Stop Workflow Disasters With Better Traffic Management

By Judith Hector

Okay, so the the bean counters (and we mean that the most affectionate way) hog Clients & Profits, and that's why you're still using a traffic system that's just "good enough."

Or maybe you just feel better juggling FileMaker, Excel, and Quark to do your traffic reports—because, after all, it's the way you've always done it.

All that juggling must get tiring!

There's a pretty good chance that if you're not using Clients & Profits for traffic you're working way too hard. That's because the spreadsheet, project manager, web application or (worst of all) paper system is probably not keeping up.

So grab a Sharpie and a take-out napkin and let's crunch some numbers. First, write down how many hours you spend every day rewriting data from the spreadsheet to the white board to e-mail memos and any place else you have to retype it. Multiply that number by your hourly wage, then again by 1,880 annual hours. Now estimate

STOP WORKFLOW DISASTERS
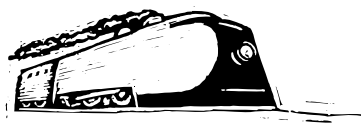
how many hours each day your staff spends tracking down details. Multiply that by the average pay, then again by 1,880. Write down how much your agency spends each year on software updates, subscriptions, licenses, and custom programming to get this hodge-podge system to work. Now add the three costs. Chances are, your grand total is several thousand dollars.

Several thousand dollars of lost profits, bonuses, new computers, and agency solvency. And that doesn't even include the cost of missed deadlines and lost clients.

It's time to upgrade from business as usual, and move Clients & Profits out of the back-office and into your shop's mainstream. If you already have C&P running office-wide, glean a few tips here to make it run even better. Like how to improve staff morale, how to keep clients happy, and how to make more money.

A short psychology lesson

Studies show that when staffers know what they are supposed to do, they are more productive and more secure in their work. Anyone who's willing to admit it will tell you that if they can, they'll choose the easy, fun tasks over boring ones any day—often without consideration for cost, schedule, or staffer expertise. When you assign tasks to staffers, you're in control of getting work done, done right, and done on time.

Also, go ahead and let staffers update a job's traffic and schedule (they can do this

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right from their timecard). They'll get an intrinsic satisfaction from "marking it off the list," and that goes a long way toward increasing morale and decreasing stress.

With task assignments, you are miles closer to analyzing the productivity of your shop. You can look at on-time task and job reports, billable vs. unbillable staff hours, and more. These reports will show you who performs well and who needs a little posterior encouragement.

No more excuses

So your staff claims they can't access Clients & Profits to see what they are supposed to do? No problem. End the bellyaching with My Clients & Profits!, the web-based job, time, and expense management system that links directly to your C&P database. Unlike other web-based job or time systems, everything entered through My C&P! updates jobs, financials, schedules, and more in real-time for real-time analysis. (Hint: Clients can also use My C&P! to check the status of their jobs. Studies show that when clients have the autonomy to check on their jobs, they maintain a better relationship with the agency. They feel that they have more control over their work, even if they can't change the job's progress.)

AEs need traffic, too

AEs are in a crummy position. In spite of fun-sounding client lunches and the like, they are the buffer between you and the client.

Top 5 Trafficking & Scheduling Reports

Here are five powerful ones that help manage workflow and track hundreds of details pertaining to your shop's work:

Production Planner Every active job is graphed with each job's duration so you see at a glance what's going on now and into the future. (Also a way to edit many jobs' traffic details. See the center spread for an example of the Production Planner and details about it's specific features.)

Daily Job Status Track and review important traffic notes, current production status, status note, and priority. You can also update a job's traffic information by selecting the job then clicking on the Traffic link.

Traffic report by production status See traffic milestones (key events that a traffic manager must remember like the date of the initial creative meeting or a photoshoot) for every job in your shop, sorted by production status code, along with traffic staff assignments, priority, and status note.

Job Schedules by Resource Who's doing what is sorted by staffer with a new page for each person (making it easy to distribute if staffers aren't yet getting their own schedules through their Weekly Task Planner).

Job Log + Schedules A marriage of trafficking and scheduling. Select only currently-active jobs to reveal their remaining unfinished job tasks. A real current workflow report!

See examples of these reports at:
www.clientsandprofits.com/report-o-matic.html

TOOLS OF THE TRAFFIC TRADE

By Mindy Williams

Traffic managers strive to have everyone and everything where they need to be with the necessary knowledge to get work done right. And that means knowing where every job is—and how close it is to being finished—all the time. It might sound like a Sisyphean task, especially jobs are constantly evolving. But with Clients & Profits' management tools, keeping a handle on jobs is easier than you might think.

Here are a few tools to get you on your way to better workflow management:

Production Planner Open this one-stop window to review and edit many jobs' key traffic details instead of finding and editing jobs individually. Whether you're closing dozens of jobs at one time, changing due dates of rush jobs, reassigning staffers, or just trying to get a feel for how busy the shop is, this is the place.

Job Timeline Seeing each job's schedule in a bar graph format helps you to visualize workflow. You can also edit special task instructions, view the task estimate, and more.

Work to Do See all of the tasks on deck in one window. In the Work to Do window, you can mark tasks as finished, update tasks and traffic and add special instructions.

Weekly Traffic Traffic managers keep important dates before them in this one-stop milestones window showing all jobs in the shop, sorted by job type. Edit traffic assignments, dates, status, and more.

Traffic Calendar The traffic department has its own calendar for keeping track of job due dates (which automatically appear). You can also add department meetings, appointments and other important reminders that are critical to traffic.

So instead of cringing next time you think about traffic, head for Clients & Profits instead and put these tools to work!

Mindy Williams is a senior member of the Clients & Profits Helpdesk and coedits the quarterly newsletters.
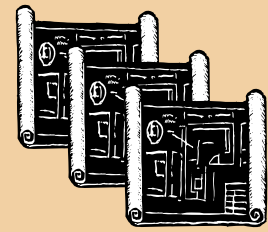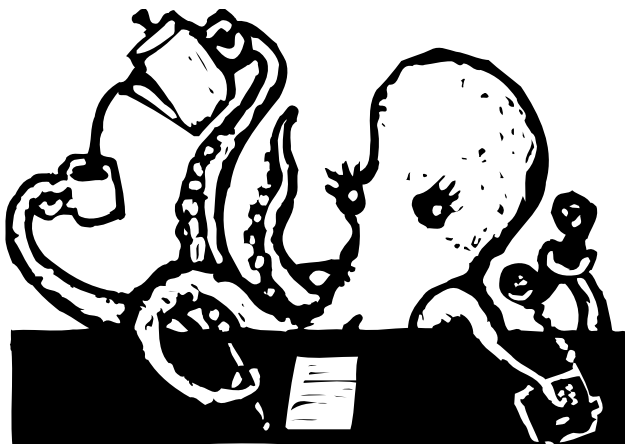
Multiple print specs make vendor quotes easy

Want to use print specs to get estimates from vendors? Need to outsource work to several different vendors? No problem! Now there is no limit to the number of print specs you can add to each job, so you can have one for each vendor. Here are some tips to help you be on your way to get the most out of multiple specs.

☑ Use spec sheets to get vendor quotes. Add a spec sheet for each vendor then use the status field to enter each vendor's quotes for quick comparison.

☑ When you've selected your final vendor, change the status of their spec sheet to "approved." For easy reference, add the PO number there as well.

☑ Add the vendor name and type to the description line for easy sorting (e.g., "Printing - Quickie Printers"). To see all of your specs for printing, click on the Description column heading to resort the specs list. All of your specs will be sorted alphabetically by description, grouping all of the spec sheets for printing together.

☑ To help save time when adding multiple print specs, clone existing ones and edit them to include important information about each vendor's responsibilities.

☑ Print the spec sheets on paper for faxing or hand delivery, or create a PDF using Adobe Acrobat then e-mail the spec sheet to vendors.

☑ If you clone a job, be sure to check the "also clone printing specifications" checkbox. That way, you won't need to re-enter the spec sheets, but you can edit them if needed. Unwanted spec sheets can be deleted from the newly cloned job.
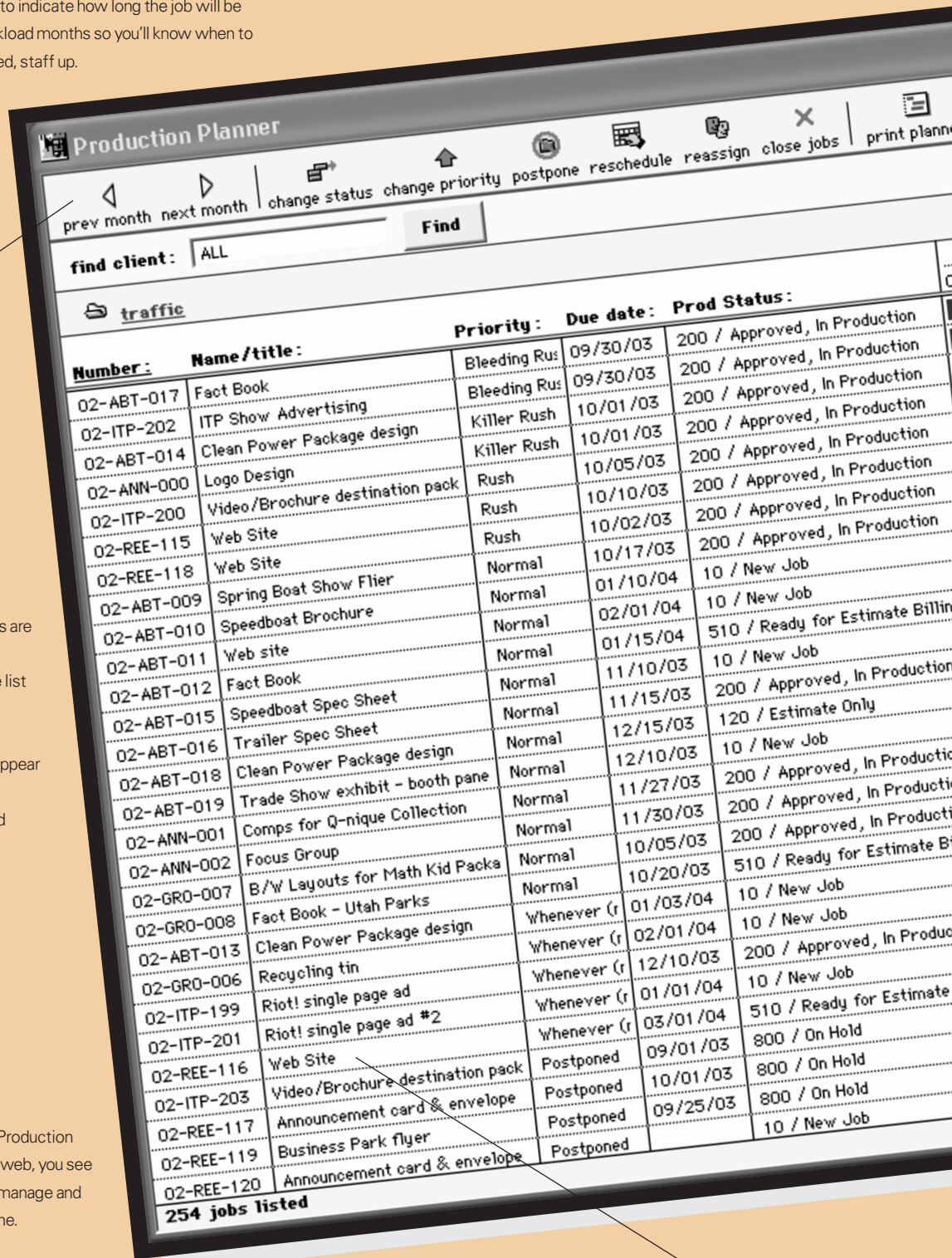
GO WITH THE (WORK)FLOW
The Production Planner shows you where every job is—and where it should be

The Production Planner shows all of the open jobs in your shop, and sorts them by priority. This "big picture" view shows you start and due dates, production status, priority, and job duration. With horizontal bars to indicate how long the job will be active in your shop, you can pinpoint light workload months so you'll know when to take on more work or, if the shop is overbooked, staff up.

Manage traffic, schedules, resources and more using the Production Planner's toolbar buttons.

All of the shop's open jobs are listed in the Production Manager. You can sort the list by clicking on any column heading, but the highest priority jobs will always appear at the top of the list, demanding attention... and keeping you on track.

Whether you're using the desktop Production Planner or accessing it through the web, you see how many active jobs you need to manage and what steps to take to get them done.

Production Planner

prev month next month | change status change priority postpone reschedule reassign close jobs | print planner

find client: ALL   Find

📁 traffic

Number:	Name/title:	Priority:	Due date:	Prod Status:
02-ABT-017	Fact Book	Bleeding Rus	09/30/03	200 / Approved, In Production
02-ITP-202	ITP Show Advertising	Bleeding Rus	09/30/03	200 / Approved, In Production
02-ABT-014	Clean Power Package design	Killer Rush	10/01/03	200 / Approved, In Production
02-ANN-000	Logo Design	Killer Rush	10/01/03	200 / Approved, In Production
02-ITP-200	Video/Brochure destination pack	Rush	10/05/03	200 / Approved, In Production
02-REE-115	Web Site	Rush	10/10/03	200 / Approved, In Production
02-REE-118	Web Site	Rush	10/02/03	200 / Approved, In Production
02-ABT-009	Spring Boat Show Flier	Normal	10/17/03	200 / Approved, In Production
02-ABT-010	Speedboat Brochure	Normal	01/10/04	10 / New Job
02-ABT-011	Web site	Normal	02/01/04	10 / New Job
02-ABT-012	Fact Book	Normal	01/15/04	510 / Ready for Estimate Billin
02-ABT-015	Speedboat Spec Sheet	Normal	11/10/03	10 / New Job
02-ABT-016	Trailer Spec Sheet	Normal	11/15/03	200 / Approved, In Production
02-ABT-018	Clean Power Package design	Normal	12/15/03	120 / Estimate Only
02-ABT-019	Trade Show exhibit – booth pane	Normal	12/10/03	10 / New Job
02-ANN-001	Comps for Q-nique Collection	Normal	11/27/03	200 / Approved, In Producti
02-ANN-002	Focus Group	Normal	11/30/03	200 / Approved, In Producti
02-GRO-007	B/W Layouts for Math Kid Packa	Normal	10/05/03	200 / Approved, In Producti
02-GRO-008	Fact Book – Utah Parks	Normal	10/20/03	510 / Ready for Estimate Bi
02-ABT-013	Clean Power Package design	Whenever (r	01/03/04	10 / New Job
02-GRO-006	Recycling tin	Whenever (r	02/01/04	10 / New Job
02-ITP-199	Riot! single page ad	Whenever (r	12/10/03	200 / Approved, In Produc
02-ITP-201	Riot! single page ad #2	Whenever (r	01/01/04	10 / New Job
02-REE-116	Web Site	Whenever (r	03/01/04	510 / Ready for Estimate
02-ITP-203	Video/Brochure destination pack	Postponed	09/30/03	800 / On Hold
02-REE-117	Announcement card & envelope	Postponed	10/01/03	800 / On Hold
02-REE-119	Business Park flyer	Postponed	09/25/03	800 / On Hold
02-REE-120	Announcement card & envelope	Postponed		10 / New Job

254 jobs listed

Open any job ticket right from the Pro

ℹ️
help

Show ▾ : **All**

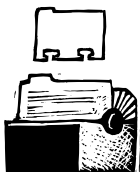| Sep	Oct	Nov	Dec	Jan	Feb
01 08 15 22 29	06 13 20 27 --	03 10 17 24 --	01 08 15 22 29	05 12 19 26 --	02 09 16 23 --

Only want to see your rush jobs? Then filter the list by priority using this pop-up tool.

The Production Planner shows six months' worth of work, but you can scroll far into the future—a great way to plan for long-term traffic needs.

The Production Planner is included in My Clients & Profits! 5, so even your out-of-office staffers can see what's going on for months to come. Unlike the desktop version, the My C&P! Production Planner doesn't allow you to edit job traffic and resources.

Back   Forward   Stop   Refresh   Source   Home   Add   Mail

Address : 🌐 http://my.clientsandprofits.com/production_planner   › go

@ My C&P! Production Planner

My Clients & Profits!

Production Planner

Job :	Name/Title :	Priority :	Due :	Status :	Sep 01 08 15 22 29	Oct 06 13 20 27	Nov 03 10 17 24	Dec 01 08 15 22 29	Jan 05 12 19 26	Feb 02 09 16 23
02-ABT-017	Fact Book	Bleeding R	09/30/03	200 / Approved, In Production	▬					
02-ITP-202	ITP Show Advertising	Bleeding R	09/30/03	200 / Approved, In Production	▬					
02-ABT-014	Clean Power Package design	Killer Rus	10/01/03	200 / Approved, In Production	▬					
02-ANN-000	Logo Design	Killer Rus	10/01/03	200 / Approved, In Production	▬					
02-ITP-200	Video/Brochure destination package	Rush	10/05/03	200 / Approved, In Production	▪	▪				
02-REE-115	Web Site	Rush	10/10/03	200 / Approved, In Production	▬					
02-REE-118	Web Site	Rush	10/02/03	200 / Approved, In Production	▬	▪			▬	
02-ABT-009	Spring Boat Show Flier	Normal	10/17/03	200 / Approved, In Production		▬	▬	▬	▬	
02-ABT-010	Speedboat Brochure	Normal	01/10/04	10 / New Job	▪	▬	▬	▬		
02-ABT-011	Web site	Normal	02/01/04	10 / New Job		▬				
02-ABT-012	Fact Book	Normal	01/15/04	510 / Ready for Estimate Billing						
02-ABT-015	Speedboat Spec Sheet	Normal	11/10/03	10 / New Job						

🌐 Internet zone

...oduction Planner.

QUESTIONS AND ANSWERS

Q. How can a traffic manager identify problem vendors?

A first step is to use the vendor diary to record interaction with the vendor, whether phone calls, e-mails, or meetings. A quick scan of the Event/Action column should flag a pending problem. If needed, add an A/P pop-up note. This message appears when adding a new PO or A/P invoice for a vendor warning people about pending issues or need for management approval. If a situation worsens and you need to stop using the vendor, place their account on-hold, preventing new POs, A/P invoices, and checks from being added. (A customized message can also appear if someone tries to add new work for a vendor so they know what's going on.) Both the A/P pop-up note and on-hold setting are added in a vendor's account info window.

Q. How do subtasks differ from regular tasks?

Subtasks can't be estimated, costed, or billed. They exist only within the scheduling realm. Their purpose is to provide a way to schedule more than one staffer to a task or to break down a single task into smaller steps. Subtasks can be renamed to make them more meaningful (e.g., instead of Edit, rename the subtasks to First Edit, Second Edit, etc.).

Q. How can we use status code e-mails?

All status codes can have e-mails associated with them to automatically contact the key staffers to notify them about an important turning point in a job. For example, when a newly-added job's status is changed to "Estimate pending" an e-mail is sent to job's traffic assignments with a message asking for creative input. Status code e-mails should not be added for all status codes nor sent to everyone, so be selective when adding them to the Status Codes window.

Q. How do we track of all art, documents, and other stuff generated for a job?

If you are using Clients & Profits Pro, Job Tracker, or C&P SQL, you can electronically link a job with its "stuff" through using the Asset Manager. The Asset Manager can automatically create a job folder on your art server for each new job added in C&P. Save all of the job's tangibles (e.g., PhotoShop, Quark, and Word files, or even PDFs of C&P reports) to its folder on the art server. (If you use C&P Classic, you can duplicate this concept manually.) You can launch any job asset file (and it's application) right from C&P. The Asset Manager also keeps track of important legal details about the files, such as usage rights, ownership, and more.

Q. What happens to a job when I postpone it?

Assign the job a priority and status code for of "Postponed". Don't worry, you won't lose any staff assignments, schedules, notes, or other details. When the job is back on, assign new start and due dates, and change the job's production status and priority.

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CUSTOM JOB TICKETS MEAN MORE

By Brenda Lohr

The traffic and production departments have their own take on what's important.

Information like who's working on what, how long it will take to finish, and what's changing is what rocks their world.

Customizing the Job Ticket window to contain important production management, trafficking, and scheduling information benefits staffers in those departments by placing job details that they manage in one, easy-to-read window.

Each user can set up the Job Ticket window's six columns to contain information that would benefit them the most to have at their fingertips, like estimate amounts, change order amounts, estimated hours, actual hours, and PO amounts.

Depending on what the staffer oversees, a job ticket's columns can also show budget amounts, outside costs, labor, expenses, and billings.

Being able to quickly review important information about a job, like estimated versus actual hours, change orders, and the like, will make a big difference in moving the job through the shop—and eliminating many unpleasant surprises when it's done.

Staffers will find that being able to see at a glance whether a job task is approaching its estimated hours, they can make all kinds of smart decisions.

So the next time an AE leans over their desk and asks if there's enough time left to tweak the illustration, they can simply pull up the Job Ticket window and check the estimated and actual hours columns.

Of course, they will still have to print various reports to get an overview of many jobs, but if it's information about one or a couple of jobs that they're after, what could be easier than just reviewing them in one easy-to-read window?

Especially when Clients & Profits lets them view job tickets their way!

Brenda Lohr is a member of the Clients & Profits Helpdesk.
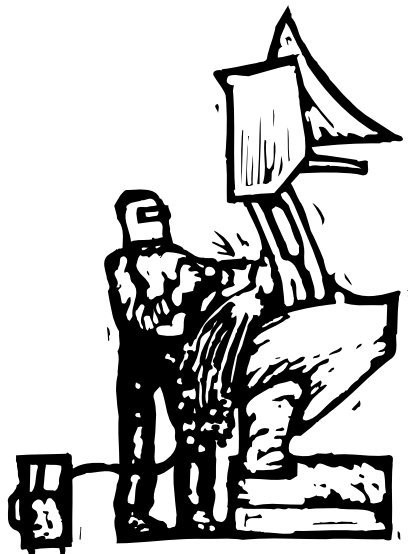
In a rush? C&P has you covered

When a client suddenly decides that they need their four-color gatefold mailer tomorrow instead of next week, you need the Clients & Profits Rush Manager to get it done today.

Rush it six different ways The Rush Manager lets you assign one of six different, customizable levels of priority to a job. (The rush categories are defined in job preferences.) You can edit a job's priority in the Production Planner or Job Traffic window—two places you are likely to be thinking about (and wanting to change) a job's priority.

Always know your priorities When you open the Production Planner, jobs with the highest priority will always sort to the top of the list so they are never overlooked. A job's priority appears in red on the Job Ticket window, and is easily viewed (and edited) in a job's traffic window.

Keep everyone in the know When you assign a new priority to a job, it resorts in the Production Manager and is updated on the job ticket and any other traffic reports and windows. Plus an entry is automatically added to the job's diary to document the change. (If you want to add details about why the job's priority changed, just edit the job diary entry.)

New flexibility for easy management Unlike generic scheduling software designed for static manufacturing environments, C&P's Rush Manager adds a dimension of flexibility to your workflow. Instead of mapping out a spidery chart that's clumsy to edit, Clients & Profits works with the fluidity an ad shop needs. You can edit, reschedule, postpone, rush a job, and more, using a software built for creative agencies, not gadget makers.

Job Management 101 So how do you rush? Instead of going crazy, go to Clients & Profits and edit the job's priority using the Rush Manager. You'll keep your cool ... and keep your deadline.

SIDESTEP TRAFFIC PITFALLS (con't)

Continued from page 2

Good ones have the uncanny ability to make everyone think they are happy, and they have intimate knowledge of what will keep the client on an even keel. They are a valuable resource in getting work through the shop, so find out from them what the client's expectations are. Likewise, keep AEs abreast of job progress and the inevitable traffic snafu. Remember, they are the buffer between the shop and the client, and can help you devise an acceptable response. If they ask for miracles, you have the power (and a database full of proof) to veto their proposal.

Build a living history

Collecting all of the information about past jobs helps you create your own bench-marks. With a long-running compilation of data, you're able to better define who the best resource for the task is, how long it should take, what it should cost, and how much profit you should make from it. Also, you'll have an ongoing record of archived jobs and job resources, like artwork and vendor info.

Once you have enough history, start analyzing past performance to improve the way things are handled in the future. Look for trends like common workflow clogs, skill set deficiencies, problem clients, or pushy AEs. Once you have a handle on where things slow down on your traffic highway, you can build a little cushion into the schedule. That gives you better on-time delivery odds—and more satisfied clients.

Built-in stress-busters

Clients & Profits is loaded with tools to help you better manage job work flow. The Production Planner, Rush Manager, scheduling calendar, and auto e-mail are just a few.

A couple of new features that are part of Clients & Profits 5 are the Production Planner and the Rush Manager. Use the Production Planner to see and update every job's timeline, production status, and priority. The Rush Manager, a job priority tool in the Production Planner prioritizes jobs so that the highest priority gets top billing.

Sometimes traffic managers confess that they use other software combinations instead of C&P (even though the shop has it) because they think it does something Clients & Profits doesn't. In a way it does: it sucks up time and money. Clients & Profits is a powerful workflow management tool that works better and faster than juggling stand-alone applications. With time, you'll have loads of historic data in one place, so you'll know exactly how long it will take to complete a job and can accurately schedule it with just a few mouse clicks. And with full integration to your shop's accounting, it makes billing and account reconciliation easy and builds a database full of facts for easier strategic analysis. (Read: The accountant will love you.) Doesn't that sound more appealing than cold coffee, aspirin, and a white board?

Judith Hector is the marketing director for Clients & Profits. She coedits the quarterly newsletters.