**[](https://www.smartsheet.com/try-it?trp=10680&utm_source=template-word&utm_medium=content&utm_campaign=Creative+Workflow+Cheat+Sheet-word-10680&lpa=Creative+Workflow+Cheat+Sheet+word+10680)Creative Workflow Cheat Sheet:**

How to Streamline Your Efforts

This cheat sheet features top tips from experts on how to make your processes

as efficient as possible. The tips are organized into two main categories:

client management and processes.

CLIENT MANAGEMENT

**Clarify the Project Scope with the Client Upfront**: [Gianluca Ferruggia](https://www.linkedin.com/in/gianluca-ferruggia-a01a276b/) is the general manager at DesignRush. “Set clear expectations and roles from the outset, and incorporate regular feedback sessions,” he says. Doing so will ensure that everyone is on the same page from the beginning, which will cut down on back-and-forth during asset development.

**Include the Client in Creative Discussions:** “Early in my career, my biggest mistake was thinking the client didn’t know anything,” says Kat Yowell, a Senior Designer with [Lucid Agency](https://lucidagency.com/). The client has the deepest understanding of their own brand, so it’s crucial to take their direction on the look and feel of all assets you produce for them.

**Explain Your Processes:** Gianluca Ferruggia of DesignRush says explaining processes to clients clearly, “helps to educate them about your process and how it benefits the project outcome.” They will be much more likely to accept your way of doing things if they understand the intention and expected benefit.

**Don’t Plow Forward Without Client Approval:** “Coming in with a bunch of (web) pages designed before the client has seen even one design can backfire hugely,” Yowell says. Use each review round to get as much feedback as possible and determine clear next steps. Make sure to capture client feedback in real time — either with a designated note taker or by recording the meeting — to keep everyone aligned.

PROCESSES

**Diagram Your Workflow:** Ed Burgoyne is the founder and lead advisor of [Makr Consulting](http://www.makrconsulting.com/). “Sometimes the process of just getting together and looking at how things currently work is eye-opening for people,” he shares. Ask the team, “How do we do what we do? Why do we do it that way? Does that make sense? How do we describe what we do?” Diagramming processes visually also helps identify redundancies or bottlenecks, allowing for improvements in workflow.

**Remain Flexible:** Ferruggia stresses the importance of remaining flexible in your workflows. “Implementing Agile methodologies helps us to iterate, adapt, and continuously improve our processes,” he says. Remaining flexible allows you to accommodate unexpected events (such as delays, a change of design direction, or a rush request), which ultimately helps you better meet your client’s needs.

**Use Creative Workflow or Project Management Software:** Workflow software can save you time by reducing manual or repetitive tasks and communications (such as email status reports). With creative workflow or project management software, you can integrate all written communications and calendar items, set automatic notifications and reminders, store, track, and manage all creative assets in production, and leave feedback directly on project files. Keeping everything in one place provides a single record that all stakeholders can refer to.

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