

Working as One: Creative Teams and Outside Agencies

Beverly Bethge & William Faust, both of Ologie, LLC: DMI Review Vol22, No3, 2011

Why is the typical relationship between an in-house creative team and its outside agency one of mistrust, competition, and anxiety? There may be more respectful, collaborative, and productive relationships than we think. But they don't get talked about much.

There are several reasons such teamwork is predisposed to be challenged:

Motivation Internal and external teams have different motivations. Internal teams are interested in maintaining consistency across its product portfolio. An outside team may be more interested in innovation and pushing the client forward.

Culture and values Internal teams are part of a larger corporate culture and take on many or most of the values of that culture. External teams maintain a culture that is all their own.

Goals and objectives Why do corporations hire external agencies when they have internal staff? Work capacity, fresh perspective, speed, and specific expertise are among the reasons. But these can be seen as signs of weakness for the internal group and this can lead to a breakdown in trust.

Skills and talent Internal creative teams and external agencies don't necessarily attract the same kind of talent. For example, a strong manager would gravitate to a corporate environment while a conceptual designer would find a design firm more appealing for its variety and stimulation.

Fear In-house teams have fears and anxieties: will they lose creative control? Will they be replaced?

Professional collaboration requires a true partnership grounded in trust and mutual respect.

Best practice No.1: Living creative briefs The usual process is an internally-prepared written creative brief (a thorough documentation of goals, objectives, design criteria, and deliverables) is given to the external agency. The external staff then interprets the brief. It is better to have a "living brief," which evolves based on the insights of both internal and external groups as the work develops.

Best practice No.2: Integrated teams and cohabitation Collaboration between internal and external teams is not the same as having true integration. Logistics is usually the cause. Internal staff have daily tasks that keep them from diving deeply into special projects. Overcoming these issues results can be astonishing because of the mix and diversity of thought, experience, and perspective that a truly integrated team has to offer.

Best practice No.3: Collaborative project space Dedicated collaborative workspaces are important whether they are called "war rooms" or "thought spaces." They are created specifically for complex and long-term projects. Internally, such space is often thought of as too valuable to use in this way. Externally, it is considered necessary to have a permanent space for the duration of a project. Work is always visible there, so it is more real. The space is used for meetings and workshops where content is added through collaboration. The space becomes a living record of the work in progress.

Best practice No.4: Shared working experience "If you want to go fast, go alone. If you want to go far, go together." Going together means sharing experiences: participatory workshops and creative sessions that require input, alternative points of view, and an active role in creating.

Best practice No.5: Objective audits and critiques Internal and external teams find it hard to evaluate the cre-

ative output, especially when it comes to the others' work. It should not be seen as competitive but an objective assessment.

Best practice No.6: Training, education, and mentoring Sharing internal and external skills and experience is typically not part of the creative team relationship. With training and education, it is important to not use teacher/student as a model, but instead create a peer-to-peer environment. Corporations tend to hire less-experienced staff because they are affordable whereas agencies hire more experienced staff. Mentoring, especially of younger in-house writing and design staff, is a great way for an external agency to further the professional growth of its client's team members.

Best practice No.7: Socialization and celebration This is easy to neglect: socializing together and celebrating the work we all do. Doing things outside the work environment or professional context helps build trust and breaks down barriers. People get to know each other as individuals.

Branding Inside Out and Outside In

Roney Abbot, Connie Birdsall, and Brendan Murphy, all of Lipincott: DMI Review Vol22, No3, 2011

The collaboration between client and consultant works best as a partnership with well-defined roles and expectations. Successful brand rollouts most often require outside agencies and their corporate clients to work as one team united in achieving a single goal. Often, tasks are handed off between them without much input or discussion. What's missing is talking, verifying, listening, and brainstorming ideas *together*, and constructive critiquing on both sides.

Design development is only part of a brand revitalization program. Equally important is managing its execution and rollout inside and outside the organization, across multiple platforms and diverse cultures worldwide.

Brand repositioning is an initiative that corporations undertake, at most, once in a decade or two – hence the value of a true partnership between the internal team that lives and breathes a brand and an outside agency that provides best-practice know-how across industries and geographies.

Branding pointers: Five things for clients and agencies to keep in mind

1 No two assignments are the same. It is critical to think through the objectives, expectations, selection criteria, deliverables, and desired process. It is best for the internal team to agree on these before they develop a short list of agencies with whom to partner.

2 Respect the expertise each side brings to the assignment. The agency may have specialized knowledge of branding issues, but the client has intimate knowledge of the company's history, culture, and markets. Both are necessary to meet a common goal.

3 Listen Create an open, trusting, collaborative environment that invites brainstorming and healthy debates.

4 Define responsibilities. Don't carve out turfs. Clarify, agree, prioritize and develop for getting the work done *together*.

5 Remember that the brand strategy is just a concept until it faces the reality of implementation.

Calibrate Before You Collaborate: Five Questions to Guide Group Work

Alex M. Dunne of Locomotive Partners and Tonya M. Peck of Microsoft Corp: DMI Review Vol23, No1, 2012

Collaboration means different things to different people, and personal factors also affect how creative groups collaborate. It's important to establish, from the outset, not just *what* will be accomplished, but *how*.

Collaboration is a creative process, not a decision-making method.

At the start of every design initiative, it is useful to convene the internal and external teams for an "intention workshop" to create a shared view of the problem, to agree on the desired outcome, and to establish a strong sense of engagement and common ownership of the work ahead. The facilitator's goal for the calibration briefing is clarity about the answers to five questions, not necessarily consensus:

1 Do we have a clear vision and a single leader? These two items are the biggest pieces of the puzzle required to start any creative initiative.

2 Where are we in the process? This helps the team locate the nature of their work in the context of a larger project lifecycle.

3 How far do we hope to go creatively? Ambition is the fuel that keeps your team going. Knowing how much of it you collectively have can affect what you're able to achieve. There are three levels: Fix a problem; Make something new; and Change the world. Again, the facilitator is trying to gain clarity, not consensus.

4 How might we best manage collaboration and conflict? Conflict is an inherent part of any group experience, and it can be an effective ingredient in the creative process. Do you have what it takes to direct a potential conflict into an opportunity for collaboration and learning?

5 What kind of team do we wish to become through this work? All groups do two things simultaneously: they perform the work at hand, and they become a different group than the one they began as. This requires empathy, curiosity, compassion, positive regard for your subject, and risk-taking. If your design goal is an emotionally resonant experience or product, then the members of your design team need to resonate emotionally with one another. Ask them not just to imagine possible futures for a product category, interaction model, or user group, but to do so for the team itself.

There are three kinds of teams:

1 An effective team *We delivered the creative brief within the time and budget allowed*

2 A high-performance team *We delivered the creative brief while actively developing each other's mastery of what we did and how we did it*

3 A repeatable team *We delivered the creative brief, increased our mastery, and wish to work together again*

Helping Business Managers Discover Their Appetite for Design Thinking

Jeanne Liedtka of Univ of Virginia and Tim Ogilvie of Peer Insight: DMI Review Vol23, No1, 2012

How can we demystify design thinking for managers? By offering a simple process and tool-based approach to make design thinking more accessible to them. We wish to borrow some of the tools designers use to develop a deeper understanding of their customers' needs, and use those tools to help managers create better value for their customers. We have four questions and ten tools:

Question No.1: What is? This argues that all successful innovation begins with an accurate assessment of the current reality. It's a data-based, exploratory question. This requires a design brief, familiar to designers, and often a revelation to business managers.

Tool No.1: Visualization Uses imagery to envision possibilities and bring them to life.

Tool No.2: Journey-mapping Assesses the existing experience through the customer's eyes, noting the steps a customer has to take when using the product or service. Particular attention must be put on their emotional highs and lows.

Tool No.3: Value-chain analysis Reviews the current value chain that supports the customer's journey.

Tool No.4: Mind mapping Generates insights from exploration activities and uses them to create design criteria.

Question No.2: What if? This is focused on the creative generation of new ideas. This is similar to brainstorming.

Tool No.5: Brainstorming Generates new possibilities and new alternative business models. It allows insights to generate more insights.

Tool No.6: Concept development Assembles innovative elements into a coherent alternative solution that can be explored and evaluated. Can it be taken apart and put together differently to add more value?

Question No.3: What wows? This helps managers prioritize possibilities and prototype the most attractive ones. The “wow zone” for a business concept occurs at the intersection of three criteria: customers have to want it, the firm has to be able to produce and deliver it, and doing so has to allow the organization to achieve its business objectives.

Tool No.7: Assumption testing Isolates the key assumptions that will drive the success or failure of a concept. What are the elements that must work in order to succeed?

Tool No.8: Rapid prototyping Expresses a new concept in a tangible form for exploration, testing, and refinement.

Question No.4: What works? This translates ideas into action in the form of small marketplace bets. There is a key difference between invention and innovation. Invention means to do something in a novel way; innovation requires that the invention create economic value. Invention doesn't produce revenue growth or profit growth – only innovation does that.

Tool No.9: Customer co-creation Enrolls customers to participate in creating the solution that best meets

their needs. This involves asking and listening.

Tool No.10: Learning launches Create affordable experiments that let customers experience the new solution over an extended period of time and test key assumptions with market data.

New Challenges for Product Design: The Product of Design

Clive Grinyer of Cisco: DMI Review Vol22, No4, 2011

Product designers are learning to take on the role of translator – someone who can listen to the consumer's voice and essentially *interpret cultural behavior*.

The customer journey Research to purchase, first use and customer service, each point can deliver customer delight or dissatisfaction. The customer experience journey cuts horizontally across the different parts of a business. The product designer increasingly has a role across the whole journey – from the design of the proposition to the actual product, the services that go with it, and the user interface involved.

Choosing Research, trial, compare, and decide (Brand, advertising, feature/price, friends, availability)

Joining Purchase or subscribe to products and services (Point-of-purchase, web store, delivery, install)

Using Set up, speed of adoption, use (Design, packaging, out of box, user manual, help desk)

Growing Increase use, up-sell, tell friends (Billing, service, upgrade, web/mobile)

Staying Customer retention, repeat business (Loyalty programs, personalize, web/mobile, corporate social responsibility)

The New Meaning of Product Design?

Clive Roux of Industrial Designers Association of America (IDSA): DMI Review Vol22, No4, 2011

Industrial design's role has always been about taking new technologies and humanizing them by innovatively improving the experience of using them. Only now, the experiences are increasingly information driven.

The field of design in the 21st century – a unified view

Spaces (Architecture and interiors) Produces artifacts

Objects (Industrial design) Produces artifacts

Communications (Graphics and advertising) Produces artifacts in these sub-areas: Information; Interface; Design Thinking; Experience Design; Brand Design; Design for Sustainability; and Design Management

Experience Design Is the Only Design

Richard Grefé of American Institute of Graphic Arts (AIGA): DMI Review Vol22, No4, 2011

At some point, graphic design became communication design. Now, for all intents and purposes, it's experience design. But these days, perhaps, all design is experience design.

From the perspective of communication designers, the practice of design has transformed itself over the past 20 years, based on the needs and demands of clients. Clients are not asking designers to be specialists; they are asking for much more.

We can see that “graphic design” is an archaic description. If we define the communication design profession by what clients need or want in the current competitive global economy, we can see the expectation shift toward *the design of experiences*.

When design simply involved issues of form, it was rightly called “graphic de-

sign.” When the designer was expected to be responsible for both form and content of messages, it was more properly “communication design.” Today, the designer is responsible for communicating complex messages clearly – for considering the form and content of a message and also the context in which that message is received by audiences over time. This is truly experience design.

While every professional designer need not evolve toward a multidisciplinary practitioner, she must be prepared to design in a multidisciplinary world. The designer’s future relevance is defined by context as well as concept and execution.

The dynamics of a rapidly evolving discipline and profession have profound implications for design education. There are six major trends to be aware of:

Trend 1: Wide and deep – Meta-disciplinary study and practice Designers must be able to draw on experience and knowledge from a broad range of disciplines including the social sciences and humanities.

Trend 2: Expanded scope – Scale and complexity of design problems Designers must address scale and complexity at the systems level even when designing individual components, and must meet the growing need for anticipation of problems and solutions rather than solving known problems.

Trend 3: Targeted messages – A narrow definition of audiences Messaging will shift from mass communication to narrower definitions of audiences (design for special interests), requiring designers to understand both differences and likenesses in audiences and the growing need for reconciliation of tensions between globalization and cultural identity.

Trend 4: Breakthrough – An attention economy Attention is a scarce resource in the information age, and the attention economy involves communication design, experience design, and service design.

Trend 5: Sharing experiences – A co-creation model Designers must change their idea of customers/users to that of co-creators (mass customization) to coincide with the rise in transparency of personal and professional lives.

Trend 6: Responsible outcomes – Focusing on sustainability Designers must recognize that the pursuit of excellence involves focusing on human-centered design in an era of increasingly limited resources, in which appropriateness is defined by careful and only necessary use of resources, simplicity, avoidance of the extraneous, and sensitivity to human conditions.

Designers, designing, and design have never faced so many opportunities to demonstrate their relevance to competitiveness, economic vitality, and cultural significance. Designers (have been waiting for these constraints) to reveal the capacity for creativity to defeat habit.

We all design experiences. Some experiences may encompass a relationship with objects, others a relationship with messages. Increasingly, service design is likely to be a major form of experience design. Yet what is important is that designers continue to find ways to solve problems in new ways to enhance the human experience.

Design thinking is distinguished from the analytic business mind that focuses more on data than experience to define optimal outcomes.

The Sudden Death of Brands

Daniel Formosa of Smart Design: DMI Review Vol22, No4, 2011

Are social networks making brands irrelevant? Who are you more likely to trust – the “everyday experts,” the friends you follow online, or some company’s marketing team?

Brands are losing their relevance. In the 1950s, top-down marketing was king. Instead of striving for user-centered innovations, many companies opted to

add layers of perceived value. Design input was reduced to pseudo-aesthetics – things like false wood grain on car doors and chrome on toasters. Today it’s all about bottom-up messages. A brand is not defined by a logo or a static image. A brand is defined by reputation and a reputation can change quickly. This has sped up recently: the speed and ease with which consumer information can be exchanged has been reduced from days to mere seconds.

More than half the US population has researched a product or service online. One in four has posted comments of reviews about things he or she has bought... It’s people relying on each other... Checking reviews online has become the norm – it’s even something of a sport. Like cell phones, we’re not sure how we ever lived without them. What, we trusted ads?

Say what you will about the credibility of information on the Internet. To the majority of us, it’s still more credible than information coming from the companies themselves.

We’re reading the one-star reviews first. Even if a product has 93 five-star reviews and just a handful of one-star reviews, we definitely check out the one-star reviews. Those dissatisfied customers, even when few in number, carry a lot of weight.

With good Internet buzz, a new product can rise to prominence seemingly out of nowhere. On the other hand, when a well-known company or brand touts a product introduction that turns out to be more hype than substance, the lifespan of the product can be measured in minutes. The point is, we are not buying technology for technology’s sake. We are looking for relevance.

...Compared with a new technological breakthrough, design can be relatively cheap and take a comparatively short amount of time. Historically, advertising and marketing budgets have far exceeded design budgets, and promises

took precedence over performance. But today, companies focus on the loftier goal of improving the customer experience. Having technical competence is important, but instilling personal meaning is imperative.

Social networks provide community, expertise, personal meaning, and (especially) people who care. That sense of caring, in many people's minds, is completely absent from many (corporations). People care and companies don't.

Our world is changing. It's not that designers are getting into branding – it's that branding is getting into design. Every product and service is now a brand representative.

The Complexity Crisis

Alan Siegel of Siegel Vision: DMI Review Vol23, No2, 2012

Simplicity, clarity, transparency, accessibility, usability. Not only do they make life easier, they also reinforce trust, save money, and generate higher profits.

Why have we allowed complexity to get the better of us? Why have we permitted companies, organizations, and agencies to overwhelm our good judgment and violate our basic rights? Why have we passively signed undecipherable consumer credit, mortgage and lease contracts with hidden fees and other terms that are obnoxious and even illegal? Why do we continue to buy – and not send back – products with mysterious features we can't use because they are poorly designed and come with instructions an engineer with an advanced degree couldn't decipher?

(My colleagues and I) have dispelled the knee-jerk reaction that simplicity was essentially simple-minded by demonstrating how clarity, transparency, accessibility, and usability provide invaluable benefits, including reinforcing trust and generating significant cost savings and higher profits.

We learned that the most effective

method to evaluate clarity and usability is to make market research techniques that ask citizens to interact with a product, contract, or form. This allows you to determine whether they can actually make an informed decision, use the product, or fill out the application easily.

We learned that one of the critical elements in simplification is to first simplify the product, service, or underlying process. What can you realistically achieve by providing a 50-to-100-page booklet to explain how to use a multi-function watch or digital camera? To make complex instructions more usable and valuable, the product itself must be made more intuitive and easy to use.

We found it is possible to simplify virtually every business and government product, service, or communication with an experienced, multidisciplinary staff of designers, writers, researchers, and technologists.

Best of all, we learned there are significant business benefits by simplification. Research we conducted demonstrated significant cost savings, higher client retention and receptivity to purchasing additional products and services, enhanced employee effectiveness and morale, and an opportunity to gain a competitive advantage.

Principles for action The essence of simplicity is rooted in three principles:

Empathy Give careful consideration to customers' needs, circumstances, and expectations.

Distillation Discipline your process to shape, filter, purify, and customize until it meets customers' needs and expectations.

Clarity Ensure that customers can understand, make informed decisions about, and comfortably use your product or service.

True simplicity is achieved when these three disciplines overlap.

You can transform the way you run your

business. You can distinguish your business, profitability, and client experiences by adopting simplicity in everything you do. Simplify operations and products. Look for bold ways to connect with you customers in imaginative ways.

Adopt a simplification mindset by refusing to put up with complexity; empathizing with customers, patients, and other constituents; and being committed to clarity in everything you do, make, or say. Focus on engaging people rather than trying to persuade them, provide authenticity, and build trust through honesty and transparency.

Adopting a simplicity mindset – a deep commitment to clarity, transparency, and usability – provides the opportunity to win and reinforce trust.

Designing with Complexity

Rob Tannen of Bresslergroup: DMI Review Vol23, No.2, 2012

As Philip Glass noted at a recent *New York Times Arts & Leisure* weekend event, "It's the complexity of simplicity that's interesting."

The three Ds of designing with complexity There are ways to optimize the relationship between the technical complexities of features and the clarity of the user experience.

Defeaturing The most obvious way to reduce technical complexity and achieve a clearer user experience is to reduce the features within a product. An exemplar of this approach was the line of Flip video cameras. The Flip was massively defeatured, providing a total of four controls. Even the built-in USB connector reduced the need for the myriad of cables and connectors found with traditional video cameras.

Demystifying Demystifying is arguably the most important contribution designers bring to the product development process. Fundamentally, it is translating a product's technical complexity into a clear user experience. Demystifying

does not reduce the technical complexity of a product, rather, it improves how the user interacts with that complexity.

(Re)Distributing Defeaturing reduces technical complexity in the most obvious way – by deleting features. Demystifying reduces it by focusing on how it is presented to the user. The third approach to addressing the relationship between product complexity and the user experience is distribution. Distribution refers to where the complexity resides within the product-user relationship and interaction.

I've discussed three means for addressing complexity in product design: defeaturing, demystifying, and distributing. These techniques are applicable to optimize the design of any product, and can also be applied to the development and differentiation of a product line and brand strategy.

Many product lines include low, middle, and high-end products within any category. Typically, the low-end products are defined by their reduced feature set and thus are less technically complex. Middle-tier products add additional features; high-end products provide the greatest number of features. This basic additive model may be changing as user experience design gains greater emphasis. For example, middle and high-end products may have equivalent features but differ in the quality of the user experience as delivered by the interface. Here, clarity is a feature unto itself – a markedly distinguishing characteristic in many of Apple's products, for example.