Online Proofing 101

A Better Approach to Creative Feedback

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At the core of any successful creative project is successful collaboration. Bringing brilliant ideas to life can be an enormously complex process involving the contributions of many individuals and teams often spread across many regions if not continents. In addition to inspiration, delivering a successful creative project on time and on budget requires discipline and careful planning.

It also requires using the right tools to keep the process moving smoothly.

Producing successful content is an iterative process of design and development. Content typically requires many rounds of feedback, revisions and ultimately approvals from a variety of stakeholders and clients.

This review and approval process is a critical project workflow and yet many creative organizations continue to manage it in a piecemeal fashion - knowing that it's painful but not really knowing what to do about it.

And that is where online proofing comes in.

We've put together this whitepaper to highlight why you might need a tool like ours, how it might benefit you, and how it's designed to augment your workflows. It will cover all the basics of how to streamline feedback and approvals and how online proofing can improve your workflows.

We hope you find it relevant, and if you'd like to learn more about online proofing and how we can support your creative workflows, feel free to take a trial or a demo. We look forward to hearing from you!

Best regards,

Stuart Feldman
Founder & Head of Product

Content

Overview

How do you gather feedback and approvals on your creative content today?

Many organizations use a hodgepodge of different techniques, including email threads, project management tools, spreadsheets, online repositories, and too many inefficient meetings.

Spread out across various disjunctive tools, these tools and systems often don't or can't communicate. The resulting silos make it hard to stay on top of revisions, timelines, and responsibilities. Ultimately, the issue is that the tools being used were not purpose-built to address your feedback and approval needs within the creative workflow.

Online proofing provides a specialized platform for managing the review and approval process during the development of any creative asset. The goal is to streamline the process by centralizing all the workflow content relating to feedback, tasks, revisions, and approvals throughout the project.

With online proofing, everyone involved in the project is on the same page eliminating any confusion around project deliverables and reducing friction among team members and clients.

The Challenges Facing Creative Workflows

Creative projects are complex undertakings, often requiring the collaborative efforts and involvement of dozens of people spread over many organizations or departments. Like a well-oiled engine, delivering a successful creative project requires that all the moving parts work in sync and with minimal friction.

Here are the most common problems that often lead to projects falling off the tracks:

A Collecting Timely and Concise Feedback
B Unreliable Coordination
C Actioning Feedback
D Tracking Versions
E Accountability
F Learning and Improving

A   Collecting Timely & Concise Feedback

Creative projects and marketing campaigns can involve many different types of digital content - images, video, print documents, and web content. Delays and ambiguous feedback can result when stakeholders don't have the proper tools required to review and provide concise content-specific markups and comments.

B   Unreliable Coordination

With feedback coming in from many different people using many different tools, it's challenging to consolidate all the feedback and keep everyone on the same page. Unreliable coordination can easily lead to miscommunication errors and delays from additional review cycles.

C   Actioning Feedback

Once feedback is collected, it's essential that creators and editors know exactly what revisions are required. They should have a fast and easy way to follow up on any questions that arise during the revision process.

D   Tracking Versions

Creative content typically involves multiple iterations. It's essential that stakeholders know they are always accessing the most up-to-date version of any files they review. It's also important for them to be able to easily access prior versions so they can readily track how revisions have been implemented without having to dig through countless email threads.

E   Accountability

Creative projects are prone to changes - that's just the nature of the beast. Out-of-scope revisions or modifications that produce delays or budget overruns can often lead to conflict and finger-pointing. Without a consolidated history of all content-related activity and communications, it's impossible to present a clear and ongoing record of project activity and progress to prevent the problems from occurring in the first place.

F   Learning and Improving

Does it sometimes seem like the same problems keep coming up from project to project? Without good data and insights into how and where the bottlenecks in your projects occur, how can you take steps to improve efficiency over time?
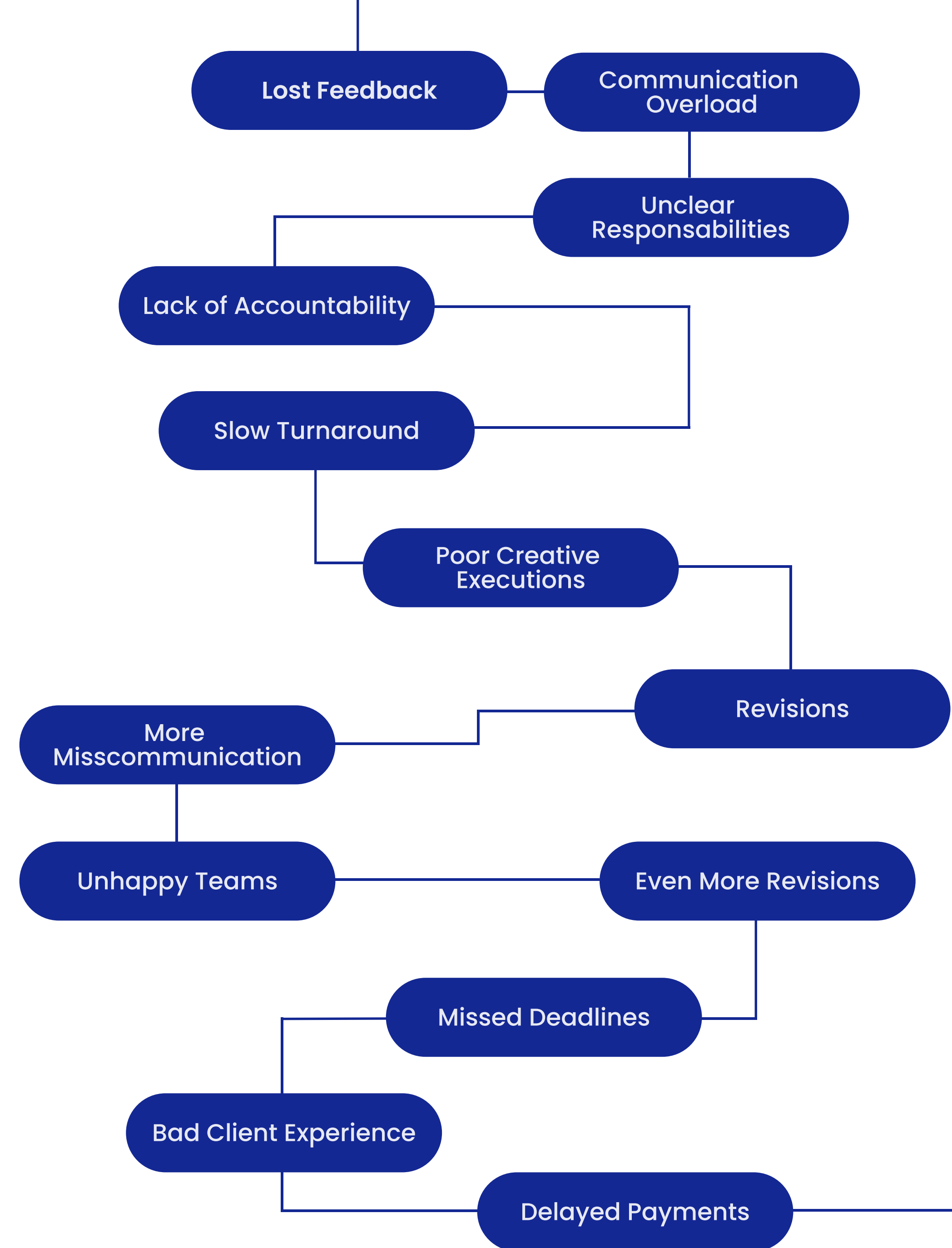
The Consequences of Broken Feedback

At the core of any successful project is successful communication. A broken feedback process - whether with your clients, your internal creatives, or your production team - can lead to mistakes and reworks that delay deliverables and result in budget overruns.

Such problems have a tendency to quickly snowball out of control, creating friction and stress for everyone involved.

A lack of accountability, finger pointing, and the culture that comes with it can ultimately affect team morale, productivity, and the quality of the work produced. More importantly, it can start to undermine your client's satisfaction and loyalty.

The consequences of broken feedback can have dramatic effects on your productivity and bottom line.

Lost Feedback

Communication Overload

Unclear Responsabilities

Lack of Accountability

Slow Turnaround

Poor Creative Executions

Revisions

More Misscommunication

Unhappy Teams

Even More Revisions

Missed Deadlines

Bad Client Experience

Delayed Payments

The Online Proofing Framework

Given these pitfalls, online proofing sets out to streamline review and approval, with the goal of limiting and eliminating the potential for communication errors.

It's designed to enable clearer feedback, facilitate coordination, and ensure accountability.

The online proofing framework addresses these issues by focusing on 3 key elements.

1 Online proofing facilitates the **collection of faster and clearer feedback** by providing an easy way to view and mark up a wide range of digital media formats from any desktop or mobile device.

2 Online proofing consolidates all content feedback, versions, and approval decisions in one centralized location, ensuring everyone on **the team stays on the same page** throughout the project and provides a clear record of all content-related activity.

3 Online proofing simplifies the sharing of project content to all project stakeholders, provides the tools to keep projects moving on schedule, and automates the approval process, to **maintain accountability in your creative projects.**

Online Proofing
Key Features & Benefits
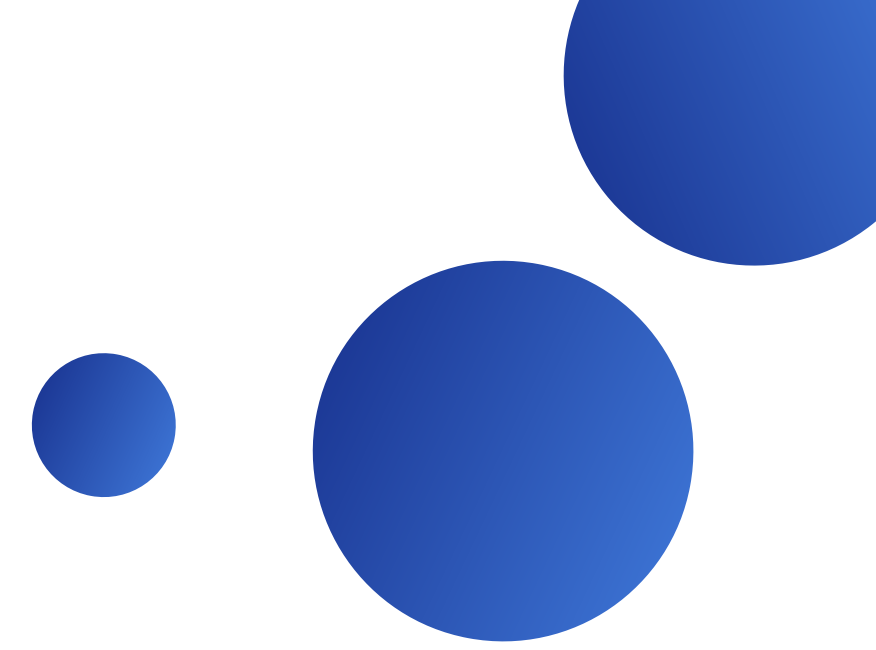
While every creative workflow is different, there are some universal needs to deliver projects on time and on budget.

Online Review and Markup

At the heart of an online proofing solution is a simple, intuitive tool that gives everyone involved in a project the ability to review and provide feedback directly on all the digital media formats that your organization works with.

Providing a consistent user experience makes it easier and faster for people to respond. And because the tool allows for file-specific markups on a wide range of formats (including images, video, PDFs, and HTML), you also get clearer and more precise feedback.

Consolidated Feedback

Consolidating feedback in discussion threads supports a more collaborative approach to content development. It reduces the need for the additional review cycles often required to coordinate feedback from multiple sources or collaborators.

Online proofing solutions can also support the ability to maintain multiple channels of communication, allowing for private internal file versions and comments.

Actioning Feedback

Collecting feedback is only half the battle. Once you have it, the next step is to make sure that the creators and editors developing the content know exactly what revisions need to be made. Having a way to vet the feedback and assign all approved requests as tasks is essential to ensuring that the creatives can move forward efficiently and quickly.

Maintaining a consolidated discussion thread through to task completion ensures that any issues can be quickly and directly resolved.

Tracking

Keeping creative work moving efficiently, requires that everyone involved in the review and approval process has clear and timely information about what is required of each participant. Ongoing project notifications and reminders help ensure that nothing falls through the cracks.

The online proofing dashboard should present each person with a real-time overview of the status of each project they are involved with and indicate clearly where they have any approvals or tasks to complete.

Versioning

Once creative teams have completed revisions, new file versions can be easily uploaded and shared for another round of review. With all versions of a file consolidated, reviewers can readily refer back to compare and validate revisions against any previous feedback.

Since all content-related communications, activity, and file versions are maintained together, there's less of a possibility for miscommunication and misunderstandings.

Routing

Some organizations require routing a piece of content through multiple levels of creative, regulatory, and management approvals. Workflow and approval automations ensure that each piece of content is moving through a pipeline on schedule.

Workflow automations can save project managers considerable time and effort in manually tracking the progress of a review. They can also expedite the review process as sequential approval requests are instantly triggered as soon as one approval stage is completed.

Project Management vs. Online Proofing Tools

Project management tools have become very popular and can play an important role in helping organizations manage complex projects. They tend to be task-oriented, focusing on the high-level tasks, milestones, and timelines that are essential to project delivery.

On the downside, project management tools can also be rigid and complex, imposing a process on projects that doesn't always conform with the iterative and collaborative approach that creatives or clients prefer. Subsequently, project management tools tend to be more useful to (and used by) the admins and project managers overseeing a project than for the creative teams and clients directly involved in the creative content development.

In particular, project management tools are not well suited for managing content review and approval. For example, a marketing campaign may include a high-level milestone to "collect feedback" and "get final signoff" for a specific brochure. But the process of collecting the feedback and iterating with revised versions until the approvals are provided may, in itself, involve dozens, if not hundreds of required changes or what we might call "micro-tasks".

Feedback and micro-tasks such as "change this word" or "align this image" can quickly overwhelm a project management tool to the point of it becoming unusable.

An online proofing tool, on the other hand, is specifically designed to facilitate the review and approval process by providing a specialized tool for collecting and consolidating feedback, tracking revisions, and ultimately collecting all the required sign offs in a timely manner.

There is still an important place for the project management tool - when you are managing project-level tasks. But not when getting into the granularities of creative-level management.

With online proofing, our goal is to ensure that the creative is the priority of the project. And not the other way around.

Project Management vs. Online Proofing Tools

	Project Management Tools	Proofing Tools
Objectives	Helps manage projects	Helps streamline feedback and approvals
Focus	Can be very narrow to very wide, with the project at the center	Very targeted, puts content at the centre
Task Management	Tasks are assigned to the project	Tasks are assigned directly to the content
Creative Feedback	Comments in a comment thread, possibly connected to media	Comments always in the context of a frame, pixel, text, or other with precision
Approvals	Various, generally on the project	On the content, with version accuracy

Who Is Proofing For?

Online proofing has clear benefits for any organization involved in the development of creative content.

Marketing teams, advertising agencies, photograpers, video producers, CGI production studios, and **designers** utilize online proofing to facilitate and manage the feedback process with their clients.

In addition to providing clients with an easy way to review content and provide feedback, the solution is very effective for keeping projects on track by ensuring clients remain fully aware and accountable for all their revision requests. Clients see and value the use of an online proofing solution as a higher and more professional level of customer service.

Brands, agencies, manufacturers, cultural institutions, and many others utilize online proofing to help manage the review and approval process for everything from internal marketing campaigns to packaging, catalog development to social content, and beyond.

In particular, for organizations where content has to be routed through many levels of approval or where feedback and approvals are required from many stakeholders, online proofing can provide an invaluable way of automating the review routing and consolidating all the feedback.
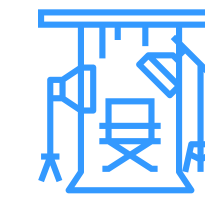
Photo Shoots
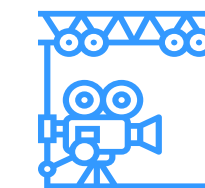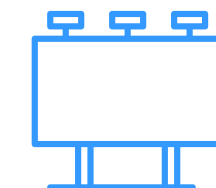
Web Banners

Traditional Media

Website Design

Packaging

Renderings

Video Content

Advertisements

Whitepapers

Social Content

Longform Video

Presentations

Web Content

All Your Content

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Next Steps

Adopting an Online Proofing Solution

If the issues outlined in the whitepaper resonate and you think that online proofing can be a good fit for your organization, here are your next steps.

Because an online proofing platform will touch many different types of users within your organization, you may want to pull together a small core team of people to participate in the evaluation of different platform options.

Typically, online proofing can involve project managers, creative directors, production team members, customer-facing roles, and management stakeholders. It will also involve external users, whether clients, consultants, or freelancers, involving them in your evaluation or pilot is paramount to successful adoption.

You can start out by collaboratively developing a checklist of key feature requirements and prioritizing their importance. After establishing your requirements, setting up a demo can be a valuable way to get an overview of the platform and discuss your specific requirements with a product specialist. The demos can also introduce you to some workflows and features that you may not have even considered.

If a solution looks promising, the next step would be to run a trial so that you can evaluate the platform further with your team using your own content. Typically, this period will be one of discovery, allowing you to identify what features or needs are a priority (vs. nice-to-haves).

Running a pilot project (real or mock) to get a better sense of workflows and user experience will raise important issues and should highlight the benefits of a solution.

Look for support in the process - not only is it important to address your practical needs, but you want to ascertain that when further needs or issues arise down the road, you'll get a quick resolution.

Onboarding a new proofing tool is an investment that will provide a fast ROI, with limited upfront cost, but there's still a cost to your organization. Taking your time to get it right can set you up for success for years to come.

The Online Proofing Checklist

General Features to Consider

☑ Does it support all the types of files you work with?

☑ Can files be reviewed from any device?

☑ Is there the ability to combine and review multiple files together?

☑ Is the interface intuitive, especially for non tech-savvy stakeholders?

☑ Does it support collaborative, synchronized, and threaded commenting?

☑ Is it simple to add users to a proof?

☑ Can users easily reference updates and revisions in a central place with file versioning?

☑ How intuitive is it to turn feedback into tasks, resolve them, and track open tasks?

☑ How simple is it for approvers to submit a decision?

☑ Can you compare versions to quickly identify revisions?

☑ Are there notification options that work for your particular needs? @mentions? Automated? Customizable?

☑ How easy is it to organize and search through proofs?

☑ How much control can you have over permissions? Can you have project groups?

☑ Does it support separate internal or external communications and versions?

☑ Is storage a factor? Will you hit a ceiling?

☑ Can you automate the routing of content through multiple stages of approvals?

☑ Do users have a personal dashboard to track content reviews, tasks, and approvals?

☑ Can the system meet your infosec standards?

☑ What will you need with regards to integrations? Is there a well documented API?

☑ Will you get the support and training you need?

Simplified Workflows for Forward Thinking Businesses

At the end of the day, online proofing enables efficient content collaboration. It creates a better way of working together, whether within an in-house team or in collaboration with outside creatives, freelancers, or clients.

Online proofing does not need to disrupt your workflows – it can integrate seamlessly and should be intuitive to adopt.

With smart collaboration, you produce stronger work in a shorter time period, reducing the friction between your teams and clients and saving you time and money.

The results are immediate.
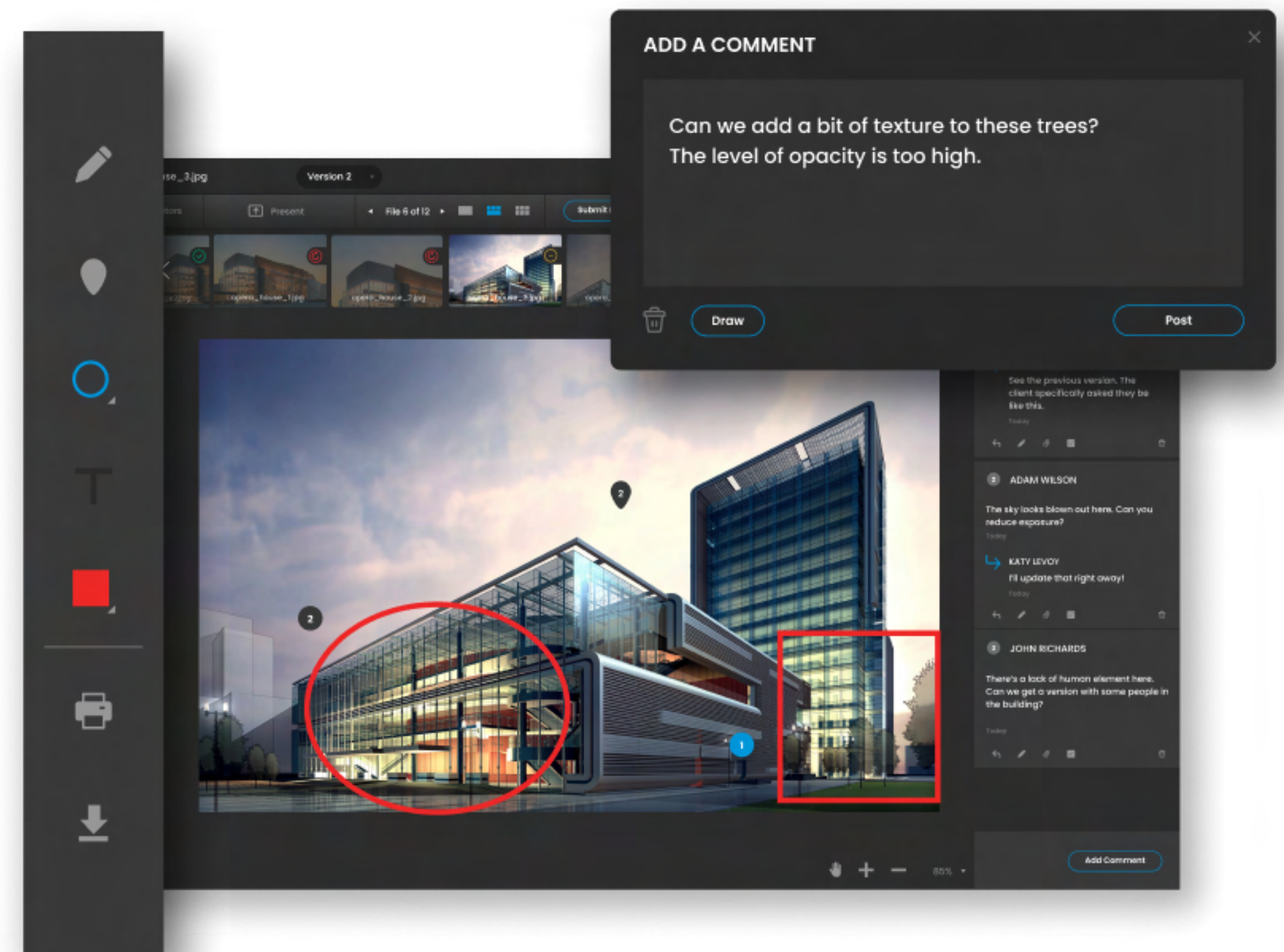
About ReviewStudio

ReviewStudio began back in 2014 by a team of art directors and digital media producers facing the challenges of coordinating feedback on a major media project involving teams spread over several continents. We recognized that there had to be a better way to review video and other project elements for more efficient turnarounds.

We saw the same obstacles we were facing with our creative workflows existed across many fields and projects. This led us to the development of an intuitive, easy-to-use platform for collecting internal and client feedback. We started our journey to become the leading software for teams looking to efficiently and effectively collaborate to realize ambitious creative visions.

ReviewStudio is designed to streamline the review and approval process for digital media projects, whether video, audio, image, PDF, or HTML. It is used by thousands of creative agencies, studios, and teams in over one hundred countries worldwide. Our customers span from some of the world's largest agencies and brands to small dedicated marketing teams, from video and CGI production studios to graphic designers – and everyone in between.

Our Approach

Prioritizing Practice Over Process

We support the way creative teams work by working like they do – with just the right balance of form and function. Process shouldn't interfere with the natural flow of a creative project.

Customer-Centric in Support and Development

We are very engaged with our customers – we aim to provide unparalleled support and training so that you get the most from ReviewStudio. As a continuously evolving platform, our development is driven by collaboration with our customers. We are constantly translating customer feedback into features and testing our hypotheses.

Tools and Features Creative People Love

The successful adoption of any tool depends on the end user wanting to use it. This means being intuitive and easy to use while facilitating great work with the least amount of friction possible.

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Simplified Workflows. Smarter Collaborations.

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Start a 30-day trial today at register.reviewstudio.com