

PBWORKS

How Creative Services Professionals Use PBworks To Raise Profits

White Paper

Overview

Many of PBworks' most successful customers come from the creative services industry. These creative services firms, which include design, marketing, advertising, and public relations agencies, have found that collaboration tools can make their businesses much more productive and profitable. In some cases, these agencies have documented that employees who use PBworks generate more than \$1,000 per month of additional productivity.

This white paper discusses the reasons why collaboration is so important for creative services firms, and describes the most common ways that these firms use PBworks to improve the profitability of their business, including specific examples from design, marketing, advertising, and public relations firms that are PBworks customers.

Creative Services: The Ultimate Knowledge Work

In the Information Age, creative services represent the ultimate in knowledge work and creative service professionals the ultimate knowledge workers. The way they add value to the economy is via ideas and images, not bricks and mortar.

This kind of knowledge work places a heavy premium on communication and collaboration, and generates vast quantities of information that needs to be stored, managed, and published. This fact alone makes the knowledge management capabilities of PBworks extremely valuable for such firms.

But is the way these companies are organized that allows tools like PBworks to contribute so much to productivity and profitability:

- 1) Time is money
- 2) Firms are virtual
- 3) Teams are distributed
- 4) The work is project-oriented
- 5) Managing and satisfying clients is paramount

Time is money

As professional services firms, design, marketing, advertising, and PR agencies generate revenues based on billing out their time. Whether the pricing is project-based, a monthly retainer, or an hourly contract, time is money for creative services firms. And with billing rates of \$250 per hour and up, PBworks' ability to boost productivity and cut down on wasted time adds directly to the top and bottom lines for these high-end businesses.

Firms are virtual

Many creative services firms use a host of vendors, partners, and contractors to accomplish their work. You can't assume that every member of the team sits inside the same corporate firewall. This makes using on-premise software tools to assist collaboration extremely difficult and expensive, if not impossible. PBworks, on the other hand, is a 100% hosted solution; you can specify exactly your authorized users, and allow them to access the tool from any network. This also places a major premium on

being able to carefully specify tasks, set expectations, and closely monitor the work being performed...a job that PBworks' notification system is perfectly suited to performing.

Teams are distributed

In a "flat" world, many creative services firms deal with vendors scattered around the globe. And even in large firms that do everything in house, a project team may include specialists from multiple office locations. PBworks' platform can be accessed from anywhere in the world, and provides teams with a central repository for all their documents, files, and materials. Meanwhile, electronic communications like PBworks' email notifications and RSS feeds help keep virtual teams moving forward on real collaboration.

The work is project-oriented

Unlike operational businesses like retail, hospitality, or manufacturing, creative work is overwhelmingly project-oriented. Teams are assembled and disassembled on a project-by-project basis. This means you need a way to connect together team members who don't have a long working history. This also means that when the project is completed, you need some way to store the knowledge created during the course of the project.

With PBworks, it's easy to create a shared space for each project, give access to the relevant team members, manage tasks and milestones, and clearly document the evolution of the project. And when the project is done, the work materials can be archived for future reference.

Managing and satisfying clients is paramount

As a services firm, managing and satisfying clients are the most important tasks your team can perform. Traditionally, however, these tasks are done manually and in time-intensive fashion. Clients expect project managers and team leads to make time for frequent status meetings, and all too often, the entire exercise degenerates into a

painful game of "telephone" with team members on both sides, vendor and client, funneling all their communications through each company's project manager. The result is that creative services firms spend a disproportionate amount of time and elbow grease maintaining the client relationship.

In contrast, PBworks gives creative professionals a better way to collaborate with their clients. Rather than dealing with email and voicemail requests for updates, project managers can simply give clients access to the workspace so that they can see the status of items for themselves. This transparency and accountability provides peace of mind for the client and the vendor. And when the project is completed, you can turn the workspace over to the client as a final deliverable, enabling the client to more easily make future upgrades and enhancements, and better maintaining operational continuity for follow-up engagements.

Meanwhile, all these client workspaces exist within an overall firm-wide "network" that makes it easy for permanent staff who are working on multiple projects to search across all workspaces at once, and to see all of their tasks from a single personal dashboard.

How Collaboration Helps

With over 800,000 hosted workspaces and over 50,000 businesses, PBworks is able to draw on the experiences of its customers to identify the key use cases that matter to creative services firms. Based on talking with our customers, our customers (design, marketing, advertising and public relations firms) have adopted four key usage scenarios.

- Project Management
- Remote Collaboration
- Client Collaboration

Project Management

The flexibility of PBworks is a perfect match for the ad hoc nature of project management. Rather than forcing project managers to spend all their time fiddling with dependencies and resource allocations, PBworks provides simple, intuitive project management functionality. Any user from your team can create and manage tasks and milestones. Each task becomes a conversation, allowing team members to communicate about the process of completing the tasks. And tasking is integrated with collaboration; you can easily link tasks to specific workspace pages, or even to outside URLs.

Plus, being able to sort and filter tasks and milestones by date and responsible party make it easy to see what still needs to be done, while automatic notifications alert people to new, due, overdue, and completed tasks.

This simple and flexible approach allows a project manager within a creative services firm to create his or her own customized approach and make it a standard within the organization.

Senior Producer Jon Krusell at Wideload Games has done just that. PBworks gives Wideload the ability to have a centralized repository of all the materials being developed for a videogame that can be accessed from anywhere in the world. "PBworks has become the standard inside Wideload for managing our projects," said Krusell. "There are presently eight PBworks installations being used on projects ranging in size from eight to about 100 people."

Remote Collaboration

PBworks' virtual work environment is especially effective for distributed teams that need to collaborate remotely. Jon Krusell of Wideload Games uses independent contractors on three continents as part of his development team. Wideload has developers in

China, South Korea, and South America, in addition to Canada and the United States. Prior to PBworks, documents and production work had been distributed by email file attachments, causing a lot of confusion and wasted time.

With PBworks, the team can share ideas, documents, and multiple iterations of creative work throughout the conceptualization process, while tasks and milestones keep the focus on critical path items. Everyone is on the same page, and new people can quickly come up to speed as they join the project, whatever their home continent.

Client Collaboration

Perhaps the greatest potential gains in using PBworks come from collaborating with your clients. Not only can you save time by cutting down on the status meetings and constant emails and phone calls, you can get your clients more engaged in the creative process, resulting in better work, and greater client satisfaction with the end results.

Rudy Kehler at The Simplify Company, a graphic and interactive design firm in British Columbia, wanted to give his clients more control over their projects, to not just tell them about the status of a project but to actually show them the status. "Clients are terrified of the Big Unknown," Kehler said, "PBworks provides transparency and accountability for the project that gives clients peace of mind." To accomplish this every member of the project team The Simplify Company assembles, including a point person at the client, gets a PBworks account.

Rudy is sensitive to the fact that his clients are sometimes required to provide their managers with status reports at the drop of an email. PBworks allows his clients insight into that status without having to ask for an update from Rudy and his team. One of the big features of PBworks that Rudy especially likes is the ability to give multiple parties access to view the workspace without having access to update or add comments to it. This allows multiple parties at the client to have a direct view of the project and its status while maintaining a single, interactive point of contact with the client, which Rudy finds essential to the smooth running of a project.

Even better, PBworks Project Edition includes unlimited workspaces and an unlimited number of "guest" licenses for your clients, so all of this comes at no extra charge.

Real Success Stories

The greatest benefits come when a creative services firm makes PBworks an integral part of its business processes. Take The Groop, for example, a prominent 50-person agency in Los Angeles that uses PBworks to generate nearly \$1 million per year in added productivity.

Clients as diverse as Nike, the Los Angeles Times, and the French Laundry, turn to The Groop to create dynamic user experiences that help them better communicate, engage and transact with their customers. The firm has won award after award for its work, including a Cyberlion from the Cannes International Advertising Festival and "Best in Show" from HOW Magazine. "Our model is to take an idea and bring it to life in three to six months," said Summer Swigart, Lead Software Engineer for The Groop.

All this success has resulted in explosive growth. "A couple of years ago, we had only five people," said Swigart. "Now we have 30 employees and 50 contractors, and we're doubling every six months."

And because The Groop relies on the Scrum methodology for project management (derived from the agile software development movement), group communication and collaboration is mission critical. The email-based approach which worked for a five-person boutique was becoming unmanageable for an 80-person firm.

"The email trails were getting over the top," said Swigart. "To get an RFP out, three departments have to collaborate: technology, design, and strategy. We were uploading

files to the extranet and emailing, 'Hey, can you review this?' People were starting to ignore and lose important emails."

"PBworks lets us centralize our information," Swigart said, "This enables agile development in a really good way, and provides transparency so that management can see that everybody is doing work. And because a lot of people have their notifications enabled, we can all see what everyone else is working on." The Groop uses PBworks for process documentation, project management, and corporate training.

For example, one key usage is determining and publishing development standards. "We have a lot of developers who are contractors," said Swigart. "We publish all of our coding standards on the workspace. That way, when something goes wrong, we can just point to our standards rather than saying, 'Why did you do it that way? It's broken!'"

Another key usage is project management. The Groop created a "LA Phil" folder to manage a project to build a tribute to outgoing Los Angeles Philharmonic conductor Esa Pekka Salonen. The Groop's project folder includes a custom project board, complete with virtual tacks and index cards (implemented via a PBworks custom template), and offers read-only access to vendors and contractors so that they can participate in the daily scrum without compromising any of the other information on the workspace.

And given The Groop's rapid growth, PBworks has become a key educational tool for onboarding new employees. "We use PBworks whenever we get a new hire," Swigart said. "Even something as simple as explaining why you say when people ask, 'What does The Groop do?' is spelled out on the workspace."

The cumulative benefit from using PBworks grew far beyond what The Groop ever hoped for. "PBworks brings up the quality of information our people can absorb," said Swigart. "It's increased information flow and brought down overhead, giving us more time for billable work. Our 50 users spend more time on billable projects as opposed to

asking, 'Where's the project?' or 'How do I connect to the Internet?' We're getting \$1 million per year in additional productivity."

RD2 also generated massive benefits, but with a focus on collaborating with clients on content development.

The firm specializes in building online communities for blue-chip clients like Southwest Airlines, Hotels.com, and Verizon. According to RD2 President Chris Ronan, the biggest challenge in its business is managing how his team and their clients collaborate on web content. "No matter how organized you are, people always underestimate how difficult it is to create the content and get it into the web site," said Ronan.

In the past, RD2 used traditional collaboration tools like emails with file attachments, but at great cost. "People grossly underestimate the costs of poor communications and processes around getting content to the web," Ronan said. "Maybe a project manager goes on vacation, and there's a file buried in somebody's inbox. Or maybe everyone is using different naming conventions. It's a recipe for a train wreck."

RD2 used PBworks to re-engineer their web content collaboration process, making it faster and more efficient for both RD2 and their clients.

"PBworks has totally changed the way we work," Ronan said. "When our project manager and user experience lead constructed a sitemap for the client, we mapped it into PBworks and identified all the places we needed the client to add their content. We presented a 30-minute tutorial to the client, and they were off to the races and loving it. The client was super-engaged with the content process, and it saved us a ton of effort."

RD2 uses a wide assortment of PBworks features to manage the content creation workflow. The team uses PBworks templates to manage the different types of content pages. For example, one template might be used for pages with header content, and

the template would specify specific parameters, like the maximum number of characters allowed in a header.

RD2 also uses tagging and notifications to streamline workflow. Pages start off being tagged as "unapproved." This makes it easy for the client to see where content needs to be added or reviewed. Once the content is in place, the pages are tagged "approved," and the design team can begin implementation. For example, RD2 used tags and notifications to work with the CMO of a major client. Ronan explained: "As soon as she makes her final edits, the project managers see those edits via PBworks' automatic notifications. They go in and edit the tags to indicate her approval. All she has to do is make the changes on the workspace."

All these efficiencies add up to a major savings. "We can have a team of six on the account, with eight people on the client side. All of them need to collaborate with each other on the content. With 48 combinations all being funneled through two project managers, you have a lot of room for error," Ronan said. "When a problem happens, you take half that team at \$150 per hour for half a day, and that's \$4,200 right there. You're already talking about more than the cost of a year of PBworks."

PBworks is now an integral part of each new client project. "We have a dedicated person who creates the PBworks framework for each client and handles giving the tutorial. Our clients will tell you--using PBworks has made the process more productive than it ever was before. People love to talk about content, but we go home at night thinking, 'Oh my goodness, the content.' It's a beatdown. You guys are saving us from the beatdown."

Conclusion

As we have seen, the professionals in the creative services industry are the ultimate knowledge workers. In an increasingly virtual and distributed world, online collaboration

becomes essential to managing projects, engaging employees, and satisfying clients. And because the time of their staff is so valuable, design, marketing, advertising, and public relations firms can generate incredible improvements in both productivity and profitability using tools like PBworks.

About PBworks

PBworks is the world's leading provider of hosted collaboration solutions. Leading companies and organizations like FedEx, Bracewell & Giuliani, and the FDA choose PBworks to collaborate with employees, customers, partners, and vendors. We host over 800,000 workspaces, serve millions of users per month, and 94% of users would recommend PBworks to a friend. Over 50,000 businesses have chosen PBworks to implement knowledge management, extranets, project management, and a host of other business processes and workflows. PBworks' investors include Mohr Davidow Ventures, Seraph Group, Sippl Investments, and Ron Conway.

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