**HOW Design Live**

**Scott Talbot, Art Director for Lucid Press and Caleb Hepler, Creative Director for Lucid Chart – *Seeing The Bigger Picture: 5 Tips To Improving Creative Team Management***

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**Speaker Introduction by Amy Conover, HOW Show Director:**

**Q&A**

**Q: HOW Design Online Attendees for Digital Session – read by Amy Conover, HOW Show Director**

**A: Scott Talbot, Art Director and Caleb Hepler, Creative Director at Lucid Software**

Good afternoon and welcome to HOW Design Online. I am just thrilled to have you here. We're excited today to be with Scott Talbot and Caleb Hepler. They are presenting on behalf of Lucid Software, Lucidpress and Lucidchart. They will be sharing about Seeing the Bigger Picture with 5 Tips to Improving Creative Team Management. I am Amy Conover, and I am the Content and Show Director for HOW Events and just thrilled to have you all with us.

Let me tell you about Lucid Press. They are a brand templating platform that empowers anyone to create and distribute on brand marketing content. Their comprehensive template gallery features hundreds of professionally designed options for you and your team members to choose from while the brand asset hub and advanced template locking help you build a stronger brand presence through consistency and customization. So now just a little bit about our speakers Scott Talbot is the Art Director at Lucid Press and he's has seven years of design experience. He knows all too well, the pain of brand and consistency and wasted design time. He is passionate about developing and promoting powerful brands and helping small creative teams punch their weight in his spare time. Scott loves camping in the Wasatch mountains. I hope I said that right, with his family and dabbling in photography.

Let's learn a little bit about Caleb. Caleb is the Creative Director for Lucid Chart, which is a visual workspace that combines diagramming data visualization and collaboration. Caleb's spearheaded a viral video campaign in which he used Lucid Charts to explain doggos and other internet means generating over 350 million views. Prior to Lucid Chart, Caleb worked in advertising, editing, television, and web commercials for brands such as Geico, McDonald's, Capitol One, Kraft, Fiat, and many others. Looks like to me all Caleb does this work cause I have nothing fun to share about Caleb. So he is just hyper-focused doesn't get out and camp or do anything else, I guess. They're all buttoned up working. So anyway, I just want to welcome Scott and Caleb and again, thanks to Lucid Press. I'm going to hop off now and I will be back for our Q and A. So you guys take it from here.

Scott

Perfect. Thank you so much. Yes. again, thank you everyone for coming and for joining us for this webinar. Again, I am well, the webinar has five tips to improve creative management. I'm an Art Director Caleb's a Creative Director. So this is focused towards creative leadership, but also anyone who works in the creative field who is looking to improve their skills or, or move up in their career. We hope that this you'll be able to find useful information in this webinar as well. So Amy did a great job of introducing us again. I'm Scott Talbot, Art Director at Lucid Press. There's a lot of Lucid going on here. Caleb and I work for the same company, but we work on sister products. So we are technically part of two different branches of the company and we don't work directly together, but we brush shoulders a lot, I guess you could say I've been here for almost four years before that I worked in advertising. So it comes from the agency side before I came over here. And yeah, I love it. Caleb. Anything else you want to add?

Caleb

I've been working at Lucid for about the same amount of time, but probably worthwhile for all of you to know is maybe the differences in teams. Cause I think that's where in this webinar that we're going to do would be helpful. Scott comes from a slightly smaller team and then our team for Lucid Chart is 9 to 10 people. So some slightly different dynamics there, which is maybe helpful in terms of how we're answering the questions.

Scott

Yeah, that's true. My team consists of myself, a graphic designer, a developer, and two writers. So my team's a little bit smaller art. Our product that we're working on is smaller. So it's a little more scrappy, maybe represents like a startup, even though we're part of a larger company. But I hope that this kind of provides a little bit of a breadth of, of perspective between like a really small organization and to a, like a more medium sized organization like Caleb was part of. So let's dive into this. Oh, and please, if you have any questions, shoot us questions. We love & A a session towards the end of the session And to prove it, we're giving away a $25 DoorDash gift card so that you can get yourself some food ordered it while you are in zoom meetings all day.

So at the end of the webinar, we're going to be picking a name and giving you a $25 gift card. So you can look forward to that. Anything else before we get started? Caleb let's go. Okay. So the big question I want to like the overarching question I want to answer here is how can you help your creative team reach their potential and create great work? I think that's something that at our core creative leadership really wants for their team. At least I would hope right. Is, is not just for, not just for ourselves, but you want the people on your team to Excel. So I've broken it up into five sections. And we were going to like talk through each one and, and see what we can see, what we can discover. Let's dive into the tips. So before we get started with the first one, I just want to do a quick survey. So this is gonna pop up for you. Do you feel a personal connection with your reports or your leadership? So that's, if you are like a creative director or maybe you're a graphic designer or a writer, do you feel a personal connection? So I'm going to send that to the audience. And I'm really interested to see what comes back. We're going to leave that up for maybe 30 seconds,

Scott & Caleb

Especially in you know, virtual world, right? Like how connected are you,

You know, now after being months away, right? Yeah. It's, it's definitely different. We want it to be sure not to make this like the COVID webinar. I think you've had a lot of those, but it definitely still, like, it plays into everything we're working on right now. Okay. We are done send results to the audience. That's think should get that now. So most of you says, yes, we've got a great working relationship, a third of you, well, a quarter of you, I guess, kind of we get by, and then just a handful of, you know, look there's a lot to do. Who's got the time. Right. All right. So let's dive in to that's. That's good that so many of you have a great relationship and maybe some of you wish you could have a better. So the first one tip is to connect one-on-one with the people on your team.

And that might seem obvious, but especially at least for me, as I move into leadership roles that require a different amount of work and different kinds of work. It can become harder and harder to stay focused on those. What used to be a really easy and casual relationship to have with like the people who are at your same level, it can get harder as you move into a leadership role. And so to kind of introduce that, this idea, like the subs thought here, build the relationships that matter. I just want to share a story about here at Lucid Press. We recently had a new General Manager come on to the, come on to the product. I guess this was a couple of years ago now, but he was brand new. A lot of us had already known each other for quite a while.

We were already friends. He came on, he wanted to be able to connect with people and make sure that he knew us and something that he did that was really pretty impressive is that he took time with each person to discover something they were interested in. And then for me it was cars. I'm a big car fanatic. I wish I could say I knew how to work on cars, but I don't really, but I know an absurd amount about cars and car history. And he like picked up on that and he said, well, I actually have this, you know, I drive an older Chevy Malibu, I'm looking for a new car. Like, what would you suggest? And then like, I gave him some suggestions and then he actually said, Hey, you know, I thought this one was interesting.

Do you want to go do a test drive, should we go check it out? And like, it was a small thing, but it was, but it gave us time, like one-on-one to be able to talk about where he was coming from, get to know each other better, but also showed that he cared about me personally, and that he took time to notice something that I was interested in. And I think that, that went a long ways to building like trust right away. And I really appreciated that about what he did. Caleb for you, your team, when you first came on the team over at Lucid Chart was pretty small and it's grown quite a bit, and you've had some turnover with, with some people moving on to different jobs and hiring new people. How, how are you figuring out how to build a relationship that matters with all of that change?

That's a great question. I think, you know, there's, there's personality times where it's very easy to just like, it's just like second nature, right. To just build that relationship. It's just like it's built in. But I think for many of us especially you know, with the amount of work that we have to do and how busy it is, it has to be an intentional thing to build that relationship. Right. And without it feeling, you know, stodgy and stale right. Or forced. But it has to be an intentional thing. So for, for me, it's certainly making sure that with new people coming in with any sort of turnover that we're folding a new team members into basically the cultural norms that have to do with relationships. So whether that's and our work, right. It's, it's certainly such that the standard is to do weekly one-on-ones right. And making sure we maintain that cadence skip level one-on-ones as well are a great thing to do that I've started to do with some people on the team that I don't get to meet with on the regular.

Just people don't know what is the skip level one-on-one.

So let's say that you know, as a creative director, I've got somebody who's fantastic and is leading the entire you know design team, right. And an art director, that's a senior and is able to lead the entire design team. Well, before him, I had these relationships with individuals on that team, just you know, maybe entry level designers. And with that person in there, who's now managing and doing those weekly one-on-ones, I don't get to have that personal connection, but being the size team that we are about 10 people or, you know, around there it's still really beneficial to have that one on one connection. I think. So being able to say like, Hey, every month, why don't you and I connect and just kind of talk about, as you were mentioning with your example, Scott, what are you interested in?

What gets you out of bed in the morning? What do you care about? So I think those things are really important. The things that are, you know, kind of built into the structure of, of your week, but then also just, you know, making sure that you're opening up time to get to know each other as a group as well. Right. And especially with right now, again, don't want to make this, that whole COVID-19 kind of special, but we have to be really intentional about saying we don't get to sit and eat lunch together. We don't get to, you know, gather on the ping pong table, foosball table, like we did. So let's set aside time every other day or something like that, just to jump into a zoom meeting and say, hi, play a game, just, you know, continue to build a relationship.

Yeah. We actually just got a question in from Jess that says any tips for staying well connected on that personal level with your team while remote. And that you're kind of talking about that, but is there any more you can say, I mean, you just, you just hired two or three new devs and so you're onboarding people in zoom world. Right. So how are, can you talk about, more about that experience?

Happy to, yeah. So we we brought them on, I think in mid June and July. And so what we've done since then is just basically we do team activities, and this is another thing that it's just kind of part of the workplace norms, right? One on ones team activities and stuff like that. So we just, we're very intentional about saying, Hey, for this team activity, we're going to do some like personality activities. Let's really get to know each other. Right. And bring them into this very tight knit group of people that already exists. And we were certainly also very intentional about saying, Hey, you know, new people typically would be eating lunch with us. Typically, you know, we'd be kind of showing you around the office. Well, given the current circumstances, let's all meet in our, we call it a post-lunch social. And it's just a time where we don't want to be really eating lunch together because it's a little gross over video. I think the audio gets a little bit bad, but after once, like why don't you all jump into the zoom meeting, we'll play, you know, a game, whether it's we play Codenames or we'll play you know, this Pictionary game or we'll play, you know, brain teasers or just catch up on the weekend. And that's been a really good way to bring people on. Even though we're working remote.

Yeah. I want to kind of put an exclamation point on this that we do have scheduled one-on-ones every week. And that's something that comes from our corporate culture, but I think is so effective. At a previous company I worked at, we never had any sort of one-on-one or performance reviews. I was like almost two years into this company when I finally had a performance review, even though I asked for one and it was positive. But it really made me feel like was like, was I important enough to, to like discuss things with, and it always made me feel like, do I like where do I stand with you? You know, am I doing good work? Am I moving forward in my career? And what was hard to it? Those are hard questions to like broach and to ask as someone who's, you know, asking their manager.

But if you have consistent one-on-ones every week for a half an hour for a half an hour that makes it really easy to say, like, we already have this time, this is the time to discuss things, you know, that you need to talk to your reports to your manager about. And so some of those some of those tougher questions are easier to tackle. We've got some more great questions coming in. We gotta be cognizant of time, but I also want to cover a couple of these really fast. So Samantha asks, what do you discuss in your one-on-ones? So one-on-ones are, can be a time to get project updates, but more important than that, it's a time to talk about more meaningful things to your reports. So you can talk about their career goals, where they see themselves in five years, what they can be doing now to help move their career into the future.

You can talk about issues on the team. You can talk about you know, are there personal issues that may be preventing them from, you know, getting to work on time or things like that. That's a place where you can really have empathy and really stretch yourself to use your position as a manager to help your reports. And that is super, super helpful. Another question, have you guys had a Pictionary game that works with cute groups? We use Jackbox a lot, which I think you have to buy through steam, but that's a ton of fun. They have a big variety of games you can use. And there's also a couple free ones like the Codenames and what's the draw, Caleb, what's the free drawing one that we do.

You're drawing one and is just scribble.io. So S C R I B B l.io, I think is all it is

Scribble, you know, scribbling, but it's great. Okay. let's keep moving. So the, so the next part of, of having one on one relationships is be a master of feedback. And this was actually a question that was asked a little bit earlier, but how to give effective feedback. And I actually had a creative director once who wasn't a tutorial for giving feedback along the lines of Hmm. That's not just, that's not quite hitting it for me or that's, that's not, it I'll know it when I see it, you know, and that is like the worst feedback you could give to your reports. And one of the, it's a skill, it's a, it's something that can be learned, but learning how to give good feedback. And, and lots of times feedback can means giving some criticism or saying like, you know what, this isn't what we're looking for, but taking time to learn how to do that can be so beneficial for your team. Caleb, do you have any thoughts about that?

Yeah, I think you nailed it. I mean, yeah. You know, the, ah, just not hitting it, just like that makes me cringe. Right. And it's something as a creative director, I'd never hoped, I hope never is the case as I talked to others, but I think the remedy, you know, cause that's really bad feedback. That's, it's so subjective. It's so cloudy. It's like, what does that even mean? But the remedy to that, isn't no feedback at all. Right. We certainly in creative management need to be able to provide good feedback. And so that's why I think these things work one on one, right. Are hand in hand. If you're having one on one relationships with people with people on your team, if you're talking to them, getting to know them, caring about who they are and how they're developing in their career, and it makes it so much easier to have that personal connection and then did it candidly give them really helpful feedback, whether it's on a project, the way they're working, just to help them grow. So I think, you know, it's, it's easy for us or for some of us, right? Maybe some of us are a little bit more direct, but for myself and others, I think it's kinda like, you know, let's let them figure it out or I don't want to push too far. Let's see what they discover. It takes concentration and time to give a really good feedback and to provide that for your team. And so it's a must for me.

Yeah there's a, there's a principle that we use on our time called radical on our team called radical candor, which is basically like being frank with your team, but also being very caring with your team. So that's like you have to work on that to build that you can't just do that in the moment. You're giving feedback, but showing you care and then Barry being very frank with the feedback so that it's clear, otherwise your reports won't know like what you're asking. Any tips on managing a new reports time without micromanaging, especially if they're afraid to say no. And that actually, we're gonna get to this a little bit later in the presentation. So thank you for asking that. Actually appreciate that. Okay. We're gonna move on to tip number two, unless you have anything else to add Caleb now let's do it.

Okay. Tip number two. Don't get in the way of your Avengers. Your team is your Avengers team. And I put it that way because, because you want to see your team as a group of superheroes who all have their unique powers and abilities who all have something to contribute. So we have a couple ideas about how to do that. And the first one is to stay above the fray. And what I mean by that is it can get, especially when you come from like being a graphic designer or a writer, and you're used to doing the day in and day out tasks Oh, sorry. And it's called radical candor. If you Google that, there's, there's a few great articles about, about that radical candor. So staying above the fray is, is not getting too involved in the nitty gritty day to day production activities, right? The individual contributor responsibilities, because even though you are very used to that, you've been doing that for years. You're good at it. That's not your job anymore. And you've, and you've moved into a leadership role. Caleb, you went from doing video production and advertising to now your creative director in house. What has that transition been like? And have you had to work on staying above the fray?

Oh yeah, absolutely. And you're very, you're very right in calling out. It's, it's the place where you previously had expertise. That is probably the, the easiest to just kind of slip into the nitty gritty production and execution details. And so for me with video it was something that I was working on very in depth for a long time and then built up a team and like had to really intentionally pass things off to them. And, and so there's that balance of saying, how do I do this in a, in a way that I I'm passing it off? So it's not the entire thing and it's not overwhelming right. As they try to like be drinking from a fire hose, but am I taking constant steps to say, this is yours, this is yours. This is yours. And keeping myself out of the weeds as it worked. That said, I think it's also really important to think through depending on your that given your, given your expertise your background, your experience, your role, there might be areas where it is worthwhile to, to say, Hey, I'm uniquely qualified for this, but just figuring out a way to do that. Well, enabling your team in the long run. Right. So it doesn't always point to be on your, on your shoulders perpetually. So it's a balance, I think, but certainly the long term goal should be let your vendors do it.

Yeah. We had that question a little earlier about what do you do with like entry level positions and how do you help them go? The fact is, is that lots of times with entry level positions, there's, it's getting to go a little bit slower than, you know, how to do it, right? Like if you, if you jumped in, you could do it, but for you and for the report, the best long term strategy is to let them do it and, and maybe do it different than you would. And that can be, it can be hard to let go of that control. And it's just natural to want to be like, I know how to do this. I'm just going to do it right. And go ahead.

I was going to jump in there because it's a hard to let, like letting go of that control. I think another good point about this. Why is it difficult? I think, you know, to enable your team all the time, we have an emotional connection with the work that we do, right? Like something that, you know, is if you step into some sort of a leadership role on a creative team, and you're kind of tasked with handing something off, there's a, there's a bit of an emotional thing where it's like, well, this is kind of, it's kind of part of who I am or what I do. It's how I identify myself. So letting go of that is something that, you know, takes a little bit of conscientiousness to do it right. And to be okay with enabling somebody else to do it and do it, how they would do it. Right. And if the results are the same, it's just a matter of how they get there and being okay with that.

Yeah. I had a creative director once who's super good at the ability to you know, always stay above the fray. But when it came down to like, I don't know how to fix this, you know, me as the graphic designer, I don't know what to do. And he just had this awesome ability to just sit down next to me, you know, pull up a chair, pull out a piece of paper and start sketching out stuff. And usually that was like all that was needed to break through my block. And, and in that moment, right, he was working on the really new minute thing that I was struggling with, but it wasn't taking away the responsibility of the project. And I think that that ability to like jump in, be a partner with the person on that in the weeds work, and then jump out is really, really valuable.

Now that's great. We got a question. Is there a way to straddle high level work and in the weeds work, especially for those in smaller companies or star startups that often create a dual role? I designed our copywriter and creative director. I am in that exact position right now. I'm an art director. I have a management role. I also do a lot of in the weeds work. And that can be, then that can be a challenge splitting that time. Definitely. I feel that every day and I, lots of times I can feel myself getting in the zone of, in the weeds work. Right. So recently I've been doing some animation, some like after effects, animation work, which requires a lot of hours, just like, you know, cranking out hours of work. And it's really easy and it's actually nice to get lost in that work.

And that feels like home for me, cause that's what I've been doing for years. And it takes a specific effort to plan out both on my schedule and on my to do list, to tackle management issues. And maybe it would be different for somebody else, but taking the time to set up systems so that I have to get my management work done, which is I like, I love my team. I like managing them. It just doesn't come as naturally to me as the creative work. Does. I hope that that helps answer that question. The next thought is you are not a project manager. Caleb, do you want to dive into this one?

Yeah, this is, this is a great one. I mean, it's so easy, especially as you were talking about like managing a creative team and so much of that, right. It, depending on the size of your team and what's at hand and the volume of work, it is so easy to kind of slip into. Well, my role is basically becoming project management and that's it because in order for our team to just like keep moving in order for us to like do you know, significant work, I've got to fill this role. Right. And so I think it's, it's a cautionary thing because you know, at some point, and I think probably kind of hash this out, especially with smaller teams, that there might be a level of that, but to understand that that is not your primary role. Right. And so I think, you know, there was a position that we were in where it was like, Oh, do we hire another designer?

And I was very adamant of like, let's build out a project management team further. I, and I think from Scott, I think you have some great examples of past times where it was like, given that choice, the amount of efficiency that can come, not only as a creative leader, but as a team member, as a designer or somebody who's on video or a copywriter I mean the, the output can just like skyrocket when you're not dealing with those minute tasks of just like making sure that the logistics are right or that the planning is such and all that kind of stuff. So it's one of those things that yeah, if possible offload that as much as you can.

Yeah. I know what you're referring to. One of the ad agencies I worked at we were just, the creative team was just swamped. And we and we could not keep up with the amount of work we were getting. We were having to work late every night. And the, you know, there's nothing more maddening, you know, then a couple account managers rolling into your cubicle at four 30 with, you know, with a drink in their hand, a little buzzed already and saying like, Oh, it's that project. And to get done tonight and just like, Oh, it's made me like so, so mad. But, but, and so I kept asking like, we need more designers and we need more designers. We can't keep up. And what the partners actually ended up doing was hiring a project manager, which at first I thought like, what?

Or like, what are you doing? We don't need a project manager, but the thing, but what happened was all of these requests disappeared like overnight because we needed somebody to ask why, like, why do we need this thing? Does this match this does this match, our goals, does this match what the client really needs or wants? And as soon as someone was there to ask questions and to push back a little bit, all of a sudden all these requests evaporated and like I cannot speak enough about the value of a project manager. They can completely like overhaul your work, your work flow, and make things so much easier. Now that's just now at this moment on my team, we're small enough. We don't have a project manager. And so I'm kind of dealing with that right now. Like how do I balance those two things? And one of the things we've had to do is is to lean on other people on our marketing team to kind of act as project managers and to get that, that roll off of our plate so that we're not having to filter everything and move projects around in a sauna and like makes that all happen. Because if you do too much project management work, you're never going to get the creative work in. And that's really where your value is in being creative. Do you have any other thoughts to add to that?

No, and I think you're, you're the, you're better suited to answer that question really well because you're in that position of having to balance that a little bit more without, which is probably where a lot of people are aware balancing that role without having a specific project manager. Right. It's a little bit more hairy, a little bit more of a gray area, but I think you're spot on to say, how do we share this? What are the areas where I really need to be asking those questions? You know, be the one who's asking, like, why do we need this? Or why does this matter? But really primarily focusing on your role and that is a creative work.

Yeah, yeah, absolutely. Which actually leads right into our next section. And we're going to kick it off with a question. Do you have a clear creative vision and I'm talking about on your team, you yourself, do you know where your team is headed? Do you know where your work is headed? Do you have a clear creative vision for yourself and your team and the company you're working with? So I'm going to launch that survey right now and we'll give about 30 seconds to respond to that. Again, I'm talking about this can be you personally, how you understand the vision on your team. Do you feel like you have a direction you're going in?

Let's see here. Okay. So 20% crystal clear vision inspires my work every day. 60%, I have a general idea where we're working on it and then 16%, no, it's a mess who knows what we're supposed to be doing? Yeah, I I'm super pumped for the 23% of you that have a crystal clear vision. And I think a lot of companies struggle and a lot of creative teams struggle to have a clear creative vision of where they're going. So let's dive into that a little bit. A quick question from Brian, are your marketing teams and creative teams separated into tier two teams or under one team inside a department? My team is the creative team is a subset of the marketing team over at press. At least the press is that's how it is over at lucid chart, right? Yeah. That is maybe worth distinguishing in terms of the marketing teams.

There's a Lucid Chart marketing team and Lucid Chart, our creative team under that and Lucid Press marketing team and Lucid Press creative team under that. So they are distinct. Yeah. Yup. So getting back to these results from the survey casting a clear vision. So part of your job as a creative director is to take the information that you have from the client or from the company, the goals of the company, the, you know, the business strategy. Even the marketing information can be fuzzy a lot of the times, and to break that information down and to cast a vision that people can grab onto you. So the first part of this is going to be to break it down. I found that business strategy and marketing strategy rarely lends itself to easy creative solutions and it, and it takes the job of the creative director to identify like, where can you get a handhold?

Like where can you get some traction on something to turn it into creative work? Does that, does that resonate for you, Caleb?

Yeah. I mean, the thing I think about with this is the amount of questions that I need to ask to get to the point where I can digest it and understand how to translate that to something that the team can grasp onto, right? Like that it takes a lot of questions and a lot of digging, which I think is part of the role of understanding the entire context so that you put a creative angle on it. And so the other thing that I add to this, you know, in terms of you know, breaking it down for your team, sometimes we think about casting division and it has to be like, you know, we think about, you know, well, that's, that's something for that's for somebody who's really charismatic or outgoing or really great, you know, presenter has a lot of presence. And I think that's, that's not always the case, right. It doesn't really matter if you're that way, which is great. Or if you're a little bit more on the introverted side or a little bit more methodical or logical or something like that, right. Break it down in the way that you are most adept to being able to do. Right. And, and, and no matter what, as long as you're still casting a vision for your team in whatever form, that's really what it's all about. It doesn't have to be in a certain way or form. It just has to be there and do it in a way that's natural to you. And that is going to be accessible and usable for your team.

Yeah. The that's so true. Creative directors do not need to be able to create a cult of personality. You don't need to be charismatic. You just have to be able to do creative work. So we've got a couple of questions coming in. How do you get your marketing director to help define that vision? And I just built my creative team just me and a team of seven. We want a vision, but I'd love my team to help with the creation of this vision. So for the marketing director the marketing directors, at least in my experience, working with marketing teams, it's going to be a little bit broader. There's going to be a lot of marketing speak that tries to cover as many aspects of the, of the product or the business as possible. So there's gonna be a lot there.

I'm sure all of you have heard of *Begin With Why* by Simon Sinek. I would definitely start there as a common language to be able to cut down the amount of business, speak into a succinct, like core message about what your product or company is about and the message that you're trying to get to people. In terms, and, and for a marketing director, there is kind of this point where the marketing director is gonna want to define all of these things about the company, the features the all the personality traits, all of the mission statement, right. But really what the creative team needs is just a small slice of what is it that we want to impact in our customer's lives. Right? So the, the small piece of why are we doing this? And from there that can explode into a lot of different creative work. The question about the helping your team. I think the team being involved in the vision process is super Oh, the beginning with why author is Simon S I N E K. He also has a Ted talk where he talks about it. That's really great.

So how having your team involved is really good. The only thing is that that can turn into design by committee. And so you need to be able to do a lot of pre-work to give guidance and options about where it can go. And do you have to do a lot of the homework before going into that meeting? I hope that helps. So one more part of this casting, the vision is to say one thing and say, one thing has become like a month life mantra for me,

So say one thing is something I learned in advertising. It's, you're going to want to say a lot of things about your product because your product or company is the best and it's awesome. And it has all these great features and you want to say everything, but in order for it to be effective, you just gotta say one thing. And, and I have like, I've been able to put this into work in real life. I have a four year old son who, you know, if, when it comes to discipline or explaining things, I've found, I have to be as simple and crystal clear as possible. And I can only get one message across at a time. If I try to do a full on lecture, like my dad used to do to me all the time it's not going to get across and he's not going to understand.

And he's just going to raise like, you know, hate the process of being lectured more than listening to what I have to say. And the fact is consumers have about the same attention span as a four year old kid. So it's like a great metaphor of where to go. So when you are doing your creative work, casting your vision I kind of alluded to this earlier, but try to boil everything down to one thing. So much of marketing or business speak wants to include more things, right? We do this and this and this, and you're going to feel this and this and this. And at the end of the day, you're going to be all of these things. And that gets so messy, so fast. You have to have to have to break things down and get to the core of the one thing you want your customer to know about you and to feel after interacting with you. Any thoughts about that, Caleb?

Yeah, I mean, that's so true. And I think that the thing is, is I think most creatives, right, we'll just buy right into that. Like that's what they want to do. That's how they want to focus their work onto that one thing. And so I think in terms of casting the vision and you think about boiling it down to one thing, it's really, really helpful to take that skill and apply it to the internal stakeholders that you're working with. If you're in an in house, you know, creative team or your client, right. And helping them understand. And this is something that from personal experience, we, we continue to work on with, with stakeholders that we're working with, but helping them understand if we say everything we say nothing at all right. And, and bring them along for that because they especially are working in a, you know, to put it in terms like kind of a bubble of that product and everything it does and all the information about that. So being able to kind of step outside of that and help them understand, yeah, we need to be able to kind of focus in and hone in on the most important things let's prioritize. What needs be said is a helpful activity for you to do not just with your team, but for stakeholders and clients as well. Absolutely. A great question coming in from Samantha. If you're a marketing manager, doesn't have any experience in defining a vision, how do you help direct them to define that vision? If every time they throw the hierarchy chart at you because you are their direct report, this is definitely a tough situation. And I've been in similar situations before and it's all about education. And that can be hard cause it's, it's your manager, right? It's the person you report to. But the, unfortunately the burden is on you to bring information that can help educate your manager about how this, how things could be done better. It's slipping my mind for some reason. I can only think of the Ted talk.

That'd be super helpful. Oh, if you've listened to anything by Steven Gates, that's super good. He's creative director over at Invision. But if you've listened to his podcast or any of his talks, he does tons of great in-house work. And so he knows that kind of internal politics backwards and forwards. I would definitely dive into this stuff to get more information about how to navigate you know, educating other people in the company and getting creative work put as a priority in your company. So hope that helps. Let's move on to tip number four, tip number four is to leverage your position. So moving into a leadership position puts you in a unique spot to be able to do things for your team, that they could never have done themselves.

And I just checked the time realized we only have 14 minutes left and I was like, Oh no, we have so much to plow through. So we're trying to come quick here. So when you're a creative director, you have access to things and access to people that your team doesn't. And I have noticed in my own experience, I know the creative directors that have leveraged their position to make things better for the team. And so the first one on that is to go to bat for your team. I had a creative director once who let all the complaints and criticisms and, and upset feelings about anything that was going on between the team and the requesters in the company to just like go straight on through. And so you got entry-level graphic designers dealing with, you know, senior level requesters who are upset about something not getting through.

And it's because of the creative director, didn't want to have tough comfort, tough conversations, people, he don't want to go to bat for his team. And I firmly believe that the creative director should be there to to protect his team in a way, right, or her team, and to be the person that can soak up the criticism. If, if someone is having an issue with creative work that is being done, they need to go to the creative director. They shouldn't be going to individual contributors, obviously there's room for collaboration. You want healthy collaboration between everybody in your company or between you and your client. But if it can be those sticky conversations that creative director needs to be taking that the, you know, taking that load off of their teams. So they don't need to deal with that. And I think that that is one of the biggest positive things a creative director can do.

And I think part of that is is when your team is having trouble, when they fail, when they make mistakes, it is the creative director's fault when the team succeeds and does great work, it is the team's fault, right. Or the teams like success. Right. And I think that I have, in my own experience of having leader, creative directors and leadership that makes like night and day difference on the team trusting you and the team's like morale going forward. Sorry. That was a lot. Caleb, do you have, what else do you yeah. What do you think?

Yeah, I think you're spot on. I think that that needs to be your default is to say, yes, I'm going to be on the front lines for the team. Right. And make sure that, you know, they're not just, just getting tumbled in any way, shape or form. And I think it's an interesting dynamic though, if we go back, even to kind of talking about like, you know, trusting your team, you know, they're your advent Avengers and like, right. Utilizing them, there is that balance probably of saying, in what ways do I allow team members? I actually consciously take a step back to say, part of your development is engaging with that stakeholder and kind of going back and forth and figuring this out. But I think it has to be a very, an intentional move and it has to be the right dynamic and the right place. And maybe it's, you know, similar to what we talked about, you're kind of going along with, but understanding where is this a place where this is developmental and they can handle it when you're right alongside and where you just need to say, you know what, no, I'm going to just jump on out and go ahead and handle this and go to bat for the team. So it's just another thing to consider in that one.

Yeah. I had a, an experience with an ad agency where we went and met with a client and we showed the creative work and the client was basically like, this is like not what we asked for. And the client was kind of upset. We had a good relationship with them, but they were kind of like this isn't it at all. And I remember one of the partners saying, I'm sorry, I missed, like, I missed the mark on this one. We can do better. I could have done better. Right. And so like the partner who actually didn't really have anything to, with the creative work, he instantly took responsibility for the work and said, like, I'll do better. And I really look up to him for, for doing that. Cause he didn't have to, it could have, he could have turned to us and said like, why did it come out this way?

Or like, I'll make sure they do better next time, you know, something like that. But all right. So the next section is cross collaborate. As you especially in house, I think this is something that I've noticed is that in a leadership position, you are, you have unique access to people in other parts of the company. So software your software development team, your sales team, your customer success team. And that gives you a unique vantage point and like political viewpoint within the company to be able to find opportunities to collaborate and to like find a new and creative ways to support to support your creative work. Does that make sense Caleb? I know you've went from, you know, you were video production to now your creative director, where have you seen that work?

It it's, it's definitely something to really dig into for the sake of your team. Right. And, and I think, again, it's another place where digging in is to the benefit of, of you and everybody else on the creative team. The way I think about it is, is my biggest takeaway, right? In terms of the working with others, especially in an in house instance and like, you know, like you said, all these other departments and finding things out and all the politics of things or all the, you know, business aspects of things is don't assume that information is getting cascaded outside of anyone, but you, right. We really need to make sure if you're in a leadership position to say, yeah, it's probably unlikely that this would trickle down to my team. I want to really make sure that this is verbalized, you know, in, in, in making sure that it's communicated to your team in a way that they can understand that and that they, you know, get that ankle as well. So I think that's the biggest thing. Don't assume that they're getting this information elsewhere.

That's yeah, that's great insight. I think sometimes it can feel like if your creative director isn't passing along information, it can feel like they're withholding information. Like you're not, you're not worthy to like, know what's going on in the other parts of the company. And so I think being that person that can, that can keep your team included in everything else that's going on in the company is, is worthwhile totally tip number five, perfect. Your process. And this kind of connects back to like, don't be a project manager, perfecting your process can do a lot to prevent you from having to do a lot of that nitty gritty work of project management. So the first part is better briefs and I kill them. I, you to tackle this first. Cause I know that when you came on as creative director, there, wasn't a lot of great processes going on processes going on. Can you talk about like your effort to, to improve that?

Yeah. I think it's just indicative of the size and the growth, right. And this is kind of where it's going to be. If it's a smaller team, you can probably get away with like, you know, you just shout over your shoulder, Hey, I need this or I need that. Right. And, and the entire team, the entire company, even, it might be in the same, you know room as you, but as we grew, we kind of saw like, yeah, these things are really falling apart. And so instituting better briefs, instituting timelines that are standardized instituting, like all sorts of basically checkpoints for stakeholders to understand what we need in order to get started was absolutely vital putting those things into place and really establishing them. And then as a creative leader sticking to them and then explaining the rationale and the need behind them is really, really important to get people's buy in. So that was a huge thing that really has set us up. And, and honestly, this is an ongoing process, right? Prefs and processes. It's just an ongoing thing that we need to continue to scale up as we grow.

Absolutely. I want to clarify, when we're talking about briefs, we're talking about creative briefs, right? And you can, you can Google this for an examples of creative brief. So basically a brief is everything boiled down so that your creative team can do exactly what they need you on a, on a specific project. Right? So if a project comes in, it needs to have a brief that says you know, the factual things like we are going to this event, we need these items. They need to be this size. Here's a link to the things we're getting printed. Here are examples of things we've done before. And then it needs to say like the challenge we're facing is, and then like we've never gone to this kind of event before and we're targeting a new audience. And then the insight, which is we think this audience would really like our product because of X, Y, and Z. And, and using the brief as a gateway to be able to say, Hey, here's the brief, let's fill it out. Can you not answer all the questions? Okay. Then you should go back and figure out your your answers to these. And then because the crave brief, can you be used as like a third party gateway to say, you need to figure this stuff out before we get started on our projects.

That’s exactly what we're running into, right. We were just like, then the design team, they would just be either creating things that would then be like, well, you never in, in coming up with things that then stickers would be like, well, you never told us this, or they'd be spending all their time chasing stuff. So that's exactly right. It really is a gateway.

Yeah. one of the questions coming in, how do you get your team on board with briefs when you're at a small company and the owners have rejected the concept of them? That is a tough question. And to be honest, I'm not sure again, you, you might have to customize your situation so that the brief is less, is less lengthy or is less formidable. And to answer the, another question coming in, who should write a brief, when I was at an ad agency, our account managers wrote the brief. Now I help write the brief because it becomes a conversation, right? So I can sit down lots of times the requester has a bunch of information available, but then we have a kickoff meeting and we can use the creative brief as a framework in that kickoff meeting to say, do we know all of these things? And so we kind of write it together and then I can make sure that all of the questions are answered and that it's actionable material. And so I'm not sure what she, what you do when you're at a small company and they've rejected the company brief except maybe repackage it and trick it, trick them into believing. It is just a meeting where we're casually talking about all these different aspects.

Right. I was going to say, just put it into things that they understand, right. Like cater it to their objectives. Right. And if it's, it's really just about gathering that context, that you need to do your job correctly and make great work that benefits the business or whatever. Right. So it's maybe the way that you just angle it.

Yeah. We actually, so the other question we had to call them project request forms, the creative brief, scared off the other teams. Yes, yes, yes. Let's see, we're getting pretty close on time and then we'll go into a Q & A session. I hope to answer some of these other questions that are coming in. So the next part is to automate as much as possible. And so some examples of things that we've done to automate our work is to we have a Google form tied to Asana so that when someone wants you know, a project done, they can fill out as much information as possible, puts it automatically puts the project into Asana and prompts us to create a kickoff meeting. And so then that way we can get a lot of that work done beforehand.

And that process also helps the requesters know what to expect. Another part of automation is we try to templatize all as much work as much as we can. Which means a little bit of work in the front end to make less work in the backend. And a little plug here for Lucid Press, which I feel like I have to do was addresses all about templatizing design work. We use it all the time to make it easier for requesters to be able to get what they need in a timely fashion. In fact, we have a, we have a saying at Lucid Press called “make your own damn flyer”, which is actually a quote from one of our customers who said you know, we want we want this form, but we just need the date changed out. And we want it to create templates so that people could make you know, make their own things quickly and efficiently.

Or, or as we like to say, make your own damn flyer. Like you can do that, that we don't need, we, we have bigger problems on enhance that. Like, we need to do big creative work. We can't be doing small, small things like that. Yeah. Just to answer a couple of questions here the workflow software where you use is Asana, A S A N A, I believe that's right. The software we use is Lucid Press as you've seen the logo on the slide. But yeah, we are just about out of time. Sorry. We had the rush at the end there, but Caleb, any last thoughts you want to add?

No, I think let's move on to the recap and would love to answer questions if we have time.

Okay. So the takeaway is one, connect one-on-one, two, don't get in the way of the Avengers, cast the vision, leverage your position and perfect the process.

So before we get to the Q & A, thank you so much for everyone for coming, we're going to have a Q & A session and we're going to get back to these questions that people have asked, have asked that we haven't been able to answer yet. We do want to do a little promotion, a Lucid Press is doing another webinar coming up in in September 9, *Most Common Templating Mistakes Organizations Make*, that is my boss right there, director of marketing. So make sure you go help me out here. And then we will also be at the HOW Design Live virtual conference, which everyone's should absolutely go to because how is awesome and huge shout out to them for putting this on and in allowing us to speak that's in November. And then finally let's get into the Q & A.

**Q&A**

**Q: HOW Design Online Attendees for Digital Session – read by Amy Conover, HOW Show Director**

**A: Scott Talbot, Art Director and Caleb Hepler, Creative Director at Lucid Software**

Amy

I'm back. First of all, this was incredible. Just the information that you shared. And I took so many notes that I wanted to kind of point out, but I'm not going to cause we have a lot of questions and I love how you answered them intermittently throughout the session. I think that was awesome.

This question is from Jessica. How do you walk the line between friends and employees you connect with, if your team reports to you as a manager?

Scott & Caleb

Yes. the, your situation definitely changes when you become a manager. It's a little bit different because you, when you're, when you're in a management position, you represent the company to your reports, which can be kind of awkward. I think an important thing to remember is that you can be friends, but from a business perspective,

You are different. Now you can give feedback, you can give performance reviews, you can affect their pay, you can affect their employment. And so I think you need to be able to be respectful of, of them and their personal situations. And like, if, and try not to pry too much, I would say, right? Like you don't want to make them feel like they have to give up information or talk about things they're not comfortable with, especially to someone who is now their manager. And that can kind of stink now that you're a management and maybe you were friends with them before. But yeah, that's what I would say, Caleb, what would you say? I personally had to go through this, right? Because my previous role was such that I wasn't, I was, I was just one of the team and then I was offered this creative director role.

So that had to shift a little bit. I think the, the difference maybe in taking on a creative management role is that like you were, as their friend, you still care about this person. You still really care about who they are and what they want to do and what they want to become and how they want to grow. You just happen to be in a position where you know, the, the way in which you're going to nurture their career or the way in which you're going to help them along to understand the, you know, the business path. Right. you're just in a position to effect that more. And so I think for me, that's maybe just a different angle of like, still caring about them, but it's, it's in a different incentive, a different light.

Amy

Good answers. Okay. next question. What are some creative ways you brainstorm with the group virtually as well as getting the group to interact more?

Scott & Caleb

Hmm. I can start. So, so we actually use our product Lucid Chart to, to brainstorm at times. In some way it's a, it's basically a canvas through which we can throw ideas out, all be in the same virtual space at the same time and understanding throwing out sticky notes or post-its, and, and, you know, drawing connections to things. So whether it's that or a different kind of collaborative workspace, I think that's a great way to brainstorm because you still need that. You still need that connection and you still need to bounce ideas off each other and see where things are going. So finding some sort of substitute to do that is really necessary right now. Yep. Totally agree.

I think the reason that works is because when you're on Zoom, you can feel like you're presenting, right? Like right now we're presenting, but it can feel like you're presenting to your team as well. And that can, everyone's looking at you and it's weird. And I think having like a third party software people to look at

Makes it a lot easier to understand to sorry, to not be afraid to share your ideas.

Amy

Yeah. Good point. That is a good point. I like that. So another question and let's see. It looks like this is from Summer. My team has so much work right now that taking any amount of time to connect one-to-one seems almost disrespectful because that will always serve to lengthen our already long days. Have you encountered this conundrum? And because I know you're thinking it, no, we can't increase head count to lighten individual loads. Summer is ahead of the game. What are your thoughts on that?

Scott & Caleb

Yeah. I mean, I have definitely been here. I would say that the one-on-ones let's reduce it to 15 minutes. Make sure you have a couple ideas that you want to talk about beforehand, but those one on ones will pay off in the long run. I, I, at least for me, we have struggled with is like team with meeting bloat on our team. Right. Especially going from, we can't just talk to each other really quick while we're sitting next to each other. We have to do a Zoom meeting. I know it's a challenge to reduce the amount of meetings you're doing and I, and you know, so try to reduce meetings, but I promise, promise, promise weekly. One-On-Ones we'll pay it off.

Amy

Yep. Yep. Sometimes you have to take some time to organize yourself. Right? You have to go Caleb,

Scott & Caleb

The same thing, it's a fun and an investment. And I think Scott, you're right on it. It's a crazy time right now, if the volume is just to the extent that it's, you know, weekly for 30 minutes, just doesn't make sense to start somewhere. Maybe it's every other week for 15 minutes, but at least getting into a rhythm where you're saying, Hey, we're going to build that connection is, is really the place to begin. And actually it could be a place where you can spot inefficiencies or things that aren't going right. And maybe reduce workload a bit.

Amy

Good point, good point. So you did a shameless, Lucid Call out. I just have to take take a second. So you, you mentioned Simon Sinek and start with the Why book. Simon spoke at HOW in 2015. And he spoke about that and also *Leaders Eat Last*. And so I just love that you know, you were kind of referencing that he's, he's got some great work and then the other one was Stephen Gates, which you mentioned as well. And he does have some awesome, awesome things around leadership. So that was my shameless plug for the HOW speakers that you referenced in your session. So I think we are out of time, but do you want to announce your Door Ddash winners?

Scott & Caleb

Yes so Door Dash winners are for $25 gift card is Ann Drago. I hope I'm pronouncing that right from the Cleveland Clinic and Abby Lewis from Prudential again, and Ann Drago and Abby Lewis. And we will email you the Door Dash gift cards in either tomorrow or in a couple of days. So look for that. I think that's it.

Amy

I just want to thank everyone for attending. This recorded session will be live on our site. For those that have registered, you'll get a link for it as well. Caleb, Scott, thank you so much and we appreciate your support in this. Have a great day.