

Directing Traffic

by Constance J. Sidles

Are you drowning in deadlines or doomed to disorganization? See how one firm's project-management system keeps designers, clients and vendors all on the same page.

I will never forget the meeting where my boss told me and the design team, 'Be as creative as you like. Get wild. Push the market and dump the old look!' Everyone in the room sat up and started smiling," says St. Louis-based project-management expert David Carrithers, recalling his days in the advertising and communications department of a Fortune 500 company.

"As the big cheese walked out of the room, he turned and said, 'Oh, and it needs to be green, fit in a #10 envelope and cost no more than 15 cents a unit.' The whole team just crumbled."

Almost every designer could tell a similar tale about a creative concept shot down by a business or technical reality. We all can remember the five-color masterpiece that was trashed because the

client couldn't afford the extra color; the double-truck rhapsody in blue that ended on a sour note when the media buyer said she couldn't guarantee the center fold; the classic cream background that came out rancid because the cheap paper we were forced to buy experienced too much dot gain.

It doesn't have to be this way. Running your shop so jobs are produced on time, within budget, on target and looking good should be a happy process in which creative and production people cooperate to produce designs that will have clients panting for more. Sound impossible? The system exists. It's called project management.

"Project management allows the requirements-gathering to take place, the 'what you want to do with what result,' before the creative team gets going," says Carrithers, who spoke on the topic at HOW's recent Mind Your Own Business Conference in Monterey, CA. "It sets up a mind-set of getting all the facts before the fun starts. It allows a creative organization to understand the budget



issues, the timing, the level of creativity, and how and where a design fits in with everything else the client is doing.”

Far from being a cage to hamper and harass artistic freedom, “project management in a creative environment is about clarity of direction and results,” Carrithers says.

A NEW JOB DESCRIPTION

Project management is completely different from the production management of old. Historically, designers dealt with clients and created the work, then handed a job off to a production manager to get the thing printed. Project managers represent an entirely different division of labor.

The project manager’s job description can vary depending on a design firm’s size and workflow. At some firms, the project manager has more responsibility for client contact; at others, she primarily deals with tracking projects inside the firm. What’s common to all project managers: They juggle multiple tasks, solve problems and direct traffic to ensure that jobs run smoothly from start to finish.

One firm that’s mastered the project-manager role is Karacters Design Group in Vancouver, British Columbia. Vice president and creative director Maria Kennedy helped invent her firm’s project-management system beginning in 1992, when it became a separate design division of the Vancouver-based ad agency Palmer Jarvis DDB. Karacters designs packaging, annual reports and corporate identities, among other projects. The company now employs 10 designers, with 17 other support staffers, including project managers.

THE PROJECT MANAGER’S JOB DESCRIPTION

At Karacters Design Group, the project manager works with the Karacters team in managing packaging, corporate-identity and marketing-communications projects for a diverse group of clients. Involved from new-business meetings and pitches through project completion, the project manager is responsible for initiating proposals and project plans, then guiding the project through the development and creative processes. The project manager is the liaison between the client and the design team. An effective problem-solver on a day-to-day basis, the project manager needs to be as adept at anticipating problems as she is at recognizing opportunities.

WORKING RELATIONSHIPS

- Reports to vice president/creative director of Karacters
- Works closely with creative, production and account staff
- Acts as the primary client contact for projects

ACCOUNTABILITIES

- Acts as team leader with a thorough understanding of the planning, creative and production processes. Proactively seeks information critical to client projects. Provides timely issuance of all documentation: proposals, project initiations, creative briefs, estimates, timelines, meeting summaries, and status and budget reports.
- Handles monthly billing and reconciliation of all projects

PROJECT DEVELOPMENT

- Develops relationship with clients and works closely with them to learn their business and communication needs
- Gathers the necessary information to plan and implement a client project
- Works with the account director (if applicable) and creative staff to develop strategic project plans
- Works with the client throughout the development and approval processes
- Works with the creative and production staff to estimate, schedule and develop projects
- Manages time and financial resources to ensure projects are on time and budget
- Invoices projects and maintains ongoing accounting status reports for clients

SKILLS

- Forges strong relationships with colleagues and clients
- Builds client confidence by demonstrating superior project-management abilities
- Demonstrates excellent verbal and written communication skills

TRAITS

- Superior communicator
- Creative problem-solver
- Takes charge and demonstrates initiative
- Responsible and conscientious team player
- Organizer



JOB NO. 1: CLIENT RELATIONS

At Characters, project managers are the front people, Kennedy says. When a client calls, a project manager takes charge and talks the client through the project, finding out all the information necessary to do the job. The project manager then prepares a brief.

"The brief really helps us to get everything down on paper, so that we have objectives for why something is done," Kennedy says. "We try to say, 'The objective is to introduce this new product to this new customer.' Or maybe the objective is to increase sales. Whatever the objective is, it goes into the brief. Then when we look at creative, we can ask, 'Is it meeting all of these objectives?'"

Often, Kennedy says, a client may come in with very specific design ideas. She wants to copy a competitor's package, or favors a particular color or thinks she wants a specific kind of brochure. "We try to say, 'No, no. What do you really want to *do*? What's the real purpose of this?'" Kennedy says. "When we prepare the brief, we might ask, 'What if we did this instead?' and come up with something completely different. Instead of a brochure, we might find that a digital presentation is better, for example."

Because the project manager takes the time to find out what the client is really trying to accomplish, Characters develops close partnerships with clients. "Our clients treat project managers, and eventually even the creative person, as part of their team," Kennedy says. "So project managers go to meetings and may act on the client's behalf when dealing with suppliers."

"I probably average 20 calls a day," says Amanda Allen, one of Characters' project managers. "I'm constantly on the phone with clients, talking to them or emailing them. I spend a lot of time following up, or just trying to find out what's going on at their end."

The time that Allen spends with clients is time that designers don't have to. Instead, designers focus on design. "Amanda works with one of our biggest clients," Kennedy says. "They have a lot of different things that they're doing, so Amanda deals with suppliers on their

behalf, and she spends a lot of time getting information that helps us get going on our part of the job. If a designer was the front person, he or she would have to be doing all that [talking and follow-up]. There'd be no way that you could ever do any creative."

JOB NO. 2: TRAFFIC MANAGEMENT

Project managers serve another important function at Characters. They help funnel incoming jobs to the appropriate designer. If one designer gets too busy, the project manager makes sure that a new assignment goes to someone else. In that way, no one designer carries the burden unfairly.

"On Fridays, I get together with the project managers and the producers, and we determine what job is going to go to whom, and how much time is required on every job, just to make sure that everybody has an even plate," Kennedy says. "On Monday morning, we have a status meeting that is mandatory for everyone. We divide up all the designers' times, so they know what they're going to be working on that week."

One of this system's advantages is that it allows Kennedy and the project managers to allocate enough time for projects to be done right. "Amanda would laugh at this, but normally, we allow two weeks for concept development, two weeks for final design, and two to three weeks for production," Kennedy says. "Some of Amanda's projects are two-week turnarounds, though. When jobs like that come in, your first inclination is to say, 'Let's just skip all the briefing stuff; let's just get the job done.' But if you do that, you get caught. You have to go back and start again."

Because project managers constantly communicate with clients as the job progresses, they can continually update the brief *and* the estimates for job costs. When billing time rolls around, there are never any surprises or arguments.

JOB NO. 3: TEAMWORK

Everyone at Characters sticks with the system: The project manager gathers information, advocates for the client and makes sure everything stays on track. The designer creates a project that meets

the goals of the brief. The producer outputs the designs in a timely manner.

The project-management system may seem too mechanical or even dictatorial to an outsider. But the Characters designers actually *want* the project managers to be involved. In fact, Kennedy says that designers are the first ones to come running to her to complain if the project manager isn't on top of the job. "It sounds like a cliché, but we genuinely love what we do here, and these systems have a lot to do with that."

Not that everything is perfect. "But we're organized in our chaos," Kennedy says. "It's a constant process of monitoring things and not letting anything go. The project managers pay for themselves in the amount of time we get to do the creative work."

"One of the things that you think about is, 'Gee, maybe I can do this on my own.' But I think the reason why people like it here is that they don't have to do everything." In short, creative people are free to be creative.

For Kennedy, when you can do what you love, you're really in luck. But when you can do what you love *and* have a smooth-running business, you're in paradise. That's what the project-management system is all about. **HOW**

Constance J. Sidles, a Seattle-based print-production manager and consultant, regularly writes HOW's Production column. (206)522-7513; csidles@isomedia.com

SOURCEBOX

David Carrithers, BusinessHive,
St. Louis (636)225-4103;
David@BusinessHive.com

Maria Kennedy, Characters Design
Group, Vancouver, British Columbia;
maria.kennedy@characters.com