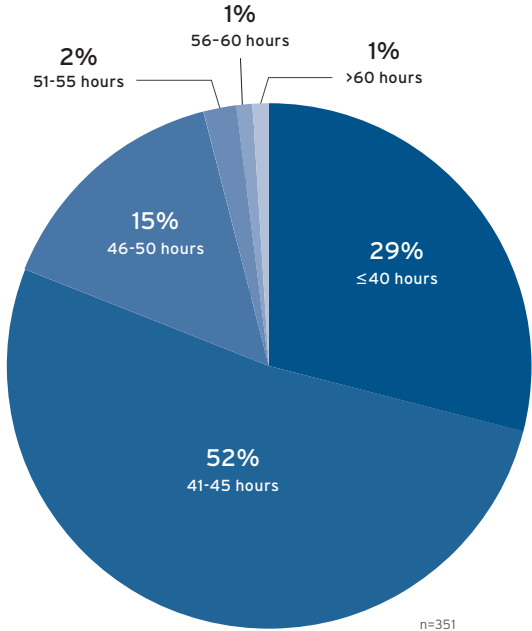
Overcoming Corporate Hiring Hurdles
bit.ly/2HIRfES

Q: Is there a **DEDICATED** operational role?
 (dedicated to focusing on the department’s process, systems and technology, vendor management, financial management and reporting)



→ 81% of in-house agencies with more than 30 team members have a dedicated operational role.

Q: How many hours per week does your staff work on average?

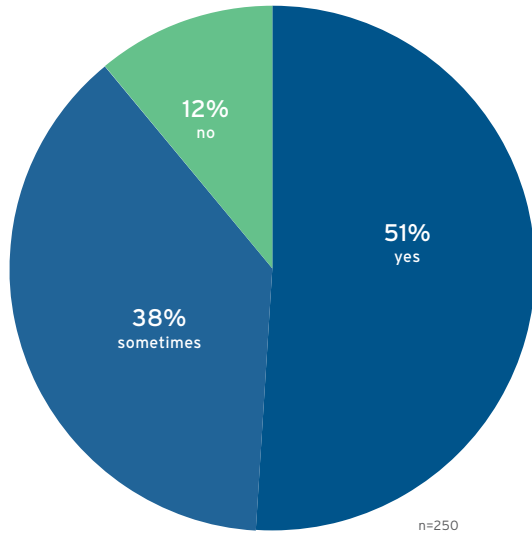


→ 81% of creative leaders indicate their team members have a reasonable work-life balance working 45 hours or less per week.

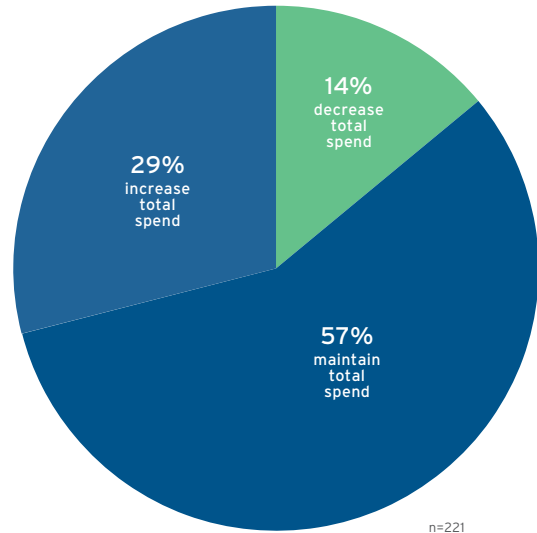
*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

DEPARTMENT RESOURCING

Q: Are you able to use flexible staffing options such as freelancers and temporary/contract workers during periods of peak demand?

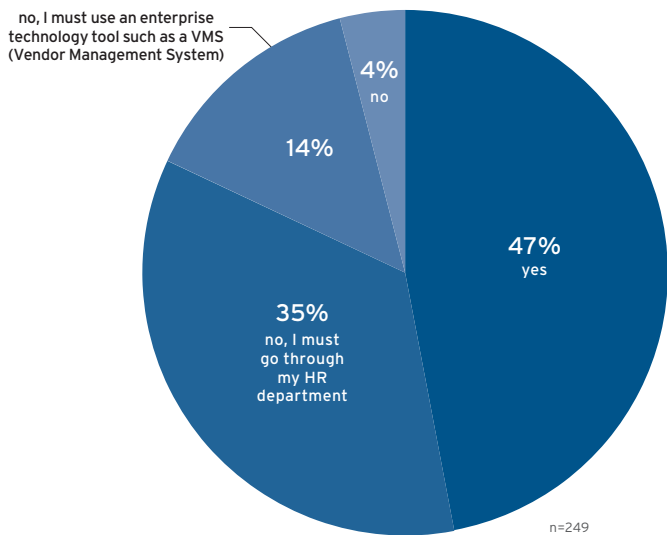


Q: What are the freelancer/temp hiring plans for 2018?

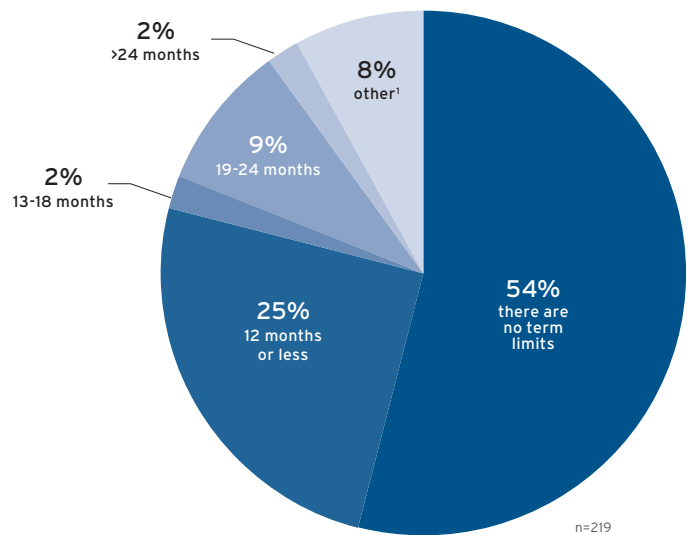


→ 89% of creative leaders are able to use freelancers.

Q: Are you able to directly contact staffing firms for your creative staffing needs?



Q: What are your company's term limits for contractors?



Hiring managers' ability to speak directly to staffing firms/recruiters is crucial for a successful hire. Placing talent with excellent skill sets in the best working environment for both parties cannot be discerned alone from a job description. Discussing the needs of the department and where this person will fit in is essential when identifying appropriate creative talent. – The BOSS Group

¹ Other includes hours-based models, project-based limits and unknown lengths.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Thank you Microsoft... Term Limits & the Creative Leader
bit.ly/1QI40Mj

The "New Normal" in Staffing Strategies: Contingent Workers
bit.ly/1WNODGY

Effectively Managing Just-in-Time Creative Resources
bit.ly/10Aiivy

Don't Let MSP or VMS Programs Obstruct Your Access to Great Talent
bit.ly/ZNrwOu

Developing the Right Resourcing Strategy to Support your Organizational Model
bit.ly/2oDCWeq

Collaboration is Key to Providing Higher Value Work

In order for your creative team/in-house agency to advance, you need to take steps to expand its scope of work. This may come through introducing new services, taking on more projects, increasing the number of Tier 1 projects, and/or providing greater strategic consultation. These things do not happen overnight, but with a strategic plan, you can make progress.

Discussion Takeaways

At our recent series, “Expanding Your Team’s Scope of Work,” we met with more than 60 in-house creative leaders in six cities to discuss strategies to increase the value in-house creative teams provide their organization. Here are the top strategies they recommended:



Ensure your staff is prepared for higher-level work by providing appropriate training and professional development



Take a consultative approach—before and during projects by working with clients to understand their overarching goals, as well as specific project goals



Make yourself visible within the company through marketing strategies such as case studies, websites, look books, etc.



Hire externally to launch a new service capability in addition to transitioning internal resources; the external hire will add credibility to the team’s capabilities



Provide the right balance of efficiency with performance by ensuring efficient processes are in place and making clients aware of expected cycle times



Get guidance on which new services your department can offer and which need upgraded approaches through client surveys and planned conversations



Build relationships beyond your existing clients and client groups

60%

of in-house creative leaders say gaining respect from internal clients or value recognition is one of their greatest challenges.*

ONLY 47%

of in-house creative teams survey their clients at least once per year.*

39%

of in-house creative teams say their primary scope of work is Tier 1, while 57% say Tier 2.*

CreativeExecs®
roundtable

CreativeExecs Roundtables are hosted by The BOSS Group and Cella and bring together creative executives for moderated peer discussions on topics tailored to the unique challenges facing leaders of in-house creative departments. Each year, we host a spring and fall series in six cities across the U.S.

*The BOSS Group and Cella Consulting, LLC. 2017 In-House Creative Industry Report, May 2017.

Join us at our next CreativeExecs Roundtable!

Visit www.creativeexecs.com to learn more and register.

Service Offerings

The number of projects creative teams and in-house agencies produce annually is loosely linked to their size. While it's interesting to discuss volume in terms of number of projects, it's not an apples-to-apples comparison across organizations. Service offerings continue to evolve and expand, providing growth for creative teams and in-house agencies. However, the new complexities require specific expertise and skill sets. Volume in its truest form should be discussed in terms of the number of "billable" or "utilized" hours per year. In addition, the various complexities in the work itself are not captured under project count and are better evaluated with hours in assessing the level of effort put into the project.

Core Competencies

Staying current with, let alone ahead of, the growing complexities of our ever-evolving service offerings opportunities is no easy feat. Determining which service offerings to expand into is a process, and you shouldn't set your team's goal to "be everything to everyone." Be selective in your core competencies and stick to them, regularly reevaluate them and adjust as needed. Don't be afraid to identify work to be outsourced to third parties. There is still value in your team art directing and project managing projects; creative execution of all media types doesn't have to be within your core competencies.

PERSPECTIVE FROM THE FIELD

Strengthen Your In-House Team to Boost Your Brand

In-house creative leaders have their fingers on the pulse of the corporate brand, which is one of the top value-drivers internal clients identify with having an in-house resource. In-house creative teams have continuously fine-tuned their company's image for years, and as creative professionals, we all know the importance of personality and how it needs to come through in every part of your brand. Without a brand personality, clients and prospects get mixed messages and have trouble connecting. The same holds true for your department, so it makes sense to put some thought into strengthening your team in a few areas to improve the perception of your brand within the company.

Think about your department's value proposition, which could be a statement identifying clear benefits your internal clients will receive when working with your team. Just like employees need to know their organization's visual identity and the general reasons for using it correctly, such as its role in enhancing the visibility of the organization, employees also need this information for the department they represent. Everyone on your creative team should be aware of how their talents can impact the business and what the department's value prop is.

Another way to strengthen your team would be to set a long-term vision for the department—in support of corporate goals. Hire people with skills that can expand your services and enhance your value proposition. Creative leaders should speak up and take the initiative to participate in new projects, lead an additional business unit, or let your peers know about some untapped talent that would benefit their strategic business goals. These efforts can elevate your team's credibility and set you up for future growth.

Professional development is also a critical area for team growth and is often overlooked due to capacity. I've found the best way to develop my team is to sign up top performers for conferences and classes. It's worth the pain of being short-handed for a few days for the benefit of inspiring your staff and allowing them to share and apply what they've learned.

The ongoing success of any creative team requires engaged and motivated people. You can contribute to this by promoting the team's value proposition, communicating your future state vision for the team and investing in training and developing your people. Think about what you can do each quarter to push your team to the next level. Treat your team like you treat your brand, and you'll begin to see a multitude of improved efficiencies and a much happier staff.

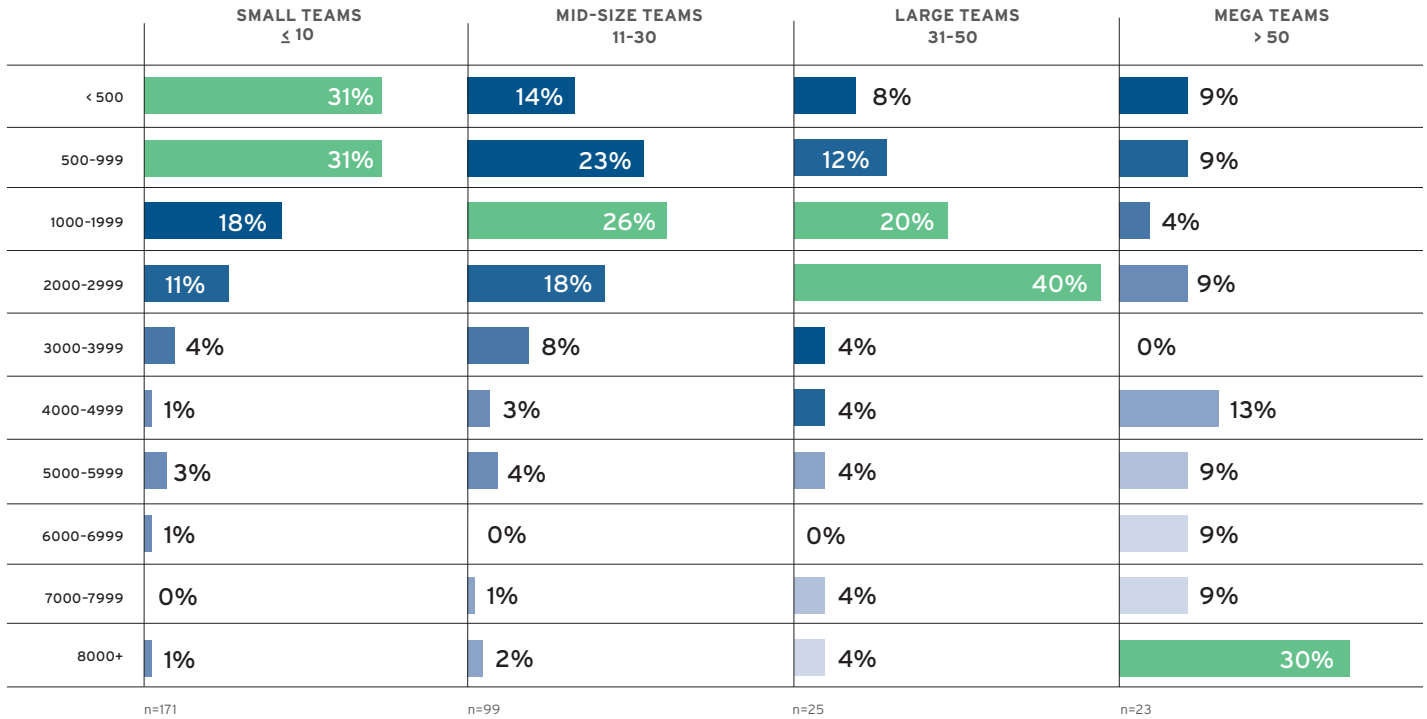
**ABOUT
THE
AUTHOR**

ROBIN COLANGELO

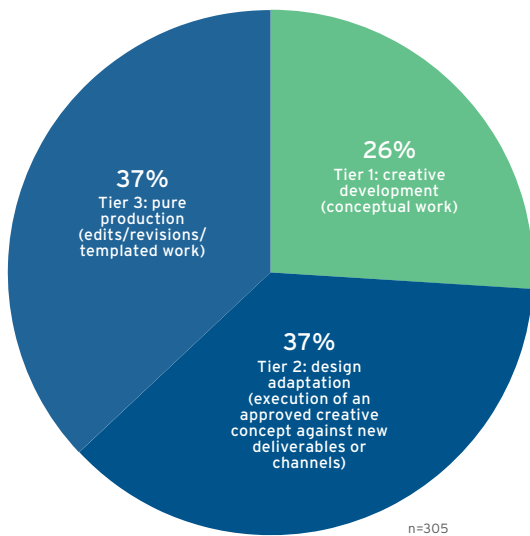
Robin is the Vice President of InSource and the Global Director of Creative Services for White & Case. She is experienced in developing brand and creative strategy with extensive in-house leadership expertise building new teams and processes. She also writes and speaks on creative leadership topics throughout the industry.

SERVICE OFFERINGS

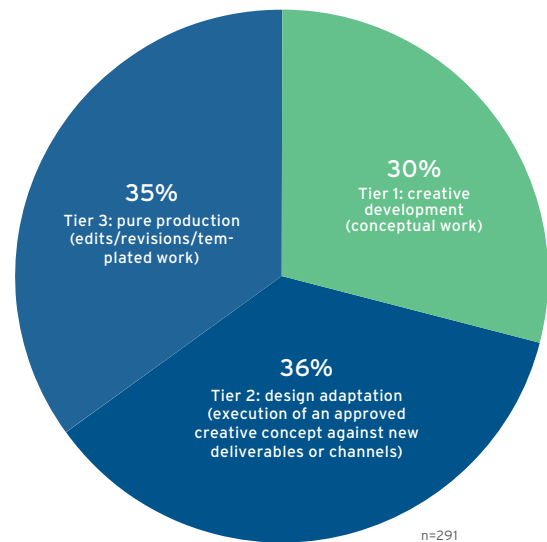
Q: How many projects did your team work on in 2017?



Q: Based on the total number of projects your team worked on in 2017, what is the breakdown of your group's work across Tiers 1, 2 and 3?



Q: What is the percentage of team hours spent on Tier 1, 2 and 3 projects?

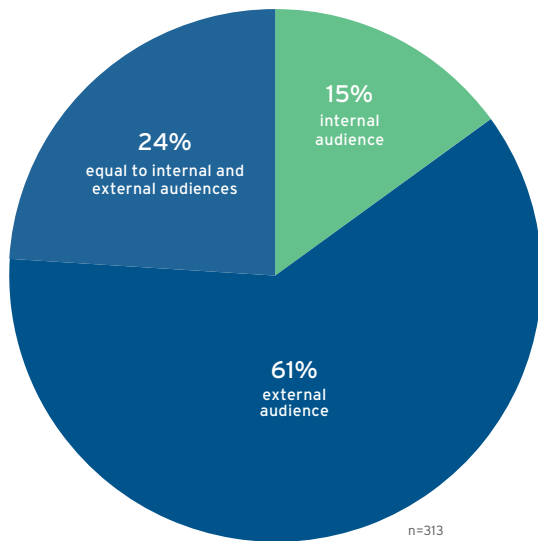


*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

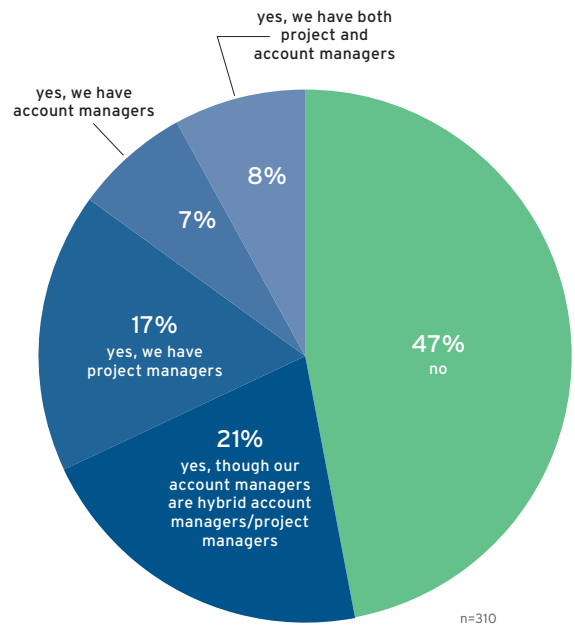
cella

Conventional wisdom would lead us to believe that Tier 1 time should be a substantially larger percentage of time than percentage of projects; however, Tier 2 and Tier 3 projects can require significant levels of effort but lower levels of creative complexity.

Q: For which audience does your team create the MAJORITY of their work?

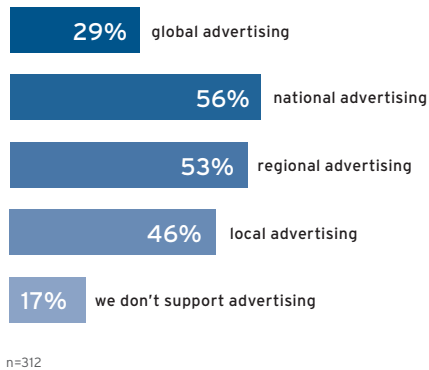


Q: Does your team provide DEDICATED account management services to your clients?



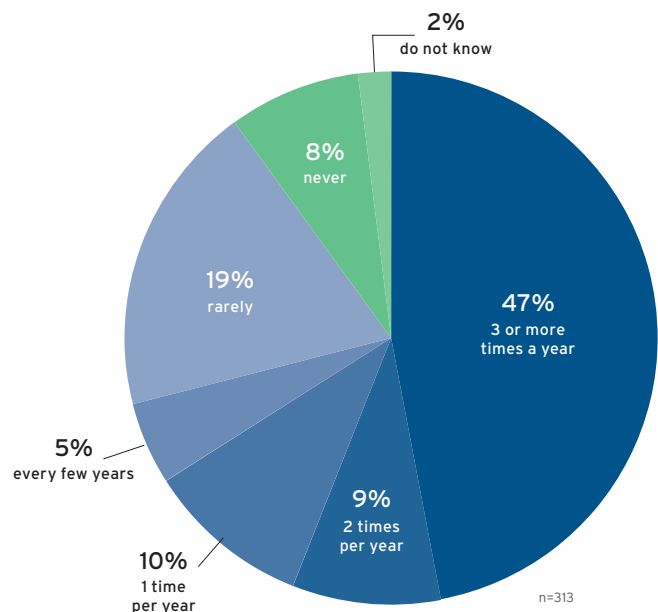
→ Only 13% of creative teams have dedicated digital project manager roles such as web producer.

Q: What type of advertising does your group support? (select all that apply)



→ 83% of creative teams support external advertising of some sort.

Q: How often does your company commission custom photography?



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

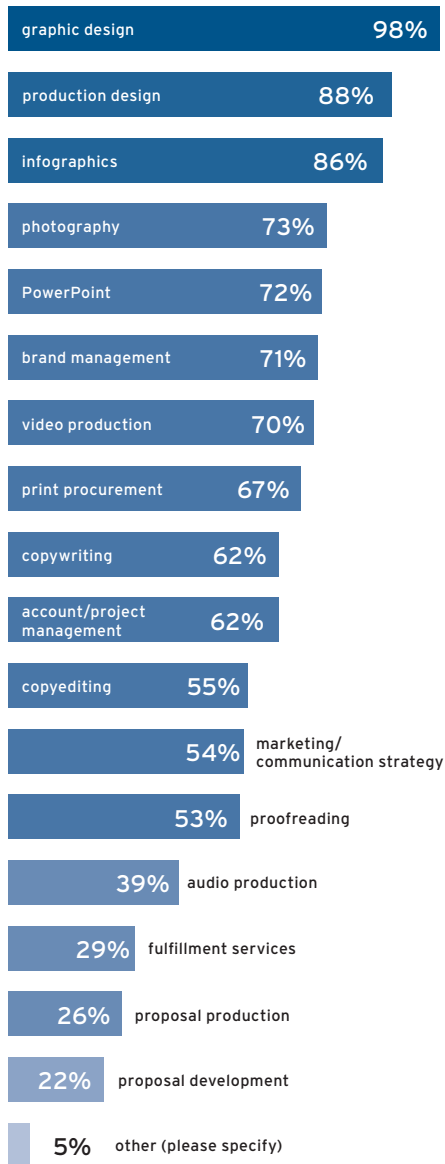
Is PMP Certification Beneficial for In-House Creative Project Managers?
bit.ly/2o9RU8N

Benefits of Instituting Project Management
bit.ly/2ornUGk

World-Class Creative Services Teams Include Account Management
bit.ly/2p11sHq

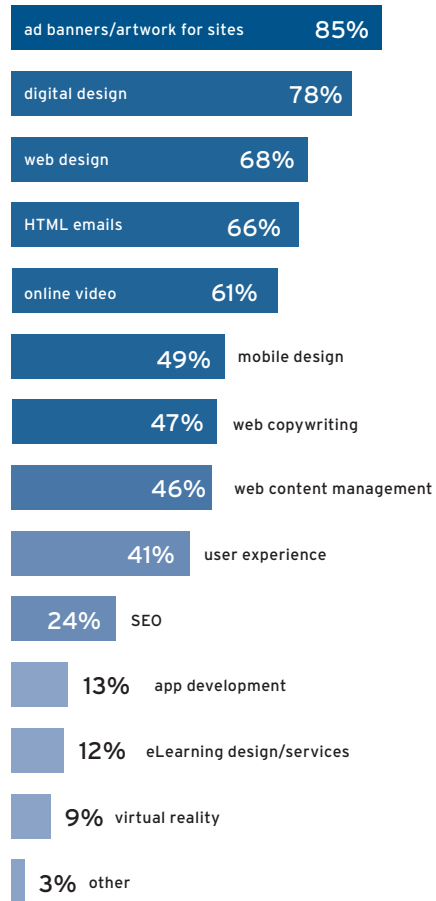
SERVICE OFFERINGS

Q: Which of the following **TRADITIONAL** services does your team provide? (select all that apply)



n=318

Q: Which of the following **DIGITAL**-specific services does your team provide? (select all that apply)



n=314

→ Top three services provided by other departments (not within the creative team/ in-house agency) include social media support, brand management and video production.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

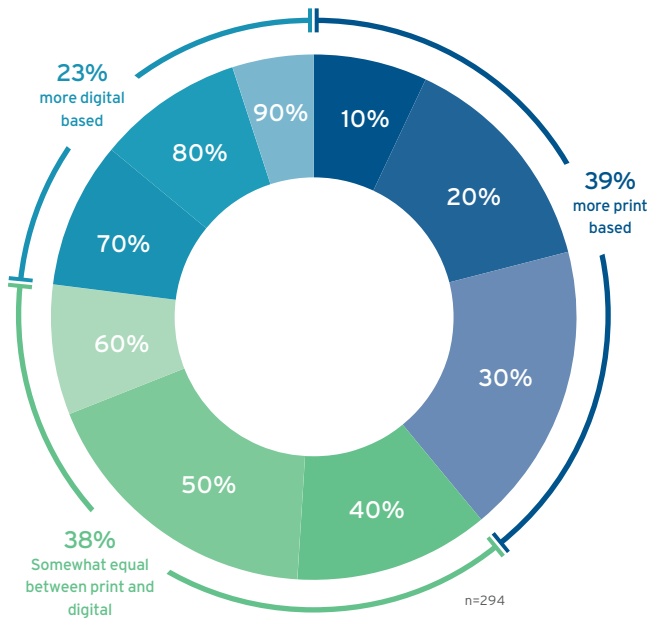
RELATED RESOURCES

Speaking in Code
bit.ly/2paVQKv

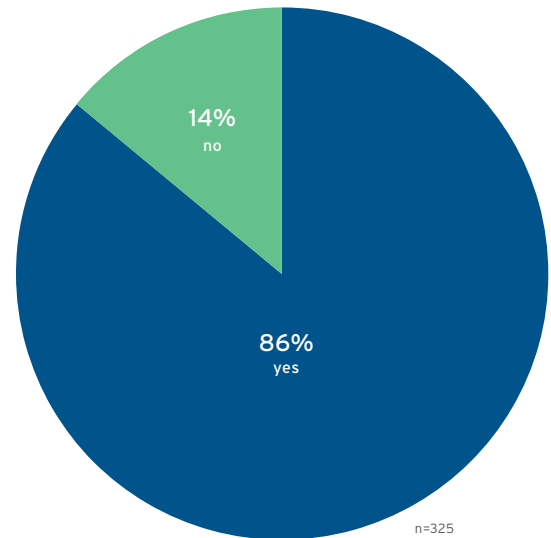
Don't Undervalue
Digital Expertise
bit.ly/1kBboiO

Top 10 Signs that You May
Need A QA Program
bit.ly/1LJNWIM

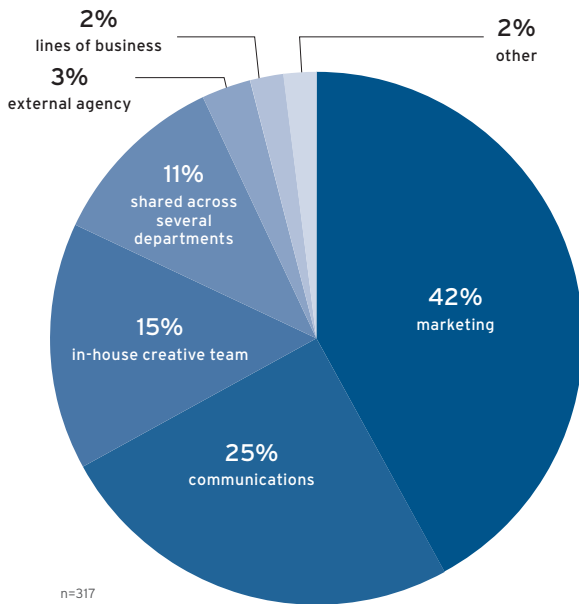
Q: What is the % of team hours spent on digital projects vs. print projects?



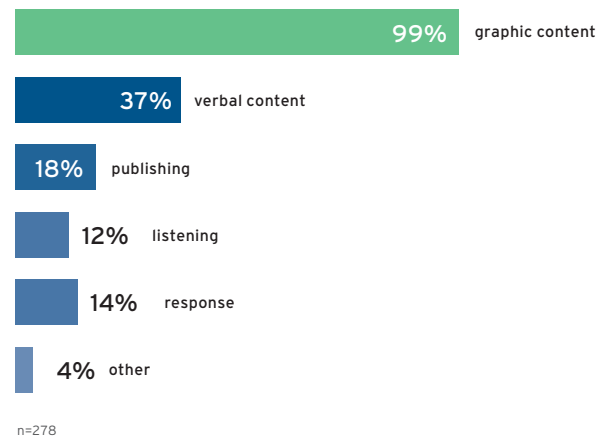
Q: Does your creative team/in-house agency support any aspect of social media?



Q: Where does social media CONTENT reside within your company's organization?



Q: What social media services does the creative team support? (select all that apply)



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

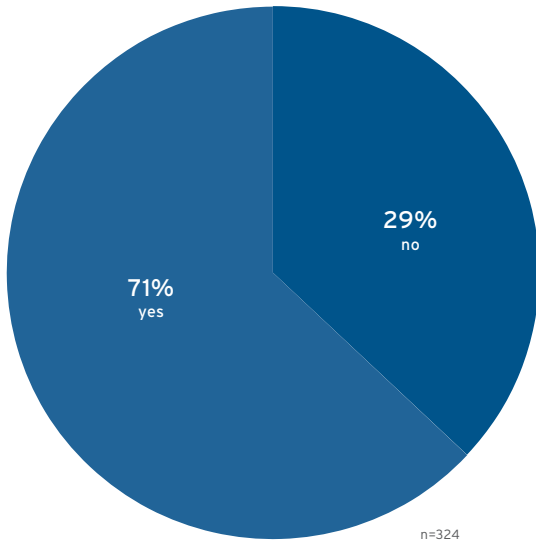
RELATED RESOURCES

What Does Social Media Mean for Marketing Infrastructure?
bit.ly/1mdfWgc

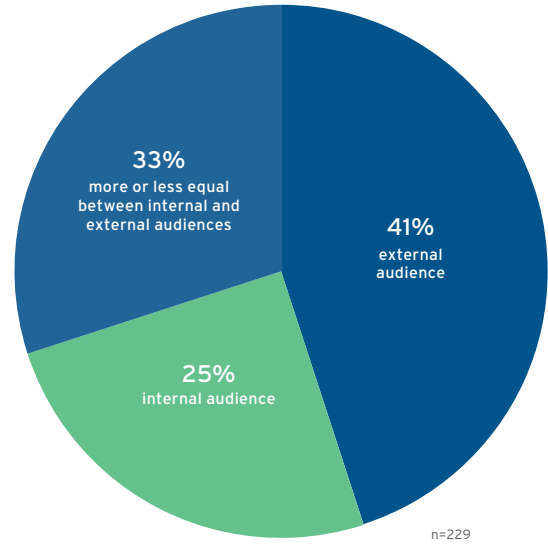
Content Strategy
bit.ly/CScontentstrategy

SERVICE OFFERINGS

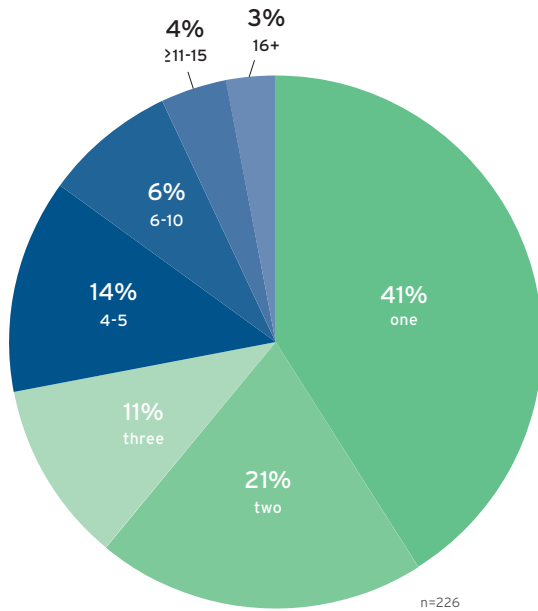
Q: Do you provide video production services?



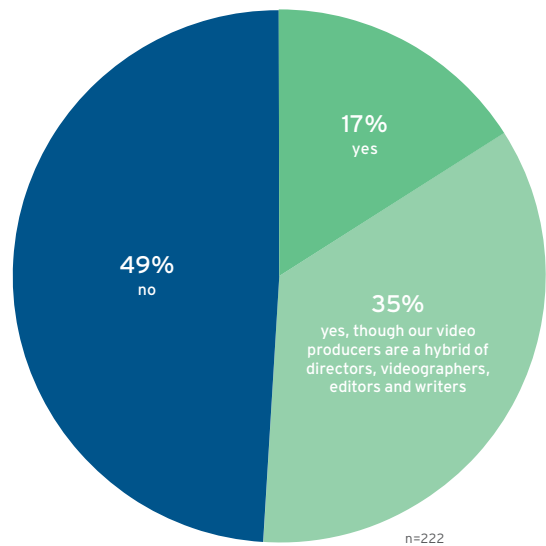
Q: For which audience does your team create the MAJORITY of their video work?



Q: How many dedicated team members support video services?



Q: Do you have dedicated video producer roles?



→ 38% of teams are supporting video with 3 or more team members.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Starting a Video Team
bit.ly/1QkJWk9

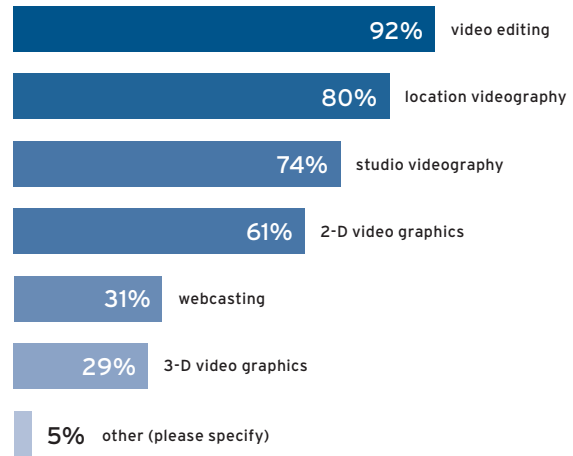
The Level of AWESOME
bit.ly/1QI9Vw3

Q: Which of the following are FTE roles? (select all that apply)



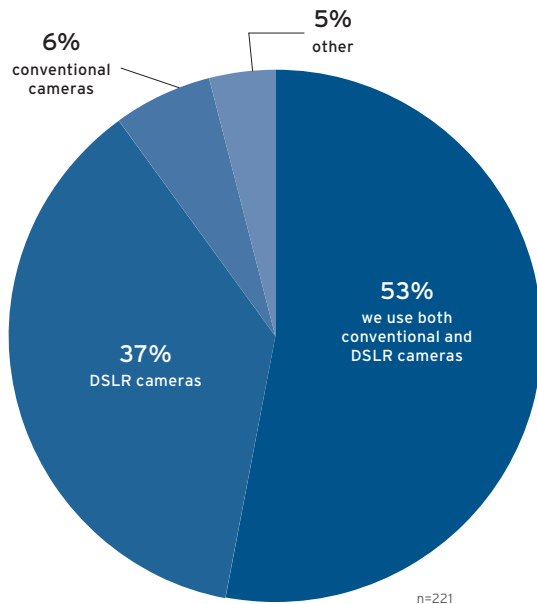
n=213

Q: Which of the following VIDEO PRODUCTION-specific services does your department provide? (select all that apply)



n=229

Q: Do you shoot video with conventional or DSLR cameras?



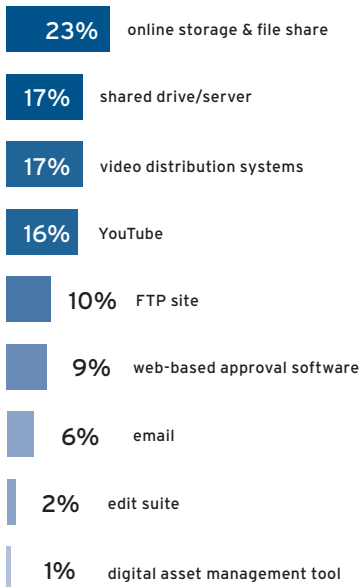
n=221

→ 69% use HD and 35% use 4K resolution to shoot and edit in.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

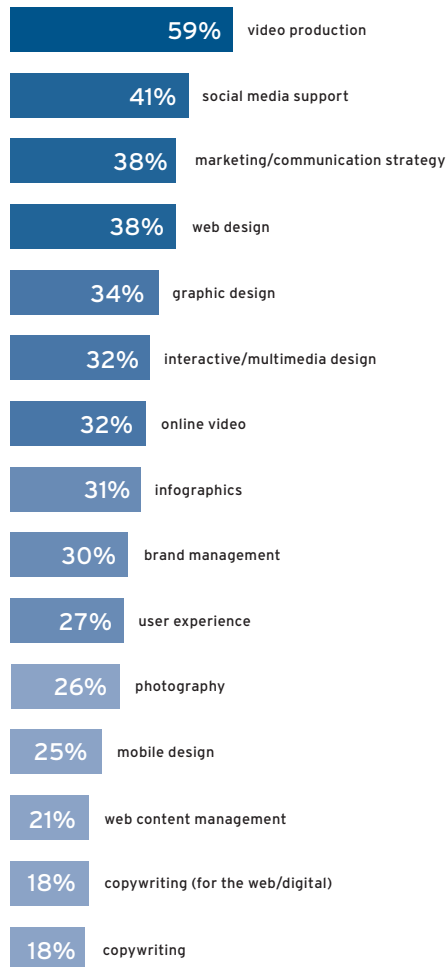
SERVICE OFFERINGS

Q: How do you most often distribute video for review? (select all that apply)



n=222

Q: Which of the following service offerings do you see greatly **INCREASING** in the future for your group?



n=310

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Evolving Your Department's Service Offerings—The Talent Question
bit.ly/11FZgRb

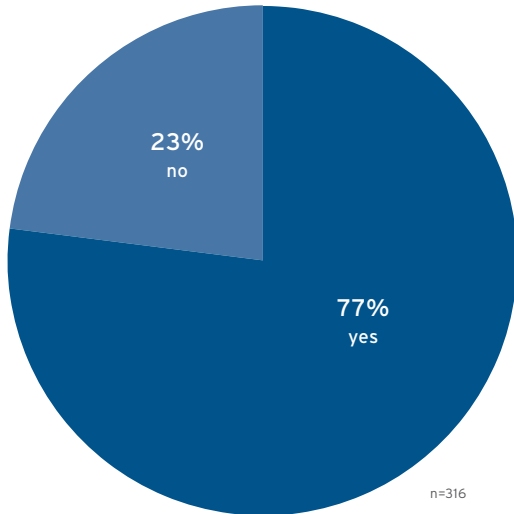
Launch That New Service... Under the Radar
bit.ly/ZnJifO

Partnerships

Partnering with agencies is often in the best interest of the business or organization and your internal team. So as a leader you must work to take away the fear of bringing in outside expertise and embrace the possibilities. It is difficult to do everything on your own. Beyond simply sharing the workload, there are other key reasons to further agency relationships, including keeping up with a dynamic business environment, “integrated” creative excellence, career development for your team and efficient delivery.

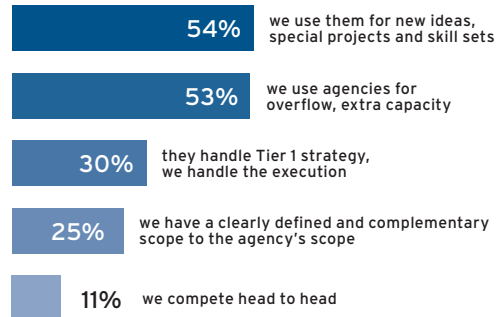
PARTNERSHIPS

Q: Does your creative team/in-house agency partner with external agencies?



→ The five most common services external agencies provide are campaign strategy & design, creative strategy, design execution, video and copywriting.

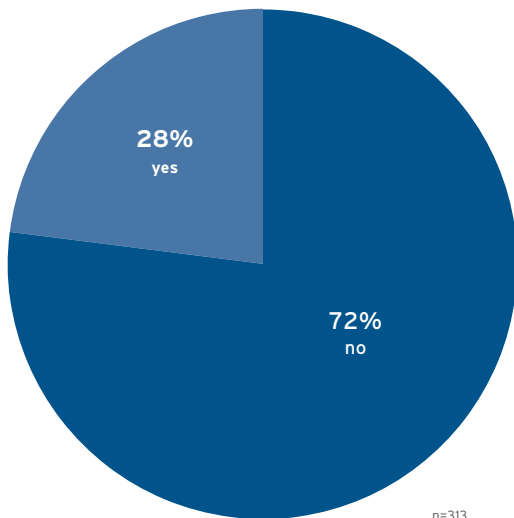
Q: What is the nature of your in-house team's working relationship with external agencies? (select all that apply)



n=237

cella	It is an industry best practice for an in-house agency to provide creative oversight of the company's external agencies as this drives brand compliance and consistency, as well as provides the in-house agency insight into future workstreams.
--------------	---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Q: Does your group partner with offshore/offsite creative and production services providers?



→ These creative teams are leveraging offshore/offsite creative and production services providers for both digital and traditional services across the spectrum of production through conceptual work.

→ 69% of in-house creative leaders are satisfied with the quality of work from their offshore/offsite partner.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

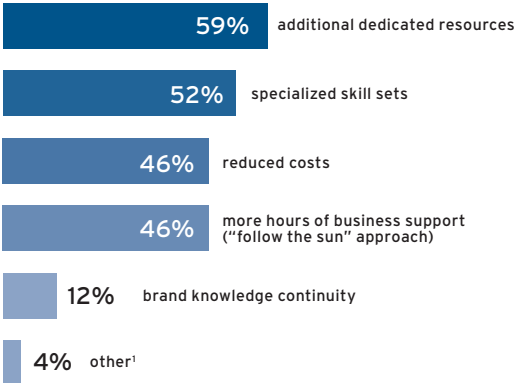
External Agencies Are Not Your Enemy
bit.ly/2or5qp0

Principal Partnership Agencies ("PPAs")
bit.ly/2ow8Wk5

Cracking the Offshoring Nut
bit.ly/1hGtsjG

Outsourcing Approaches
bit.ly/1n1PKc

Q: What are the **BENEFITS** of working with your offshore/offsite partner? (select all that apply)



n=83

¹ Other includes: close to local regional offices, cultural knowledge and language familiarity

Q: What are the **DRAWBACKS** of working with your offshore/offsite partner? (select all that apply)



n=77

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

Global Operations

Firms are taking two approaches with global operations. Some teams are choosing to use a global approach in low-cost markets to take advantage of cost savings and offer a more “24/5” approach, while others are serving global creative needs by positioning their teams in global offices close to their customer base.

For in-house groups with multiple locations, tactically evaluating the benefits and drawbacks of each location’s operations is critical. Most commonly you will find trends demonstrating a need for brand continuity, increased cost savings, which leads to shifting more capabilities and roles to a lower-cost labor market, either domestically or internationally.

Following are challenges to prepare for with global operations:

- Technology:** Remote teams often experience slowness in the shared network, which is something that may not be able to be improved.
- Process:** There is a critical need for effective and efficient project hand-offs across locations. Communication of project details and creative direction is a constant challenge.
- The clock:** Depending on the global locations, short or nonexistent time zone overlaps create hurdles in connecting and clarifying, which in turn can negatively impact turnaround time.

PERSPECTIVE FROM THE FIELD

Think Locally, Act Globally

There is a growing demand of in-house agencies (IHA) to expand their services to a global scale with brand continuity and supporting local business partners as the primary drivers. Though extremely exciting, much thought and special considerations need to be taken into account for a successful expansion and implementation.

IHA groups first need to self-assess and work towards ensuring the current group's fundamental infrastructures are in place and operating efficiently. Once capabilities have been established, the IHA must perform a thorough analysis of the global needs and plan a phased approach of the group's expansion to ensure the best structure, processes and systems are in place. Explore many considerations as you plan to scale your team globally.

Service & Reporting Model

Creative teams can provide a range of services, which can be defined as global. It's important to remain flexible and approach each opportunity as unique.

- Full services provided by headquarters who support all global locations
- Full services offered at each location with local or regional clients
- Partial services provided at each location (volume dictates whether to staff locally); all services available at HQ; clients are served via hybrid approach
- Headquarters utilizes outsourced location for overflow or specific project-type support (typically an offshored or outsourced venture)

A reporting model must also be considered:

- Local roles report into local IHA leadership who report into HQ IHA
- Local roles report into local IHA leadership who report into HQ IHA and local leadership has a dotted line to regional leadership
- Complete independence locally with brand standards managed at HQ

Value Proposition

Global operations develop in one of two ways: acquisition of existing, independent creative teams and building a team from scratch. The first requires "selling" the value of centralization as local clients and leadership are often suspicious of improved services managed remotely. The second requires research and building a business case to determine whether the team will be sustainable.

The following value drivers must be considered and communicated when building a global team:

- Quality (Brand consistency)
- Cost savings
- Timeliness
- Comparisons to local agency spend
- Culturally-sensitive output
- Native language design skills
- Client collaboration

Organizational Agreement and Support

To execute global expansion, it is critical to have all levels of support and agreement throughout the organization. Specific individuals must be identified to take on leadership roles to establish a successful global IHA.

Market Selection

When building a team from the ground up, market selection is critical. There are high performing markets per region, but other reasons to consider specific markets include company office locations and areas with lower labor costs.

Data Gathering & Needs Analysis

A thorough needs analysis should take place to determine ease of implementation and true need of services. Include key individuals from the company's home offices and all markets to build trust, alignment and ongoing support.

Language

When operating in a different market, it is important to recognize and present information to various audiences in either English or the local language, employing primarily English in the early stages. At the implementation phase, communication to stakeholders should be in their local language. Hence, hiring a strong bilingual staff is essential.

Change management will be the main obstacle, especially if the local market has no internal group providing services. Cost savings and efficiencies will be the greatest benefits.

Recognize that scaling globally isn't simple, so create a plan with a phased approach. Embrace it and empower your team to be problem solvers and adapt swiftly. Your plan should include a customer-centric approach, specialized skill sets, process modification and improvements and technology configuration. Only then will you be guaranteed success in your globalization efforts.

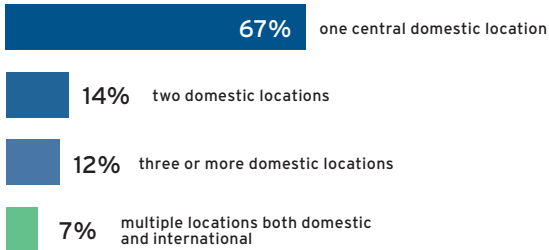
CINDY PONCE

Cella Practice Lead Cindy Ponce brings more than 20 years of in-house, advertising and marketing experience. She has successfully built and managed internal agency model organizations globally and has effectively managed cross-functional teams worldwide. Cindy is a sought-after consultant for Fortune 500 companies advising on creative operations optimization, agency expansion and services strategy. She has also delivered presentations at some of the industry's biggest events, including HOW's In-House Manager's Conference and ANA In-House Agency Days.

ABOUT
THE
AUTHOR

GLOBAL OPERATIONS

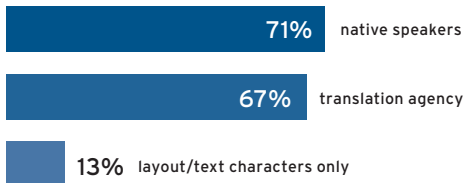
Q: At how many locations do your team members reside?



n=309

→ 83% of respondents indicated their team was primarily based in the U.S. Canada was the next largest headquarters location for respondents.

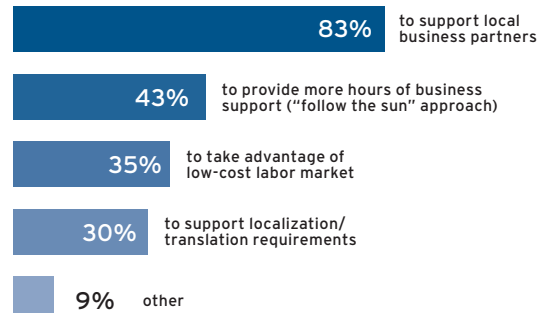
Q: How do you manage language support? (select all that apply)



n=24

→ Outside of English, the most commonly supported languages are French and German (54%) and Spanish (50%).

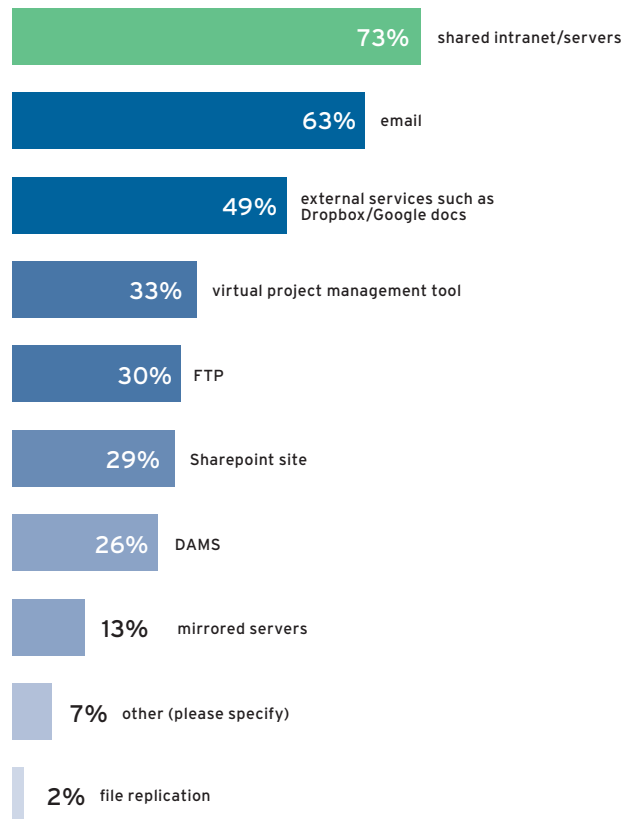
Q: What are the primary reasons for international creative teams? (select all that apply)



n=23

→ England and India are the most common non-U.S. locations when multiple locations of a team exist.

Q: How do you share files between locations? (select all that apply)



n=100

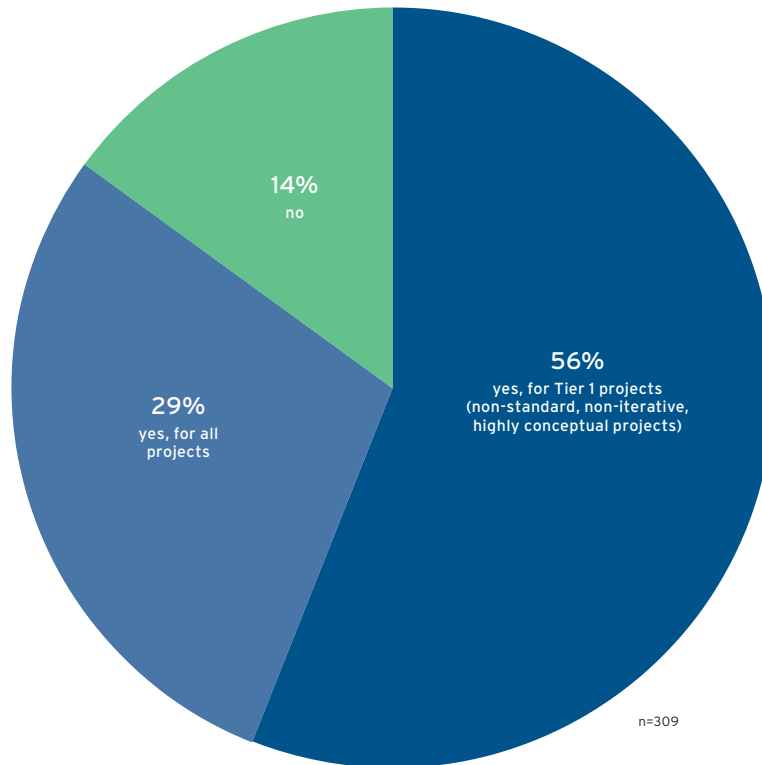
*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

Processes

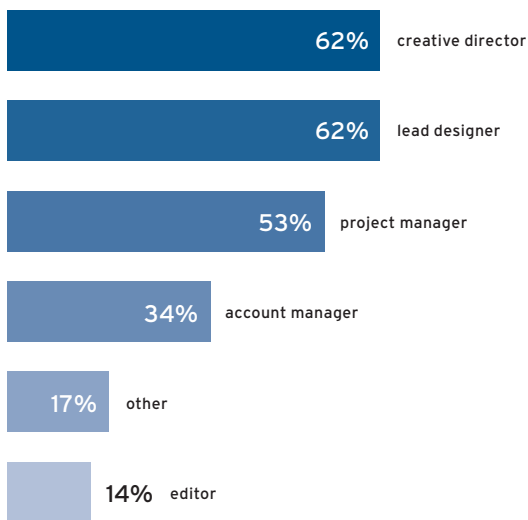
Standard operating procedures, workflows and systems are usually an afterthought and come into play when a creative team and in-house agency group's volume of work is significantly increasing, and so is its size. But if implemented early, these tools provide transparency, clarity of roles and responsibilities, automated support and efficiencies, resulting in increased productivity – and a stronger foundation to support growth.

PROCESSES

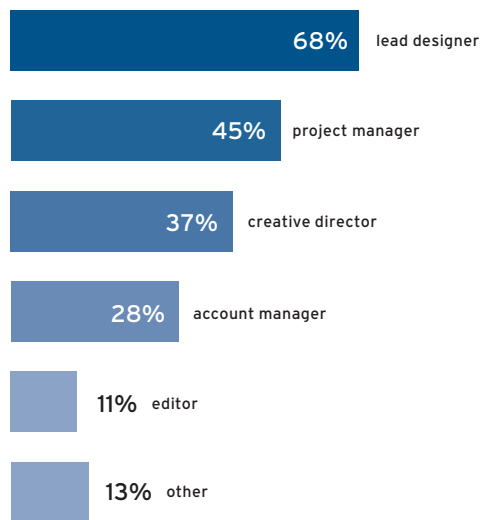
Q: Does your team use creative briefs?



Q: Who meets with the client to scope a new project? (select all that apply)



Q: Who meets with the client to review iterations? (select all that apply)



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

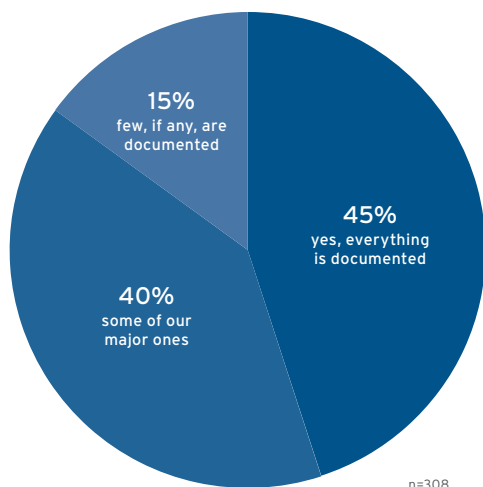
Use a Creative Brief or Risk Creative Grief
bit.ly/2oDnMpu

What's the Big Deal About Tiering?
bit.ly/1kQDJNO

Getting From Process Definition to Efficient Process Execution
bit.ly/1R7oPBx

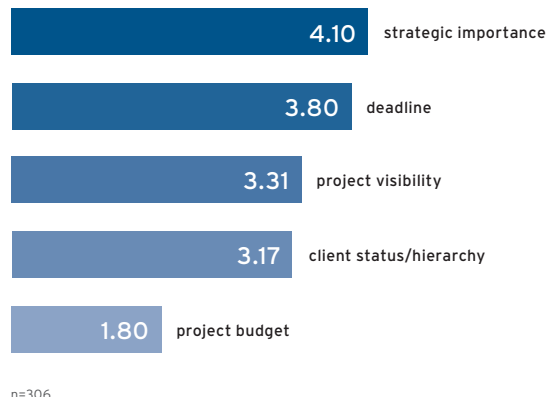
Skipping Quality Control Steps is a Fool's Move
bit.ly/2tYxk2L

Q: Are your workflow processes documented?

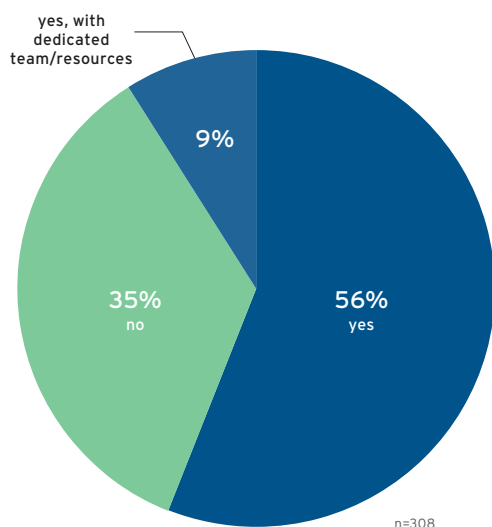


Q: What are the most important criteria considered to prioritize your group's assignments?

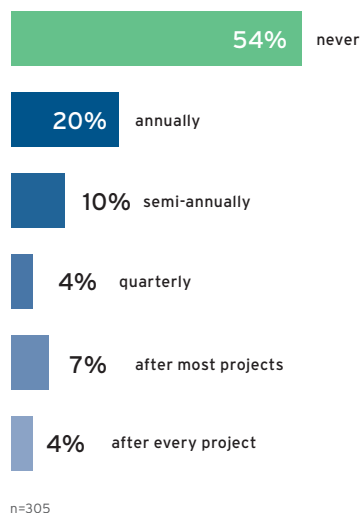
(average score on a 0-5 scale, in which 0 is not important and 5 is extremely important)



Q: Do you have a fast-track process in place to accommodate quick-turn projects?



Q: How often do you survey your clients?



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Process Documentation—More Than Just Pretty Pictures
bit.ly/1i8zwpJ

Getting Started With Process Documentation
bit.ly/1qi2VNA

5 High Impact Hacks to Immediately Increase Efficiencies
bit.ly/2pdogjR

Size Doesn't Matter (when managing an in-house agency)
bit.ly/2HLCrFz

Using Incremental Changes to Yield Big Results
bit.ly/2pl6YTA

Technology

Across the last decade there has been a revolution in supporting technology aimed at improving the efficiency and effectiveness of creative operations. As these systems continue to develop to meet our needs they continue to add functionality. But in doing so, the complexity and the lines of distinction between these systems are blurring making it more difficult to design the appropriate tech ecosystem for our teams.

Today, we have project management systems (PMS), content management systems (CMS), document management systems (DMS) and digital asset management (DAM) systems. To make it more confusing, much of the functionality of these systems overlap. Each of these systems manage creative assets and workflows but have a different purpose or focus. They also have unique functionality that can be used in conjunction with other systems to develop a comprehensive end-to-end solution. When looking for a new system, it can sometimes be difficult to know where to start if the primary focus or functionality is not clear.

While technology complexity is increasing, creatives still desire simple, yet aesthetically pleasing tools with which to work. In this ever-changing environment creatives teams must learn to adapt and embrace this technological change or be left behind. It is no longer possible to concentrate only on creative output, we must also concentrate on the delivery of this output and how it impacts the success of the organization.

PERSPECTIVE FROM THE FIELD

Content Management and Automation

Over the past few years Cella's consultants and in-house agency staff have been witnessing an increased emphasis by companies on more effectively managing and leveraging their content assets and intellectual property.

This initially showed up as a focus on developing best practices, processes and dedicated resources for managing content being pushed out through online Content Management Systems (CMS) platforms. Talent, usually with editorial expertise, have been recruited into Content Manager positions. In this role, they typically both curate content sourced from subject matter experts and create new content depending on their level of expertise and the industry they are working in. The Content Managers can either live within the department that owns and generates the content, the company's marketing department or in a creative team/in-house agency. In addition to the Content Managers, some organizations have established content development teams with the capability to create graphics, photographic imagery and videos to accompany content being pushed out on social media.

The other area relevant to in-house agencies that this first iteration of content management often supports is the delivery and management of internal corporate communications. Business units, departments and even individual teams now establish and maintain a presence on their company's intranet. While much of the content on these sites is static, much of it is dynamic and in need of curation and updating on a regular basis.

Often the groups who create these team sites rely on creative teams to design and implement the site and if they don't have the internal bandwidth to maintain and keep the content current, the site owners rely on outside providers to take this responsibility on as well.

More recently, companies have expanded their content management efforts to include packaging up previously developed marketing materials and communications in a form that can be tapped for other purposes outside of their original use.

The content assets pulled from source documents are typically broken up into pieces that can later be mixed and matched with other assets allowing users more flexibility in customizing new marketing and communication materials (think of this as content Legos). This practice is generally referred to as Content Automation and the initiative as a Content Factory.

The formatted assets are then housed in a content database and distribution solution to allow for efficient searches and access. In highly regulated industries, these assets are also often pre-vetted to ensure regulatory and legal compliance, expediting the process of repurposing the content for new uses.

(continued on next page)

PERSPECTIVE FROM THE FIELD

Content Management and Automation (cont.)

It's important to note that this is not what has sometimes been incorrectly referred to or considered as digital asset management. Content assets are typically text-based and adaptable for inclusion in designed deliverables that may or may not include images or graphics. Guidance on how these assets can be assembled and wedded with visuals often is provided by the content automation solution.

In-house creative agencies have a unique value proposition to offer in engaging in and supporting this new business practice. Most obviously, in-house groups may have created the content being formatted and ingested into content automation tools and therefore be the best option for assuming the responsibility of managing the solution.

Even if external third parties developed the original assets, internal creative teams possess the functional, regulatory and branding expertise to efficiently prep and ingest any content designated for enterprise-wide use. Some in-house teams even design the solution/platform itself if they possess a strong digital development capability.

Another powerful reason for in-house groups to become a key stakeholder and potential owner of content automation is the fact that they will most likely be one of the primary users of the Content Factory. Clearly, whether or not the in-house agency drives the content automation process and manages the solution, they will be interacting with it since most in-house groups work on projects that rely on previously created content and visual assets.

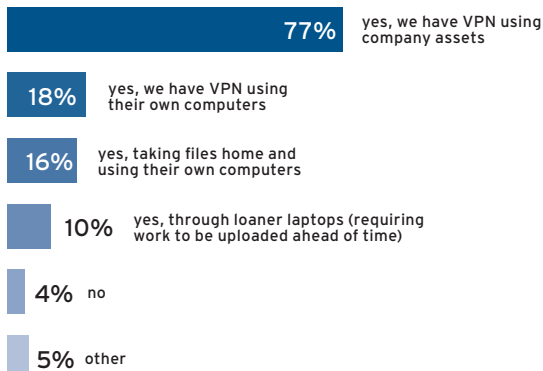
Companies are adopting content automation as a necessary driver of their communications and marketing efforts and in-house creative teams have a big part to play in those initiatives. It's critical that internal creative leadership work their way into the adoption process in its early stages so they can determine where and how they can bring the most value and what organizational and operational enhancements they'll need to undertake to support their assumed role in their company's content management and automation efforts.

ABOUT THE AUTHOR

ANDY EPSTEIN

Andy Epstein is an industry thought leader in the field of in-house creative. He currently serves as the Director of Studio Operation for Cella Solutions where he oversees the operations of three Managed In-House Agencies. Andy has written and spoken extensively on in-house issues and published "The Corporate Creative," a book on in-house design, in partnership with F&W Publications in the spring of 2010. He is a co-founder of InSource, an association dedicated to providing support to in-house designers and design team managers.

Q: Is technology available for your team to work remotely as needed? (select all that apply)

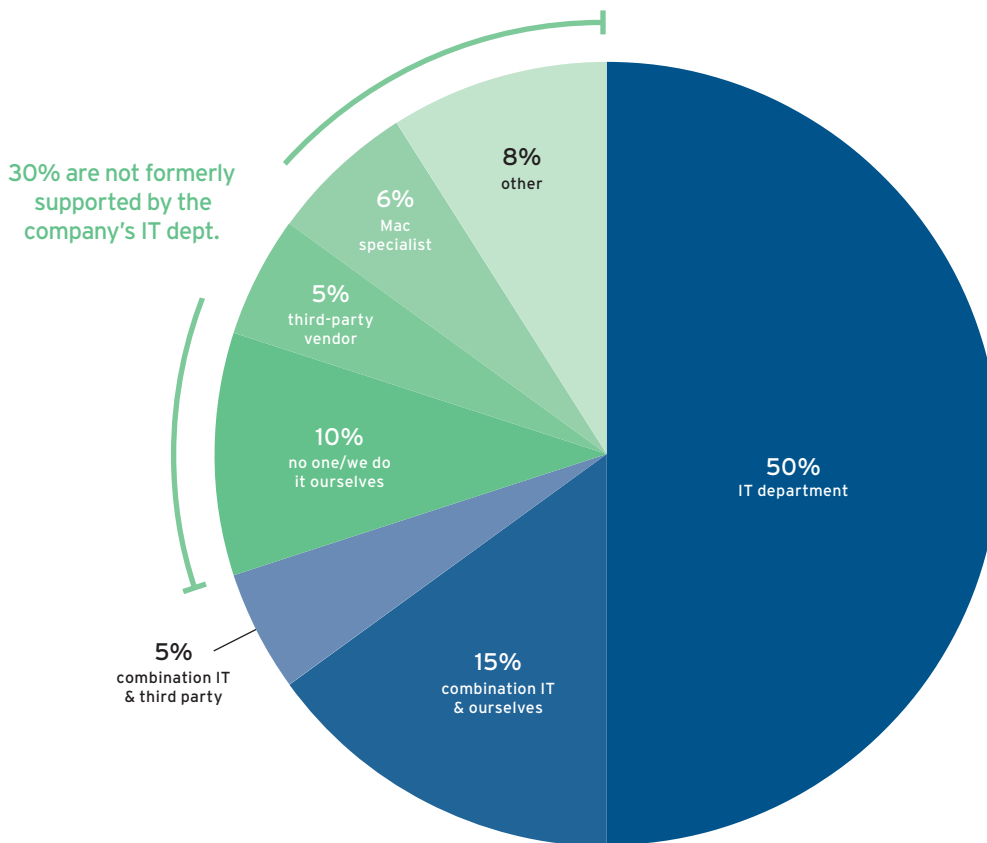


n=308

cella Instituting remote working environments is not just for disaster recovery precautions.

 Many of The BOSS Group's clients make use of a remote workforce to fill niche roles that require a specific skillset that may inhibit onsite placements with a tightened talent pool available. When they do so with proper remote management and technology, productivity increases and output needs are met. - The BOSS Group

Q: Who provides technical support for your Macs?



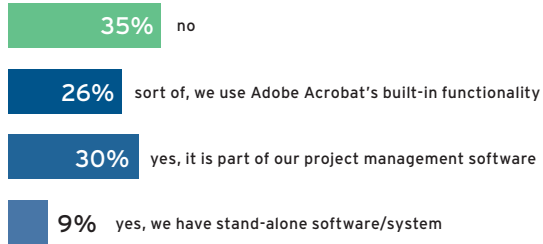
n=309

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

TECHNOLOGY: SOFTWARE & SYSTEMS

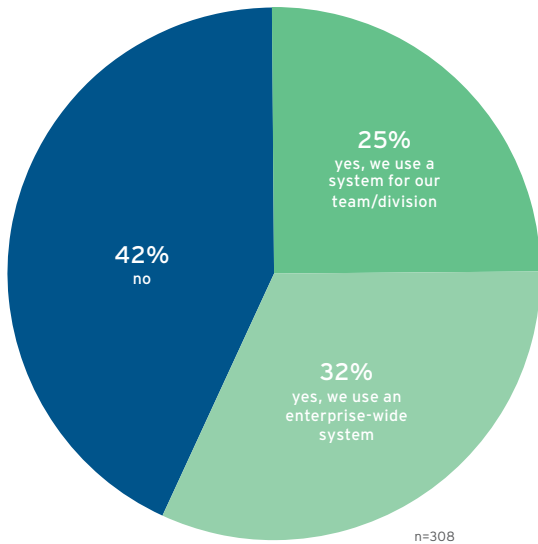
Q: Does your team use soft proofing software to collaborate with clients and collect/track feedback?



→ Workfront's Proof is the most commonly used soft proofing software, followed by inmotionnow

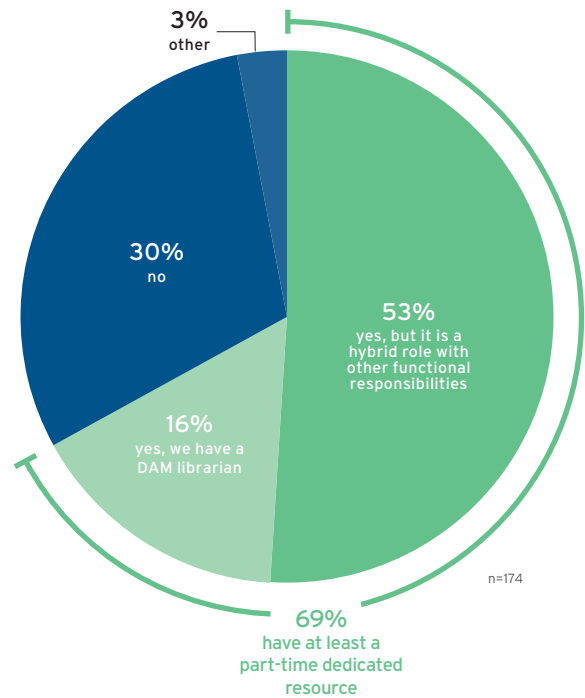
n=305

Q: Does your team use a digital asset management system?



n=308

Q: Do you have a dedicated resource managing your DAM system?



n=174

→ The most commonly used DAM systems are Adobe Experience Manager Assets, SharePoint, Widen Media and Workfront.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

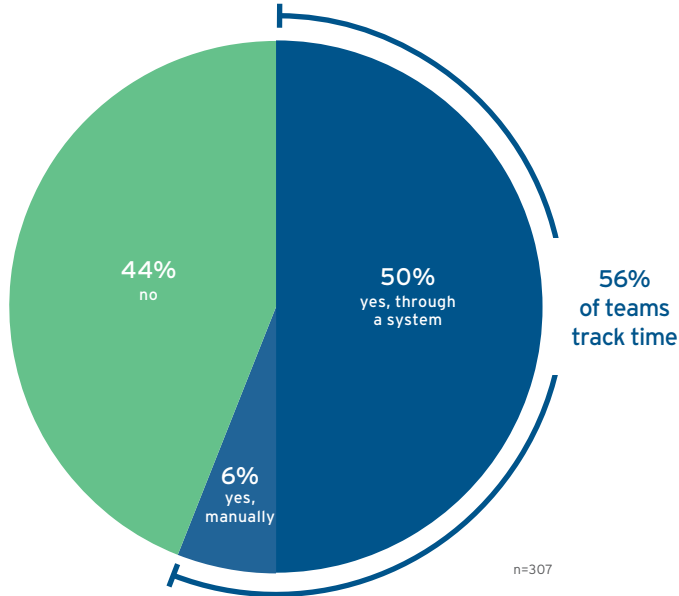
The Changing Landscape of Digital Asset Management
bit.ly/11HNILO

Digital Asset Management Systems: Benefits for In-House Creative Groups
bit.ly/1QTsjH9

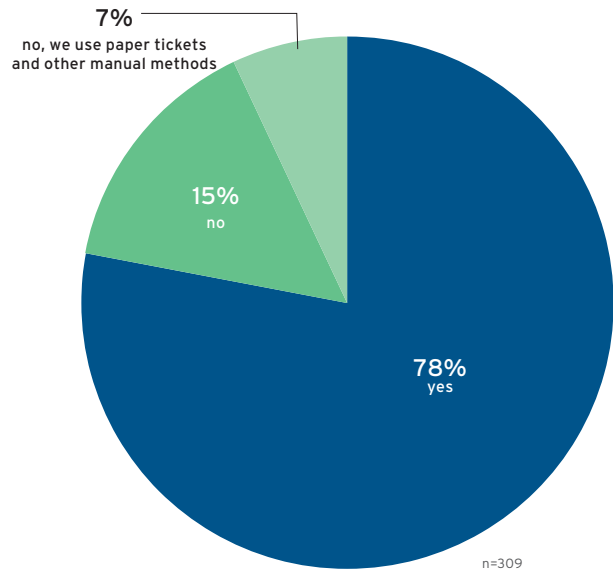
DAM Systems: Before You Buy
bit.ly/2orrQHn

DAM Implementation Best Practices
bit.ly/2FKsBal

Q: Does your team track time?

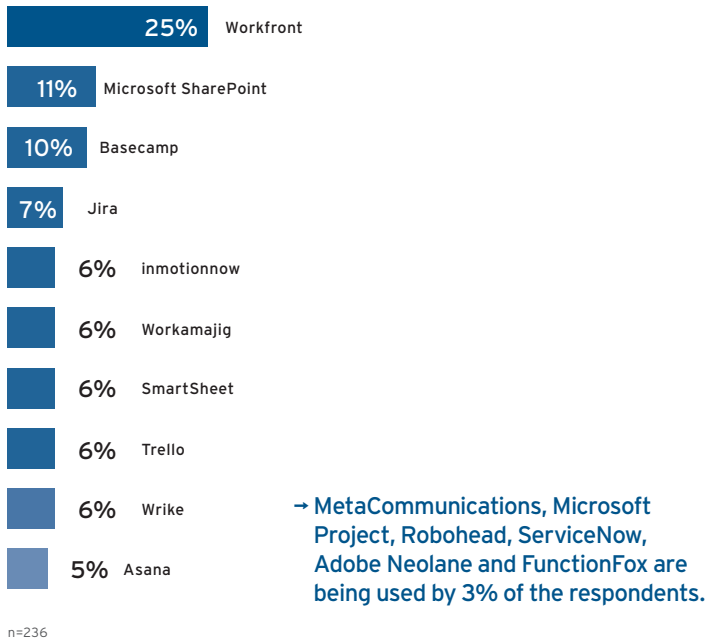


Q: Does your team use project management software?

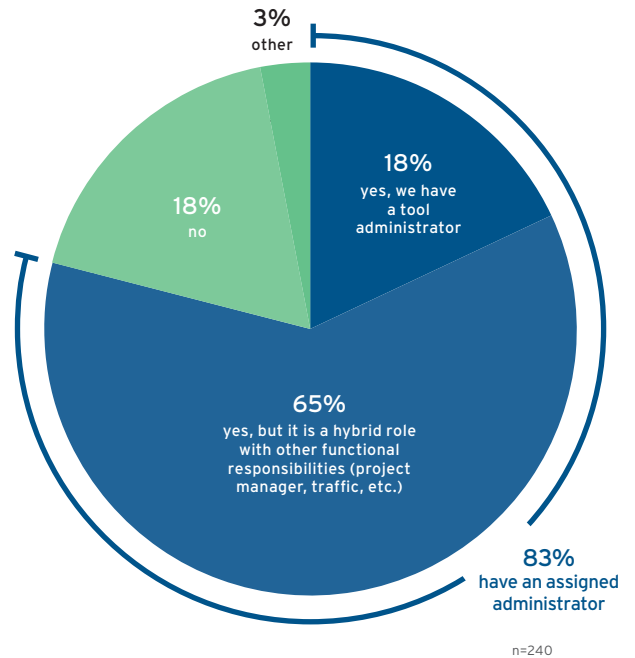


cella Tracking time is an industry best practice and a fundamental necessity to produce your department's KPIs.

Q: Which, if any, of these systems does your team use? (select all that apply)



Q: Do you have a dedicated resource managing your project management tool?



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Can Workflow Systems Replace Project Management and Traffic Management?
bit.ly/1Cam3d5

The Technology Eco-System for Creative Teams
bit.ly/1CaIXSX

Project Management Systems: Setting Up For Success
bit.ly/1QBOPEP

Tips for Evaluating Workflow Tools
bit.ly/11ldG7B

The Metrics Minefield
bit.ly/21A4KlJ

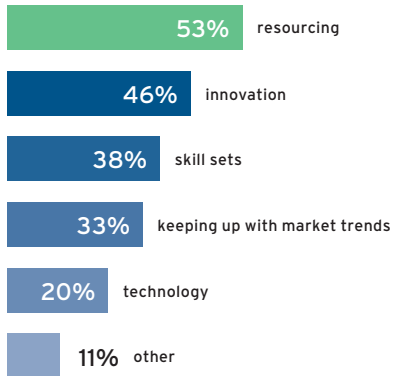
Values & Challenges of In-House Teams

Many creative groups stand on the value proposition of being lower cost (whether that is free or a chargeback rate that is lower than agencies), and while that value will open doors, it won't keep them open. It's extremely important that creative leaders identify and preach the team's value outside of cost. Institutional knowledge and shared company values and goals are other highly recognized values of an in-house group, with the greatest value being brand knowledge.

Almost regardless of industry, company size and team size, the challenges of creative leaders are very consistent. Year over year, affecting client behaviors remains the greatest principal challenge. Resourcing, innovation and skill sets are also top challenges. Ensure your group's value proposition by proactively creating a strategic plan with these challenges in mind.

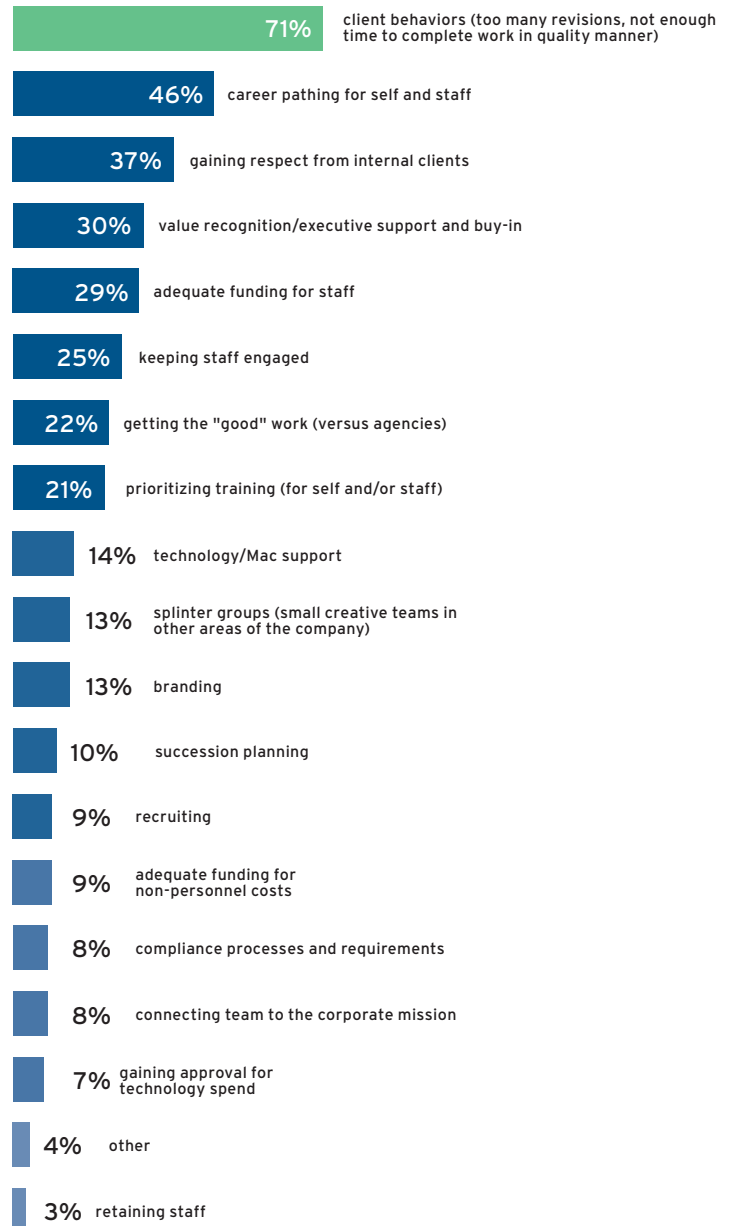
VALUES & CHALLENGES OF IN-HOUSE TEAMS

Q: Of the provided choices, which are your group's greatest challenges?



n=304

Q: Which of the following topics provide the greatest challenge for you as a creative leader? (select top three)



n=306

→ The top five challenges remain the same for the sixth consecutive year.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Why Does Your In-House Agency Exist?
bit.ly/2o9Xnf0

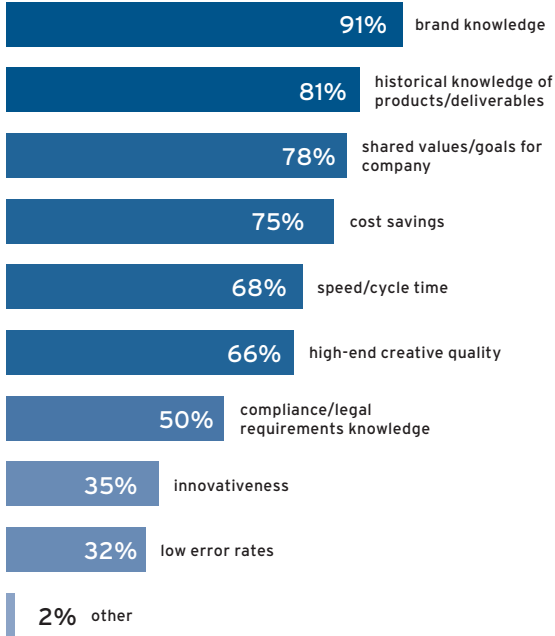
Building a Successful Full-Service In-House Agency Requires Vision
bit.ly/147dgr8

Yes, We Can Be Great
bit.ly/1erRCnu

The New In-House Agency Success Story: Adapt or Die, Part One
bit.ly/2pmq3F1

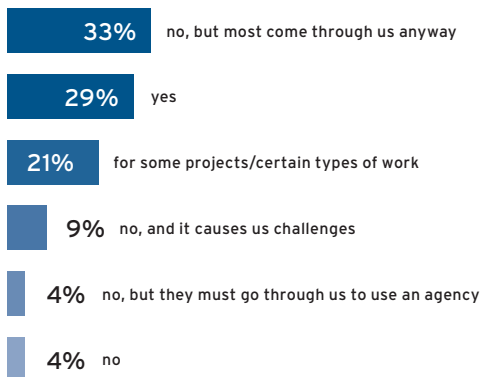
VALUES & CHALLENGES OF IN-HOUSE TEAMS

Q: Which of the following do your internal clients recognize as part of your value proposition? (select all that apply)



n=308

Q: Are internal clients required to use your group?



n=399

→ 36% of creative leaders responded that other creative groups exist within their company.

cella When multiple groups exist, other variables need to be considered and sorted out, such as clarity on the groups' services, who to initiate a project with and how the groups collectively function.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

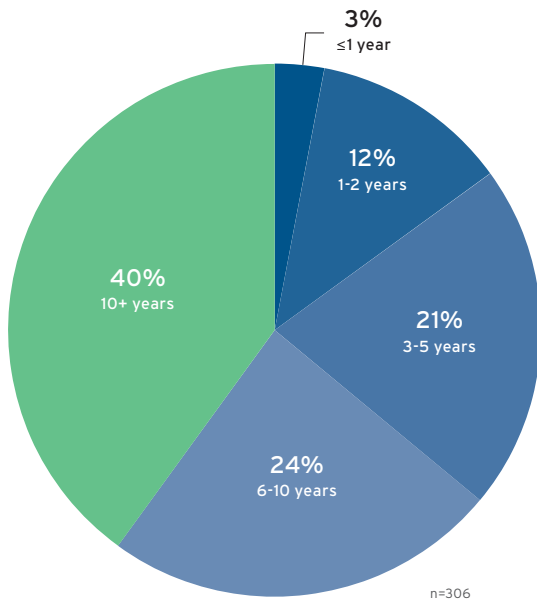
Creative Leader

Though 74% of in-house creative leaders are mostly or extremely satisfied in their current roles, almost half responded that career pathing for themselves and their teams is one of their greatest challenges. It's not surprising to learn that almost 30% of creative leaders aren't confident in the job market for roles similar to the ones they are in.

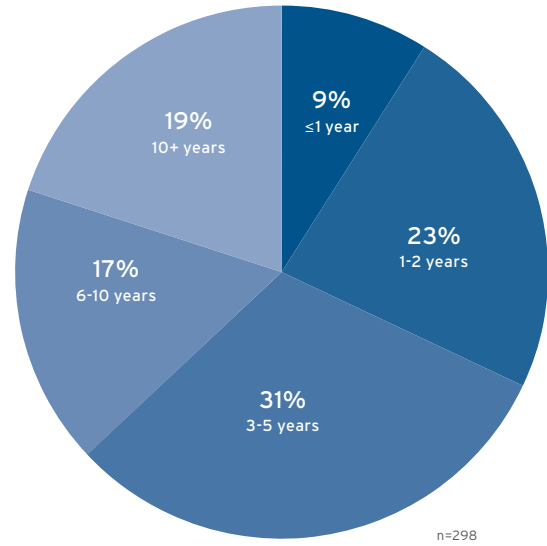
Although creative teams and in-house agencies are on the rise – both in size and number – there still aren't an abundance of them, let alone open senior roles. So for the 61% of leaders who responded that their next career move could most likely be another in-house creative group, they may be looking at relocation or alternative options.

CREATIVE LEADER

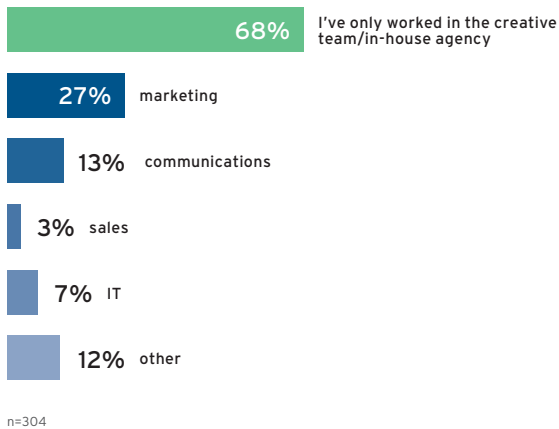
Q: How long have you worked for your current employer?



Q: How much longer do you expect to stay with your current employer?



Q: What departments outside of the creative team/ in-house agency have you worked within at your current company? (select all that apply)



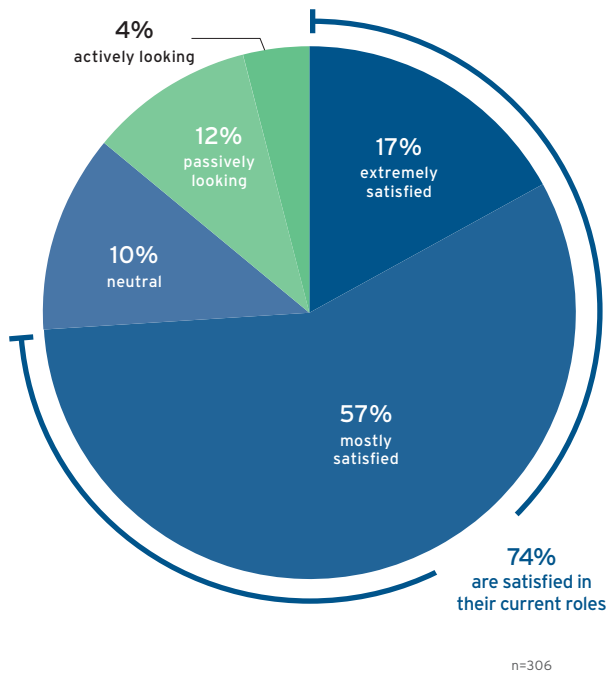
*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

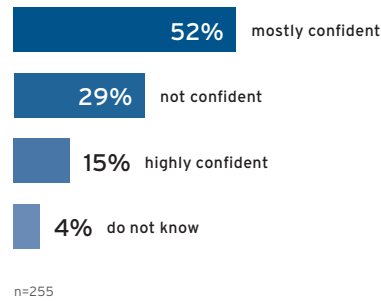
The In-House Employment Advantage
bit.ly/Y7pcqA

Positioning Creative Managers for Greater Success
bit.ly/2FQFNXI

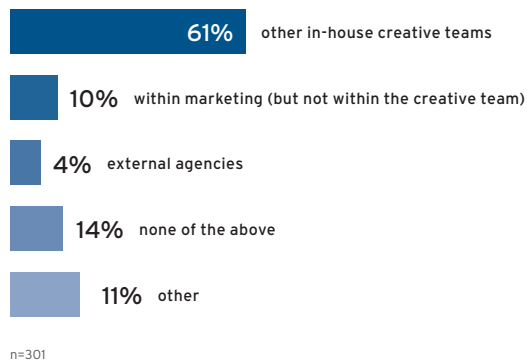
Q: How satisfied are you in your current role?



Q: How confident are you in the job market and opportunities available for someone in your role?

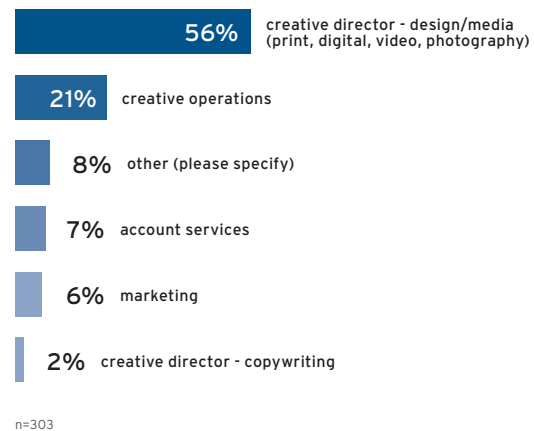


Q: Your next career move would most likely be? (select all that apply)



→ Self-employment and retirement were the most popular "other" responses.

Q: In what discipline is the majority of your background and experience?



*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

RELATED RESOURCES

Career Pathing for Creatives - Is There Life After Corporate Creative? bit.ly/R9Aad5

Tips for Creative Leaders Looking for New Jobs bit.ly/1EeV90Y

Appendix

Survey Participant Demographics

SURVEY PARTICIPANT DEMOGRAPHICS

Survey responses were filtered to represent only responses by in-house creative leaders. To identify leadership-level responses we filtered titles per the chart below. Responses were further narrowed down to eliminate duplicate responses and ensure one unique response per company and/or each in-house agency residing within an organization.

Q: Which of the following best describes your title?

creative/marketing services manager	27%
creative director	22%
director/business unit head	18%
design/production manager	9%
operations manager/director	8%
vice president	7%
art director	6%
other management role	4%

n=434

Q: Please identify your company's/ organization's annual revenue.

education, government, not-for-profit	17%
< \$250M	15%
\$250M-\$999M	19%
\$1B-\$5B	16%
\$5B-\$10B	8%
\$10B-\$30B	12%
> \$30B	11%
did not provide	3%

n=434

→ 31% of respondents are from the Fortune 500 or have an equivalent annual revenue.

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

APPENDIX

INDUSTRIES REPRESENTED

aerospace/defense	2%
associations, events & tradeshows	2%
automotive/transportation	2%
banking/financial services	9%
consulting/professional services	5%
consumer products	6%
education	7%
education services	1%
energy	1%
food/food services	3%
government	2%
health care	10%
insurance	4%
legal	2%
manufacturing	7%
marketing/advertising	2%
media and entertainment	2%
not-for-profit	7%
pharmaceuticals	2%
real estate	1%
retail	3%
retail: fashion/apparel	2%
sports and fitness	1%
technology and software	10%
telecommunications	1%
travel, hospitality & leisure	3%
utilities	1%
other	2%

n=434

*NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING.

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