THE CREATIVE FEEDBACK SERIES

Fixing Creative Feedback

A Practical Guide to Online Proofing

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How do you gather feedback on creative content?

Bringing ideas to life can be a complex process. Success requires discipline, careful planning, and above all - collaboration.

Final deliverables can take many rounds of revisions and approvals. Many organizations rely on a mix of email threads, project management tools, spreadsheets, and meetings. These **disconnected tools create silos**, making it difficult to track revisions and responsibilities.

Online proofing provides the most efficient way to manage review and approval. It streamlines the process by **centralizing feedback, tasks, revisions, and approvals** throughout the project.

It helps **keep everyone on the same page**, reducing miscommunication, minimizing friction and helping you deliver your best creative - faster.

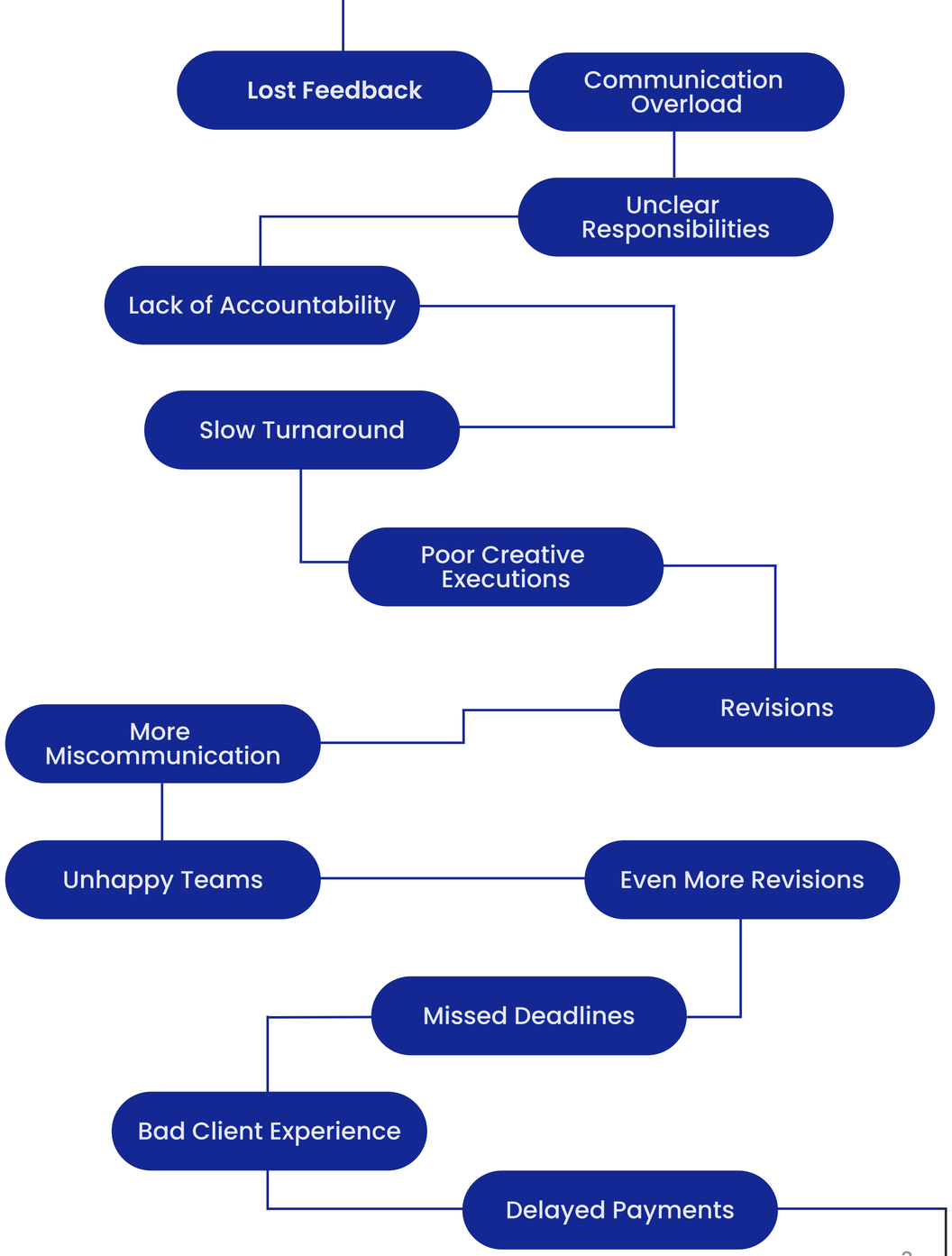
The Hidden Cost of Broken Feedback

A broken feedback process whether with your clients, your internal creatives, project managers, or your production team, can lead to disastrous outcomes for your workflows.

These problems have a tendency to quickly snowball out of control, creating friction and stress for everyone involved.

What starts with miscommunication leads to slow turnarounds, which kills timelines and ultimately your team's ability to deliver. A lack of accountability, finger pointing, and the culture that comes with it can ultimately affect team morale, productivity, and the quality of the work produced.

Broken feedback in a creative workflow can have dramatic effects on your productivity and bottom line.



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The Challenges Facing Creative Workflows

Creative projects are complex undertakings. **They can require the collaborative efforts of dozens of stakeholders.**

Like a well-oiled engine, a successful creative project requires all moving parts work in sync and with minimal friction.

Here are the most common challenges that often lead to projects falling off the tracks:

A. **Collecting Timely & Concise Feedback**
B. **Coordination**
C. **Actioning Feedback**
D. **Tracking Versions**
E. **Accountability**
F. **Learning and Improving**



A Collecting Timely & Concise Feedback

Creative projects and campaigns involve many different types of digital content - images, video, documents, or web content.

Delays and ambiguous feedback happen when stakeholders don't have the proper tools to provide precise content-specific feedback.

B Coordination

With feedback coming in from many different people using a variety of different tools, it's challenging to keep everyone on the same page. Unreliable coordination can easily lead to miscommunication errors and delays from additional review cycles.

C Actioning Feedback

Once feedback is collected, it's essential that creatives and editors know exactly what edits or revisions are required. They should have a fast and easy way to follow up on any questions that arise during the revision process.

D Tracking Versions

Creative content typically involves multiple iterations. It's essential that everyone knows they are always accessing the most up-to-date version of any files they review. It's also important for them to be able to easily access prior versions so they can readily track how revisions have been implemented, without having to dig through endless email threads.

E Accountability

Creative projects are prone to changes. That's just the nature of the beast. Out-of-scope revisions or modifications that produce delays or budget overruns can often lead to conflict. A consolidated history of revision requests and approvals can offer a clear and ongoing record of project activity.

F Learning and Improving

Does it sometimes seem like the same problems keep coming up from project to project? Without good data and insights into how and where the bottlenecks in your projects occur, how can you take steps to improve efficiency over time?

Enter the Online Proofing Framework

Given these pitfalls, online proofing sets out to streamline review and approval, with the goal of limiting and eliminating the potential for communication errors.

It's designed to enable clearer feedback, facilitate coordination, and ensure accountability.

The online proofing framework addresses these issues by focusing on 3 key elements.

1. Online proofing facilitates the **collection of faster and clearer feedback** by providing an easy way to view and precisely mark up a wide range of digital media formats.

2. Online proofing **consolidates all content, feedback, versions, and approval decisions** in one centralized location, ensuring everyone is on the same page providing a clear record of all content-related activity.

3. Online proofing simplifies the sharing of project content with all project stakeholders, provides the tools to keep projects moving on schedule, and automates the approval process, **maintaining accountability in your creative projects.**

Online Proofing
Key Features & Benefits

While every creative workflow is different, there are some basic review and approval needs that every team shares.

Online Review and Markup

At the heart of any online proofing solution are intuitive tools that give everyone involved in a project the ability to provide feedback directly on all the digital media formats that your team works with.

Online proofing allows for precise markups on a wide range of formats (including images, video, PDFs, and HTML) that are tailored to the format being reviewed.

The consistent user experience makes it easier and faster for people to respond.

Consolidated Feedback

Consolidating feedback in discussion threads supports a more collaborative approach to content development. It reduces the need for the additional review cycles often required simply to coordinate feedback from multiple sources or collaborators.

Online proofing solutions can also support the ability to maintain private internal file versions and comments, alongside the external conversations, within one space.

Actioning Feedback

Once you have precise and clear feedback, the next step is to make sure that the creators and editors developing the content know exactly what revisions need to be made. Having a way to review feedback and then assign requests as tasks is essential to ensuring that creative teams can move forward efficiently.

Maintaining a consolidated discussion thread through to task completion ensures that any issues can be quickly and directly resolved.

Tracking & Approvals

Keeping creative work moving efficiently requires that everyone involved in the review and approval process has clear and timely information about what is required of each participant. Ongoing project notifications and reminders can ensure that nothing falls through the cracks.

A dashboard should present each person with a real-time overview of the status of each project they are involved with and indicate clearly where they have any approvals or tasks to complete.



Versioning

Once creative teams have completed revisions, new file versions can be easily uploaded and shared for further review (and hopefully approval). With all versions of a file consolidated, reviewers can readily refer back to compare and validate revisions against any previous feedback.

Since all content-related communications, activity, and file versions are maintained together, there's less of a possibility for miscommunication and misunderstandings.

Routing

Some organizations require routing a piece of content through multiple levels of creative, regulatory, and management approvals. Workflow and approval automations ensure that each piece of content is moving through a pipeline on schedule.

Workflow automations can save project managers considerable time and effort in manually tracking the progress of a review. They can also expedite the review process as sequential approval requests are instantly triggered as soon as one approval stage is completed.



Project Management vs. Online Proofing Tools

Project management tools play an important role in helping organizations manage projects. They tend to be task-oriented, focusing on the high-level tasks, milestones, and timelines that are essential to project delivery.

On the downside, project management tools can also be rigid and complex, imposing a process on projects that doesn't always conform with the iterative and collaborative approach that creatives or clients prefer. Consequently, project management tools tend to be more useful to (and used by) the admins and project managers overseeing a project than for the creative teams and clients directly involved in the creative content development.

In particular, project management tools are not well suited for managing content review and approval. For example, a marketing campaign may include a high-level milestone to "collect feedback" and "get final sign-off". But the process of collecting the feedback and iterating with revised versions until the approvals are provided may, in itself, involve dozens, if not hundreds of required changes or what we might call "micro-tasks".

Feedback and micro-tasks such as "change this word" or "align this image" can quickly overwhelm a project management tool to the point of it becoming unusable.

An online proofing tool, on the other hand, is specifically designed to facilitate the review and approval process by providing a specialized tool for collecting and consolidating feedback, tracking revisions, and ultimately collecting all the required sign-offs in a timely manner.

There is still an important place for the project management tool - when you are managing project-level tasks. But not when getting into the granularities of creative-level management.

With online proofing, our goal is to ensure that the creative is the priority of the project.

And not the other way around.

Project Management vs. Online Proofing Tools

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	Project Management Tools	Proofing Tools
Objectives	Helps manage projects	Helps streamline feedback and approvals
Focus	Can be very narrow to very wide, with the project at the center	Very targeted, puts content at the center
Task Management	Tasks are assigned to the project	Tasks are assigned directly to the content
Creative Feedback	Comments in a comment thread, possibly connected to media	Comments always in the context of a frame, pixel, text, or other with precision
Approvals	Various, generally on the project	On the content, with version accuracy

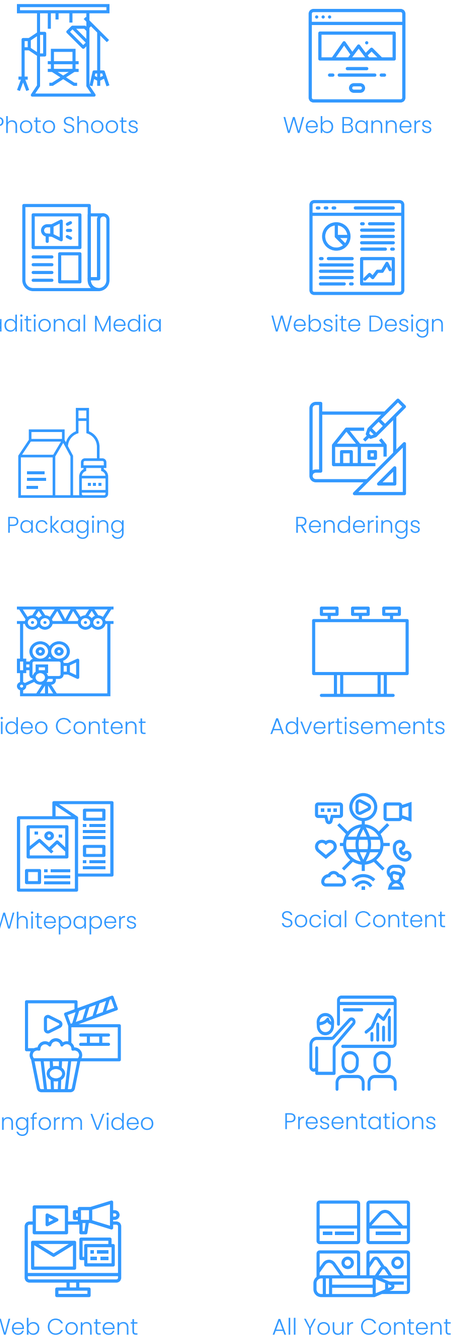
Who Is Proofing For?

Online proofing has clear benefits for any organization involved in the development of creative content. **Marketing teams, advertising agencies, photographers, video producers, CGI production studios, and designers** use online proofing to facilitate and manage the feedback process with stakeholders.

In addition to providing teams, whether internal or external, with an easy way to provide feedback, the solution is very effective for keeping projects on track.

Brands, agencies, manufacturers, educational institutions, and many others utilize online proofing to help manage the review and approval process for everything from internal marketing campaigns to packaging, catalog development to social content, and beyond.

In particular, for organizations where content has to be routed through many levels of approval or **where feedback and approvals are required from many stakeholders**, online proofing can provide an invaluable way of automating the review routing and consolidating all the feedback.



Next Steps

Adopting an Online Proofing Solution



If the issues outlined in this guide resonate and you think that online proofing can be a good fit for your organization, here are your next steps.

Because an online proofing platform will touch many different types of users within your organization, you may want to **pull together a core team** of people to evaluate different platform options.

Typically, online proofing can involve project managers, creative directors, production team members, customer-facing roles, and management stakeholders. It will also involve external users, whether clients, consultants, or freelancers. **Involving them in a pilot is critical to successful adoption**.

Start out by collaboratively **developing a checklist of key feature requirements** and prioritizing their importance. After establishing your requirements, **set up a demo** to get an overview of the platform(s) and discuss your specific requirements with a product specialist. The demos can also introduce you to workflows and features that you may not have even considered.

If a solution looks promising, the next step would be to **run a real project through a trial** so that you can evaluate the platform further with your team using your own content. Typically, this period will be one of discovery, allowing you to identify what features or needs are a priority (vs. nice-to-haves). Running a pilot project (real or mock) to get a better sense of workflows and user experience will raise important issues and should highlight the benefits of a solution.

Lean on product support in the process - not only is it important to address your practical needs, but you want to ascertain that when further needs or issues arise down the road, you'll get a quick resolution.

Onboarding a new proofing tool is an investment that will provide a fast ROI, with limited upfront cost, but there's still a cost to your organization. Taking your time to get it right can set you up for success for years to come.

The Online Proofing Checklist

- [ ] Does it support all the types of files you work with?
- [ ] Can files be reviewed from any device?
- [ ] Is there the ability to combine and review multiple files together?
- [ ] Is the interface intuitive, especially for non-tech-savvy stakeholders?
- [ ] Does it support collaborative, synchronized, and threaded commenting?
- [ ] Is it simple to add users to a proof?
- [ ] Can users easily reference updates and revisions in a central place with file versioning?
- [ ] How intuitive is it to turn feedback into tasks, resolve them, and track open tasks?
- [ ] How simple is it for approvers to submit a decision?
- [ ] Can you compare versions to quickly identify revisions?
- [ ] Are there notification options that work for your particular needs? @mentions? Automated? Customizable?
- [ ] How easy is it to organize and search through proofs?
- [ ] How much control can you have over permissions? Can you have project groups?
- [ ] Does it support separate internal or external communications and versions?
- [ ] Is storage a factor? Will you hit a ceiling?
- [ ] Can you automate the routing of content through multiple stages of approvals?
- [ ] Do users have a personal dashboard to track content reviews, tasks, and approvals?
- [ ] Can the system meet your infosec standards?
- [ ] What will you need with regard to integrations? Is there a well-documented API?
- [ ] Will you get the support and training you need?

Explore these features with a 30-day trial!

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About ReviewStudio

ReviewStudio was founded in 2014 by a team facing the challenges of coordinating feedback on a major project involving teams spread over several continents. There had to be a better way to review video and other project elements more efficiently.

We saw the same obstacles we were facing with our creative workflows existed across many fields and projects. We started our journey to become the leading software for teams looking to efficiently and effectively collaborate to realize ambitious creative visions.

ReviewStudio is designed to streamline the review and approval process, whether video, audio, image, PDF, or HTML. It is used by thousands of creative agencies, studios, and teams globally. Our customers span the world's largest agencies, brands, CGI production studios, graphic designers – and everyone in between.

Case Study

How Lixil uses ReviewStudio to deliver assets at scale

More Efficient Collaboration

With over 50,000 employees, Lixil products are used by billions of people every day. Creative assets, whether photography, video, or renderings, are vital to bringing these products to market. With teams spread across the world, efficient collaboration is critical.

Centralized Feedback and Approvals

With ReviewStudio, Lixil gained a centralized platform where comments, feedback, and approvals are managed and accessed by the right people - wherever they are.

Staying on Track and Accountable

A centralized review and approval process keeps thousands of assets on track. Markup tools, threaded commenting, and the ability to collaborate on any format in one place keeps the creative process on track and accountable.

> **"ReviewStudio has significantly boosted our team's productivity by reducing the number of revision rounds by 35-45%, streamlining version control, and saving us countless hours in the process."**



Nick Cruz, Brand Asset Coordinator,
Lixil (American Standard)

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