2022

In-House Creative Industry Report

The Emotional Connection

Cella®

Putting Passion to Work®

Cella is an award-winning leader in staffing, consulting and managed solutions for creative, marketing, digital and proposal development teams. We help people build meaningful careers and partner with companies to help them win. Our secret sauce? The Cella Trifecta: we have the right people, we understand our clients and we deliver results. Success requires a partner who offers all three. **Together, we put passion to work.**

Cella is a 2022 Best of Staffing® 10-Year Diamond Award Winner for both Clients and Talent—an honor earned by only 1% of staffing firms.

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Our goal is to benchmark the operations of creative teams and in-house agencies to gain insights into industry standards and best practices that will support you in driving your business decisions and validating the direction of your department to upper management. We encourage you to share the findings among your colleagues and industry peers.

We ask that you cite this source as:
Cella, Inc., *2022 In-House Creative Industry Report*, April 2022.

Highlights from Cella's 2022 In-House Creative Industry Report.

The Emotional Connection
Our normal has changed— for the better.

KEEPING THE RIGHT PEOPLE HAPPY

Caring more about what motivates the workforce.

75% feel that **flexible work schedules** boost job satisfaction

53% are *mostly satisfied with their jobs*, while the extremely pleased number dipped a bit

10% noted an **uptick in training and development investments**

Companies continue to change how they communicate and connect with people, showing empathy for their well-being.

Finding the right superstars to meet today's needs.

81% **plan to hire** in 2022

IHAs see a **noticeable decrease in available talent** since last year.

Especially for these critical positions:
Account Managers
Content Strategists
Digital Designers
Graphic Designers
Motion Designers
UX Designers

Raising the team's performance—more than a remote possibility.

44% report that **remote working** has had a **positive impact on productivity**— it's **risen 15%**

73% noted an **increase in the volume of work**; over half attribute this to **changes in marketing or communication** strategies

High productivity remains the same or better year over year, while work volumes continue to grow without significant differences in quality.

After facing times that tested our emotions, IHAs have emerged stronger and optimistic—confident we can maintain and even improve communication with each other, use new ways to work virtually connected, and expand new opportunities for growth.
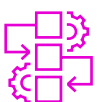
DIGITAL: DOING WHAT'S DEMANDED

Reconnecting in a disconnected world.

56% still maintain **fully remote operations**

Just 7% more companies are now **back at the office full time**

A preferred workflow process emerges.

45% use the **Hybrid (Waterfall + Agile) process methodology**—a **12% increase** over last year

Technology takes center stage.

86% plan to **update their creative technology** within the next **5 years**

Digital Asset Management

68% use a DAM system to **maintain institutional knowledge and connections** with each other

Noteworthy!
95% of mature IHAs have a dedicated DAM manager

40% of IHAs using a DAM were established 16+ years ago

For the first time ever, this year's results showed a decline in the assets being shared via email (down 9%).

Project Management

87% reported they use a **project management tool**

Fewer respondents said they were dissatisfied with their PM tool—an improvement indicating that companies are using the technology more, and more effectively.

Augmented Reality/Virtual Reality

16% support **AR/VR** in house

Companies need to stay committed to investing in technologies that keep remote workers well connected. Employees benefit both physically and emotionally from tools and platforms that deliver improved user interfaces and customer experiences, while Agile processes maximize cross-functional collaboration.

A STRATEGIC PARTNER IN GROWTH MARKETING

The Creative and Marketing partnership gains more traction.

75% said their **creative leaders now meet with the CMO/marketing leaders** at least monthly

10% **fewer requests for cost comparisons** to external agencies

Growth Marketing highlights.

SURVEY DEBUT

56% of teams reported spending **at least 10% of their time on Growth Marketing**

11% said their **IHA now includes the integration of a Growth Marketing partner** or segment

Biggest adopters!
25% of teams operating up to 5 years

30% of teams operating for **16+ years**

28% offer **Growth Marketing content** support

As they focus on creating an emotional connection with customers, marketers are forging a more strategic connection with their in-house agency—essential to the success of Growth Marketing.

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About the Report

Welcome to the Cella 2022 In-House Creative Industry Report, our 12th year in publication. This widely read report benchmarks the in-house creative community and provides insights that leaders can use to guide the path of their departments/agencies. Benchmarking will help identify gaps in an organization and generate potential solutions, but personal, innovative thinking and institutional knowledge should not be eliminated from the process.

The In-House Creative Industry Report was first published in 2011 and has evolved each year to stay current with trends in the industry that impact creative teams.

We hope the data and insights included in this report continue to provide a source of validation and direction, contributing to a more effective and efficient operating model. The report is published annually, and we welcome your insights and ideas to help us continually improve.

Survey Respondents

Nearly 300 leaders from creative teams and in-house agencies responded to our survey conducted in January 2022. These leaders represent Fortune 500 companies, as well as middle-market and not-for-profit organizations spanning multiple industries including, but not limited to, banking/financial services, consumer products, education, healthcare, manufacturing, technology and software. More information about the demographics of our survey respondents is available in the Appendix.

Perspectives From The Field

In this report you'll find six *Perspectives From The Field* articles written by in-house creative leaders who have provided their insights on challenges and goals shared by IHAs across the industry.* This year, the article topics include information about: running a global in-house agency that covers multiple countries, time zones and languages; the shifts technology providers need to make in light of consumers' evolving behaviors and access preferences; the steadily increasing selection of digital marketing solutions; using the IHA's core strengths and established value propositions to a greater advantage within the organization; improving project management tool adoption and maintaining teams' satisfaction with using it; and how to approach implementing Agile process methodologies in a creative environment.

* The opinions expressed in these articles are those of the writers and do not necessarily reflect the views of Cella, Inc.

Executive Summary

There are reasons to feel encouraged by the benchmarking information in our 12th annual In-House Creative Industry Report. This year's edition sees the beginning of stabilization following two years of eventful change, it also illustrates evidence of the new breed of marketing—namely Growth Marketing.

Behavioral science teaches us that people make most decisions from an emotional perspective. Growth Marketing is designed to make an emotional connection with consumers to influence purchase decisions. Aided by evolving technology, increasingly sophisticated social media use and a deeper reliance on business analytics, the relationship between the Creative and Marketing teams is proving to be more productive and symbiotic, as this year's survey confirms. Here are highlights and insights from this year's survey.

Power partners: Creative and Marketing

75% of IHA leaders meet at least monthly with the CMO/Head of Marketing

Creative teams continue to increase their partnership with Marketing—collaborating and connecting at C-Suite levels, mirroring Growth Marketing's deeper emotional and intelligent interactions with customers.

IHA support for Growth Marketing

25% of teams operating up to 5 years and **30%** of teams established **16+ years ago** are Growth Marketing's biggest adopters

56% spend at least 10% of their time on Growth Marketing

Support for Growth Marketing activities is rapidly expanding across the industry, outpacing IHAs' production of Tier 3 work.

Agile adoption goes hybrid

45% use the Hybrid (Waterfall + Agile) process methodology—a **12%** increase over last year

Many creative departments still rely on Waterfall methodology for deadline deliverables, while the Agile model continues to aid communication among distributed team members, enhancing opportunities for actionable input and feedback.

More technology buys, adoption

37% use true DAMs

31 different DAMs were named

IHAs are purchasing technology that integrates communication, reviews and storage. Feedback is positive re: tool adoption and team satisfaction. And here's a first: they're getting true digital asset management (DAM) software.
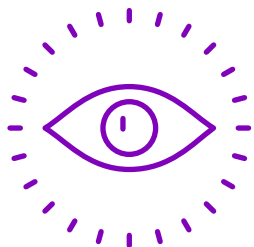
More to come . . .

Is your IHA forging a stronger partnership with Marketing? How will you find qualified talent to fill Growth Marketing roles? Which technologies are you evaluating to help meet challengews on the way?

Glean info from the pages to follow. Things are looking good for a positive, emotionally connected 2022!

Organization & Resourcing

Expert Perspective

By Angela Conway
Specialty: Operational Optimization and Business Process Planning

Considering the pandemic and changing workplace habits, it's highly positive to see that teams have largely maintained their size year over year, with 25% of teams comprised of 30 people or more. We can conclude that the teams' work, work habits and able management of resourcing have contributed to the consistent stats.

Q: Into which division does your in-house agency report?

2% business development/sales
1% public affairs

operations/shared services
8%

3% brand
8%

other[3]
8%

chief creative/ content officer[2]
8%

10% hybrid[1]

12% communications

47% marketing

88% marketing and communications groups
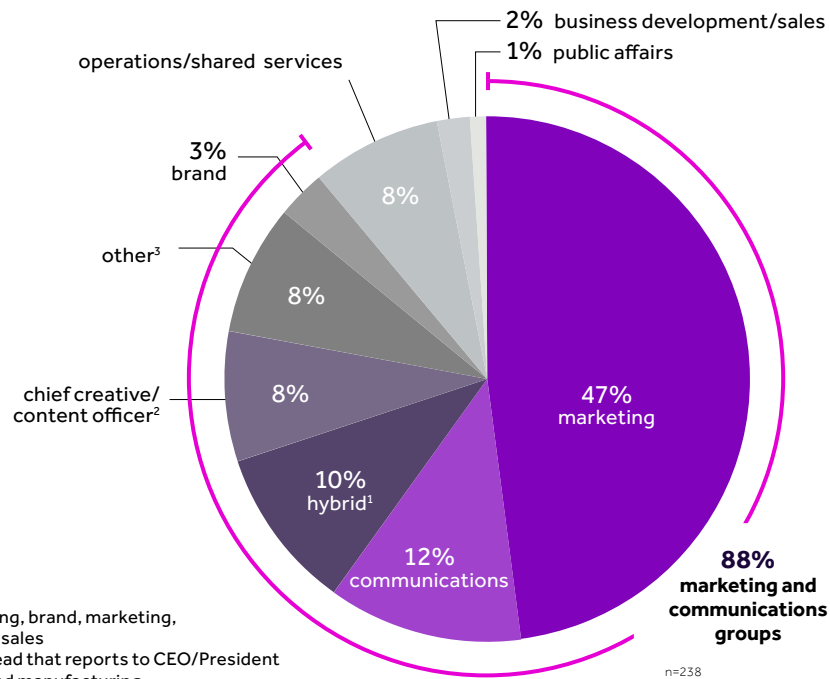
[1] Two or more of advertising, brand, marketing, communications and/or sales
[2] Also includes creative head that reports to CEO/President
[3] Includes e-commerce and manufacturing

n=238

Q: How often do you meet either 1-on-1 or in a group setting with the CMO/Head of Marketing?

15% rarely, if ever

10% quarterly

47% weekly

28% monthly

n=130

While it is more common for IHA leaders who report outside of marketing groups to not meet with the CMO regularly, being within marketing does not guarantee IHA leaders access to the CMO, either. Gaining direct access to the CMO needs to be a priority for IHA leaders who are looking to expand their team's value proposition.

Q: How often do you meet either 1-on-1 or in a group setting with a direct report of the CMO/Head of Marketing?

quarterly
4%

11% rarely, if ever

20% monthly

65% weekly

n=113

22% of survey respondents are direct reports of the CMO/Head of Marketing.

Q: How large is your in-house agency? (combined FTEs and contingent workers)

2021

SMALL TEAMS
39%

1	1%
2–5	16%
6–10	22%

MID-SIZE TEAMS
34%

11–20	24%
21–30	10%

LARGE TEAMS
11%

31–50	11%

MEGA TEAMS
16%

51–75	4%
76–100	5%
101+	7%

n=281

2022

SMALL TEAMS
40%

1	2%
2–5	20%
6–10	18%

MID-SIZE TEAMS
35%

11–20	25%
21–30	10%

LARGE TEAMS
8%

31–50	8%

MEGA TEAMS
17%

51–75	5%
76–100	5%
101+	7%

n=188

Q: How is your team organized?

by functional area, and within Agile teams in part

2% within Agile teams

8%

9% by LOB

16% by functional area with specific resources aligned by LOB

47% by functional area

18% n/a*

n=238
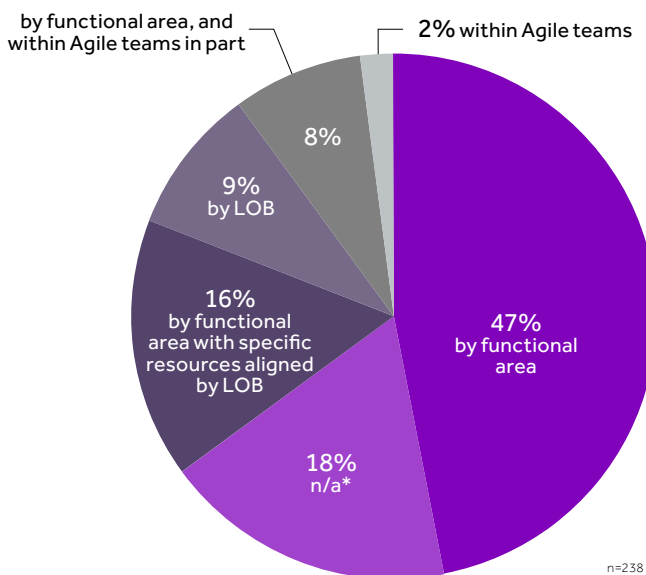
* We're a small team with minimal structure/a relatively flat structure

Q: For the most part, is your team adequately staffed to meet client demand, considering both full-time and contingent staff?

39% no

62% yes

n=187
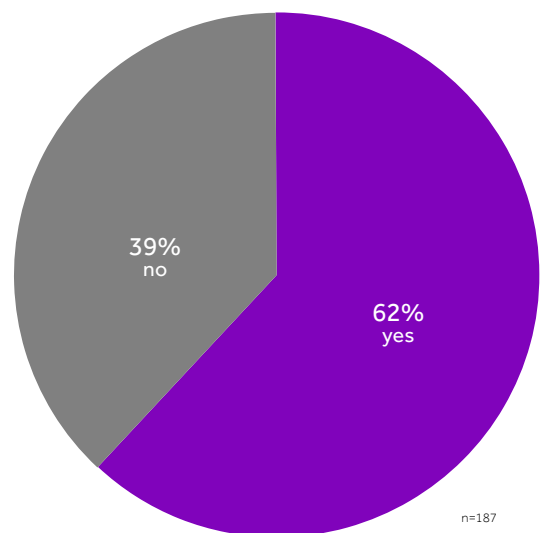
Q: How did your total team size change between Dec. 2020 and Dec. 2021? (regardless of whether the team member is an employee of your company or contingent staff)

- 40% increased
- 41% remained flat
- 19% decreased

n=187
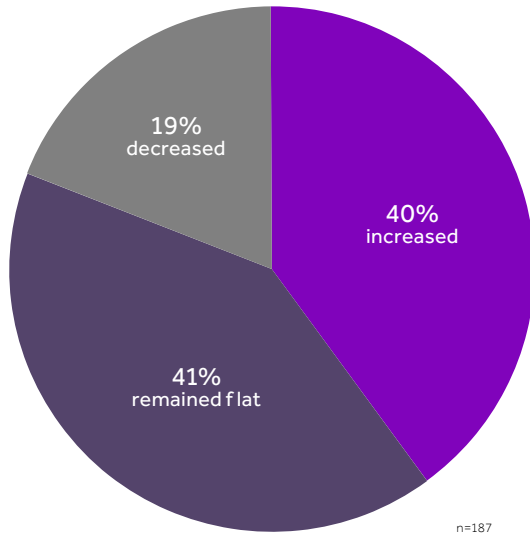
Q: What was your 2021 attrition rate?

- 56% ≤5%
- 16% 6-10%
- 11% 11-15%
- 6% 16-20%
- 4% 21-25%
- 7% >25%

n=179
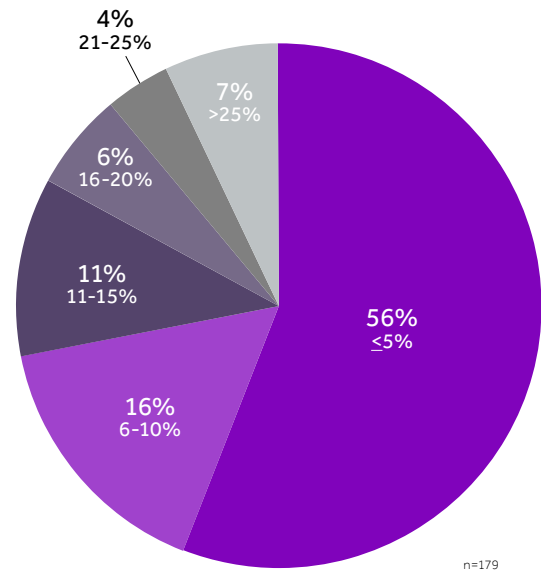
Q: What are your hiring plans for 2022?

- 50% increase current FTE headcount
- 49% maintain current FTE headcount
- 2% decrease current FTE headcount

n=187

Of the IHAs planning to add headcount:
49% will add headcount via employees.
32% will add headcount via contractors.
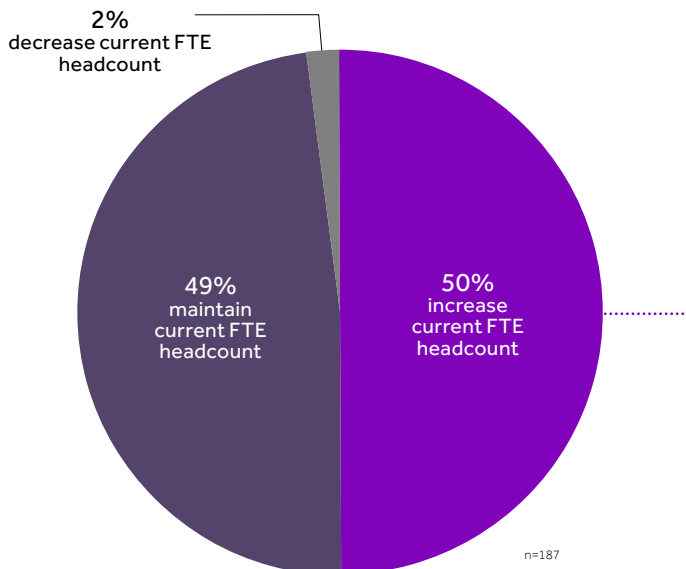
Q: Which best describes your in-house agency's resource mix? (select all that apply)

Category	%
company-employed staff	98%
outsourced services[1]	61%
contingent labor (hourly contract workers)	53%
managed services[2]	23%

n=238
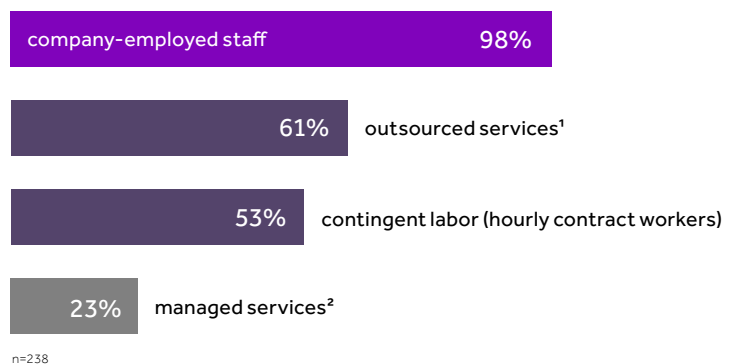
[1] Includes off-site outsourcing partners who deliver a specific scope of work; does not include strategic agencies
[2] Includes specific scopes of work and/or teams managed by an embedded third-party partner

Q: What is your perception of the available talent in the marketplace right now?

Role	There's an abundance of highly qualified talent	There's enough qualified talent to choose from	There's limited qualified talent	Having trouble identifying qualified talent	n=
Account Managers	8%	51%	28%	14%	80
Art Directors	6%	42%	34%	18%	102
Content Strategists	5%	31%	34%	30%	83
Copywriters	7%	38%	35%	20%	116
Data Analysts	3%	40%	38%	20%	64
Digital Designers	10%	37%	35%	18%	124
Digital Project Managers	5%	45%	35%	14%	77
Graphic Designers	14%	48%	25%	12%	138
Motion Designers	5%	25%	49%	22%	102
Project Managers	1%	46%	29%	17%	96
Proofreaders	1%	47%	25%	19%	72
UX Designers	10%	31%	38%	21%	68
Video Producers	10%	40%	45%	5%	97

Q: Are you able to use flexible staffing options such as freelancers and temporary/contract workers during periods of peak demand?

9% no

38% sometimes

54% yes

92% IHA leaders are able to use freelancers

n=185
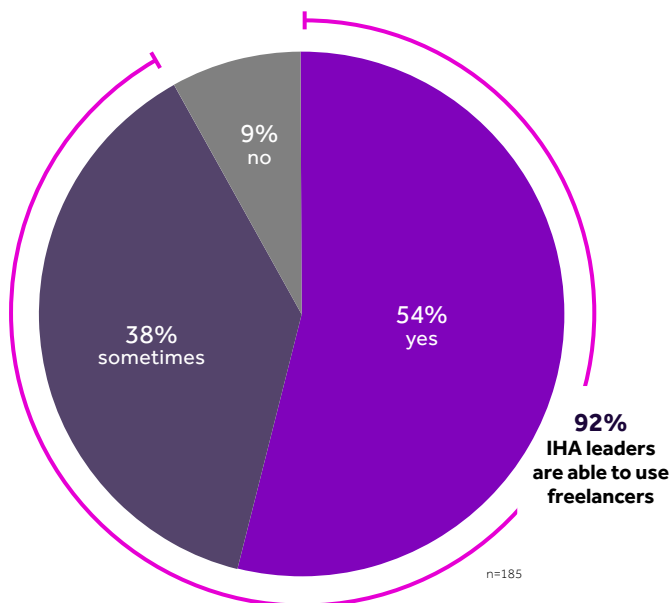
Q: If you aren't able to use flexible staffing options, why?

40% ability to staff quickly is difficult

33% lack of budget

27% corporate culture and/ or co-employment rules

n=89
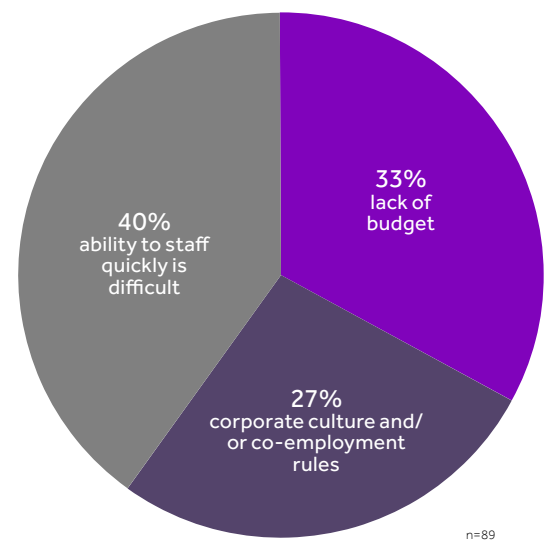
Only 1 in 3 in-house agencies is required to turn over contractors after specific lengths of service (i.e., restricted by term limits).

Q: If you plan on utilizing contingent staff (e.g., freelancers and contractors), what are your spending plans for 2022?

33%
increase spend compared to 2021

42%
maintain spend

9%
decrease spend

16%
zero spend

n=183
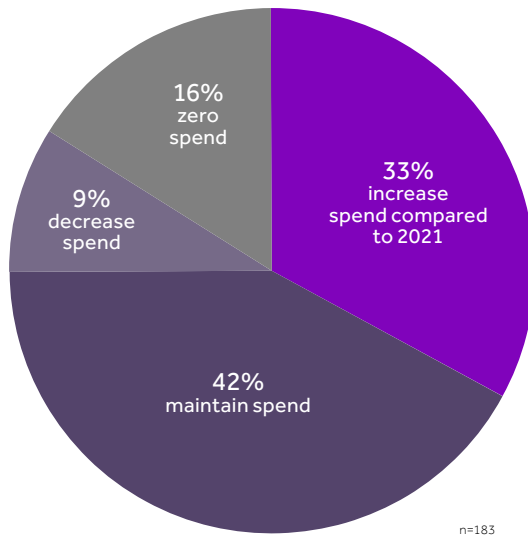
Q: How is your creative organization referred to internally?

other[2]
8%

branded name
8%

10%
marcomm[1]

10%
in-house agency

12%
marketing

28%
creative services

24%
creative team/ creative studio

n=237
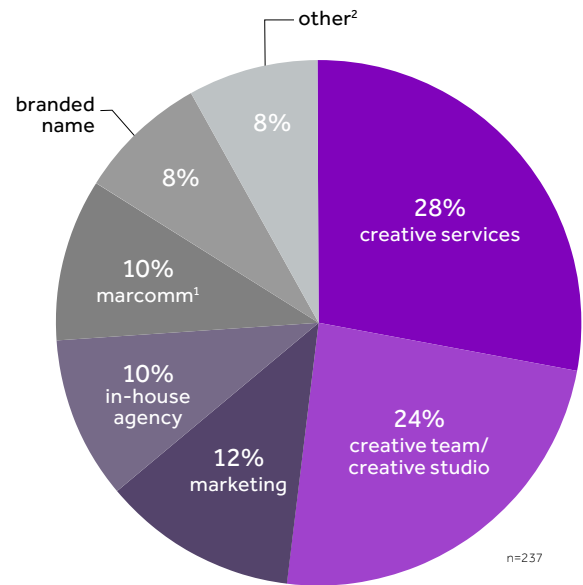
[1] Marketing communications
[2] Includes communications, content studio, user experience, center of excellence and others

Q: How long has your team been in existence?

I don't know
7%

15%
<3 years

14%
4-5 years

16%
6-10 years

12%
11-15 years

35%
16+ years

n=238
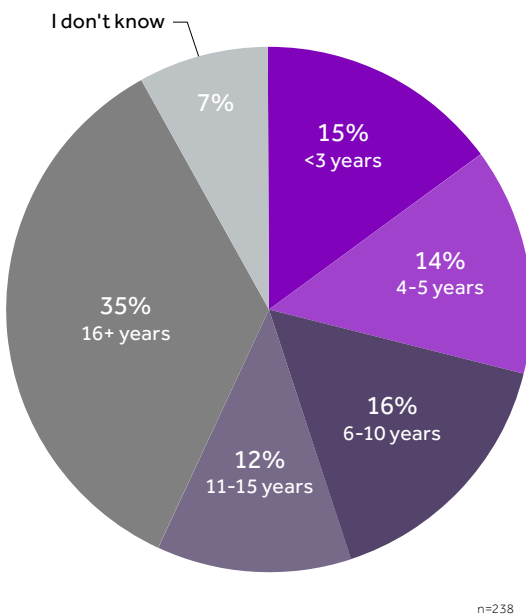
Q: Does your in-house agency have a dedicated operations role*?

47%
no

53%
yes

n=187
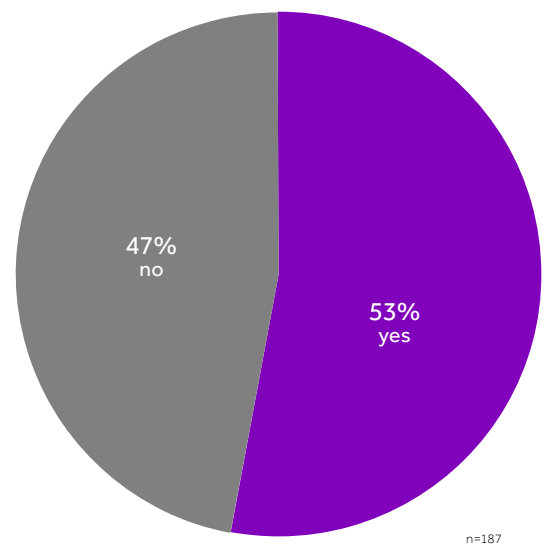
* Someone dedicated to focusing on the agency's processes, systems and technology, vendor management and/or financial management and reporting

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Capabilities

Expert Perspective

By Mark Pierce
Specialty: Global Operations and Process

In-house teams are staying busy with greater project volume as the marketing landscape responds to COVID's impact. Steadfast monitoring and quick reactions will be needed as IHAs continue their support for Growth Marketing and digital/social media deliverables, video (plus motion graphics), digital design and copywriting/content creation for external audiences.

Q: Which of the following are part of your in-house agency's services? (select all that apply)

78%	content development
69%	digital development
61%	campaign management
58%	content marketing
51%	social media management
50%	digital marketing strategy
47%	marketing strategy
37%	marketing operations
36%	UX
28%	growth marketing content support
28%	marketing analytics
25%	media strategy/planning/buying
16%	AR/VR
13%	martech
6%	other

n=236

Q: Within the below options, objectively where does your in-house agency fall?

23%	23%	44%	5%	6%
creative services team[1]	developing in-house agency[2]	in-house agency[3]	IHA+ integrated growth marketing partner[4]	IHA+ integrated growth marketing partner segment[4]
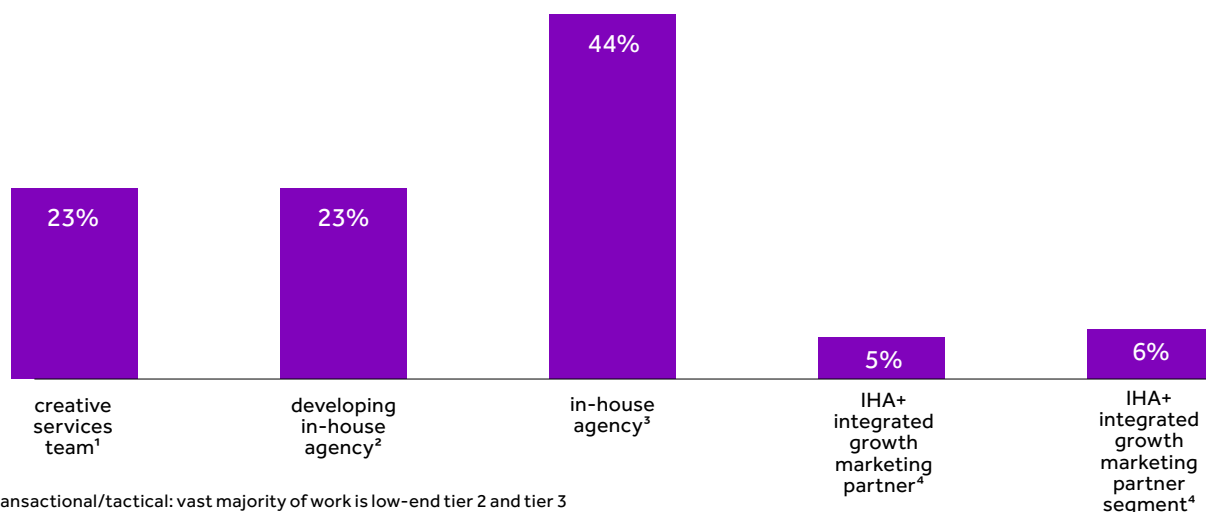
[1] Fully transactional/tactical: vast majority of work is low-end tier 2 and tier 3
[2] A healthy mix of all three tiers of work with a growing base of tier 1 projects
[3] Regularly included in planning and tier 1 scope of work; work likely also includes tier 2 and tier 3 projects
[4] Same as footnote 3, plus designated content creation team and strategic digital media channel partners

n=235

Q: How many projects did your team work on in 2021?

	SMALL TEAMS ≤ 10	MID–SIZE TEAMS 11–30	LARGE TEAMS 31–50	MEGA TEAMS > 50
< 500	35%	11%	22%	11%
500–999	38%	28%	14%	7%
1000–1999	20%	24%	22%	21%
2000–2999	7%	23%	14%	11%
3000–3999	0%	8%	14%	7%
4000–4999	0%	2%	0%	4%
5000–5999	0%	2%	0%	11%
6000–6999	0%	0%	0%	3%
7000–7999	0%	0%	7%	4%
8000+	0%	2%	7%	21%
	n=60	n=53	n=14	n=28

Q: For 2021, based on the total number of PROJECTS your team worked on, what percentage were tier 1, 2 and 3 work? (total must equal 100%)

	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Tier 1: creative development	29%	33%	17%	7%	8%	3%	3%	1%	0%	0%
Tier 2: design adaptation	8%	19%	33%	26%	8%	3%	2%	0%	0%	1%
Tier 3: pure production	15%	22%	25%	21%	10%	3%	5%	1%	0%	0%
Growth Marketing engagements	55%	30%	8%	4%	2%	1%	0%	0%	0%	0%

n=156

Q: What percentage of your team's HOURS were spent on tier 1, 2 and 3 work? (total must equal 100%)

	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Tier 1: creative development	25%	25%	20%	13%	9%	4%	2%	1%	1%	1%
Tier 2: design adaptation	9%	26%	28%	24%	9%	2%	1%	1%	0%	1%
Tier 3: pure production	18%	26%	25%	16%	6%	6%	3%	1%	0%	0%
Growth Marketing engagements	56%	28%	11%	2%	3%	0%	1%	0%	0%	0%

n=153

Q: In which of the following capabilities do you expect the most growth? (top 10 results)

- 35% video—shooting and editing
- 33% creative and/or digital strategy
- 32% video—motion graphics/animation
- 31% digital design
- 23% content
- 22% social media content creation
- 16% copywriting
- 11% analytics
- 11% UX design
- 9% social media design
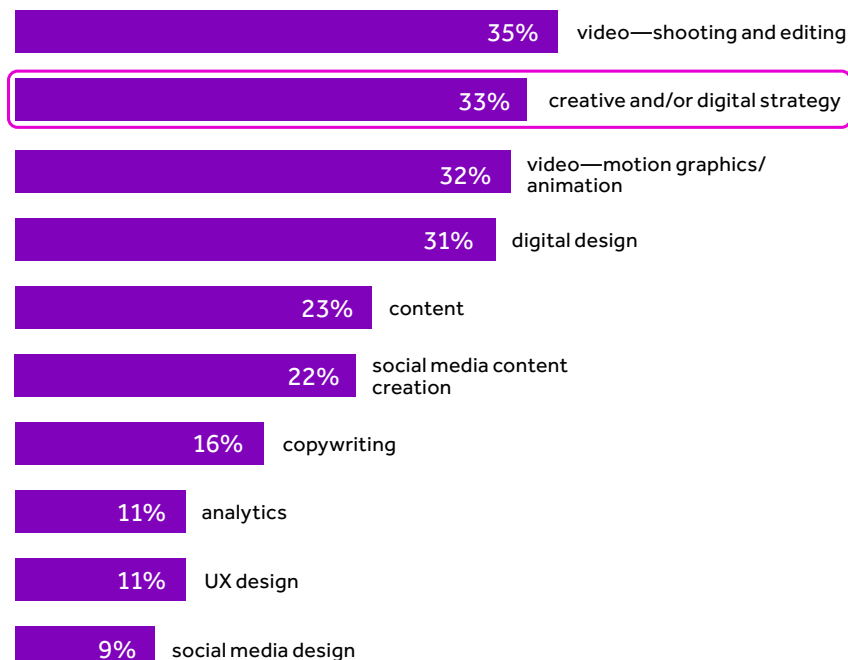
n=162

Originally surveyed separately, creative and digital strategy both resulted in top 10 placements. However, we've chosen to emphasize the combined result as it is indicative of a growing requirement of leading IHAs.

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Q: For which audience does your team create the MAJORITY of their work?

- 68% external audience
- 20% equally for internal and external audiences
- 12% internal audience

n=161

Q: Which markets does your in-house agency support? (select all that apply)

- 68% b2b (business-to-business)
- 68% b2c (business-to-consumer)
- 49% b2e (business-to-employee/internal communications)
- 41% b2b2c (business-to-business-to-consumer)
- 24% b2hcp (business-to-healthcare professional)
- 24% b2g (business-to-government)
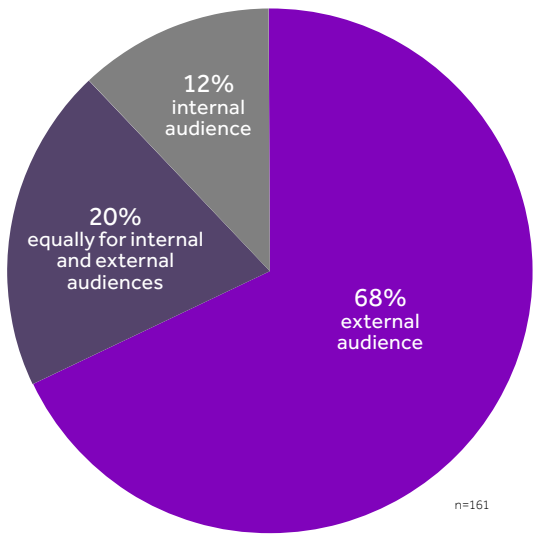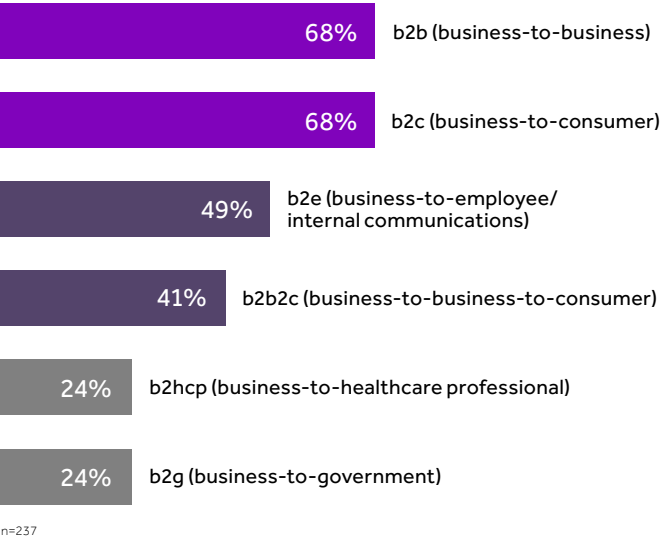
n=237

Q: Does your team provide a DEDICATED client service role*?

- 47% no
- 15% hybrid account managers/project managers
- 11% yes, both dedicated account and project managers
- 19% yes, dedicated project managers
- 9% yes, dedicated account managers

39% have dedicated AM/PM roles

n=161

* Team member(s) responsible for serving client needs and not wearing another hat (e.g., designer, writer, etc.)

Q: Who is primarily responsible for the project management of digital/interactive work?

- 43% project managers who manage both traditional and digital work
- 11% dedicated digital/interactive-specific role (e.g., producer or digital project manager)
- 27% individual contributor who is doing the creative work on the project (e.g., web designer, programmer)
- 13% team manager(s)
- 1% scrum masters
- 6% other

n=160

54% of teams have dedicated project managers to support digital work.

Q: Do you provide video production services?

28%
no

72%
yes

n=162
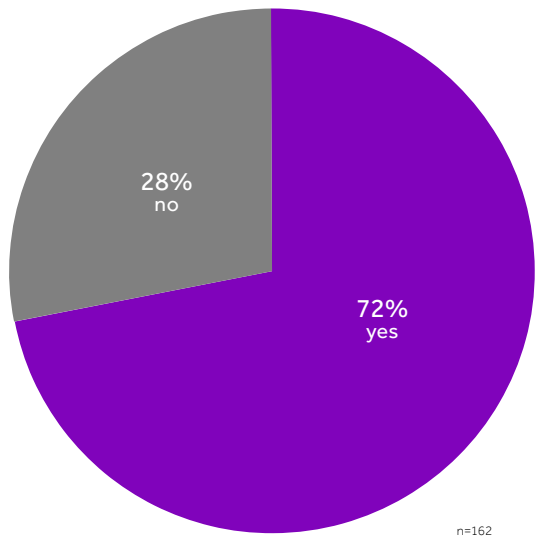
Q: For which audience does your team create the MAJORITY of their video work?

10%
internal audience

30%
more or less equal between internal and external audiences

59%
external audience

n=115
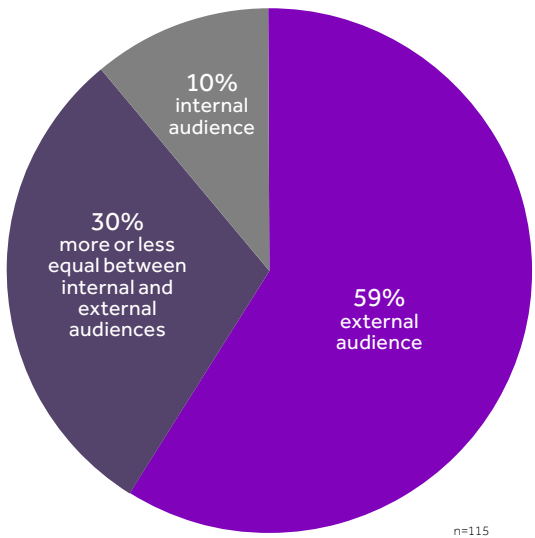
Q: How many fully dedicated team members support video services?

1%
11-15

1%
16+

13%
6-10

21%
one

29%
4-5

15%
two

18%
three

n=89
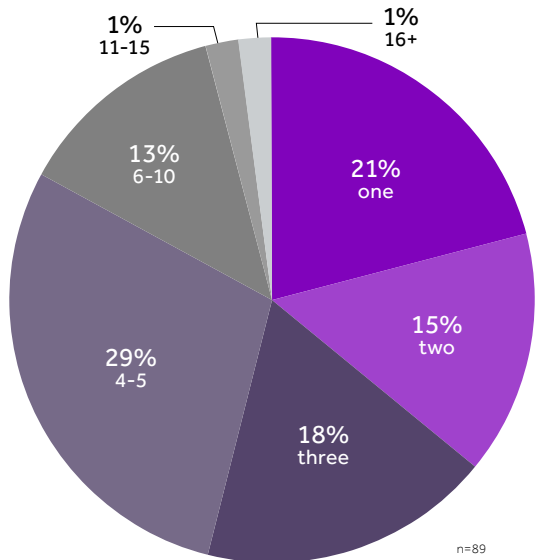
Q: If you have only one video resource, what is that role?

producer

11%
other*

5%

video art director

5%

21%
motion designer/animator

58%
hybrid of producer, editor ("preditor") or camera operator

n=19
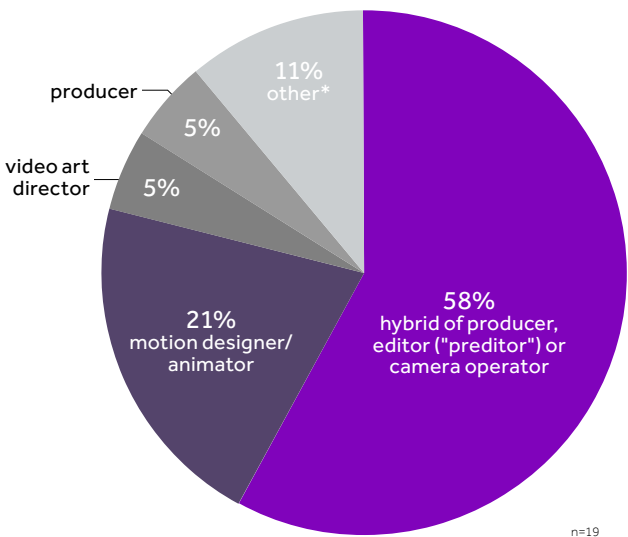
In-house agencies are growing their dedicated video staffs; it is now common to have at least 4-5 people fully dedicated.

**Other includes: director of video/video lead and creative director

Q: How do you most often distribute video for review? (select all that apply)
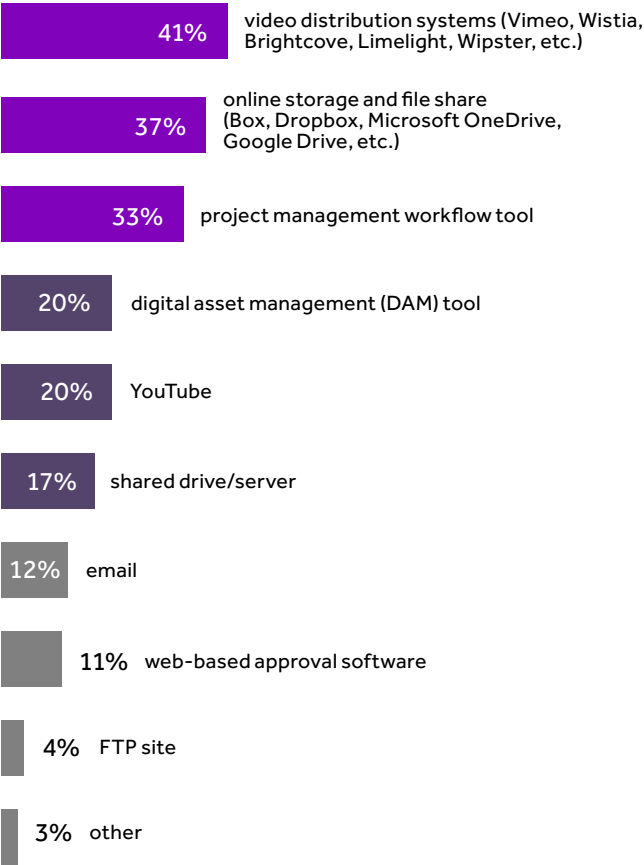
Q: Which of the following video-specific services does your department provide? (select all that apply)

41%	video distribution systems (Vimeo, Wistia, Brightcove, Limelight, Wipster, etc.)
37%	online storage and file share (Box, Dropbox, Microsoft OneDrive, Google Drive, etc.)
33%	project management workflow tool
20%	digital asset management (DAM) tool
20%	YouTube
17%	shared drive/server
12%	email
11%	web-based approval software
4%	FTP site
3%	other

n=115

video editing	**95%**
motion design/animation	**82%**
social media content	**77%**
live-action video recording	**68%**
42%	live video streaming
25%	dynamic video
4%	other

n=114

Jenny Drapp
Staff Vice President,
Anthem Creative Studio

Jenny Drapp, Staff Vice President of Anthem Creative Studio at Anthem, Inc., has over two decades of experience in the healthcare marketing industry. In her current role, Jenny is responsible for managing Anthem's talented IHA team. She leads with a passion for building and encouraging a culture of creativity, support and inclusivity, which she believes ultimately results in more meaningful and relevant work. When not busy inspiring excellent output, Jenny can be found spending quality time with family, entertaining, or on the golf course.

Data Driving Results

In an industry that offers intangible products and solutions, our members and customers have a hard time digesting the right information at the right time. More and more of our members and key stakeholders consume information differently, which created more need for dynamic videos and other omni-channel communications. The Anthem in-house Creative Studio has steadily increased our output of digital marketing solutions—especially the use of videos—to meet this need. As a result of our efforts over time, we quickly realized we had a sizeable amount of exemplary video work in our portfolio; however, we had no centralized location for those assets and our stakeholders had no understanding of what was already produced and available. We challenged ourselves to develop a high-tech, low-cost, intuitive solution that would solve our business challenges.

Assessing Project Requirements

During fourth quarter of 2021, the Creative Studio began to assess the number of video projects we had supported over the years. The digital creative team within our Creative Studio is a specialized resource with the capacity to support a tremendous amount of output. In an environment where we're constantly contending with capacity constraints, the need for quicker speed to market and a high demand for more engaging ways to communicate to our audiences, video is quite often the solution most recommended or desired by our marketers. We began to discuss where our videos are stored, whether they are leveraged on a regular basis, and if they are repurposed to help evolve future campaigns. The path led us to the need for a more robust video repository solution. Our initial step was to draft the blueprint for a comprehensive in-house proprietary solution allowing users to search a database of all videos, with an analytics dashboard for each.

From "Go" to Data Modeling in a Matter of Weeks

To lay the foundation, we assigned a dedicated team of no less than five associates to this project. The first task they undertook, while tedious, was to reduce the number of our development environments from three to one. Extensive research went into determining the software services currently available for application development within our organization. We considered solutions that offered familiarity, flexibility and feasibility, as well as ones that were already implemented in our organization. Once we made our selection, we were able to move into the development phase.

The video repository portion of the project was rather simple in nature, taking less than five weeks to build the proprietary, web-based solution. It allows a user to search for an asset by line of business, date, audience, brand and/or type (whether motion graphics or live action). The repository even provides a clickable thumbnail image for quickly viewing a video. Once this feature was developed, we quickly began exploring how we could further enhance the tool so that marketers could leverage it as a mechanism to help track and monitor key performance indicators (KPIs) for their campaigns. This is when the team really got excited. They worked to catalog available data, set up a separate environment specifically for data, detailed what was needed by stakeholders, and defined what we could already offer. It may have been unconventional, but it was also an impressive step: we were modeling the data even before we started to build code. To support the integrity of the solution, we accomplished break tests all along the way at multiple stages.
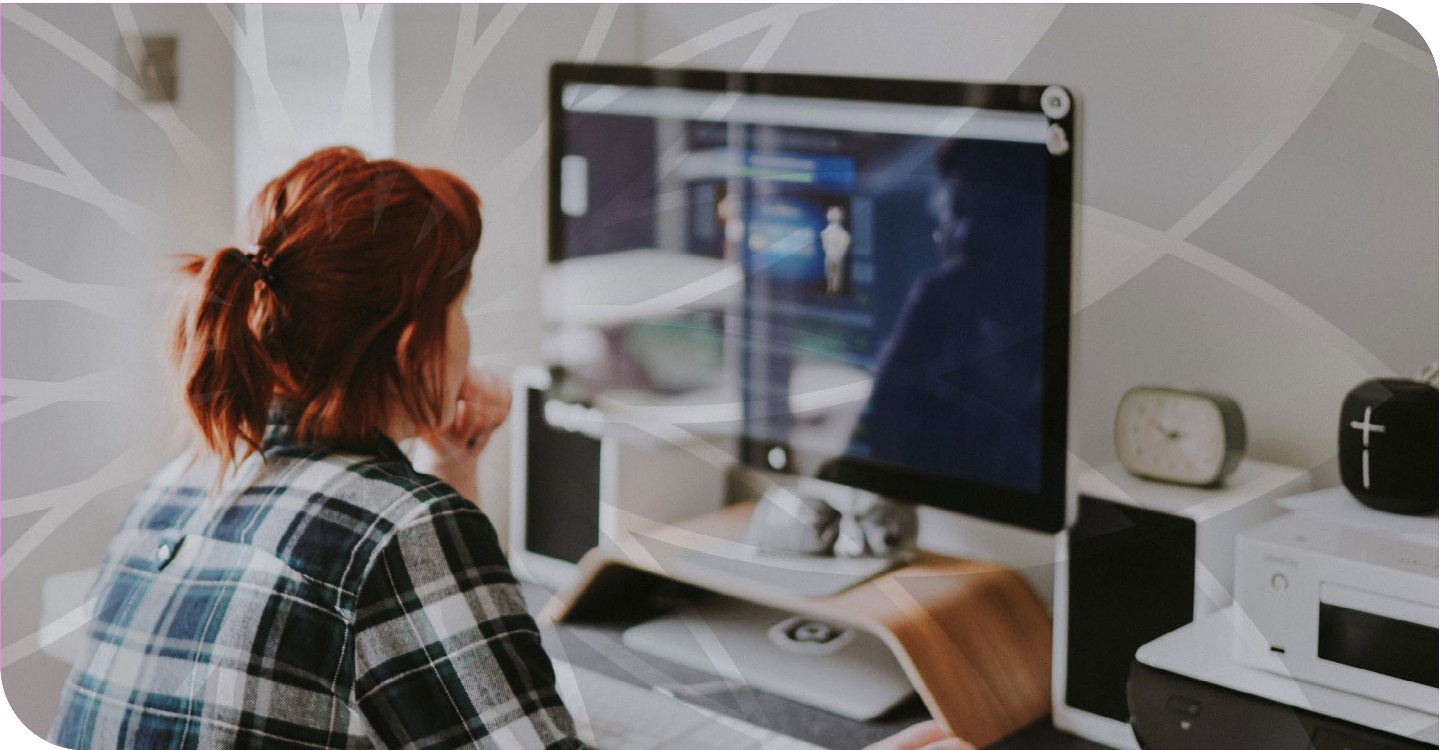
The outcome? A singular repository that provides the ability not only to find and view a video, but also to understand how the market is responding to it in almost-real time. We can now obtain data such as retention rates, impressions and view rates that are updated every 20 minutes. Quickly gaining this level of information about how a product is being received allows marketers to make timely adjustments (and potentially move to a different channel) to obtain their desired outcomes. They can promptly grasp how the information is being consumed—whether by mobile, desktop or another means. It truly allows us to work smarter, not harder. Most importantly, it informs how we use video for future projects or campaigns. The solution provides us confidence in how we promote our work, the length of videos we develop, and where we post them.

Launching a New Era of Video Analytics

After we launched the solution, we began collecting user feedback regarding all aspects of performance. Users indicated they were now able to pull metrics based on a variety of standard date ranges or customize their own range, which meant they could use that data to monitor their monthly campaign metrics, as well as to check in more frequently and determine if a specific event made an impact. Additionally, they reported that through the domain metrics, they were able to gain insight into the most appropriate place for the audience to consume product information based on

impressions. For example, one marketer reported that 95% of impressions for an old video were occurring on one domain, and thus she made it a top priority to update that video to the newest version first.

Dashboard Reporting: Insights in a Flash

Prior to the dashboard, the marketers had to create a video reporting request ticket in our workflow tool each time they wanted an updated report, which then went through a full request prioritization process. A few weeks later, they would have updated reporting. Now, users have told us they can find several metrics themselves. With just one click on the dashboard.

The use of bar graphs, line graphs and pie charts to present information for each video on the dashboard makes things incredibly consumable and easy to understand. This analytics dashboard implementation also allows our development team more time to focus on other initiatives, since they can off-load time-consuming report generation tasks involving video metrics. Users have expressed they appreciate the charts being ready to go, so they can copy and paste relevant information into a one-page document that can be easily shared.

With the development of the video repository and analytics dashboard, the Creative Studio and Anthem can now quickly access an internal library of videos and gain valuable insight from their metrics to inform future work and the overall success of our digital campaigns.

Funding

Expert Perspective

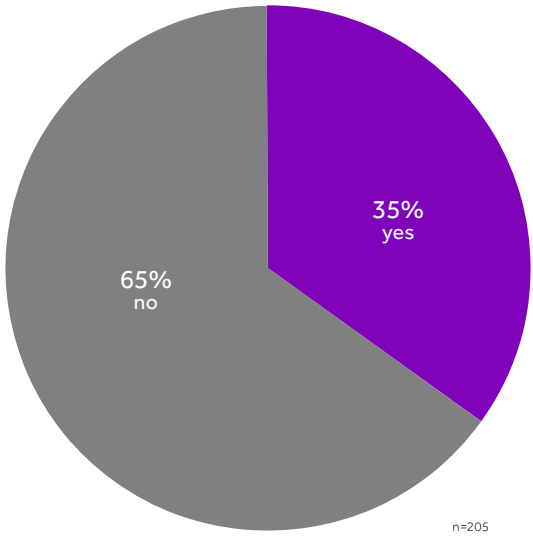By Sue Wolski
Specialty: Operational Optimization
and Financial Control

Centrally funded organizations still represent more than 50% of the IHA funding-model responses. Understanding your department's financial management and knowing how to run the business of your IHA are crucial measures of your team leadership and ability to help manage the behaviors of business partners/internal customers.

Q: Which of the following best describes the head of the IHA's ownership of the department's overall budget?
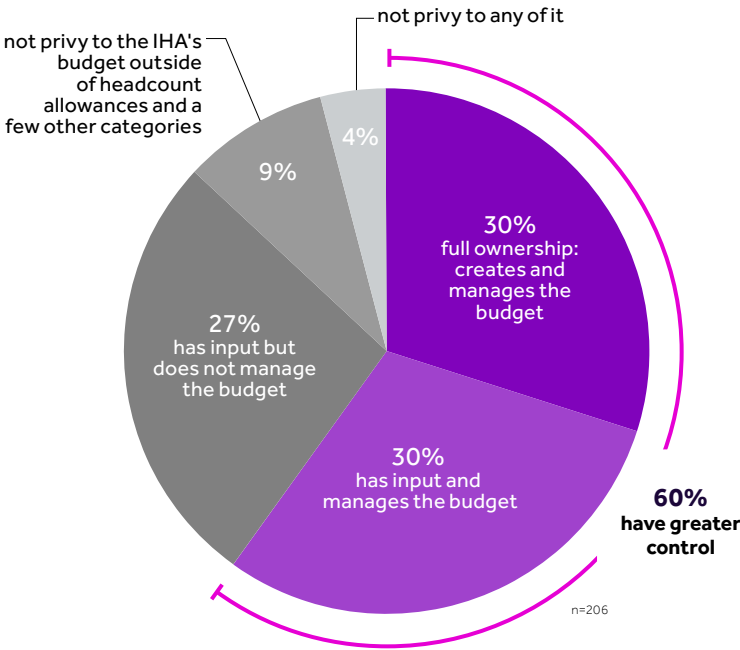
Q: Have you ever been asked to provide a cost comparison between your in-house agency and comparable external agencies?

not privy to any of it

not privy to the IHA's budget outside of headcount allowances and a few other categories

4%

9%

30%
full ownership:
creates and
manages the
budget

27%
has input but
does not manage
the budget

30%
has input and
manages the budget

**60%
have greater
control**

n=206

35%
yes

65%
no

n=205

Q: What is the funding model for your in-house agency (not including any pass-through costs)?
(select all that apply)

52% centrally funded[1]

25% allocation[2]

13% partial chargeback

12% chargeback

n=207
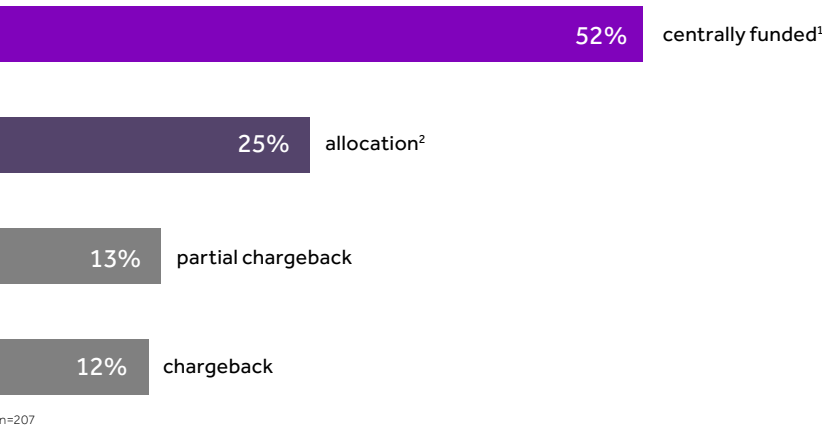
[1] The IHA is funded as a percentage of G&A, marketing, etc.
[2] Business units contribute budget based on historical or projected use of IHA services

While centrally funded is still the dominant funding model, its usage decreased 15% this year while allocation grew 3%. And this year's 7% drop in chargeback allowed even more project-led work to be done in house. All of these factors indicate that IHAs are increasingly being regarded as a strategic partner by their clients.

Q: What is the most common method used to charge clients?

other

4%

12%
flat project
rate

46%
blended hourly
rate

38%
service-specific
hourly rate

84%
recover
through an
hourly model

n=50
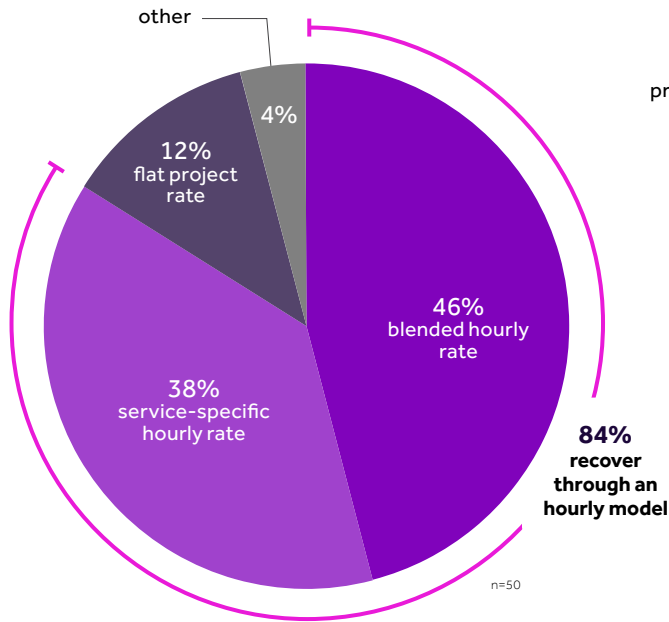
Q: Which most accurately describes your chargeback model?

i'm not sure

profit requirement

8%

8%

52%
subsidized
chargeback

32%
full-cost
recovery

n=50
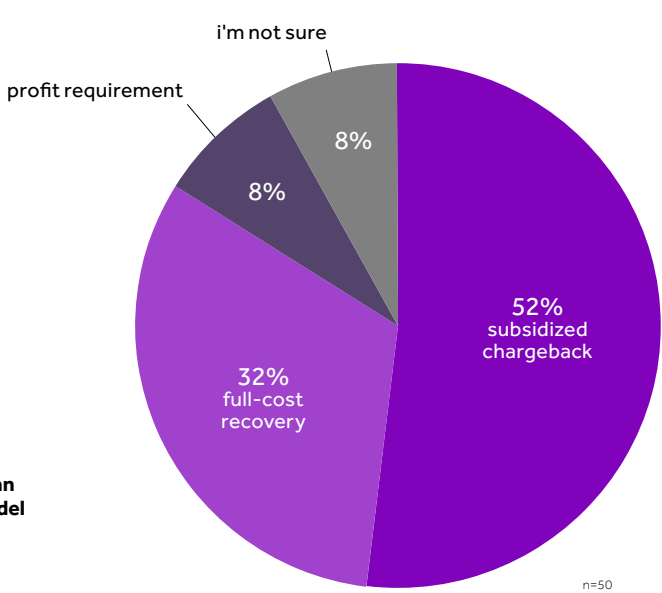
Q: What is your blended hourly rate for creative services?

> $160	$141-$160	$121-$140	$101-$120	$81-$100	$66-$80	$51-$65	< $50
0%	13%	17%	13%	22%	13%	9%	13%

n=23
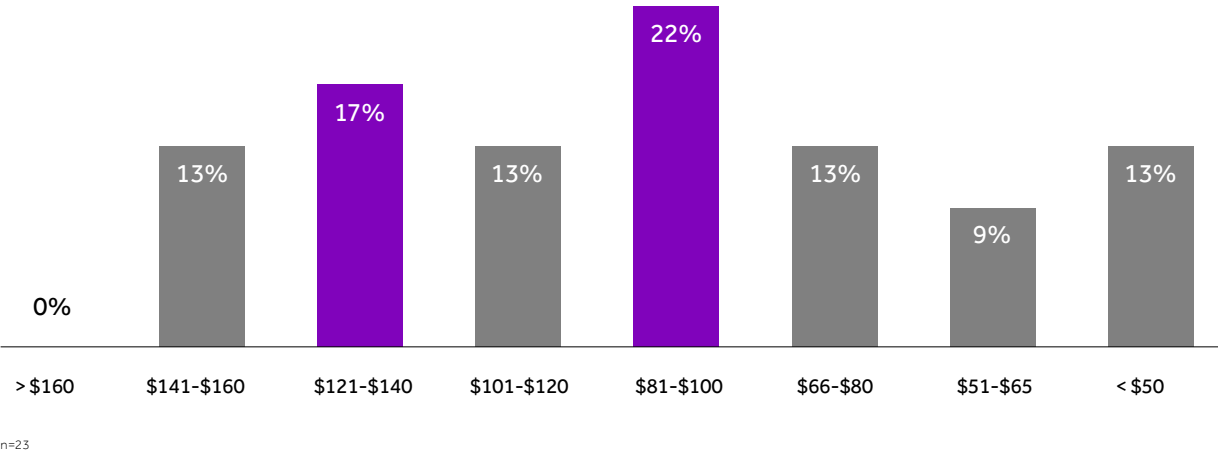
Note: the sample size for chargeback teams is small and should be taken into account when evaluating responses by percentages

Q: What is your hourly rate for the following services?

|	Not a service we provide	We don't charge for this	<$50	$51–$65	$66–$80	$81–$100	$101–$120	$121–$140	$141–$160	>$160
Account management	30%	16%	3%	3%	14%	11%	8%	11%	5%	0%
Project management	24%	16%	3%	8%	19%	5%	11%	8%	5%	0%
Graphic design	0%	5%	19%	11%	16%	22%	11%	11%	5%	0%
Digital design	0%	5%	16%	11%	16%	24%	14%	5%	8%	0%
Digital user experience (UX)	14%	8%	14%	8%	11%	17%	17%	3%	8%	0%
Creative direction	5%	14%	11%	3%	14%	11%	11%	14%	19%	0%
Copywriting	19%	11%	8%	5%	14%	14%	11%	14%	5%	0%
Copyediting + proofreading	24%	5%	8%	16%	16%	14%	3%	5%	8%	0%
Video production (capture, editing)	11%	6%	8%	14%	11%	17%	17%	6%	11%	0%
Video animation	14%	6%	8%	8%	14%	17%	17%	6%	11%	0%
Video motion graphics	6%	6%	8%	14%	14%	17%	17%	8%	11%	0%

n=37

Q: What is your expectation for your 2022 training and development budget?

17% less than 2021 spend

33% greater than 2021 spend

50% equal to 2021 spend

n=198
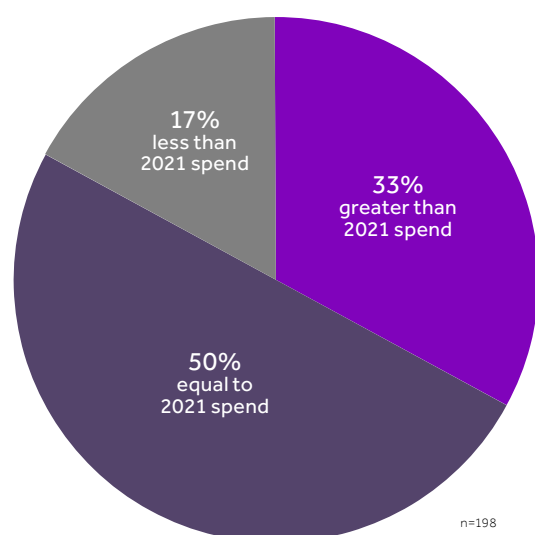
Q: What measures are being taken to help manage and motivate today's workforce? (select all that apply)

Flexible work schedules	75%
Private (1-to-1) recognition	67%
Increased personal conversations with direct reports/team members	55%
Physical and mental health resources/awareness	47%
Informal virtual team-building meetings/get-togethers	45%
Public recognition on channels such as Slack or intranet	41%
Increased training and development	41%
Increased team-wide messaging and updates	32%
Team challenges/contests	21%
Goodwill/social projects	20%
Leadership-driven videos and podcasts	13%
Other*	5%

n=196

* Includes: Autonomy, Company culture improvement, Cross-team meetings, "Safe" events, "Thank-you" vacation days and Team-building activities

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Process & Performance

Expert Perspective
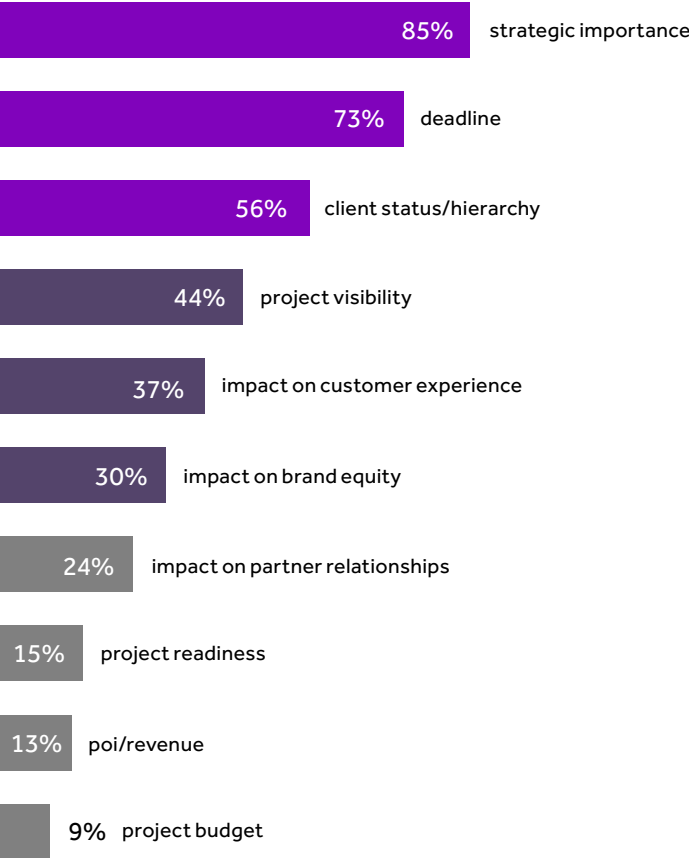
By Kathy Haven
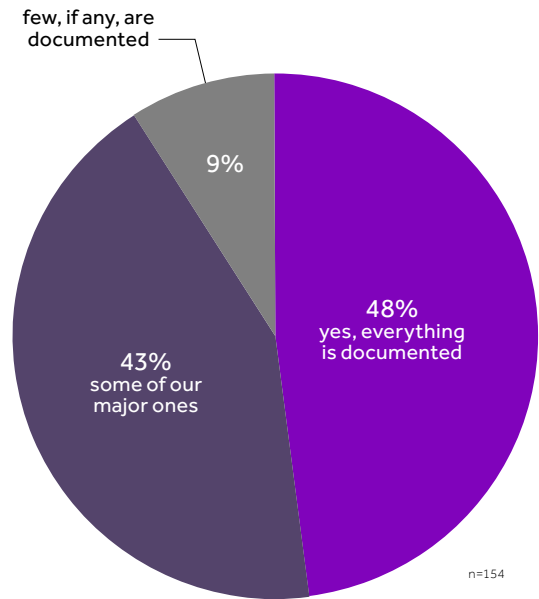Specialty: Process, Technology
and User Adoption

Almost 50% of respondents document all of their workflow processes, while fewer than 10% document little to none of theirs. This matters. Documented processes provide a baseline for continuous improvement and create a foundation for effective growth planning. Once it's created, maintaining documentation is just as important.

Q: What are the most important criteria to consider for prioritizing your group's assignments?
(select all that apply)

- 85% strategic importance
- 73% deadline
- 56% client status/hierarchy
- 44% project visibility
- 37% impact on customer experience
- 30% impact on brand equity
- 24% impact on partner relationships
- 15% project readiness
- 13% poi/revenue
- 9% project budget

n=153

Q: Are your workflow processes documented?

few, if any, are documented

- 9%
- 48% yes, everything is documented
- 43% some of our major ones

n=154

Q: Does your team have established/published service-level agreements for creative deliverables?

- 18% yes, for all deliverables
- 52% no
- 31% yes, for some deliverables
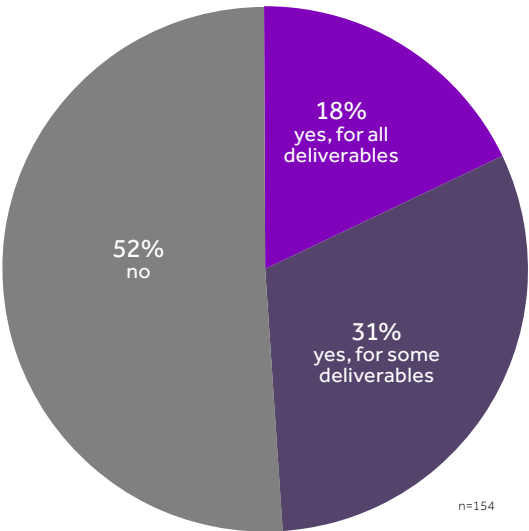
n=154

Q: Do you have a fast-track process in place to accommodate quick-turn projects?

- 31% no
- 57% yes
- 12%
- yes, with dedicated team/resources
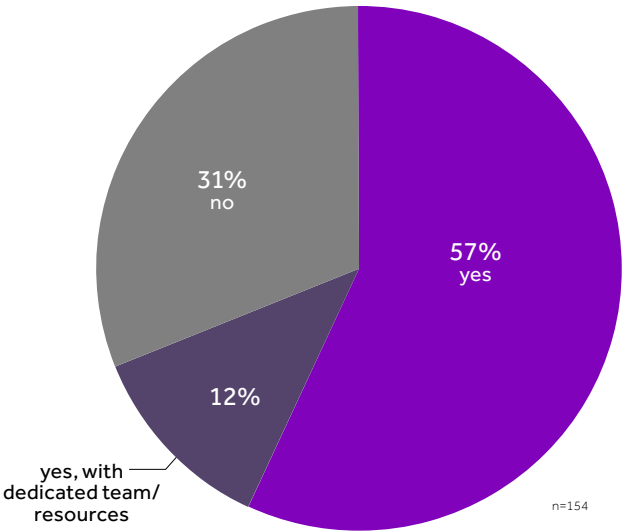
n=154

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Q: What process methodologies does your team use?
(select all that apply)

45%	hybrid waterfall-Agile
37%	waterfall
19%	Agile
19%	other
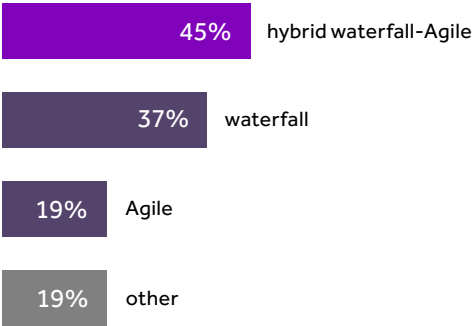
n=139

Q: How long has your in-house agency been using Agile methodologies?

- 13% > 5 years
- 30% < 1 year
- 38% 1-3 years
- 20% 3-5 years
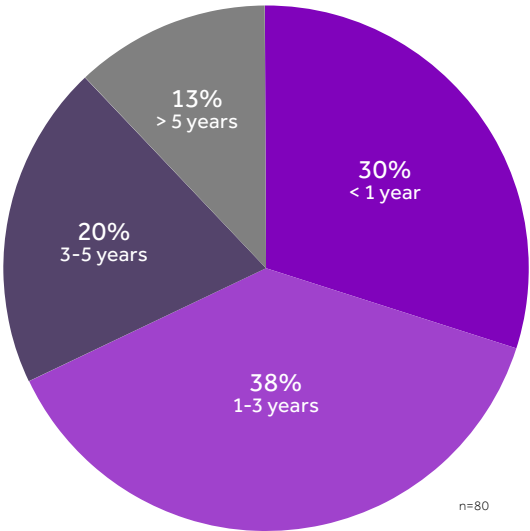
n=80

Q: What Agile methodologies do you use?
(select all that apply)

39%	hybrid
27%	scrum
21%	kanban
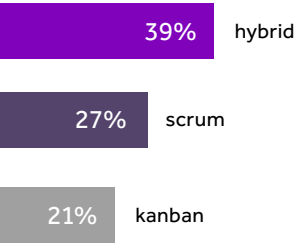
n=105

Its lack of any responses this year indicates the phaseout or elimination of the Scrumban methodology.

Q: What percentage of work is done using Agile methodologies?

< 10%	~ 25%	~ 50%	~75%	> 90%
32%	19%	25%	14 %	11%
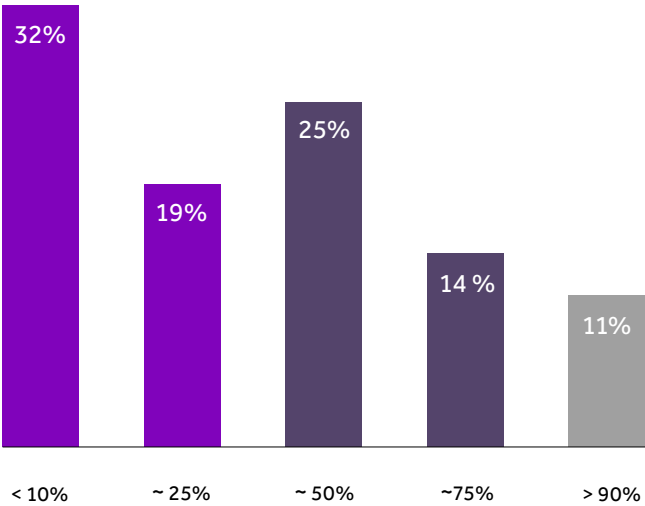
n=81

Q: Did your IHA do more or fewer projects utilizing Agile methodology in 2021 (vs 2020)?

11% substantially more

25% more

61% about the same

4% fewer
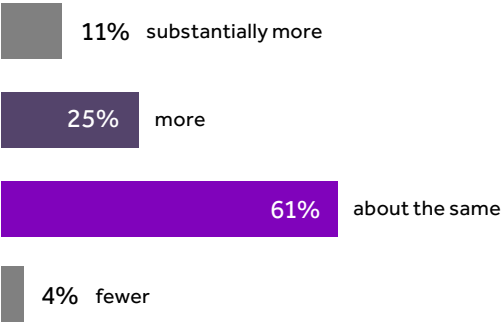
n=76

Q: Which project types are managed with Agile? (select all that apply)

96% digital

39% offline (print)

33% video
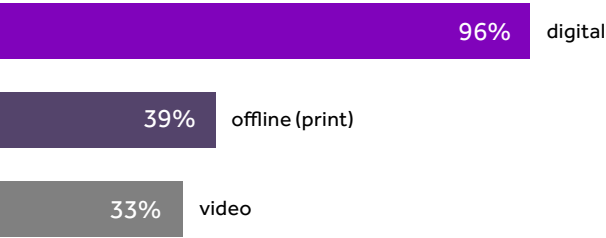
n=75

Q: Which tiers of work are managed with Agile? (select all that apply)

69% tier 1

56% tier 2

45% tier 3

21% Growth Marketing content
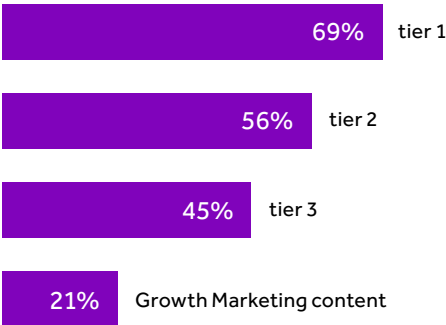
n=75

Q: How often do you survey your clients?

after every project

after most projects

3%

7%

9% quarterly

10% semi-annually

50% never

22% annually
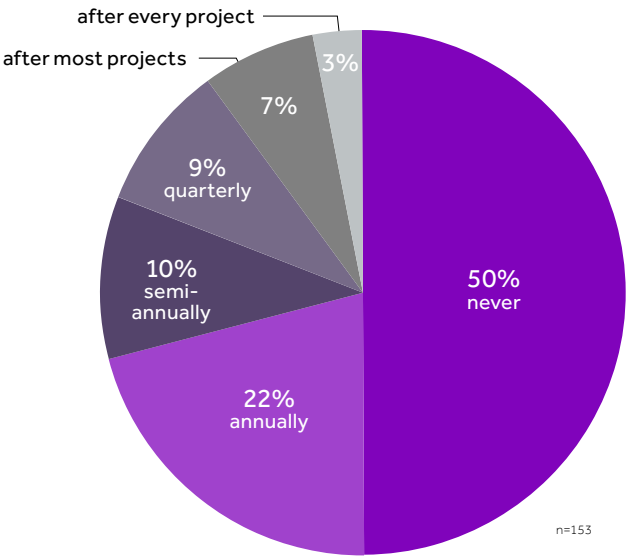
n=153

Q: Does your team capture and report on operational metrics (such as utilization, volume and cycle time)?

42%
no

58%
yes

n=154
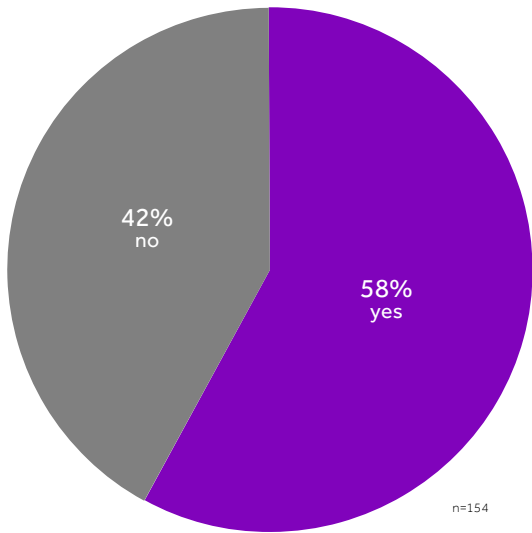
Q: What are the three most important operational metrics you measure/track? (select up to 3)

79% volume (project count)

58% level of effort (project hours)

34% utilization

30% output by job type (web page, video, ad, brochure, etc.)

30% output by client

27% output by category (digital, media, print, etc.)

22% on-time delivery

10% cost avoidance

3% error rate

3% other

n=90
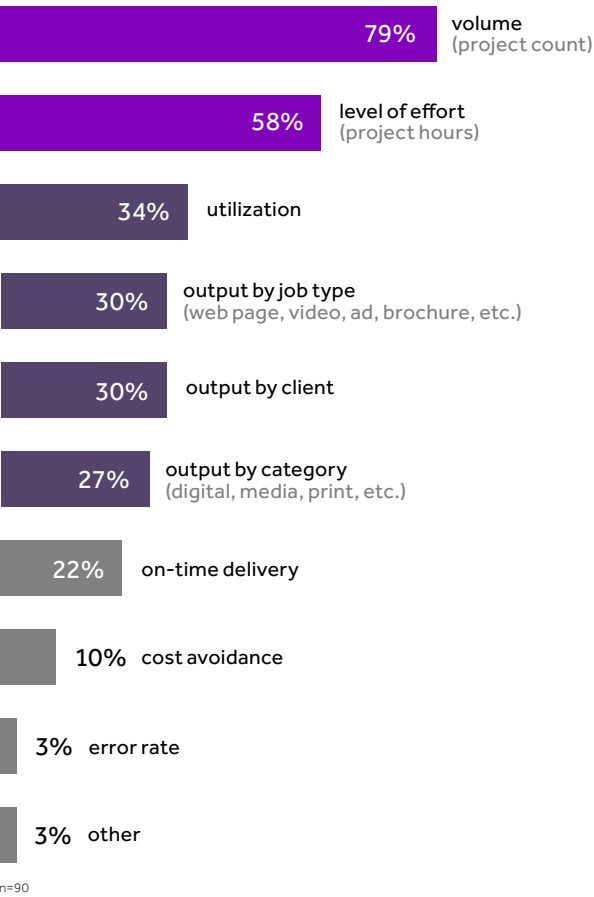
Q: Does the in-house agency measure/receive performance metrics on the external-facing assets it creates?

43% no

24% yes, for most digital projects

20% yes, for most tier 1 projects

14% yes, for most projects, regardless of tier or channel

n=153
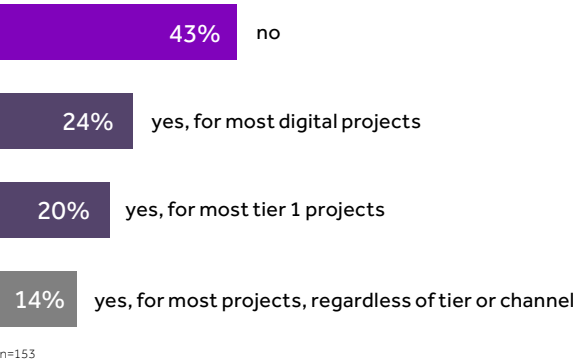
Q: What is the in-house agency's approximate on-time delivery rate?

26-50%

3%

14%
51-75%

84%
75-100%

n=153
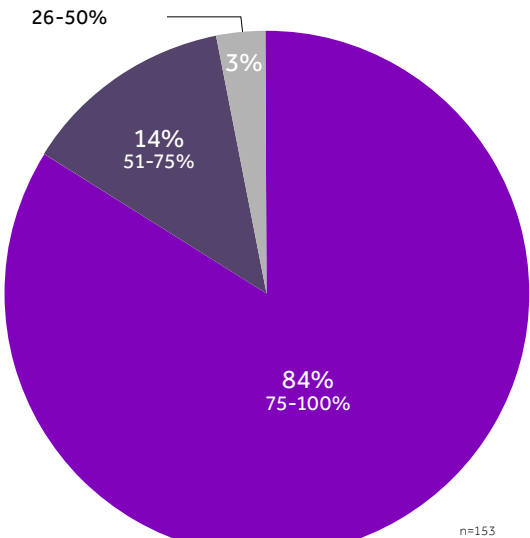
Q: Does your team use creative briefs?

53%
yes, for
tier 1 projects
(nonstandard,
non-iterative,
highly conceptual
projects)

31%
yes, for all
projects

16%
no

n=154
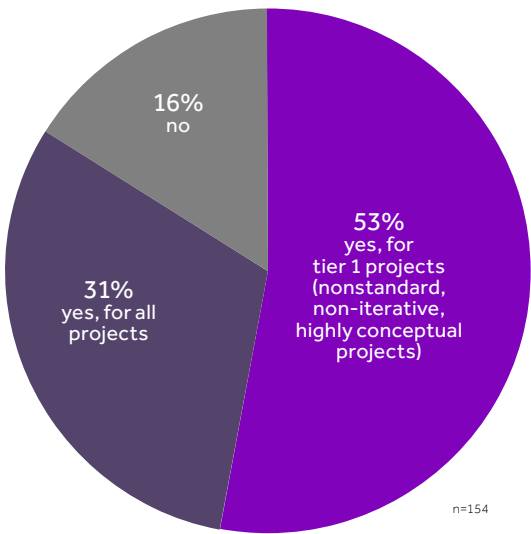
Q: Who meets with the client/business partner to scope a new project? (select all that apply)

53%	creative director
50%	project manager
46%	lead designer
32%	account manager
25%	team manager
18%	copywriter
8%	other

n=154
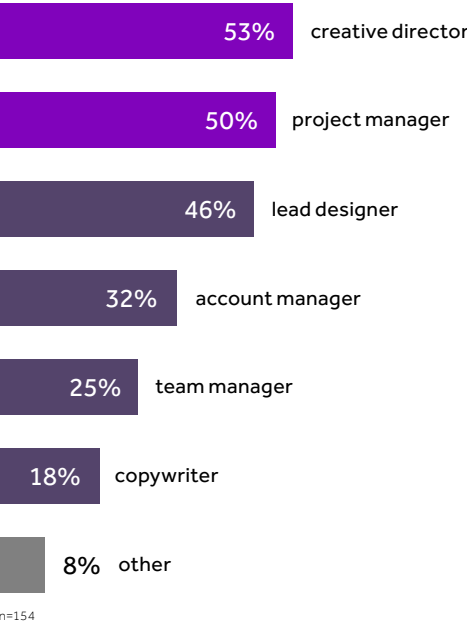
Q: Who meets with the client/business partner to review iterations? (select all that apply)

65%	lead designer
50%	project manager
46%	creative director
24%	account manager
24%	copywriter
15%	team manager
9%	other

n=153

Q: What is the breakdown of planned versus ad-hoc work?

9% planned 90%+ with 10% ad-hoc

29% planned 75-89% with remaining ad-hoc

39% planned 50-74% with remaining ad-hoc

16% planned 25-49% with remaining ad-hoc

7% planned 0-24% with remaining ad-hoc

n=127
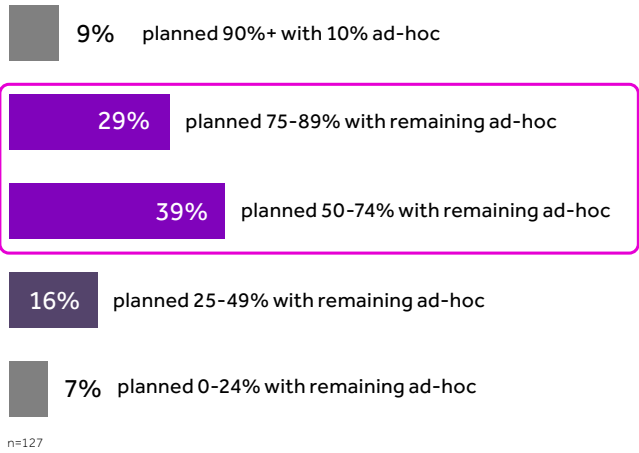
Q: How much notice is provided to your creative team for a deliverable request?

17% annual and quarterly plans

25% weekly or bi-weekly strategy sessions

58% submitted as needed with due dates (no advance notice)

n=128
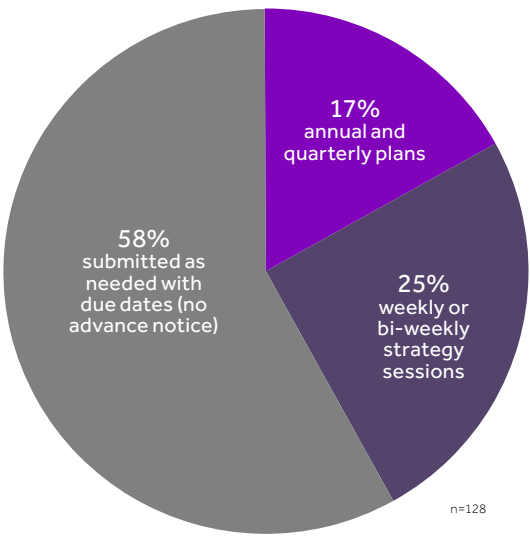
Q: Does your agency have access to business analytics data?

36% no

64% yes

n=126
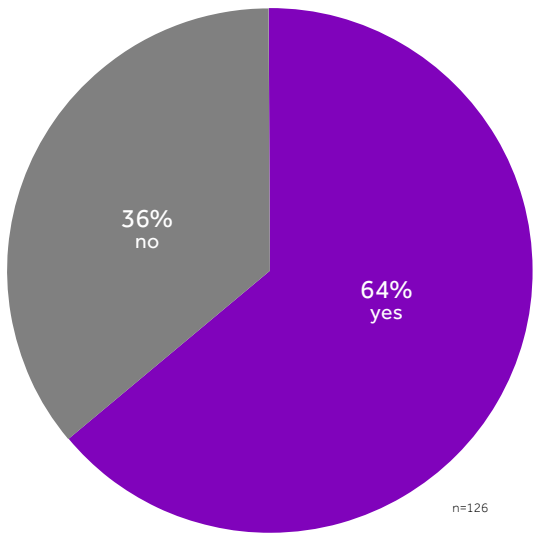
Q: Do you have a behavioral scientist or customer insights role at your agency?

22% yes

no, but intend to

7%

71% no

n=126
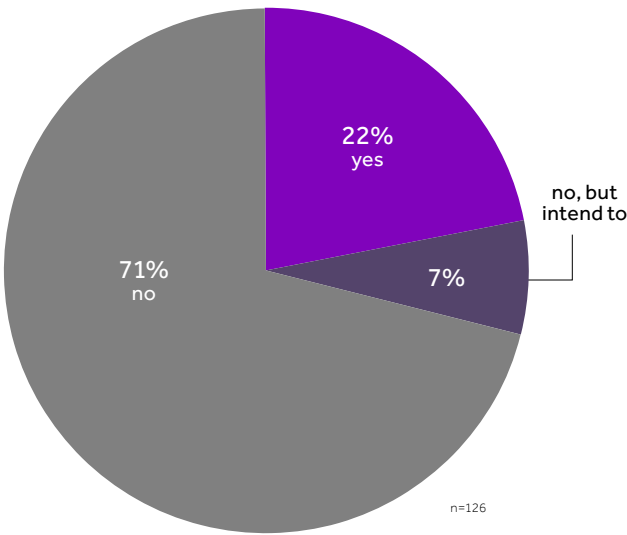
Q: Are you tracking or reviewing customer sentiment data?

37%
yes

26%
no - but want to

37%
no

n=125
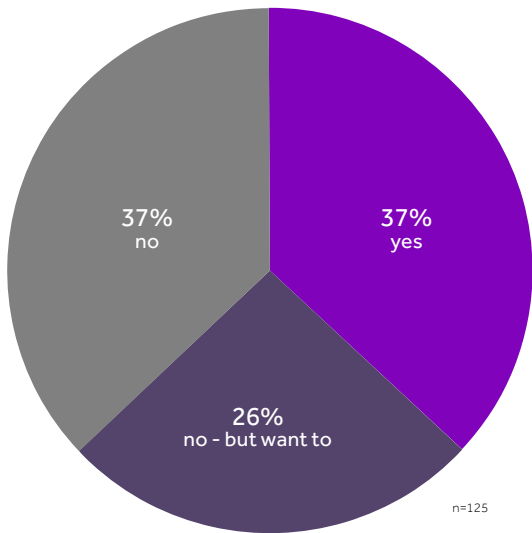
Q: Does your creative team have access to customer interaction data?

50%
yes

50%
no

n=125
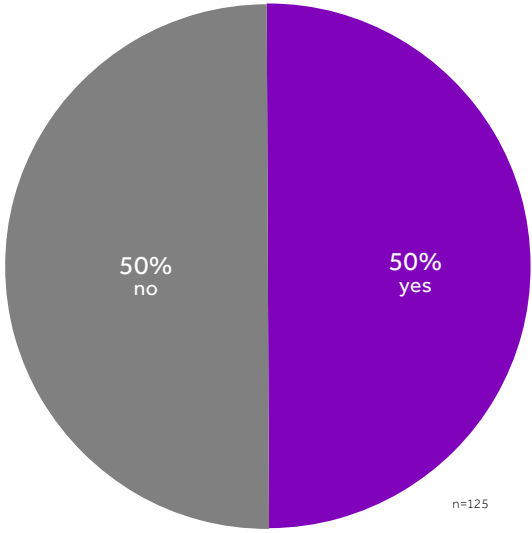
Q: Do you review and update your strategic direction and creative briefs based on feedback data?
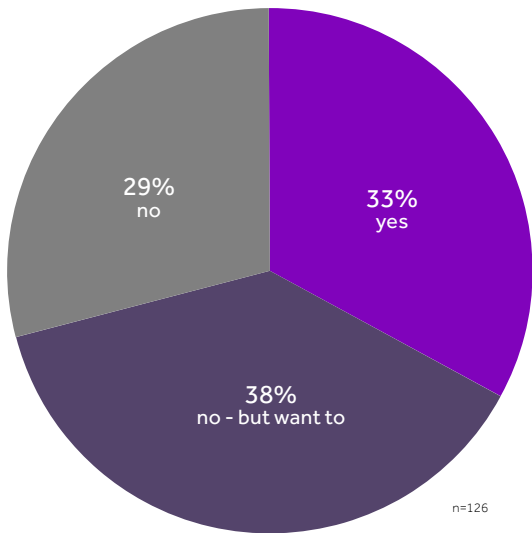
33%
yes

38%
no - but want to

29%
no

n=126

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Kylie Turnauer
Director of Marketing
Operations, McKesson

Kylie Turnauer is the Director of Marketing Operations at McKesson. Prior to McKesson she led Marketing Operations at Carmax and Genworth Financial. While she has spent over a decade building and growing marketing operations teams and improving efficiency across marketing organizations, she did not start her career in the marketing world. The first half of her career was spent in business operations roles with a focus on process improvements and system implementations. She has brought her passion for collaboration, efficiency, and process automation to the marketing world. The use of Agile methodologies in the marketing space has been of particular interest to her for the last six years. She welcomes every opportunity to talk about the concept!

Adopting and Adapting Agile for Marketing and Creative

Speed to market. Increased efficiency. High team engagement. Workflow transparency. Have you ever sat around a conference room table (or joined a video call, in your PJs, at your dining room table) to discuss these topics with your marketing colleagues? If yes, did you all agree that these are must-haves for your marketing department? And does your leadership team desire them, too?

Now let's replace those topics with these words: Daily stand-ups. Backlog refinement. Sprints. Points. Retrospectives. Minimum viable product (MVP). Do people toss these around in your video conferences? Not likely. Ever heard of these concepts at all? Maybe.

Scary Good Sense for Others

These terms have been around for two decades. Heck, a meeting was held at a Utah ski resort to develop a manifesto around them. So why don't we know and use them? For many marketers and creatives, it's because these words are scary—presumably meant for their colleagues who do big digital implementations or create new products. I, like many of my colleagues, once believed this about Agile. I was first introduced to Agile and its terms when I was a business operations project manager, years before I ever thought about working in marketing. I knew the methodology's words and the high-level concepts, and it all made a lot of sense to me—for IT teams, that is. The idea that Agile would save you from wasting months working on a project, spending money and time to ultimately do a "big bang" release that would no longer meet the needs of your customer . . . That just seemed like good business sense, and I understood why IT teams were adopting this way of working.

Needed: Quick Fix for Stormy Situation

Fast forward a decade. I was leading Marketing Operations, and the perfect storm was brewing. We had a marketing services team (project managers, designers, copywriters and media planners) with very low engagement. Tired of being order takers, they were never in the driver's seat when it came to timelines, and always felt like they were moving in reactive mode. Basically, they just did everything they were told to do, when they were told to do it, without ever questioning if it was the right thing to be doing.

At the same time our business partners, aka clients or customers, were getting tired of having multiple points of contact within marketing services and wanted project management support that focused on more than just creative execution. Not to mention, it took a long time to get anything done. And if those issues weren't enough, our CMO informed us that a market wasn't performing well, and our team had to turn it around FAST.

Start to Standup in Two Weeks

Fast? Marketing? Don't count on it. Our standard process took months to bring a full campaign to life, and we didn't have months. We had just a few weeks to start fixing the problem. At my prior company, I took the opportunity to become certified as an Agile scrum master, but I had never actually been a scrum master. My certification classes had shown me that our team need not recreate the wheel; I knew a model existed to help us accomplish our goal. Thankfully our company's technology team, which had fully embraced Agile, physically sat next to us (back when we sat next to people) and was happy to teach us the methodology.

Just a couple weeks after being presented with the turnaround challenge, we had stood up a very scrappy Agile team to pilot this "new to us" way of working. We made one of our marketing strategists the product owner, I became the scrum master, and we rounded out the team with a media planner, data analyst, copywriter and art director. First things first, we worked with the corporate training team to put our team through a day-long Agile training not at all tailored to marketing. Of course, we created a catchy team name (Operation Chowdah will always hold a special place in my heart), and because we were all-in on this concept, we co-located our team to what had become the room where office furniture went to die! We had a problem statement, a bunch of sticky notes (all different colors and sizes), whiteboards, dry erase markers, planning poker cards and the desire to try something different.

Checking All the Boxes

Within one month this team was doing backlog refinement, bi-weekly sprint planning, using points to size work, having daily stand-ups, holding bi-weekly open houses to showcase completed work, and conducting retrospectives after every sprint. We put up a Kanban board and filled it with all those different sticky notes. As a team, we conducted user interviews and discovery sessions to create a persona and better inform the marketing tactics that were being built. Ultimately, we had our persona (Walter, he was a good man) drawn on a wall for us to look at whenever we talked about the customer. We used whiteboards for building creative briefs together, vs. filling out forms and loading them into a system. Then within six weeks of being stood up, and truly acting as an Agile team, we successfully delivered multiple tactics into the market. We didn't wait for the "big bang" campaign launch; we provided smaller components to our targets, saw how they performed, and iterated as needed.

Our team stayed together for six months, our planned end date. When things wrapped up, we did an assessment of how everything went. Despite the performance turnaround happening in the problem market, assessors agreed that our endeavor to use Agile for marketing was just "OK." As a team we believed that some things had worked well, but there were plenty that didn't. While many companies would have used that "OK" as an easy out to go back to the old way of doing things, we used it as permission to keep experimenting. Essentially, we had created the MVP of an Agile model for our team, and decided to keep iterating on it.

Lessons Learned the Next Three Years

And iterating we did! Over the next three years we stood up 16 different teams and experimented with seven different types of them. All had internal resources, but some teams also included external agency partners. We created teams intended to exist for extended periods of time (durable) and others that we stood up for just a single project. But all shared the commonalities of being collaborative and using Agile principles. And we all learned many lessons along the way.

- **We built collaborative teams, not Agile teams –** The term Agile can be scary for creatives. So, we removed it.

- **No two teams were the same –** We tried to give each team as much operational autonomy as possible, but all teams had to follow some basic tenets.

- **Leadership support of the model is very important –** If you're going to turn the way people work upside down, leadership must support the change and the growing pains that come with it.

- **Waterfall will never go away – we were Wagile –** There is a process to marketing (copy, design, legal review, etc.); it's not going anywhere. You can be successful with Agile without getting rid of all waterfall process components.

- **Retrospectives are the most important ceremony –** The only way to get better is to figure out what worked and what didn't and commit to doing some things differently. Many companies lack a culture that acknowledges what didn't work and then embraces those findings the next time around. The sooner you get there, the better!

- **Pick a "team health" item to focus on after every retrospective –** It might touch on communications, or maybe having more fun together . . . Trust me, you won't regret prioritizing the health of the team. Put the scrum master in charge of it!

- **Not all people are cut out to work in this way –** You will need to start hiring people who are comfortable with this work style. Those who are uneasy with it will figure out how to leave on their own.

- **This concept isn't right for all types of work –** Some projects and work types may have to be done fully waterfall. No need to beat yourself up over this!

- **If at first, you don't succeed. . . just keep trying! –** You'll discover the ideal approach for your organization. And it won't be exactly like other organizations'.

An Awesome Accomplishment

When I look back over this period, I am inspired by people's willingness to just try something different. We didn't have all the answers when we started, but we had a leadership team that was willing to let us try, fail and keep trying. We had employees that were craving change and were open-minded when it came to doing things differently. I'm not going to sugar coat it. Things got messy at times. And there were plenty of emotional growing pains. But I remain in awe of the changes this marketing department accomplished in just a few years, all aimed at increasing speed to market, becoming more efficient, improving team engagement, and bringing a new level of transparency into their work. I'm confident that if other organizations give this a try, they'll find the model that works best for them!

McKesson is not a current customer of Cella.

Partnerships & Global Operations

Expert Perspective

By Angela Conway
Specialty: Operational Optimization
and Business Process Planning

A large majority (77%) of IHAs use external agencies for overflow work, specific creative expertise, and special projects. And (53%) regularly use them for Tier 1 concepting. It should be noted that these numbers declined as alternative contingent staffing/expense rose. IHAs with global locations do so for labor cost benefits (57%), proximity to local business partners (48%), time zone advantages (38%) and brand continuity (29%).

Q: What is the nature of your in-house team's working relationship with external agencies? (select all that apply)

42%	we use agencies for overflow, extra capacity
35%	we use them for new ideas, special projects and skill sets
33%	we partner with agencies on a regular basis to provide niche expertise or on enterprise wide/large assignments
24%	we do not have a relationship with external agencies
20%	they handle tier 1 strategy, we handle the execution
12%	we have a clearly defined and complimentary scope to the agency's scope
6%	we compete head-to-head

n=156

Q: Does your group partner with offshore/off-site creative and production services providers?

23% yes

77% no
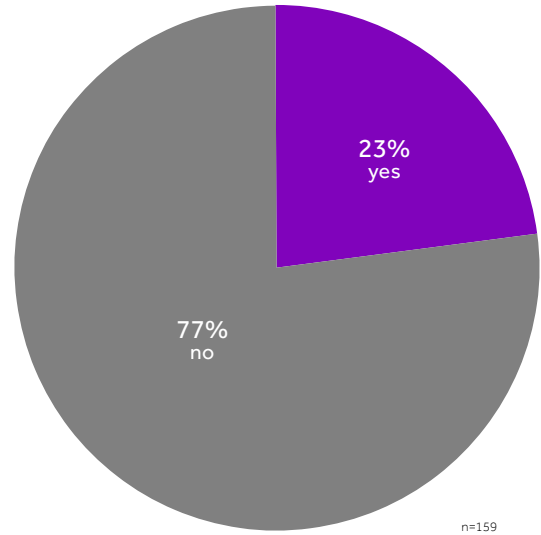
n=159

Q: What services does your offshore outsourcing partner provide? (select all that apply)

	graphic design	digital design	development
Tier 1: creative development	50%	36%	50%
Tier 2: design adaptation	60%	36%	48%
Tier 3: pure production (edits, revisions, templated work)	59%	41%	44%

n=34

Outsourcing partners are primarily providing tier 2 and tier 3 graphic design services. Last year no tier or type of work significantly outweighed other categories.

Q: How satisfied are you with the quality of work from your offshore/off-site partner?

3%
very
dissatisfied

11%
somewhat
dissatisfied

31%
very
satisfied

20%
neutral

34%
somewhat
satisfied

n=35
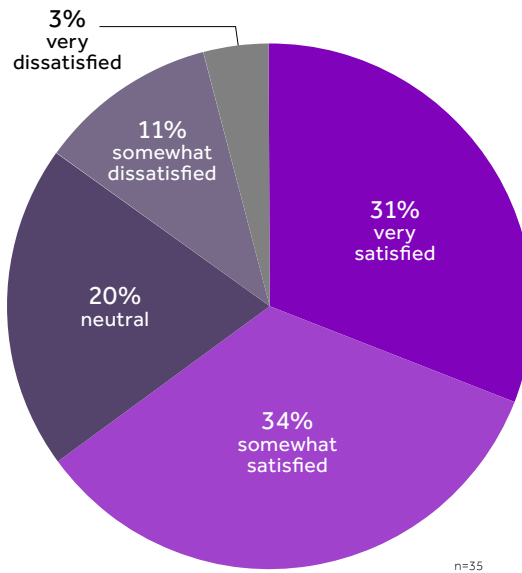
Q: What are the BENEFITS of working with your offshore/off-site partner? (select all that apply)

66% — additional dedicated resources

66% — reduced costs

46% — more hours of business support ("follow the sun" approach)

20% — specialized skill sets

6% — other

3% — brand knowledge continuity

n=35
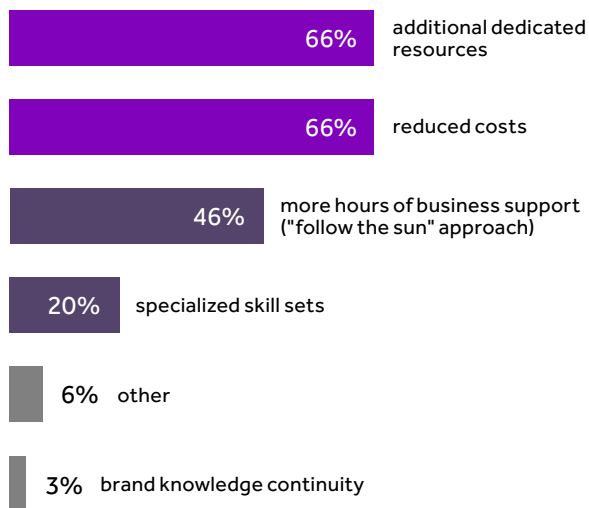
Q: What are the DRAWBACKS of working with your offshore/off-site partner? (select all that apply)

45% — lack of brand knowledge

39% — poor attention to detail

36% — miscommunication

33% — prep work required to share work

27% — time zone misalignment

15% — none

12% — other

9% — missed deadlines

n=33
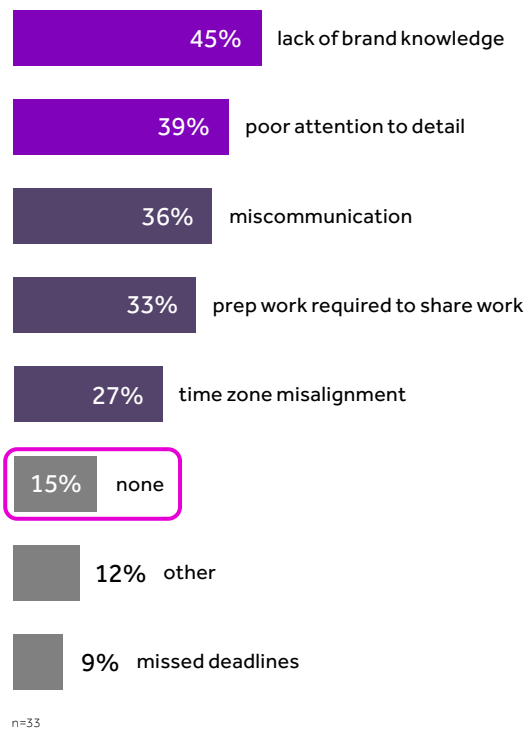
Q: In how many locations do your team members reside? (with at least three people at the location)

The most common locations outside the U.S. for an IHA to have a presence are India (7 teams), England (6), and Mexico (6). Fourteen other countries were also listed.

15% multiple locations both domestic and international

14% three or more domestic locations

59% one central domestic location

12% two domestic locations

n=155
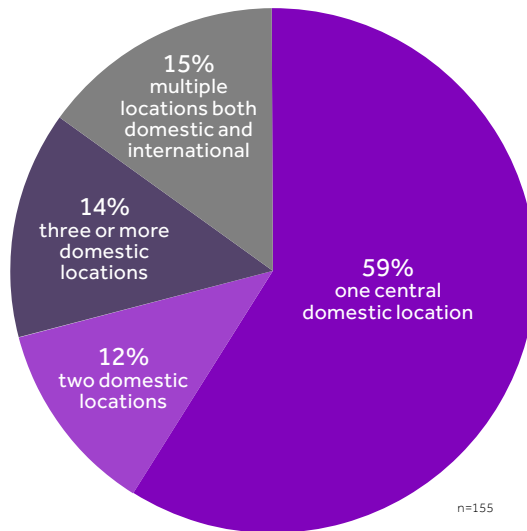
Q: What are the primary reasons for international creative teams? (select all that apply)

%	Reason
57%	take advantage of low-cost labor market(s)
48%	support local business partners
38%	provide more hours of business support ("follow the sun" approach)
29%	ensure brand continuity
19%	support localization/translation requirements
19%	other
14%	location of corporate hq is not in the U.S.
10%	source specialty talent

n=21
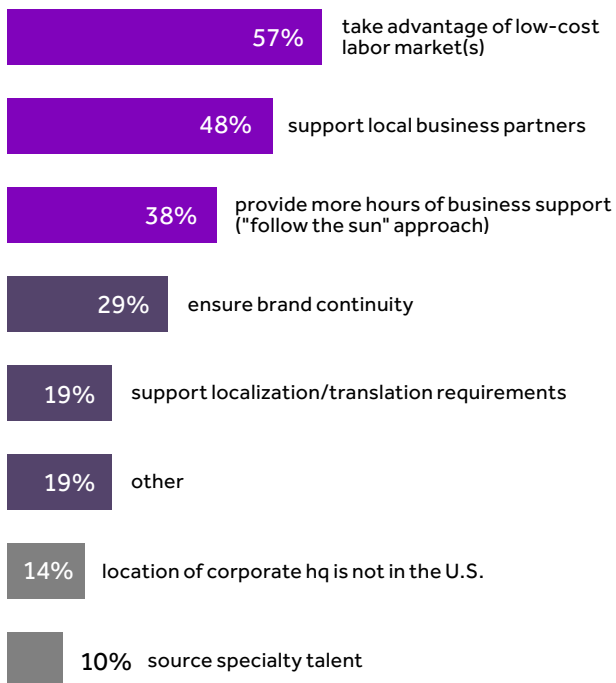
Q: How do you share files between locations? (select all that apply)

Microsoft OneDrive	55%
Project management tool	47%
Email	44%
External services such as Box/Dropbox/Google Drive	44%
Shared intranet/servers	44%
Sharepoint site	42%
DAMs	38%
FTP	19%
Mirrored servers	8%
Slack	8%
File replication	3%
Other (please specify)	2%

n=64

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Anna Maria Marra
MBA, Sr. Director, Global
Biopharma Operations, Pfizer

Anna Maria launched the first Global Marketing Operations team at Pfizer in 2019. Her team includes a strategic and creative service agency which produced >1000 promotional pieces in less than a year, generating considerable cost efficiencies. Anna Maria has 24 years of sales and marketing experience in the pharmaceutical industry, taking her to all parts of the globe and allowing her to follow her passion for languages—she speaks five!

The Creative IHA: Single-Point Global Partner

At Pfizer we are on a journey to reimagine our in-house creative content offering, by developing a fully integrated internal creative agency for clients within the company. Our vision is to be a one-touchpoint creative partner, providing a seamless end-to-end experience along the content development process.

We had already taken big steps towards this goal in 2021, when we consolidated more than 30 creative services specialists into a central creative shop: Biopharma Operations Creative Lab. Our goal was to provide a framework for streamlining content development in house by combining teams from two existing groups, Creative Lab and Pfizer Ink. The resulting integration builds on a 12-year proven track record of delivering high-quality creative for the company and enables us to deliver the full suite of content creation services.

While I'm proud of the great progress we've made to date, a considerable amount of change-management work is still needed to bring about full integration of our creative service offerings within marketing teams globally.

Changing Perceptions of Pharma IHAs

Pfizer's rollout of Biopharma Operations Creative Lab makes us one of the pioneers among the pharmaceutical industry, which has been relatively slow to adopt internal creative services. Many marketeers prefer to use trusted external agencies for their tailored campaigns. And while we've made good progress at Pfizer, our own Biopharma Operations Creative Lab is not immune to these challenges.

The perception that the internal agency is a design studio, rather than a full-service creative agency, is a key challenge for us at Pfizer—one that will require considerable effort to overcome. The misconception is rooted in past practices. Individual brand and marketing teams would create their own tailored solutions, working with one of many different internal yet independent creative teams.

That approach seemed logical on many levels; coming from a global organization, marketing campaigns must be relevant for individual markets, meaning that a local agency—whether internal or external—that understands the market and speaks the same language became an attractive option.

However, the perception that each market is unique has resulted in more than half of the marketing content for Pfizer still being created from scratch at the local level. With the integration of our in-house creative content offering, we are aiming for the globalization of materials to change that situation. In our alternative scenario, global marketing teams produce a campaign that cascades down to individual markets. Those locales won't need to produce new content, thereby saving them precious time and resources.

Internal Agencies as Strategic Partners

To maximize the full potential of our internal creative agency, we need to establish a distinctive identity that encourages our brand and marketing teams to think of us as a strategic partner, to consider our Biopharma Operations account managers as another

pair of hands inside their marketing team, and to have our teams sit down together to build a strategy and pull through on creative content execution.

In short, we need to bring about the trust and collaboration that will enable the full integration and potential of the internal creative agency.

What's more, this transformation will happen in an environment where the drive towards digital means the nature of marketing campaigns is changing. These days, marketing strategies include more content and more variable output than past approaches that were typically centered around one big campaign. As a result, it's more important than ever to be agile and efficient with marketing budgets. This is another way in which our internal creative agency can add exceptional value. Our approach is to support cost-effective marketing strategies built around personalized and modular content.

Marketing Strategies With Purpose

We should not forget the bigger picture as to why we are working so hard to increase efficiency and effectiveness of Pfizer's marketing campaigns via an integrated internal agency.

The process is being driven by our corporate Purpose—breakthroughs that change patients' lives. This means we need to get even more of our innovative medicines and vaccines into the hands of people around the world. To deliver on this commitment, we need to transform how we engage physicians and patients on their terms. The digital explosion has revolutionized how individuals, including physicians and patients, experience services and products. Now, physicians, patients and even our own colleagues want to experience technology advances much like those they see in other industries—and this need has been further accelerated by the global pandemic. Our transformation into a fully integrated, full-service in-house agency means we will be best positioned to help deliver greater awareness of breakthroughs that change patients' lives.

CASE STUDY
Creative Lab's Super Bugs campaign drives conversation around antimicrobial infection

Pfizer is committed to fighting antimicrobial resistance (AMR) through different initiatives aimed at healthcare professionals, payers, other stakeholders and the general public.

Despite efforts to explain AMR, there is still a gap in appreciating its threat and a lack of understanding by the general population as to how they can help fight it. In 2018, Creative Lab, as the internal agency, joined with Global Marketing, Corporate Affairs and Medical to collaborate with the local country markets and implement an awareness campaign with a 360-approach. The campaign used different channels for internal and external activities such as public activations and social media.

The objective was to increase awareness of AMR using "Super Bugs" (cartoon-like 3D models of bacteria and fungi responsible for superinfections) as well as the implementation of a gamified experience for the general public called the Bug Bus, which transformed a complicated topic into something engaging for the general public, generating positive noise along with a call to action. This project was quite challenging since, in the beginning, some believed that the public might not take the topic seriously due to the message's creativity and simplicity. However, the campaign's reception proved this assumption wrong as those elements increased engagement and led to positive results.

More than 25 countries conducted awareness and education activities, and the Bug Bus was visited by more than 28,000 people across Europe. The campaign was recognized externally by the Life Science Awards in Italy as one of the country's best educational initiatives for patients in 2018.

The Super Bugs campaign was implemented in our AMR awareness campaigns in 2019, 2020 and 2021. It is an example of how engaging global content can be used and leveraged locally with great impact.

Technology
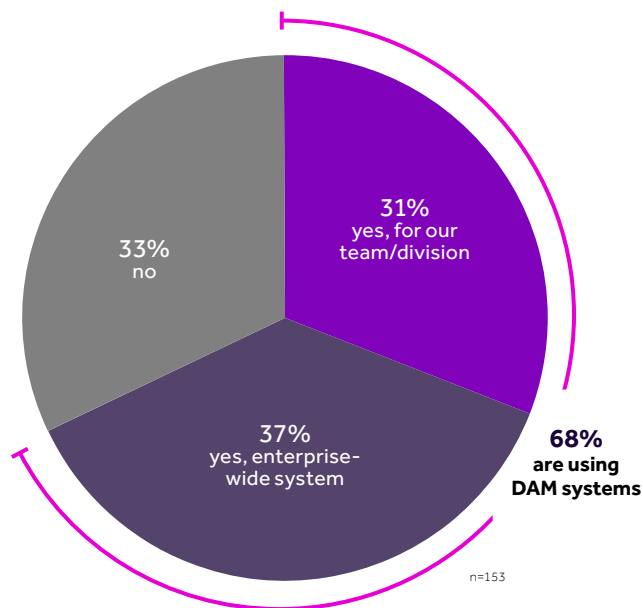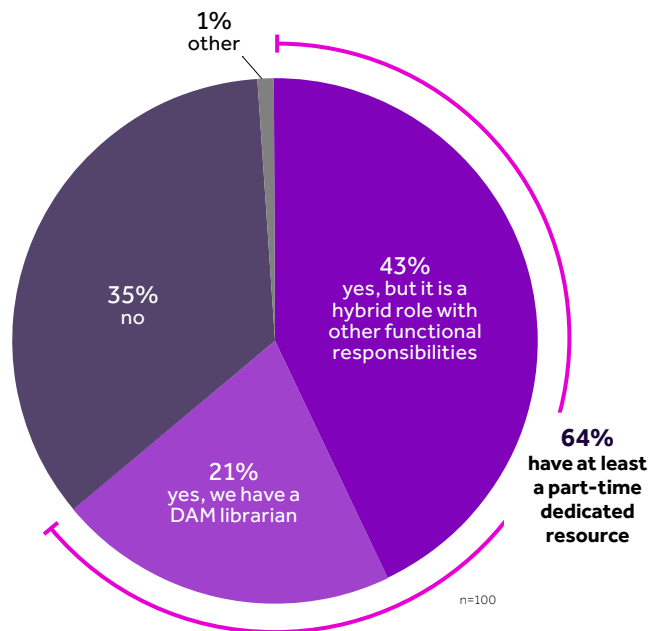
Expert Perspective

By David Iscove
Specialty: Martech Strategy,
Implementations and Integrations

Even before the pandemic, we were seeing a rapid acceleration of content creation to meet rising consumer expectations. Technology helped create a competitive edge for IHAs. Now the benefits they achieved in 'crisis mode' can be even greater when used in the wake of 'new normal' operations.

Q: Does your team use a digital asset management (DAM) system?

31%
yes, for our team/division

33%
no

37%
yes, enterprise-wide system

68%
are using DAM systems

n=153

Q: Do you have a dedicated resource managing your DAM system?

1%
other

43%
yes, but it is a hybrid role with other functional responsibilities

35%
no

21%
yes, we have a DAM librarian

64%
have at least a part-time dedicated resource

n=100

Q: Which DAM system(s) does your team use? (select all that apply)

DOCUMENT COLLABORATION TOOLS (TOP TEN)

%	Tool
30%	Microsoft SharePoint
28%	Microsoft OneDrive
21%	Microsoft Teams
18%	Google Drive
16%	Dropbox
13%	Box
10%	Project Management System with built-in DAM
1%	Confluence
1%	Frame.io
1%	Digizuite

n=100

ASSET MANAGEMENT (DAM) (TOP TEN)

%	Tool
18%	Adobe Experience Manager Assets
9%	Webdam
8%	Bynder
7%	Widen Collective
3%	Canto
3%	FileMaker Pro
3%	Xinet
3%	PhotoShelter
2%	Aprimo
2%	Brandfolder
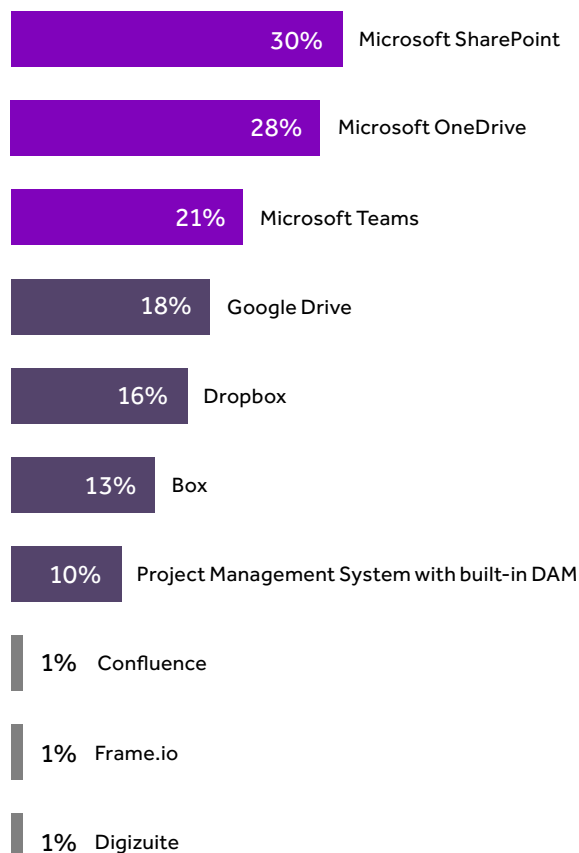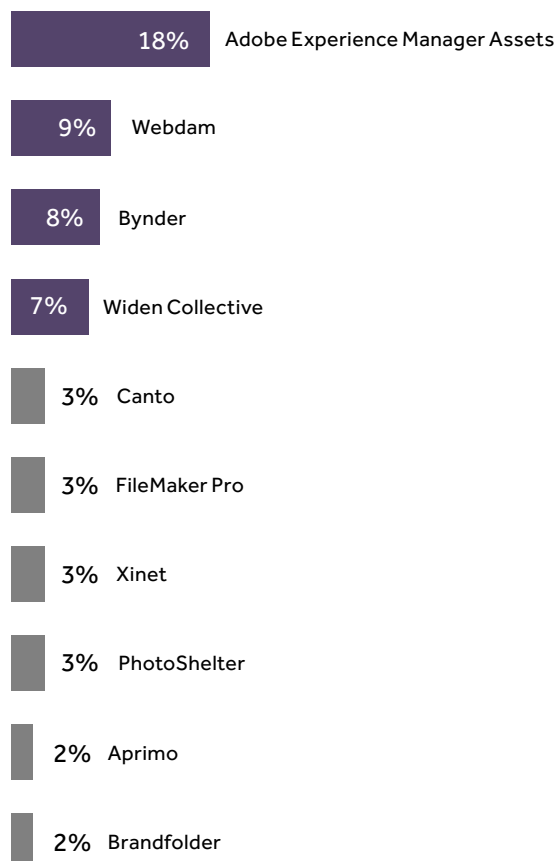
NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Q: Do you plan to update your creative technology within the next 5 years?

14%
no

86%
yes

n=114
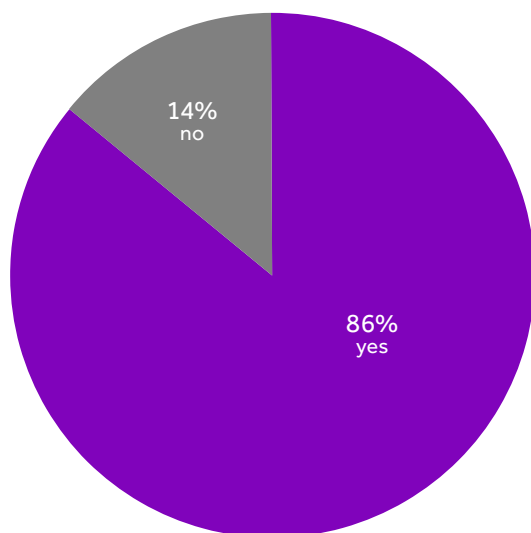
Q: Does your team use project management software?

3%
no, but researching software

10%
no

14%
yes, but dissatisfied

73%
yes

**87%
of teams
use PM
software**

n=152
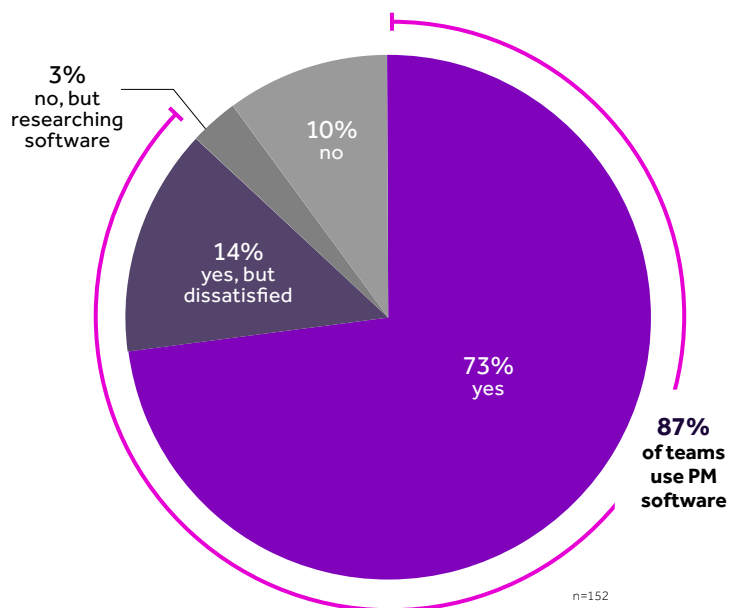
Q: Do you have a dedicated resource managing your project management system?

1%
other

23%
no

53%
yes, a hybrid role with other functional responsibilities

24%
yes, we have a tool administrator

**77%
have an
assigned
administrator**

n=131
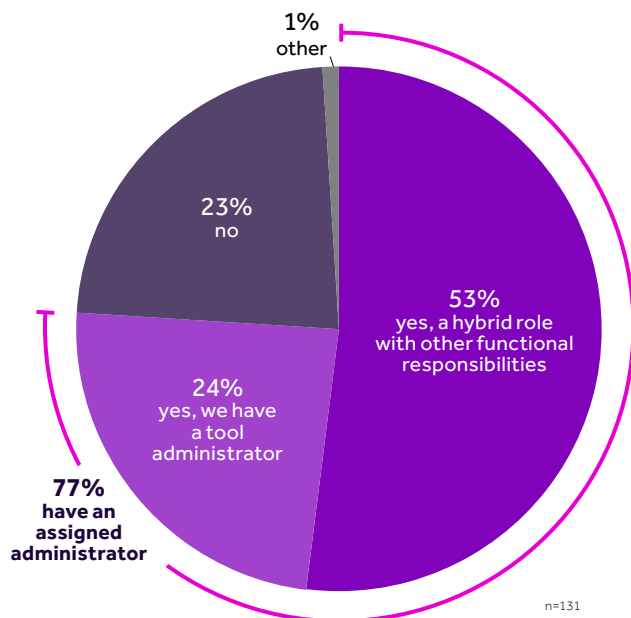
Q: Do you use a digital/online review and approval tool, or a digital markup and routing tool?

no, but researching software

15%
no

7%

7%

no, we print and use other manual methods

8%

63%
yes

yes, but dissatisfied

**71%
use a digital
markup tool**
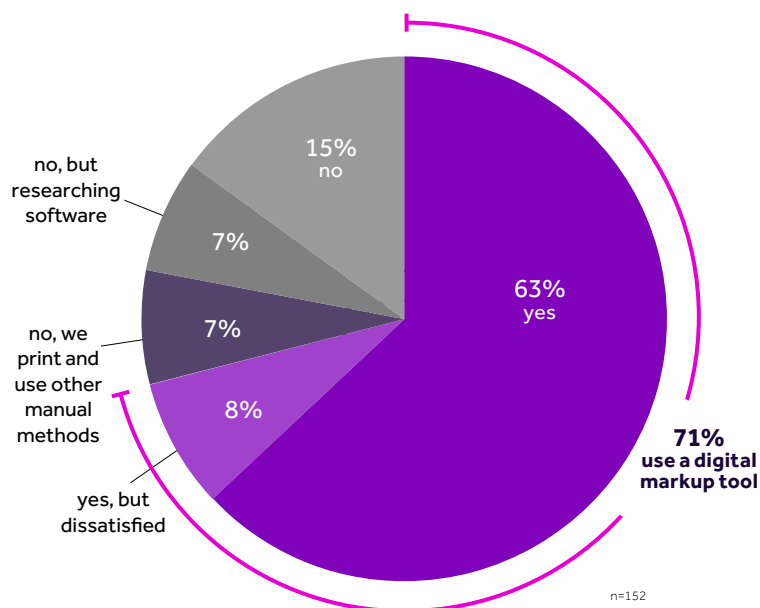
n=152

Q: Which, if any, of these systems does your team use?
(select all that apply)

37%	Adobe Workfront
15%	Microsoft SharePoint
12%	Jira
10%	Wrike
8%	Basecamp
7%	Smartsheet
6%	Asana
6%	Monday.com
6%	Trello
5%	Microsoft Project

n=130

Last year 20% of teams were dissatisfied with their project management systems. This number has dropped six points, indicating greater care is being taken to make technology selections the right fit for their people and use case.
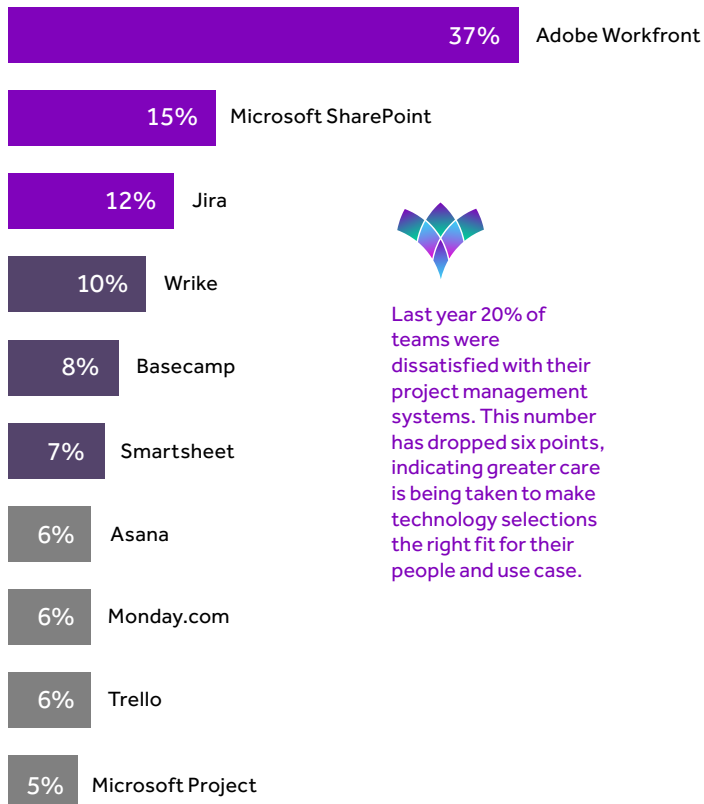
Q: Does your team track time?

- 49% yes, we use project management software to track time
- 14% yes, we use a manual method to track time
- 36% no, we do not track time

63% of teams track time
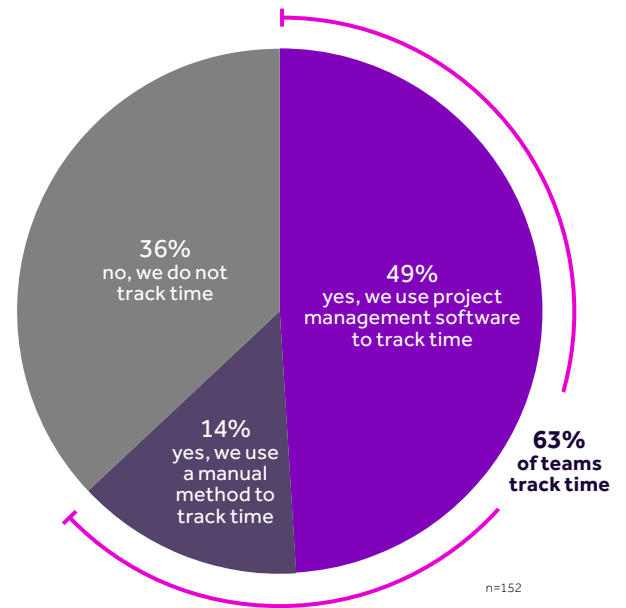
n=152

Q: What level of automation do you employ for creative work?

- advanced
- 4%
- 56% none
- 40% some

44% are using automation
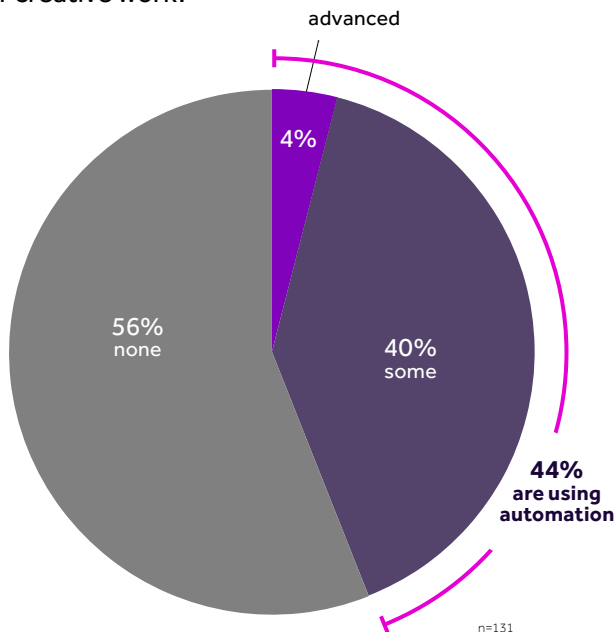
n=131

Q: Have you integrated any of your marketing and creative anchor technology platforms?

- 16% yes, project management and digital asset management (DAM)
- 7% Yes, project management and financial/billing system
- 48% no, but intend to
- 29% no, don't see the ned
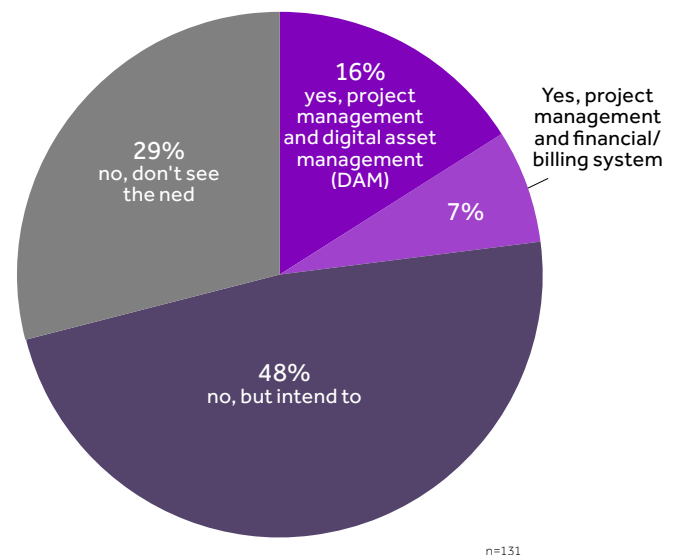
n=131

Q: What tool do you use to gain visibility of planned work?

33% dedicated marketing content calendar or planning software

36% none

31% spreadsheets

n=127
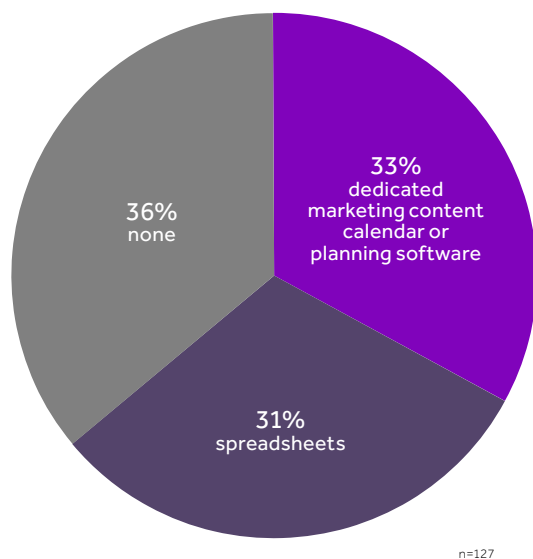
Q: Which dedicated marketing content calendar or planning software do you use?

47% other

12% Smartsheet

9% Monday.com

8% Airtable

8% Asana

8% Trello

3% Contently

3% Sprinklr

1% Aprimo

1% Opal

n=75
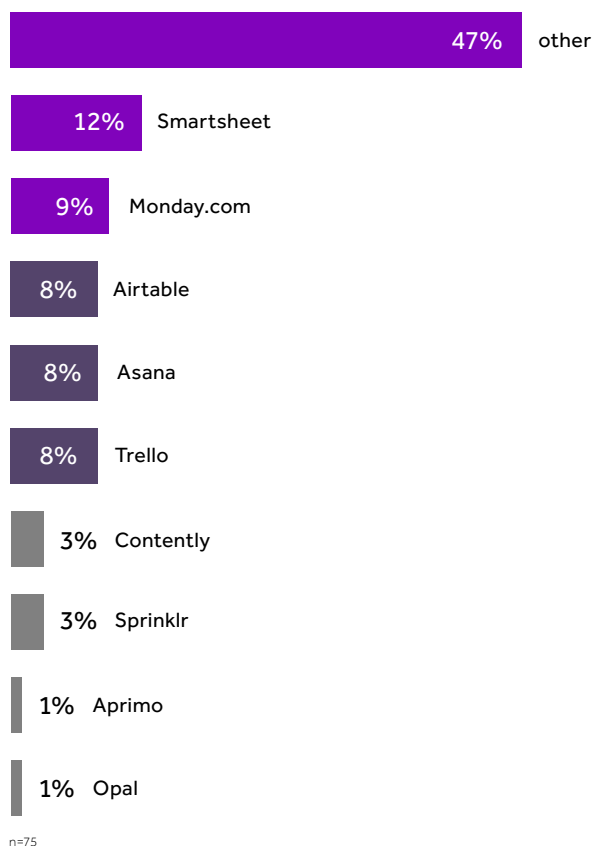
Q: Is your content calendar integrated with the platform you are using to track the execution of tactical work?

11% use content calendar app

19% yes

69% no

n=108
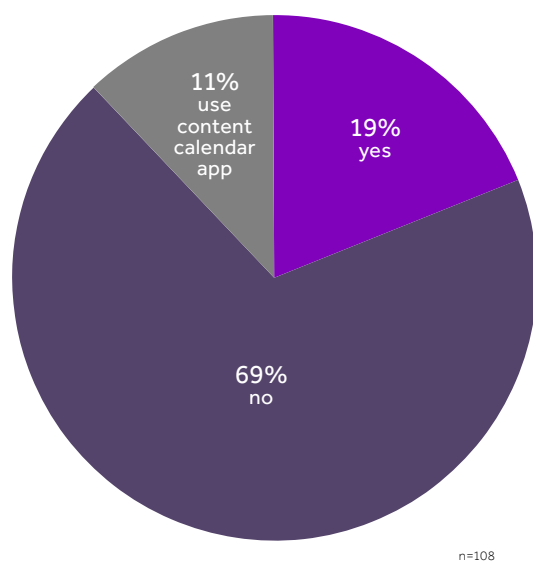
Q: Do you produce dynamic content?
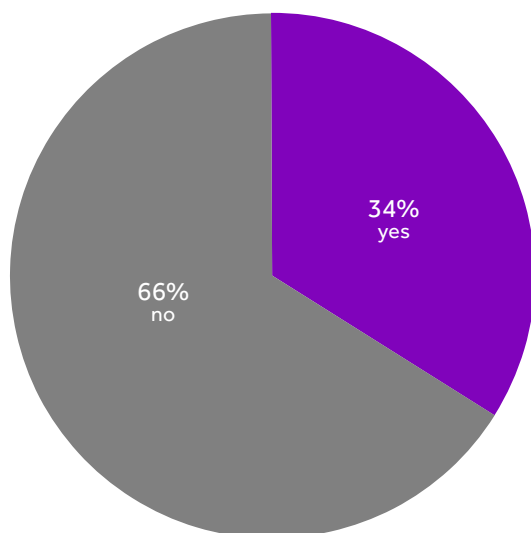
Q: Is the production and delivery of your dynamic content managed internally or externally?

34%
yes

66%
no

n=128

14%
external
agency
handles both

25%
oversee the
brand strategy,
but an external
agency manages
the delivery of
dynamic content

61%
own both the strategy and
delivery of dynamic content

n=44
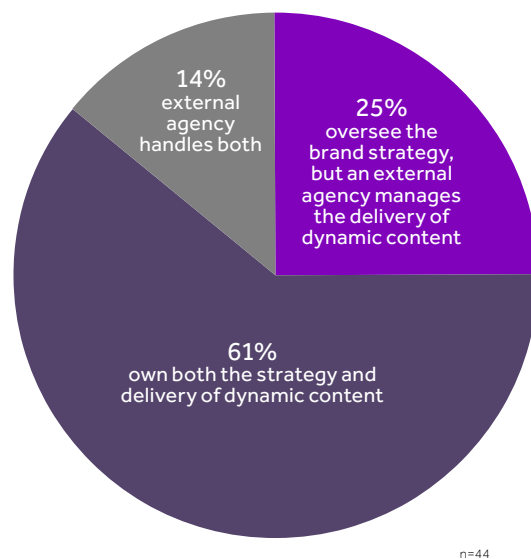
Thomas Kragelund
CEO, Creative Force

Thomas Kragelund has worked in e-commerce and creative operations for more than 20 years and is currently the co-founder and CEO of Creative Force. Prior to Creative Force, he co-founded and was the CEO of Pixelz, the world's largest post-production service provider. After overcoming his own challenges with the hypergrowth of creative teams, he's now passionate about sharing what he's learned to help other creative leaders scale their creative capacity through automation, lean principles, and flow production.

Scaling Creativity with Technology in Retail

Leveraging technology to scale creativity itself might seem counterintuitive, even antithetical to its pursuit. After all, how can machines supersede the potential of the human mind?

But in my own experience in scaling creative at Pixelz, one of the world's largest post-production service providers—where we grew from 200 to over 1,000 retouching specialists in less than 3 years—I found that when deployed properly, technology facilitated additional capacity for creativity more than anything else. The challenges we faced as we sought to scale are ubiquitous amongst creative departments and surely will sound familiar to you: too many repetitive manual tasks, significant administrative burden and ultimately, too much time spent on things not contributing to creativity.

Fast forward to today and the future of creative work within the retail industry is being defined by a few overarching trends but the underlying challenges remain the same. Understanding these trends and the drivers behind them is essential for creative leaders when evaluating new technology. Some may think that the driver of change is the technology itself, but I think we need to take a broader view.
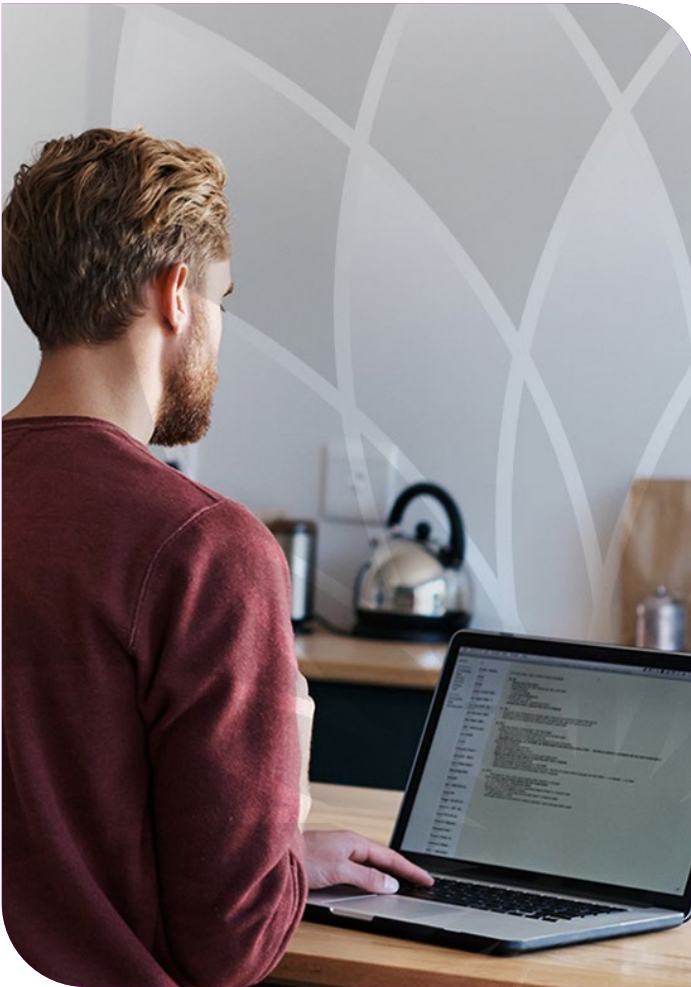
At Creative Force we spend a lot of time with our managers and customer-facing teams discussing emerging trends we need to keep an eye on. In this article, I'll go over some of the trends we're analyzing and their potential impacts on retailers' ability to scale creative output in order to meet the increasing consumer demand for content.

Significant Shifts in Consumer Behavior

The global pandemic has had a huge impact on consumer behavior. Even before the pandemic, e-commerce had grown steadily at 15% per year and exploded by 32% in 2020, due to consumer habits and behavior that seemingly changed overnight. No doubt this shift will have a significant long-term impact on retail as these pandemic-era consumer behaviors have become deeply rooted habits. We will not go back to the old normal, rather we will continue to see a new normal emerge.

In the new normal, product purchase decisions often start (and end) online. The first stage of the consumer purchase journey, product awareness, has moved to social media platforms like Facebook/Instagram, TikTok, and YouTube. For retailers, this means that marketing exists in near real-time. Campaigns must be executed at lightning speed with deliverables needing to be created in many formats, for multiple channels. As if this weren't a big enough challenge, we also see more complexity in these campaigns—with considerations for localization, personalization, inclusive sizing, and diversity.

For retailers, the ability to differentiate is limited completely by their ability to create new branded content. Creative leaders will be looking for technology that drives these complex processes, enables them to create content deliverables at scale, and reduces the time it takes to get those deliverables in front of consumers.

For all the challenges that forced remote work has presented to creative teams, it has also spurred some new opportunities. Teams can now be globally distributed and seamlessly work across time zones, or simply according to the schedule that best suits their creative inspiration. With remote collaboration no longer a hindrance (thanks to technologies that facilitate it), teams can draw on creative talent from around the world, adding talent with region-specific knowledge and ensuring coverage to meet the "always-on" content demands of consumers.

The Need for Better Insights

As complexity grows so does the need for better reporting and insights into creative operations. A lot of organizations struggle to get even basic throughput and turnaround time data.

As creative leaders look for new ways to structure work, they are often inspired by Agile software development and lean manufacturing. These methodologies will drive the need for more advanced reporting and the ability to identify bottlenecks as or before they appear. This is especially true in larger operations where the need for planning can be reduced by implementing and managing flow production. Continuous improvement initiatives are only achievable when everybody on the team has access to actionable insights.

Another big issue we've heard about for years but still haven't solved is the problem of data silos. In retail, we see more and more attention focused on integrating data from different departments and making it accessible to other parts of the organization. This can be beneficial for both pre-production and planning of campaigns while performance data from website conversions and other marketing campaigns can inform additional creative projects.

Changes Driven by Technology

In recent years we have seen significant innovations in automation technology. With the promise of high returns on investment and the ability to scale operations, automation seems like an attractive way to go for most organizations. Companies such as UiPath, which provides software that helps enterprises automate repetitive digital tasks, have seen explosive growth recently.

Another area receiving a lot of attention is artificial intelligence (AI). Advanced technology made accessible by cloud platforms, such those by Amazon, Google, Microsoft, and IBM, are enabling many startups to provide new and innovative products. AI will be interesting for the creative industry, especially with the advances in computer vision.

As creative operations are becoming more aware of the standardization of work and processes, we will see great opportunities for implementing technology.

While these technologies hold great potential, I learned from my scale-up at Pixelz that their success within your own organization will still ultimately depend on a critical element: A team that understands the value and limitations of these tools. The human element.

Collaboration Is Not What It Used to Be

When picturing creativity in action we often think of a crowded room with people shouting, ideas flying, and palpable excitement. But given what's happened over the past couple of years, remote work is the new normal for most of us. So how do we foster that creativity and collaboration, getting everybody on the same page, without getting everybody into the same room?

Not only are people no longer collaborating in the same room—they're not even working at the same time. With so many creative teams working asynchronously, tools to manage workflows and file routing so that staff have the right information at the right time, regardless of their schedules, have become critically important.

Recently there has also been an added emphasis on improved user interfaces (UIs) for enterprise tech. They now look much more like consumer tech, making the systems much more intuitive to use. This trend has further enhanced remote collaboration and the ability to scale by allowing teams to leverage and quickly onboard freelance talent.

COVID-19 Impact

Expert Perspective

By Sophy Regelous
Specialty: Operations and
Technology Transformations

The pandemic has changed the way we work, maybe not permanently but emphatically for sure. Stabilization is emerging a bit, so we should be examining how we create within our new normal. Accepting today's work methods will help us leave the shock of COVID-19 behind and turn out even greater awesomeness.

Q: Is your team currently working remotely due to COVID-19?

- no, working in the office (some exceptions may exist)

9%

36%
partially

56%
yes, all team members are working remotely

n=236
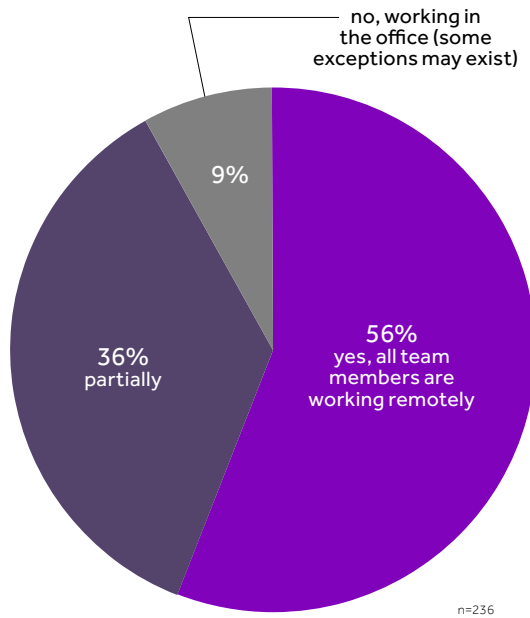
Q: When a formal return to work occurs, will you revert back to your prior remote work policies?

7% already shifted to almost 100% remote work before the crisis

will likely increase our remote work opportunities and schedules but still maintain office hours **61%**

30% already allowed for moderate to extensive hours of remote work and would expect it to be the same

2% yes, our business's success relies upon us being back in the office

n=203
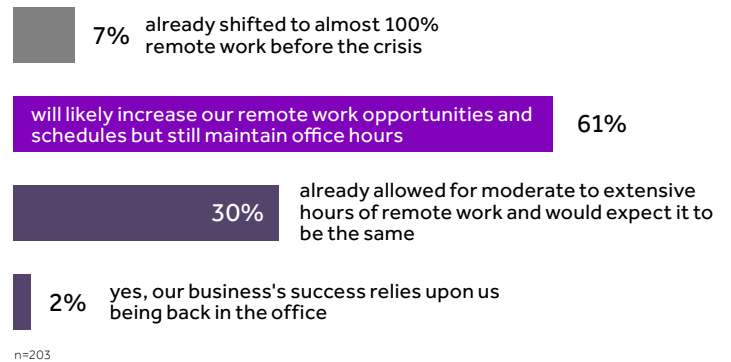
Q: How has productivity been affected since the team began working remotely?

negatively

4%

51%
consistent with pre-COVID

44%
positively

n=203
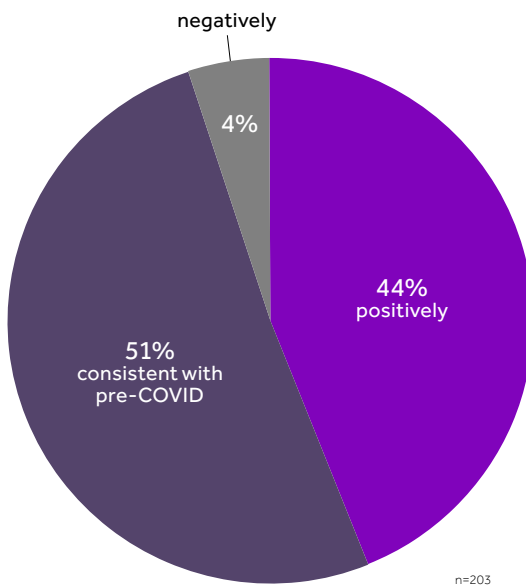
Q: How has the quality of your team's work been affected?

negatively

6%

23%
positively

72%
consistent with pre-COVID

n=204
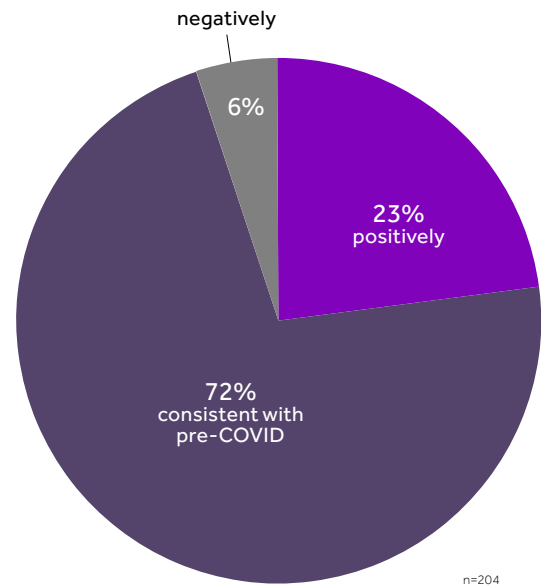
NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Q: In contrast to 2020, how has the volume of work changed for your team in 2021?

- 9% work has decreased
- 18% no change
- 73% work has increased

n=215
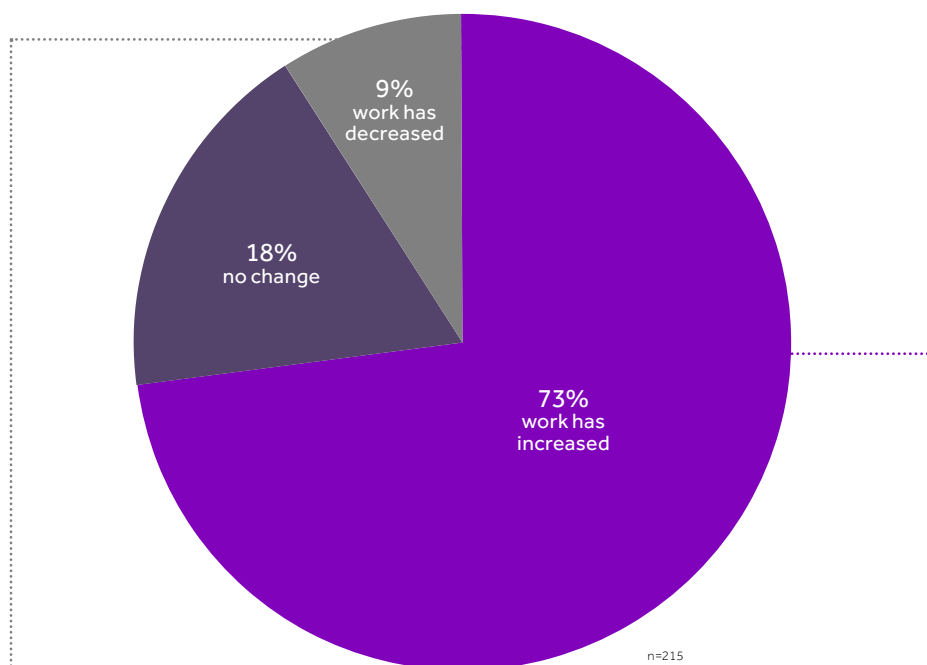
Q: What do you attribute the DECREASE to?
(select all that apply, top 6 shown)

- 50% reset of marketing or communications strategies/messaging
- 30% economic downturn—company is cutting costs and now **less** work is coming to us
- 25% continued COVID-19 response support—externally
- 15% continued COVID-19 response support—internally
- 15% reduced staff
- 10% rapid shift to digital commerce/business

n=172
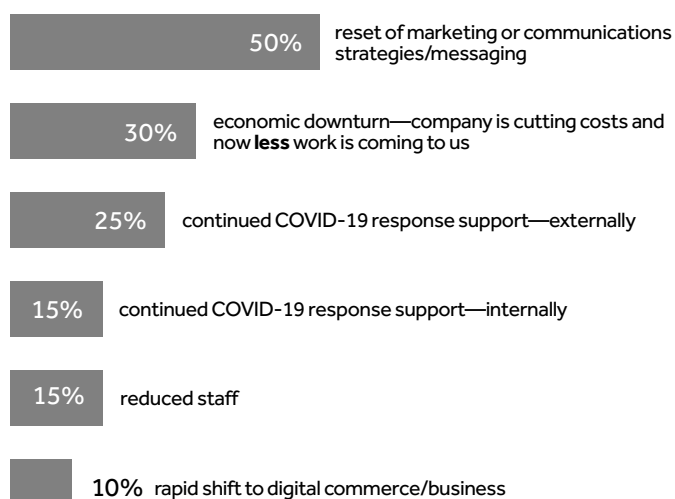
Q: What do you attribute the INCREASE to?
(select all that apply, top 6 shown)

- 68% reset of marketing or communications strategies/messaging
- 42% rapid shift to digital commerce/business
- 35% continued COVID-19 response support—internally
- 32% continued COVID-19 response support—externally
- 22% reduced staff
- 22% remote working—partners are able to get **more** done

n=172

Q: In contrast to 2020, how did the type of work done by the IHA change in 2021?

	Up Significantly	Up	No Change	Down	Down Significantly
Print design	3%	10%	33%	27%	27%
Digital design	35%	43%	18%	4%	1%
Presentation design	12%	35%	43%	7%	3%
Social media design and/or copy	28%	47%	24%	1%	0%
Video—live action	25%	36%	32%	7%	1%
Video—animation	27%	39%	31%	3%	0%

n=214

Q: What, if any, are your concerns about long-term remote working? (select all that apply)

63% creating strong relationships with colleagues	16% retaining staff
60% maintaining/building culture	12% reduced productivity
52% staff engagement	5% attracting new team members
41% reduced creativity due to lack of in-person or real-time collaboration	4% losing "business" (colleagues not using the iha as often)
30% appropriate work/life balance	3% other*
18% n/a — i do not have concerns about long-term remote working	

 * Within "other" the three most common concerns were: onboarding, burnout and mixed technology approach

n=204

Marcia Colburn
Corporate Marketing
and Brand Manager,
Caterpillar Financial

Marcia Colburn is Corporate Marketing and Brand Manager for Caterpillar Financial Services Corporation (Cat® Financial), headquartered in Nashville, Tennessee. Cat Financial is the finance arm of Caterpillar Inc., a Fortune 100 company and the world's largest manufacturer of construction and mining equipment, natural gas and diesel engines, and industrial gas turbines. Marcia is responsible for the global marketing of all finance and extended protection products offered to Cat customers. She also manages the Cat Financial brand as well as reward and incentive programs for Cat dealers. Marcia joined the Marketing department in 2000 and has led multiple marketing and communications teams over the last 22 years.

Expert to Expert:
Workflow Q&A

Kathy Haven, Senior Consultant at Cella, loves to help people find the order in work chaos by applying project management technology and best practices. So when we asked her to interview Marcia Colburn, Corporate Marketing and Brand Manager at Caterpillar Financial Services Corporation (Cat® Financial), about deploying Workfront, she had a ready set of Qs (after all, she'd helped with the implementation!). Below is the story of how Marcia has led her marketing team on a journey from painful project management to handling workflows in ways that are incredibly informative, visibly consistent and delightfully efficient.

Tell us what prompted your team's conversation about using a project management tool.

Traditionally, our team had been using several tools and approaches for managing project workflows. We lacked a system that provided consistency and visibility, giving us a clearer picture of who was doing what, when. We had looked at Workfront years ago as a potential project management (PM) tool for marketing. We loved the tool, but it wasn't feasible for our single business unit to take on the investment. So when our parent company came along and told us they're going to investigate marketing PM tools, we said, "PLEASE LOOK AT WORKFRONT!". My team worked with the parent company's marketing and brand group, so we decided to make the investment together. I sat in on the reviews of different tools and when the decision was made to move forward with Workfront, I said we are IN!

Is there any crossover or collaboration with the parent company built into the tool?

We aren't crossing over much within the tool, because they have some specific processes and we have our own. Our administrator contacts them for best practices and I have met with my counterpart on that side to do the same. Our deployment has been more about building collaboration versus integrating our processes.

What do you think has led to an increase in satisfaction among the teams using Workfront at Caterpillar Financial Services (Cat Financial)?

It is about having one consistent method to track our projects. Before Workfront, even though we had Excel templates, everyone filled them out differently and then used them differently. So we now have consistency. The second factor is our ability to utilize a single, convenient workflow. We can now move the work through a process in one tool versus using spreadsheets, emails, attachments, phone calls, etc. Having all this in one tool has helped get everyone on board and built the desire for the teams to keep using it.

Did you build out reports to help show work in progress, like what point it's reached in the workflow? Can you visualize this in Workfront?

Not really. We do have a few dashboards to see progress on projects and resource allocation. But we're doing this at the team level. Plus we have a monthly meeting to go over things in Workfront and review what is working and share best practices learned. Our admin pulls up her dashboard so everyone can be looking at the same things and see each other's projects.

During that meeting a team might call out that they were about to assign a project to a particular resource, but saw that this team member was already going to be engaged, so the work was assigned to another resource. That visibility and understanding of resource allocation never happened before. It was conversations with our designers about their workload which was difficult over the last two years while working from home.

Are there specific areas of the tool where you're realizing higher user adoption?

I'd say it's higher for the day-to-day projects and tasks than for the larger projects. It's hard to quantify a larger project, but for us it would be a trade show. The more tactical tasks are where we are seeing the highest adoption though with the integrated workflow.

Are you looking to expand usage of the tool for large projects, like tracking trade show tasks in Workfront?

Potentially. We haven't had one of the big events happen yet, but we are considering it—or at least using a hybrid option. Hybrid meaning the project would be mainly tracked in Excel, but then when we start making assignments, say when the graphic designer has to do something, we would go into Workfront to make the assignment. That's because we need to make sure that we've captured the information showing that this resource is working on something. We will likely try it and see how it goes!

How has Workfront helped support Cat Financial in a hybrid/remote work environment over the last two years?

It has definitely helped us see what everyone is working on. We don't have the day-to-day personal interactions anymore; we're still 90% remote, although some people do come in a few days a week. So we can't just yell over the cubicle to find out who's doing what. For us to be able to have a tool where we can see what everyone is working on . . . it is invaluable. This also ensures that the resources aren't overwhelmed.

The team is resolving prioritization issues on their own too. Before, graphic designers would come to me saying, "I have these 10 tasks—help me prioritize." I haven't had one of those conversations in over a year. It has been a huge increase in operational efficiency.

How do you engage with your users and keep them interested and knowledgeable? For example, lunch-and-learns, newsletters on new releases, and so forth?

Two things. First, we can always do better at sharing information. So I need to be considering the whole team, including digital, and not just my group. Mainly though, right now I'd say the most effective method is the once-a-month meeting with my team. We can be talking and pulling up Workfront, and our admin will say something like, "Hey, I just learned this cool new thing. Have you tried this?" Or someone else will speak up about maybe a software challenge they couldn't quite figure out, and we get to brainstorm on solving it. I need to expand this meeting and practice to include everyone using the tool—the resource group, our digital counterparts and so forth.

Where has Workfront brought Cat Financial the most operational efficiencies? Project management, resource management, proofing?

Overall, primarily in project management—seeing what everyone is working on, knowing we are using the same tool in a consistent way for approval processes and resource allocations. We are working on getting the legal approval process integrated. Right now, we have a company Excel document that legal does their approvals in, so we are building that into the Workfront tool, too.

Are you managing any work in Workfront using Agile or hybrid methodologies? If yes, for what type of work is this most helpful?

The digital team is using Microsoft Azure for their new digital project development, and their process is Agile. It does not fully overlap with Workfront, though. We are not currently using Agile in Workfront.

Are there any areas of the tool where Cat Financial is planning to expand their use of Workfront? Such as Workfront Goals and Scenario Planning? Or integrations with Workfront Fusion?

Definitely the incorporation of legal approvals into the proofing process. We also want to include the customer experience team. That's the only other group in marketing which is not using Workfront. They can see the advantages; we just need to scope out what that would look like for them versus how they're managing projects currently. I definitely think it would be better if we were all using the same solution for project management, even knowing that our digital team has to use another Agile tool, as well.

We are not yet using any of the Workfront Fusion integrations. What I would love to see is a link to the TransPerfect portal. That would be a huge time savings for us. I'm hoping this can be developed!

Is there Workfront data informing decisions through reports or dashboards? What are you using the Workfront data to inform?

Not as much yet. We have had some change in leaders so we are getting them trained on using Workfront, and haven't tapped into this much as of yet. On a leadership level, I am really the main one going in and looking at the data in the tool. The Workfront data is being utilized by the team to prioritize work and manage resources.

We're still discovering the benefits of utilizing the features and efficiencies of a cohesive project management tool. I expect that we'll be incorporating and applying more workflow aids as time goes on. It's been a fun experience, not to mention a great operational decision.

Creative Team Leader

Expert Perspective

By Sue Wolski
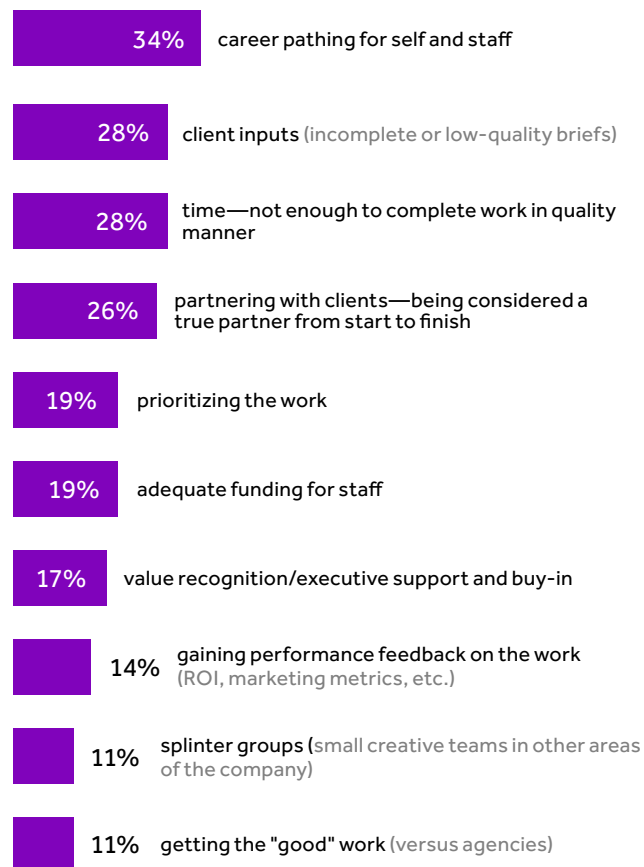Specialty: Operational Optimization and Financial Control

Too little time for creativity and lack of planning by business partners are troubling challenges for creative teams. Often, low-quality input up front causes negative ramifications in the work and timing that follow. Solving the planning problem should be a first step in effectively forecasting, scheduling and determining who will create the output.

Q: Which of the following are your group's greatest challenges? (select all that apply)

66%	balancing competing request priorities
66%	not enough time for creativity
61%	access to or lack of planning by business partners
57%	creative brief/intake quality
47%	timing constraints
43%	work prioritization
36%	resourcing—having enough people
26%	resourcing—having the right roles
26%	skill sets—growing our capabilities as technology changes
22%	technology tools

n=148

Q: Which of the following topics provide the greatest challenge for you as a creative leader? (select top three)

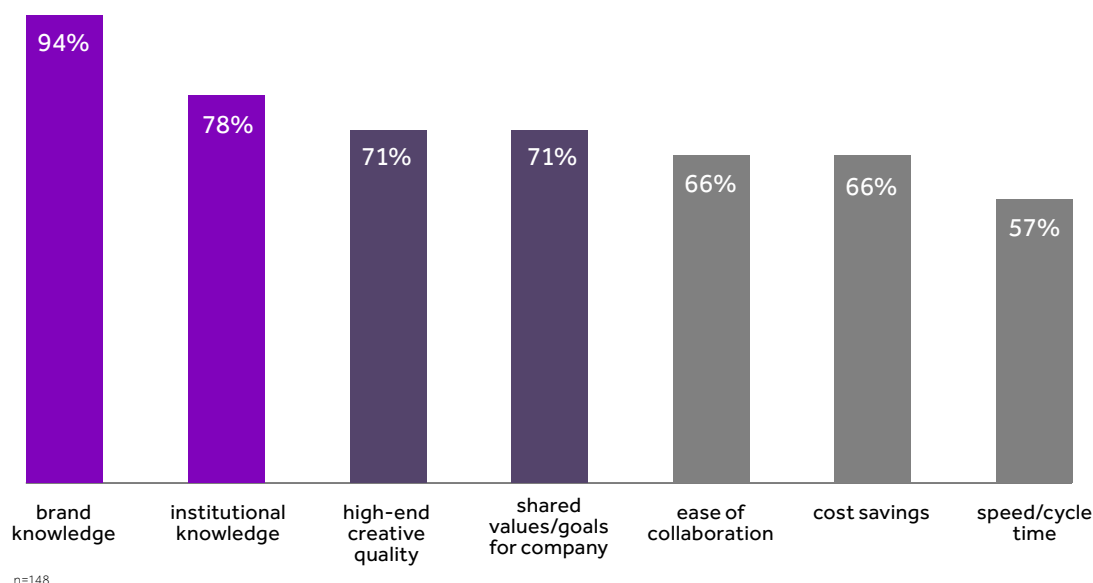|	
34%	career pathing for self and staff
28%	client inputs (incomplete or low-quality briefs)
28%	time—not enough to complete work in quality manner
26%	partnering with clients—being considered a true partner from start to finish
19%	prioritizing the work
19%	adequate funding for staff
17%	value recognition/executive support and buy-in
14%	gaining performance feedback on the work (ROI, marketing metrics, etc.)
11%	splinter groups (small creative teams in other areas of the company)
11%	getting the "good" work (versus agencies)

n=149

Q: Which of the following do your internal clients recognize as part of your value proposition? (select all that apply)
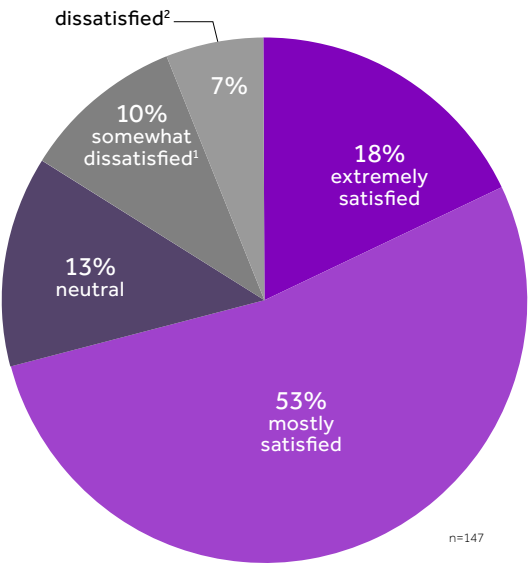
Overwhelmingly, clients continue to name their IHA's brand knowledge as the most valuable contribution to their efforts.
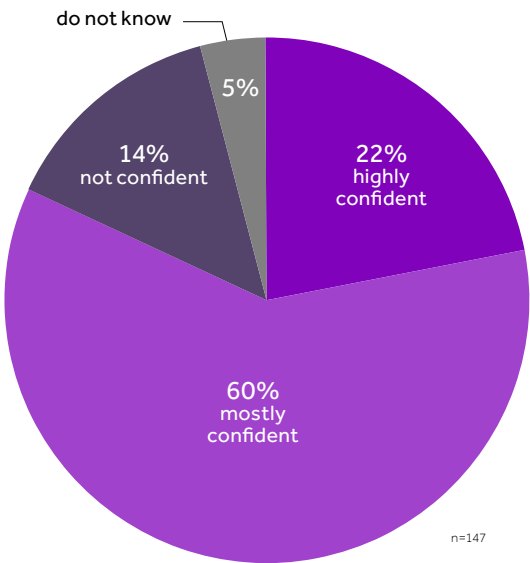
brand knowledge	institutional knowledge	high-end creative quality	shared values/goals for company	ease of collaboration	cost savings	speed/cycle time
94%	78%	71%	71%	66%	66%	57%

n=148

Q: How satisfied are you in your current role?

18% extremely satisfied

53% mostly satisfied

13% neutral

10% somewhat dissatisfied[1]

dissatisfied[2] 7%

n=147

[1] I'm passively looking for a new role
[2] I'm actively looking for a new role

Q: How confident are you in the job market and opportunities available for someone in your role?

do not know 5%

22% highly confident

60% mostly confident

14% not confident

n=147

Q: Where do you anticipate your next career move?

46% another in-house agency

19% promotion within this IHA

14% retirement

6% consulting

5% freelance or start-up

3% within marketing (outside the IHA)

2% external agency

4% other

n=145
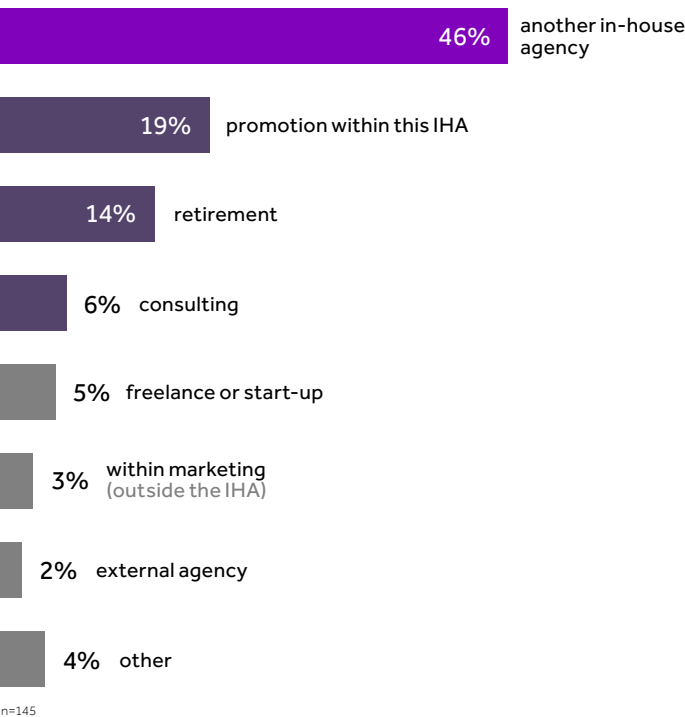
Q: How long have you worked for your current employer?
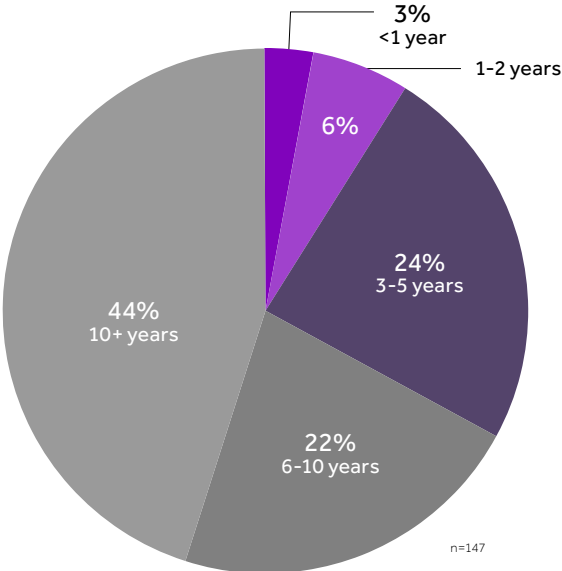
3% <1 year

1-2 years 6%

24% 3-5 years

22% 6-10 years

44% 10+ years

n=147

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

**Carrie
Supancic**
Director of Brand Identity
& Creative Services, Quest

Carrie Supancic is the Director of Brand Identity & Creative Services at Quest Diagnostics, where she heads the internal agency. She also led the formation of Greenhouse. A graduate of the Miami Ad School at Portfolio Center, Carrie began her career as a freelancer, and has spent the past 15 years as a brand and creative leader.

Creative Rooted in Brand: Recognizing the Intrinsic Value of In-House Design

Quest Diagnostics became a household name due to the COVID-19 pandemic. Greenhouse, Quest's in-house agency, experienced a similar effect—albeit, on a much smaller scale. The active role we played in Quest's COVID-19 response drew attention to our agency, elevating the perception of Greenhouse and increasing recognition of team members as brand experts. Our agility was on full display, showcasing that we can pivot quickly and address challenges as they arise, and providing us with an incredible opportunity to highlight the significant benefits and distinct value of in-house creative.

In-house agencies have a relationship with their respective brands that goes beyond correctly executing brand guidelines. It involves infusing each decision with a brand perspective, looking at each project with a strategic eye, and guiding our clients based on our deep brand and institutional knowledge. Since Greenhouse's founding in 2017, we have operated as stewards of the brand, and our influence on and advocacy for it have continued to grow over time.

Even the Greenhouse name itself is derived from the brand, inspired not only by the fact that Quest's primary color is green, but also because Greenhouse serves as the creative core of Quest, growing, cultivating and protecting the brand. Fittingly, our three-pronged mission is to **create, consult** and **connect**, with each element rooted in our company's identity.

Propagating IHA's Unique Value

While Greenhouse was formed to support the marketing team (within which we reside), the agency's potential positive impact on the Quest brand became evident immediately. Our related expertise has defined and differentiated our team's unique value proposition ever since. It's true that cost effectiveness and cost avoidance have long been hallmarks of in-house creative teams. Also emerging are fuller awareness and understanding of the intrinsic value these teams provide—along with appreciation for our brand expertise, creative leadership, proximity, responsiveness and collaboration.

- **Brand expertise:** We know the brand inside out. That expertise, paired with institutional knowledge and practical experience, creates a unique and valuable combination. We own the brand identity, and we establish and evolve brand guidelines to elevate creative standards.

- **Creative leadership:** We educate others, both internally and externally, through brand training and consultations. The increased trust and confidence that result from these interactions often lead to a surge in project requests.

- **Proximity:** There is no substitute for total brand immersion. As "insiders" we have easy access to internal files, we can adeptly navigate the company landscape, and we can take on confidential or highly sensitive projects with assurance.

- **Responsiveness:** Proximity and access mean we are poised to act quickly and nimbly to give our clients an edge.

- **Collaboration:** We always consider the broader company impact, taking strategy and brand into account, and we position ourselves as strategic partners, invested in and committed to our clients' success.
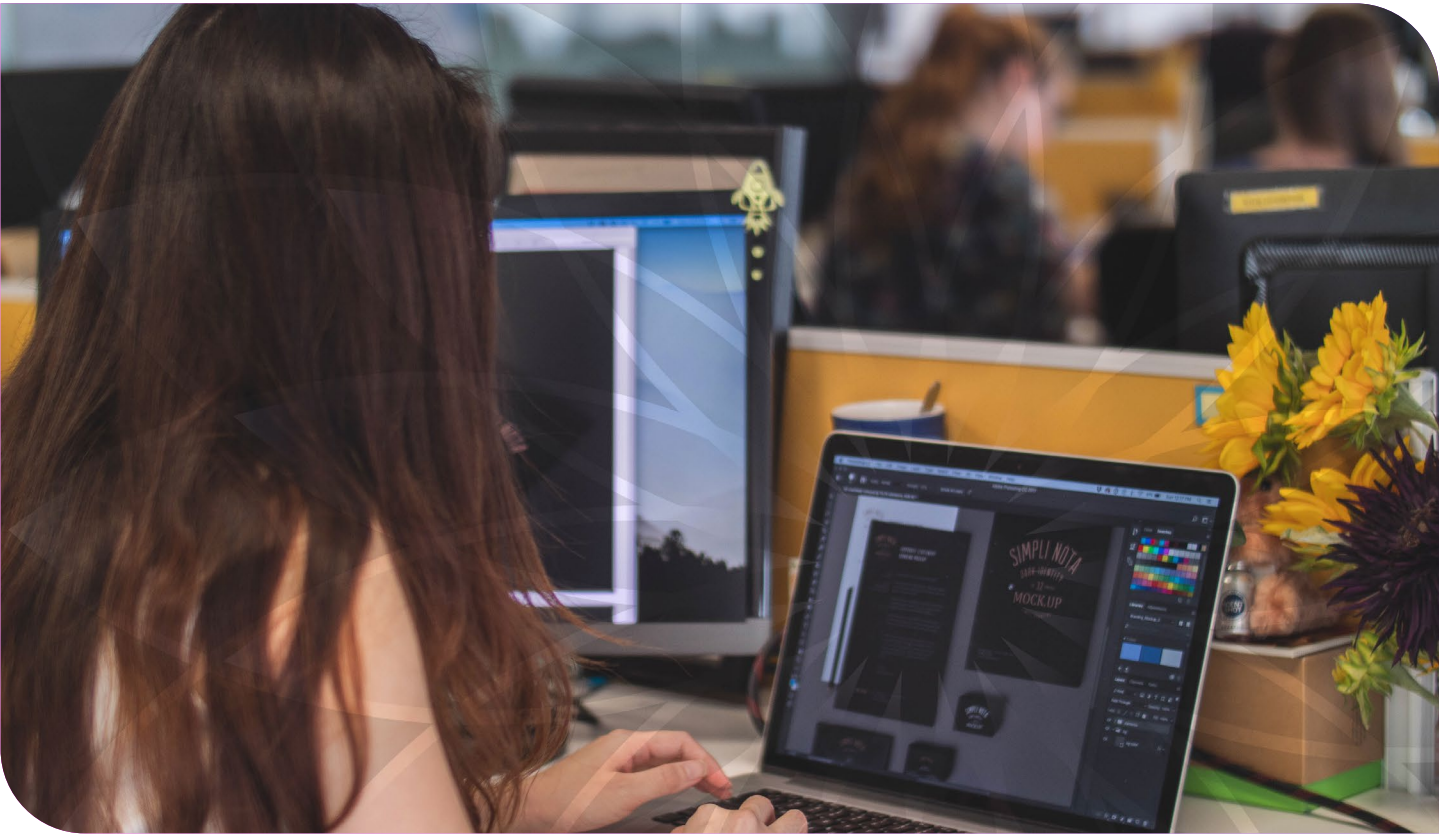
Ensuring Consistent Expression

In-house agencies are also uniquely positioned to play a role in brand governance. At Greenhouse, we are responsible for the visual and verbal brand reviews that are a part of Quest's company-wide review process. If clients work with Greenhouse, their project is considered brand compliant by default, which results in a smoother review experience. In addition, being a part of the review process gives us an almost omniscient view of all in-process creative projects (those handled by Greenhouse and those handled externally). This insight is instrumental in helping us identify which aspects of the brand identity that individuals and agencies struggle with.

We also work seamlessly with the brand strategy team to ensure consistently cohesive visual and verbal expression across Quest's full portfolio of brands. We have a thorough understanding of how our various brands, campaigns and associated visual expressions layer correctly with one another. This grasp of Quest's brand nuances gives Greenhouse an edge, especially when creating artwork in support of acquisitions and other critical endeavors.

The Fruits of Exceptional Work

The confidence we've inspired has led to Greenhouse's involvement in more high-visibility projects, which subsequently contributed to an increased demand for our services. From 2020 to 2021, our team saw a 78% growth in project volume, attracted attention from senior management, and was commended as the embodiment of Quest's pursuit of Everyday Excellence (an internal HR-led program) for our work on COVID-19 signage at Quest's Patient Service Centers. As part of this acknowledgement, we were invited to create a segment in a company-wide leadership training module.

Our influence on brand-related decisions has also increased. In the past year, we consulted on and created assets for the new Quest Diagnostics website that launched in October 2021. We were also approached to create environmental graphics for a number of laboratory spaces as part of a larger inclusion and diversity effort. And, for the fifth year running, we were asked to provide the content and design for the Quest Corporate Responsibility Report.

When Quest engaged Cella in 2021 to evaluate Greenhouse processes and help us create a roadmap for the future, it quickly became clear how much we are relied upon for brand support. In fact, our brand work is seen as so integral that it inspires ongoing investment. We are eager to grow the Greenhouse team, expand our service offering, and increase our impact. One thing, however, will remain constant: our brand expertise and influence will only grow.

Any brand is constant only in its continued evolution, and throughout that journey, in-house teams are leading the way as trusted experts, advocates and guides.

Appendix

Survey Participant Demographics

Survey responses were filtered to represent only responses by in-house creative leaders. To identify leadership-level responses, we filtered titles per the chart below. Responses were further narrowed to eliminate duplication and ensure one unique response per company and/or each in-house agency residing within an organization.

Q: Which of the following best describes your title?

Vice President/Executive	9%
Head of the In-House Agency	27%
Creative Director (not Head of the IHA)	26%
Operations Director/Manager	16%
Functional Leader (Design Manager, Head of Copy, etc.)	14%
Other Management Role	8%

n = 285

Q: Please identify your company's/organization's annual revenue.

Education, Government, Not-for-profit	19%
< $250M	14%
$250M–$1B	16%
$1B–$5B	18%
$5B–$10B	7%
$10B–$30B	13%
> $30B	12%

n = 269

Industries Represented

Aerospace/Defense	1%
Architecture/Construction/Engineering	1%
Associations, Events and Tradeshows	1%
Automotive/Transportation	0%
Banking/Financial Services	9%
Biotech/Healthcare Products/Medical Devices	2%
Construction	1%
Consulting/Professional Services	4%
Consumer Products	3%
Education	5%
Educational Services	0%
Energy, Oil and Gas	2%
Food/Food Services	1%
Government	2%
Healthcare	9%
Insurance	4%
Legal	0%
Logistics	0%
Manufacturing	6%
Marketing/Advertising	2%
Media and Entertainment	1%
Not-for-profit	7%
Pharmaceuticals	3%
Real Estate	3%
Retail	7%
Retail: Fashion/Apparel	1%
Sports and Fitness	2%
Technology and Software	7%
Telecommunications	1%
Travel, Hospitality and Leisure	2%
Utilities	0%
Other*	9%

n = 269

* Includes Agriculture, Construction, Engineering, Educational Services, Non-Governmental Organizations (NGOs), Nutrition and Utilities

NOTE: PERCENTAGES MAY NOT EQUAL 100% DUE TO ROUNDING

Professional Development and Peer Collaboration for In-House Creative Leaders

PEER ROUNDTABLES

Join your peers and Cella experts in moderated discussion on topics specifically tailored to the top challenges today's leaders face. Hosted multiple times a year, our CreativeExecs®, DigitalExecs and ProposalExecs roundtables are for leaders looking to share and gain fresh insights.

LEARN MORE

PROFESSIONAL DEVELOPMENT

Want to get ahead and stay ahead? Personally and professionally? We'll arm you and your team with skills and training to do just that. We offer several that are beneficial to creative teams including Boot Camp Events for creative managers looking to hone their skills and manage teams/projects more efficiently. We also host an In-House Agency Leadership Summit that provides senior leaders of IHAs with compelling data from their peers that will help future-proof the way they run their agencies.

LEARN MORE

NETWORKING EVENTS

Looking to expand your network? Gather with other industry pros (online and in person) to meet new people, share stories and learn a little more about your industry. Our CreativeConnects® and ProposalConnects events offer opportunities for creative, marketing and digital professionals to gather in a casual setting, share ideas and expand their networks.

LEARN MORE

For more information, visit cellainc.com/events

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We can't wait to talk to you.

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