



CROOW

How to Rock Remote:

10 Experts Share Best PM Practices

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REMOTE PM FOR CREATIVES

01

WHY THE FUTURE OF CREATIVE WORK IS REMOTE



JON TSOURAKIS
President and Chief Revenue Officer, Oyova

It's been said, but bears repeating: remote work is the new normal. If you find yourself suddenly thrust into a virtual setting, making up rules as you go, you might feel a bit disorganized and overwhelmed. Luckily — we have experts for that. We've collected ten thought leaders from creative industries to share their best practices on implementing project management techniques to help you clean up your act and rock remote. Read on for some superb insights!

Creativity is Key

When pressed for the most important strategy for creative remote collaboration, Jon Tsourakis immediately responded, "Creativity. Problem solving requires creativity. Connecting the dots takes creativity."

As the current president and chief revenue officer of a team of 25, his web development and marketing company, Oyova, only recently shifted to remote work. While some employees work out of state and are often remote, the agency has two main offices in Florida and most employees worked five days per week in-person. Oyova's shift to remote work has forced Jon and his team to be more direct when providing feedback, while also remembering to be human and adapt to the current situation. Rather than waste time going back and forth through email, colleagues across multiple departments are forced to get creative and learn to communicate and solve problems at a quicker pace. This has become a benefit for his internal teams and also his client work, as clients are getting more available customer service and internal teams are quickly turning around development projects. "I wish we did this sooner," Jon shared.

Set Process Guidelines

One of the most important aspects of remote creative collaboration, according to Jon and other agency leaders, is the use of collaboration platforms such as Zoom, Slack, project management software, plus the traditional calendar and email. Without the opportunity to collaborate in person with other teams or stop by your colleagues' office to ask a question, it's more important than ever that employees keep their calendar updated and publicly shared with the rest of the team. Not only is it important to communicate via email and Slack, it's also going to be imperative that teams align on what each collaboration tool is used for. "It's greatly important that leaders outline the processes from the very beginning, while also being gentle and direct," said Jon.

Commit To Your Team

As the president of a company, Jon had high hopes for his team's level of commitment when they first shifted to 100% remote work. He was pleasantly surprised. "I was thoroughly impressed with the team's level of maturity and ability to adapt to the situation, deliver, and execute." For both leaders and employees, this level of commitment has shown why remote work can be a long term benefit for companies. Not only does it change the discussion around work/life balance, it gives managers the opportunity to communicate more effectively and intentionally with their teams.

Jon spoke to the fact that as a leader, you may be physically present in the office, but you may naturally close your door and make yourself less accessible without meaning to. With the remote work lifestyle, managers are able to be more readily available, teams are speaking on more immediate terms via Slack and text, and relationships between teams are actually improving.

Teamwork in Action

What is the quickest way to take these strategies and make them best practices for your team? First, as a leader, you need to set the standard for remote work communication and collaboration. High touch leadership and being as authentic as possible will be very important going forward.

According to Jon, his strategy is to check in more often than usual: "Send a random email or Slack to your teammates, let them know nothing has necessarily changed, while also giving that in-person presence." It's going to be important for a leader to remember to reach out to their employees and colleagues, including opening up opportunities for water cooler Slack channels, like #jokes or #happyhour so that teams have the opportunity to let off steam and stay connected to each other. This will help internal teams build stronger bonds as the future of collaboration continues through a screen.

02

REMOTE RULES OF ENGAGEMENT



DIMITRI MOISE
Project Manager at Global Thinking Foundation USA

If you're following the trends, you'll know that rapport is in. In fact, according to Deloitte's 2020 Human Capital Trends report, 79% of those surveyed said that a sense of belonging was important to the success of their business, and an overwhelming 93% feel that this belonging drives organizational performance. However, only 13% felt very ready to address this trend. In the world of remote work, building your workplace community can have more unique challenges — so best practices are key.

Luckily, Dimitri Moise has some to share. Moise is a performer, activist and media consultant from Brooklyn, New York who has worn such hats as a non-profit co-founder for TORCH, a managing editor for Pride Publishing's Chill magazine, and actor. "Fun fact — I made my Broadway debut on my graduation day," Dimitri says. All of these diverse experiences have made Dimitri an expert in teamwork, and he's got a few key practices when it comes to engaging your team.

01

Understand Your Team

The first thing you have to do is lay the groundwork for personalized outreach. This means you have to know your team, and anticipate any challenges they might have working in a remote environment.

"I think people who are not as tech-savvy or used to the digital lifestyle — it can make it difficult to plan meetings," Dimitri says. "If I'm running a meeting, I want to make it equitable so that everyone can access it in some sort of way. So for example, if someone doesn't understand [your video platform], have the wherewithal to reach out ahead of time to help the person connect over the phone. Almost like a teacher adjusting to different learning styles. How do you make sure access is equitable for your employees?"

02

Reach Out & Connect

Now we understand what we should aim to learn about our team — but how do we do it? In the world of remote work, outreach is imperative. To make the most of everyone's time, Dimitri suggests that there are a few practical approaches to take.

"Before any meetings, I like to give five minutes off the top [to ask], 'How are we feeling?'" he says. "In general that provides a really great blank slate for people. You never know what people are going through. I like to practice social and emotional learning in the workplace. We have lives outside of the Zoom calls and may be at different places, and it's important as a manager to honor those places. I did an ice-breaker where I said, 'Share how your week is going with only 3 words.' We did it popcorn-style where each person picks the next person, so that keeps the rest of the group on their toes, and it's structured and concise so you wouldn't lose people. Plus, I could adjust my meeting based on their answers — are they tired? Are they annoyed? This doesn't just make them engaged in the meeting, but [they become] engaged with each other."



03

Be Prepared

Have you ever attended a virtual meeting that felt like you'd entered a realm of talking heads? Meeting after meeting of zoomed-in faces can become monotonous, and be a big hurdle in your battle to engage your team. That's why Dimitri recommends coming to your own aid with some visuals — even if that means more legwork in advance.

"I'm planning all our Pride events [for our] church," Dimitri says. "We can't meet [in person], so I'm doing everything virtually. We had a meeting discussing all these Pride events, so while it was extra work, I made slides to present and made sure people were following along, including points in the deck where I could ask if there were thoughts." This can also help you keep to an agenda, stay organized, and keep to time in your meetings.

04

Tech Is Your Friend

Finally, when you're remote, technology may feel like a necessary evil — but make it your friend (or at least your frenemy). Dimitri recommends getting to know your meeting platforms, because then you can use their features to their greatest potential.

"I like to use the chat function a lot," he says. "If I'm [in a meeting], I'll ask questions and have people comment in the chat." If you've ever tried to say something in a meeting only to have your sound cut off by someone else doing the same thing, you know the over-talking frustration is real. "This is a total logistic thing but I usually mute everyone on entry and keep them muted till I need certain individuals to speak," Dimitri says. "I engage more if I can see faces, not be interrupted by all the noise, and just check in a chat."

If your meeting platform comes with a gallery view, this can be a fantastic tool to offset the struggles of physical distance. "If you're with a team in person, you can visibly see if someone is struggling," Dimitri says. By using gallery view, you can see "if someone is out of frame or on their phone. Look for active cues as a manager to see if someone is not paying attention, and then shoot them a message," he says.

TEAMWORK IN ACTION

"Always remember the rule.... 80/20. Try listening 80% of the time and speaking for 20%. You'll be surprised by what you'll come to learn."

03

REMOTE CULTURE CLUB



JOLENE RHEAULT
Owner of Refreshing Solutions

“When you think of the words ‘work culture,’ usually the last thing on your mind is how to implement it for a remote team,” Jolene Rheault, owner of Refreshing Solutions, says. But as remote work continues to become the norm for many businesses, it’s time to think about building culture outside of physical spaces. “It’s hard to believe that you can do team building activities while working remotely, but hear [me] out,” Jolene says. “These are no replacement for trust falls (because who doesn’t love those!) but they are great ice breakers designed to build a sense of collaboration between co-workers and maybe even elicit some laughs.”

01

Virtual Happy Hour

“Holding simulated happy hours, coffee breaks or lunches with remote teams will foster a sense of unity, camaraderie and understanding,” Jolene says. “In the long run, this kind of connection makes working relationships much better.” You can organize a get-together like this very simply, by booking some time on your team’s calendar and using a video platform to spend time together — apart. Or if you’re looking to up the ante, Jolene suggests working with some help. “The Go Game comes with your own personal host and DJ for an hour and even has virtual happy hour integrations that include things like pub trivia, Pictionary, Categories, fact match and lip-synch.” These days, there are virtual escape rooms, remote concerts, and so much more — you really have a wealth of options to pick from.

02

Hack-A-Thon

“As creatives, this is one of our favorite team building activities,” Jolene says. In the creative context, a hack-a-thon would be a sprint-like event where all of your teams work together to develop a brand new product or service. “It gives team members an outlet for their creativity and fosters the ultimate collaborative environment,” Jolene says. “At the end of the day, each team presents what they made and sometimes companies will even have everyone vote for their favorite one to turn it into a real offering from the business.”



03

Collaboration With Remote Teams

Beyond organized activities, day-to-day communication is imperative for your team's well-being and success. "Communication is so important when working virtually and if team members can't communicate properly, it can lead to resentment and frustration," Jolene says. She recommends moving beyond email, and investing in a more advanced communication tool. One fantastic example is Slack. "Nearly any organization can use Slack, and the free option has no limit on the number of members that can join a group," Jolene says. By providing a method for real-time communication with channels that allow for work and non-work related conversations, platforms like Slack can help you feel connected no matter where you are.

04

Tech Is Your Friend

In remote spaces, the days of white-boarding in the moment with your peers may feel like a distant memory. But by adopting a great collaboration tool, you can plan, design, and review with your team and clients. For example, CROOW was built with creatives in mind, and offers the functionality that Jolene says will enhance your performance, no matter how far-flung teammates are. "With everything from mood boards to brand asset features to better review and approval pathways, you can't go wrong," Jolene says. "By providing features like these, teammates are less likely to get frustrated and spend long hours on documentation in different places and so forth."

TEAMWORK IN ACTION

"It's extremely worthwhile to put the effort into building a positive remote team culture and fostering a collaborative environment."

04

GUIDE TO PM SOFTWARE



IVAN GIL
Co-Founder, Picture + Story

Prioritizing tasks, staying accountable, and hitting deadlines — these are key to a successful campaign normally, but their importance skyrockets when your team is virtual. So how can you keep everyone on the same page and moving towards project completion? Project management software is a handy tool in the battle to stay organized.

There are lots of options on the PM software market, so you may feel overwhelmed trying to pick one. Luckily, Ivan Gil is here to help. Ivan is the co-founder of Picture & Story, a consultancy geared towards supporting non-profits with their marketing campaigns. He's also the Director of Marketing and Communications at NASPA, a higher education association — and, a new dad. So you can imagine there are a lot of things he's juggling. For this reason, Ivan relies on a PM approach to his work. "Account managers are project managers. That's essentially their jobs," he says. Here are Ivan's top tips for selecting PM software to support your teams.

01

Features

First and foremost, you need a clear vision of what features are necessary for you and your team. Ivan suggests coming up with use cases to help guide this list. "Project management, at the end of the day, is helping solve and prevent problems," he says. So what problems are you trying to solve? Reducing emails and meetings, maintaining task lists, and calendar functionality could all be important features for your organization. "Calendar is key," Ivan says. "You have to have that global perspective. Not only is it a calendar, but it's one that has everything associated with it so we don't have to look in multiple places."

"I love actually getting my hands on tools before making a decision. I want to be able to ask for a temporary account or demo that I can play with — and I like to break things. I ask myself, what are the random use cases I can think of that people would ask for — and test them."

02

Integration

Another critical consideration when assessing potential PM software is how it integrates with your existing tools. "If you're using a good communication tool, it shouldn't feel like you're adding just another tool [to that]," Ivan says. "It should feel like it's part of it. Otherwise you'll feel like you have to update the chat, then go and update in your new tool — that's where it becomes tedious."

Integration doesn't only apply to your existing tools, but to your team's processes and procedures, both today and one year from now. "Make sure whatever tool you select isn't just the tool you need for right now, but the tool you need for the future," Ivan suggests. "It's future-proofing your tool. Ask the tool owners these questions: Are updates being done on a regular basis? What new features will roll out? Can we get a sneak peek? How willing is the development team to hear you out on the features you need? You're not just picking a tool, you're picking a partner."



03

Adoption

One of the most important considerations you can make when selecting a tool to support your project management tasks is, will your team adopt it? All the bells and whistles in the world won't help you if nobody is actually using the platform. "One of the harder parts is making sure people are trained and using the software as they should," Ivan says. "Everybody works differently, so one of the things I'm a big proponent of is making sure there's flexibility. Some people like stickies, some people like their to-do lists, some people use Outlook Tasks. If someone doesn't feel comfortable with something, they're not going to use it. So in terms of specific functionality, it needs to be flexible. You should be able to add or remove features based on how people work."

That said, Ivan also believes in encouraging your team to get their hands dirty in your selected tool. "Yes you have to be flexible, but you have to be able to follow a structure because there are decisions that need to be made that the structure allows for that time/flexibility," he says. "At Big Brothers Big Sisters, the platforms we grew out were heavily adopted. We marketed it in such a way that it seemed too good to be true, and then when they got in the tool, it lived up to expectations."

Ultimately, Ivan says that a tool must be utilized at all levels of an organization. "You need to be able to have adoption across the organization, but specifically at the top. If you're implementing Slack, for example, and you don't have your CEO actively in Slack — that doesn't work. Employees need to be able to feel like the barriers of access are eliminated to the CEO." So practice what you preach to see your adoption increase!

TEAMWORK IN ACTION

"The question you need to answer first is, how invested is the organization going to be in selecting the tool? Is there someone responsible for ensuring people are using the tool, or will you have a dedicated person to update it accordingly? Otherwise, it's going to be another tool no one uses. From a staffing perspective, figuring out what sort of commitment you're talking about up front is essential."

05

TIPS FOR VIRTUAL GROWTH



VICTORIA PECIC
Marketing Effectiveness Program Manager at Nielsen

If you've only recently joined the remote working world, rather than skipping down the road towards a thriving agency, it may feel like you're simply trying to survive. So it could feel overwhelming to consider growing your business right now. But according to Victoria Pecic, Nielsen's Marketing Effectiveness Program Manager, there are some straightforward strategies you can adopt to strengthen the foundation of your team and set yourself up for increasing success.

Victoria would know — before joining one of the biggest information, data and measurement firms in the world, she worked in operations for the Billboard Music Charts team, and for the Federal Reserve. She has experience as a product owner, scrum master, project manager and product manager, and was kind enough to let us pick her brain for her top tips for growing remote teams.

01

Communicate Effectively

If you want to achieve growth, you need to nail your basics — and that means communicating well across your team, no matter the remote circumstances. “Unfortunately, miscommunication is the root of a lot of issues that exist when you’re not in person,” Victoria says. “Miscommunication travels really, really quickly when you’re not face to face.” Victoria recommends combatting this in a few ways. First, make sure you’re including everyone you need to include on important messaging. Don’t be afraid of the CC!

Additionally, when you think of on-boarding new team members or simply setting proper expectations for your existing team in a new remote world, put together a presentation. “Outline team responsibilities,” Victoria says. “Cover topics like your rules of working together, your cadence for ceremonies. Decide up front on expectations: if stories spill over, it’s not a big deal; or, if stories spill over, we’re treating it as a big deal. Missed expectations are the reason for disappointment, not the fact that you didn’t do something.”

02

Don't Forget to Document

With teammates in a variety of locations and time zones, information needs to be widely accessible and trustworthy — which is why it’s more important than ever to document your progress. “We have one work breakdown sheet, and all of our directors rely on that to say, here’s where we are, here’s all the stuff that has to happen before we can go to market,” Victoria shares. “As a remote team, you have to physically update that sheet — versus when we were in person, they were post-it notes. You could just go [to the white board] and move one post-it from to-do, to doing, to done. It’s a lot easier to do that when it’s right behind you in person rather than having to sign in, color code, or assign to other people in remote software. But it’s more critical than EVER because you don’t know when someone is looking at something. It has to be up to date.” There’s no forward movement — and no growth — if projects are thrown-off or delayed due to inaccurate information.



03

Facilitate Accountability

One of the best ways to keep your team on the same page, and bought in to the project at hand, is to act as a facilitator instead of a dictator. “Instead of mandating, ‘We’ll do a stand up every day for 15 minutes,’ reach out to your team and see what they’re thinking,” Victoria suggests. “Find out what’s inside their heads. In most cases, they’re willing to adapt and have good ideas, so leverage that and see what they are comfortable with and what they were going to do before you asked.” By seeking out recommendations from your team in regards to tracking task progress and providing updates, you can make efficiency gains and foster creative thinking broadly across the team.

“Previously a lot of project management was really administrative and very prescriptive, and we’re seeing this shift today where it’s more outcome-based and facilitation-based, and I think in the landscape of remote work that’s even more necessary,” Victoria says. “When everything is remote, you have all the artifacts you need — why would a PM have to corral documents into a folder anymore or update timelines? We’ve really seen the shift of accountability to the team as a whole, so the role of the PM has shifted into making sure the voices of the team are heard, and encouraging those who are more meek or on mute to speak up.”

04

Implement Bungee Cord Thinking

“It’s almost like effective project managers are fortune tellers,” Victoria says. “We think of the next 5/50/500 steps, and we really play it out. I call it bungee cord thinking. It comes from Six Sigma and The Five Whys, but that’s looking backwards. Effective project managers look forward.” Instead of why, Victoria recommends asking, “OK so what?” For example, if your project is dependent on a contract that was scheduled to come June 1 but was delayed to June 15, don’t be quick to assume the after effects. “An ineffective project manager would say, ok we’re delayed to June 15, that’s 15 days overall,” Victoria says. But what about the other deadlines that will now have to be pushed back because of their dependency on that contract? “Would you rather know up front that you’re delayed 15 days, or two months? You need to be able to play out your scenarios, and don’t stop — keep going.”

TEAMWORK IN ACTION

“A team is a team — otherwise it’s just a group of people who are working on something. You’re gonna have to onboard people when you’re remote, and let people go, and people will go on maternity leave. They’ll only come back if you made it personal. Don’t lose that human element.”

06

GET STARTED WITH REMOTE PROJECT MANAGEMENT



SARA CASSIDY
Head of Product — Senior Director at Earnd

What if you want to harness the power of project management in a remote world, but you've never really applied PM practices to your work before? Take it from a pro — Sara Cassidy, the head of product at Earnd, has years of experience as a project manager at a Fortune 500 company, and knows what it takes to oversee a successful campaign. For Sara, thinking about project management means thinking about time management. "How do we organize our meetings and organize our thoughts so that we utilize our time wisely?" She says this is the question to keep at the forefront of your mind as you begin to implement PM processes.

01

Back to Basics, Down to the Details

When you're looking for a foundational touchstone of project management, Sara suggests framing it in terms of the design life cycle. "The hardest thing in remote work is you have to understand very quickly what are peoples' goals and motivations so you know immediately where they're coming from," she says. "So we go through each topic and talk about goals for those topics. Then we define success ... what does success look like? Do we agree on the timeline? Did we scope this? Do we have the product we want? Let's go through the requirements. Did we put this across the timeline?" Posing these fundamental questions will result in timelines, accountable parties and scope of your campaign. As these appear, write them down!

"We live and die by our tickets," Sara says. "Write the details down. Before I can hold someone accountable, I need to understand what I'm holding them accountable to. If they say, 'Yeah I'll get that done in two days,' I need them to define what they're getting done for me. Be accountable to a fact or a task rather than a person."

02

Plan for Change

Another key element to a well-managed project is planning for the unplanned. "You have to build in a buffer for requirement changes," Sara says. "And you have to build buffer for decisions taking longer to make. Build that into your timeline." You're probably used to readying yourself for a fresh slew of feedback from your client on their latest product campaign, but remember — it can come from inside the house, too. What would happen if the one designer working on that logo was out sick for a week? What if your account manager needed to go on paternity leave? What if you're supposed to pick a color and font in a meeting, and the meeting comes and goes and you haven't picked anything? Building in a buffer up front will help you stay calm and keep to schedule later.



03

Time is Priceless

Let's circle back to time for a moment. We've heard it flies, is money, heals all wounds, and a stitch in it saves nine (whatever that means) — but most importantly to a project manager, time is limited. There are only so many working hours in the day, so the more waste you can take off of a team member's plate, the better. But how? "I live and die by our ticketing system as true north," Sara says. "And then Slack is key. Especially being respectful of people's time right now. Coming from a culture of texting [at my previous job], I try to keep things in Slack to help be respectful of everyone's time zones. People are drowning in email. If I have something that could help people, I document it and put it in Slack."

Besides removing some emails from your peers' queue, do what you can to save your own time, too. When you're looking to adopt a new process or procedure, stick with what's easy. "I don't have time to train everyone, so I want to keep it in the wheelhouse of what people know," Sara says. "I don't want to reinvent the wheel."

04

Define "Done"

One huge difference between remote project management and in-person project management is that you can't all sit in the same room and look at a tangible asset together. There are no walk-ups in the traditional sense, so you need to make sure you're on the same page in regards to quality of the finished product or task. "You look at great athletes — what they do well are the details," Sara says. "Kobe or LeBron wouldn't leave [practice] until they hit a certain amount of free throws. You can't have your definitions of 'done' until you close out all your tickets, or meet all your requirements. You don't have the luxury of fixing it in the mix. You've gotta be on your A game."

And when it comes to "done," documentation matters here, too. "I think the most dangerous statement right now is, 'What is fill in the blank doing?'" Sara says. "'What is that team doing? What is that person doing?' It implies that they're not doing anything — and that's just toxic. The more transparency you have — this group is delivering this feature, or this designer is working on this part — reminds us, we're all in this together."

TEAMWORK IN ACTION

"The team has to trust their project manager. It goes back to those details — you gotta show them a plan. If doubt creeps up, pull up the facts. Go back to your artifacts and say, nope — it's ok. Here's the plan."

07

HOP ABOARD REMOTE ON-BOARDING

**TRAVIS LEONE**

Director Of Lifecycle Marketing at Houghton Mifflin Harcourt

Bringing new talent into a remote working environment can be tricky. It's not as simple as grabbing a coffee with the newbie and introducing them to team members on the walk back to their desk. You have to be measured in your approach, and think through all of the main points your new colleague will need to know to be successful. Travis Leone, the director of lifecycle marketing at Houghton Mifflin Harcourt and an adjunct professor at the University of South Florida, has been on-boarding team members for four years, and has some hot tips for how to nail the process and create a truly welcoming virtual environment.

01

Welcome Wagon

If you're the manager of a new employee and you're on-boarding them remotely, you have a particular responsibility to provide proactive outreach and a coordinated warm welcome. "You don't have the ability to take them out to lunch in person," Travis says. "You could do a virtual meeting over lunch, but you don't have the ability to walk the halls and introduce them to other colleagues in person. You don't have the ability to swing by their desk and talk to them informally. It requires a little more consistent communication."

Don't despair — just because the old ways of casual introductions may be unavailable doesn't mean you're limited in connecting creatively. "I ensure that I am establishing a relationship with my new employee," Travis says. "I'll meet regularly with them a little more heavily up front so I have an opportunity to establish a relationship. Things like — hey, why don't you go to a conference room and I'll video chat with you, we can lunch together." Travis also recommends pairing up the new employee with a buddy, particularly if that buddy is physically close to the new person. This can help make a remote team feel far less remote.

02

Tools for Success

Just as you would get a new employee set up with all the proper tools and software they'd need in a physical workspace, technology is still a cornerstone in the remote on-boarding process. But what tools should be on your must-have list? "Tools like Microsoft Teams and Slack are paramount in that they offer quick communication," Travis says.

"I'd also say some type of project management tool. Using a tool like that is very helpful because it allows us to keep track of project status." If any of your tools will require training, you'll need to make sure you have someone assigned to tackle that training with your new employee. If the tools can be learned independently, bake in time for that self-discovery in the first few weeks of your employee's schedule.



03

Check it Twice

To keep yourself organized in the on-boarding process, one critical best practice is to create a checklist. “Put together a first week checklist of things they need to do,” Travis suggests. “Things like getting their email address set up, providing access to the internal servers, downloading these different types of communication software we use. You can couch it in the context of a getting started checklist that the on-boarding employee can have next to them and work through.” This helps ensure you don’t miss an important on-boarding step, but it also provides some clarity and comfort to the new employee. They know what they need to do, and can easily update you on their status.

“You have to almost treat on-boarding a new employee as if you were making a presentation to your boss,” Travis says. “You have to have a clear agenda, walk through items step by step, provide them with take-away materials, and give them things to follow up on — some self-development for researching things themselves. It requires more communication, and more up-front preparation going into on-boarding sessions with them.”

04

Back to School

Even as an adult, the word “homework” probably makes you cringe — but it can be very useful in the on-boarding process. There are a few types of tasks that can set a new employee up for success. “Ask the new person to familiarize themselves with your products and services, and what you’ve done traditionally with your marketing (looking through examples) so they can be armed with the right questions when they are in subsequent meetings,” Travis says. “This way, they’re not asking questions that already have documented answers. They’re armed with background context of what you do.”

Additionally, it can be a good idea to assign a daily status report to your new employee. “Ask new employees to provide you with a daily hot sheet, with three bullets of what their focus is for the day,” Travis says. “It allows you to verify that the new employee is doing things that align to your overall strategic direction. It’s not to micro-manage, but when you are remote, over-communication is necessary. And something as simple as a daily hot sheet helps them stay organized, and you can be a better manager to them.”

TEAMWORK IN ACTION

“Meetings are more important now than ever before. One-on-one meetings and team meetings help ensure we’re working on the right things, and executing the right strategies.”

08

FAVORITE PROJECT MANAGEMENT FEATURES



NATHAN JOHNSON
Founder and Creative Director, Allison's Alligators

Project management tools are the future. According to Finances Online, organizations that use proven PM practices waste 28 times less money than their counterparts. All businesses strive to save time and money, and PM processes aren't just limited to certain industries. Remote creative teams can benefit in big ways by adopting best practices. Nathan Johnson, founder and creative director of Allison's Alligators, is currently leading a team of 20 people across the U.S. and Canada, and is a master of project management collaboration.

Nathan comes from a background in sales, working the first stint of his career in an international business position with Nestle where he handled customer relationship management. Working alongside creative teams, he gathered customer feedback to make sure the creative and the product were satisfying customers. What he learned was that customers were not satisfied with the disconnect they felt from working far apart from the creative team, and he sought to provide a better solution. Now, his creative agency works with large companies who have been strictly focused on their business rather than keeping up with the heavily evolving marketing trends.

01

Useful Platforms

The first step towards implementing or improving the best remote collaboration techniques is selecting your tools, and communicating to your teams what, when and how each one will be used. Nathan shares that his teams rely on multiple tools, but each employee knows which software is used for which task. For example, they use a cloud storage service for file sharing. They use a project management software to track progress and create a visual timeline for external clients. They use design tools for all creative and graphic design projects. And recently, they've added an additional storage tool with higher security specifically for clients with the most sensitive data to protect. Knowing what you need can help you identify which tools to adopt.

02

Most Important Features

But how do you figure out which features you need? According to Nathan and his team, having cloud storage and two-way communication are the top two important remote collaboration tools. In order to quickly move projects through the funnel, a clear-cut feedback feature is necessary. This streamlines the approval process by providing a central location for editing and commentary, and there's no need to constantly get on the phone or send emails that ultimately get lost in the mix.



03

A Day in the Life

On the average day, Nathan and his team are doing 10+ projects at once. They spend a lot of time working on content, which requires hours of research for each client and their industry, attending public speaking engagements, partnering on strategy sessions, and executing campaigns. Although their team has been working remotely for years, they have found a new appreciation for video calls and screen sharing becoming the new norm. With the combination of working remote and utilizing project management tools and techniques, they have already seen an increase in efficiency and decreased turnaround time on creative projects. The clients are happy, so Nathan is happy.

TEAMWORK IN ACTION

"Learn how to delegate — and explain exactly how you want things done. Once you master delegation, processes within creative teams should become fully automated."

09

DO'S AND DON'TS OF CREATIVE DIRECTION



JANEL GANCENA
Art Director at Sparxoo

"How is this possible?" This was the first thought of Janel Gancena, Sparxoo's Art Director, when the entire company moved to remote work. "I wondered, how am I supposed to give very detailed feedback? I'm the type of person where, if I'm sitting with you, I'll want to point and say, this is what I'm thinking. It was very easy in the office to just go up to a person and say, 'Hey, I don't really understand this,' or, 'I want to talk to you about xyz,' and we would just talk it through." Since the shift to a virtual workplace, though, Janel has managed to come up with creative workarounds and best practices for leading a creative team. Here are her top tips.

01

Do: — Picture It

When you're in the leadership role of creative director, you need to have vision. "You need a wide look on all of your projects so you're aware of the client's mission and goals," Janel says. "That's how we can figure out what we need to do to get them there, and what we can do to push them, because we're the experts in our field and they're coming to us. They know what they want, but they may not know what they need to be truly successful. It's about thinking strategically and bigger picture to get them to that spot." Janel recommends selecting a collaborative project management software in order to quickly access up-to-date project and task statuses from your team.

02

Do: Invest in the Process

While it may be tempting to simply impress your stamp of approval onto a designer's work, Janel says it's much better to invest in the process. "You don't want to just go through the motions," she says. "If a designer is sending me stuff to approve, I want to understand what their thoughts were — their design rationale. I want to understand their choices on color or typography. As the creative director, you should make sure the choices you make in a design are always going back to your client's goal."





03

Don't: Be a Control Freak

Micro-managing is one of the biggest sins of creative direction. "From my experience as a designer, I want to be able to explore," Janel says. "I think that's what empowers any creative, is when you can really think about it yourself, and feel like you got there through your own work and thinking. It helps your confidence, which helps improve your skills, and then that just helps everything." This doesn't mean you need to lose track of the details — Janel admits that she'll notice if just one pixel is off. But if you put your team and their growth first, you'll get better results. "Now it's not only about you, not only about your work, it's also about trying to teach junior designers how to be better," she says. "They can't be better if you're just telling them what to do."

04

Don't: Demonize Mistakes

In every campaign, you want your team to produce the best possible work. But if you think that means you can't give your designers space to make mistakes — think again. "I think that's what prevents a lot of designers from either being sure of their work, or being comfortable talking about their work," Janel says. "I think a responsibility of a true creative director is to provide an open, safe space for their designers who want to explore. You're supposed to make mistakes, that's how you learn — especially in design."



TEAMWORK IN ACTION

"We've created a Google Hangout version of a study hall. Sometimes it's an hour, sometimes it's a whole afternoon. I'll usually play a little bit of music very low, and we'll talk about what we're working on. There's long stretches of time where we're silent and working, but it's cool to know that there's someone there. It energizes everyone to be around each other."

10

PRODUCTIVITY CHEAT SHEET



ALEXIS QUINTAL
Marketing Consultant, Alexis Rose Co.

Our final best practices for remote project management come from Alexis Quintal, a Tampa-based marketing consultant with a black belt in organizing and prioritizing. We'll let her take it from here.

“As a sales and marketing consultant, community-involved leader, and philanthropist, but also a fiancé, friend, big sister, and church volunteer, staying organized is key to staying productive. Here are some cheats to using project management in your personal and professional life.”

01

Organize

“Having a to-do list organizer is KEY to keeping multiple projects on track and minimizing the risk of missing any important deadlines. The first thing I do when I start my work day — other than reach for a cup of coffee, of course — is open my to-do list. It’s also the last thing I look at before I sign off at the end of the day to make sure all of my boxes have been checked off. The best feeling in the world (other than finishing a good book) is crossing off items from my to-do lists!

Half the battle of organization is keeping your assets and documents organized. With many new project management tools offering “clouds” with storage for you and an external partner to access, knowing where your documents are at all times, and having the ability to access them from anywhere is a game changer.”

02

Schedule

“Your calendar should be your daily bible — updated at least seven days ahead of time with any meetings or commitments you must attend to. I even include my personal commitments so I am able to balance out my personal and professional life without having to worry about dropping the ball on anything (or anyone) important.

By having an organized and clear schedule, you have a better chance of keeping your work-life balance intact, and you can be honest with yourself about what happy hours you can or cannot attend. By having your schedule booked at least seven days ahead, you can also avoid any stressful situations where you realize you’re double-booked.”





03

Communicate

Whether it's a personal or professional conversation, treat all discussions with priority and remember to be kind. Respond to emails within 12 hours, even if it's a quick "thank you." It is very important you acknowledge the sender, even if it's to tell them you need more time to gather the full information required to respond. Don't leave them on "read" and never go back.

Be direct and clear — it will save you the back and forth that comes with a buried message. Listen to others and take notes so you can remind yourself of the important information covered later on.

04

Prioritize

Prioritize not only your work, but your mental and physical health so you can give 100% to each project. A to-do list, organized folders and a clean email inbox is one thing, but a healthy body and mind can also do wonders towards your ability to manage multiple projects at once. Remember that prioritizing not only helps you with the quality of your mental health, but it helps the quality of your work. By having your timelines set up properly and giving yourself the time you need to focus, you will submit better work to your clients and colleagues.





CREATE AND COLLABORATE WITH CROOW



Ready to put these tips and tricks into action, and manage your creative campaigns like a top-notch project manager? Check more off of your to-do list with CROOW, the collaboration platform built by and for creatives like you. By utilizing tools like time tracking, wireframing, approvals and asset management, your projects will be completed promptly and conveniently located in one place. Schedule a demo today and tour CROOW to see how it could work for you.

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