

# Creative Operations & Design Systems Portfolio

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## Operational architecture for creative teams

- *I design operational systems that enable creative and product teams to scale their work with clarity, consistency, and predictable delivery.*
- *Focus areas include workflow architecture, governance frameworks, operational documentation, and scalable creative production systems.*

# Case Study Overview

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## Creative Operations System Design for a Hybrid Creative Team

### Client Environment

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- Creative agency with distributed contributors
- Mix of internal staff and fractional specialists
- Work spanning social media, marketing deliverables, and digital assets

### Operational Challenges

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- Requests arriving through multiple channels
  - Informal communication across Slack, email, and meetings
  - Limited visibility into project ownership
  - Inconsistent creative review cycles
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**Objective:** Design a scalable asset management system that improves discoverability, version control, and organizational clarity.

**Role:** Operational systems design, workflow architecture, and governance framework development.

**Stakeholders:** Creative team, marketing team, project management, and leadership stakeholders.

# Operational Environment

*Creative agency supporting marketing and digital production initiatives.*

*Hybrid team structure with internal staff and fractional contributors.*

## Team Structure

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- 1 Founder
- 1 Marketing Manager
- 2 Designers
- 1 Social Media Manager
- 1 Animation studio
- 1 Project Manager

## Production Scale

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- Up to 40 active projects/month
- Up to 200 assets produced/month
- Work spanning social media, physical product, & digital marketing assets
- Multiple concurrent campaigns spanning social, marketing, and product deliverables.

## Operational Complexity

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- Requests entering through Slack, email, and meetings
- Distributed contributors working across multiple time zones
- Informal project coordination and approval processes

# Operational Assessment

*To understand operational friction across the organization, discovery interviews were conducted with creative, marketing, & project management roles. The assessment focused on identifying structural issues affecting delivery and collaboration.*

## Areas Analyzed

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- Role ownership and delegation
- Creative review and approval cycles
- Communication channels and visibility
- Project status tracking and accountability

## Assessment Method

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- Stakeholder interviews across creative, marketing, and project management roles.
- Workflow mapping to identify decision bottlenecks and review cycles.
- Analysis of communication channels and project visibility.

## Key Findings

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- Unclear role ownership across projects
- Inconsistent approval checkpoints
- Ad-hoc communication replacing structured updates
- Lack of a centralized system for project visibility

**Outcome:** *These conditions resulted in reactive workflows, misaligned expectations, and inefficient delivery cycles.*

# Decision Governance Framework

To eliminate ambiguity around decision ownership, a governance model based on the **MOCHA** framework was implemented.

## Defined Roles

- Manager:** Provides oversight and ensures alignment with organizational priorities.
- Owner:** Directly responsible for completing the work.
- Consulted:** Provides expertise before decisions are made.
- Helper:** Supports execution when needed.
- Approver:** Holds final authority for decisions.

**MOCHA Operating Model**  
Manager / Owner / Consulted / Helper / Approver

**About this template**  
This chart outlines who is responsible for each portion of a project or task. In order to keep things simple, there should only be a maximum of 2 roles per task. The role of the Client is assumed as an official approver and not explicitly called out.

Role	Description	Social Media	Co. Branding	Client Website
<b>Manager</b>	Oversees project from a higher level, ensures alignment to goals	●	●	●
<b>Owner</b>	Directly responsible for completing the task	●	●	●
<b>Consulted</b>	Provides subject expertise when needed	●	●	● ●
<b>Helper</b>	Assists the owner in execution	● ●	● ●	● ●
<b>Approver</b>	Final authority on decisions	●	●	●

**KEY:**

- Founder
- Marketing
- Creative
- Social Media
- Project Management
- Developer

**Outcome:** Clarified decision authority and accountability, reduced approval bottlenecks, revision loops, and decision delays for project outcomes.

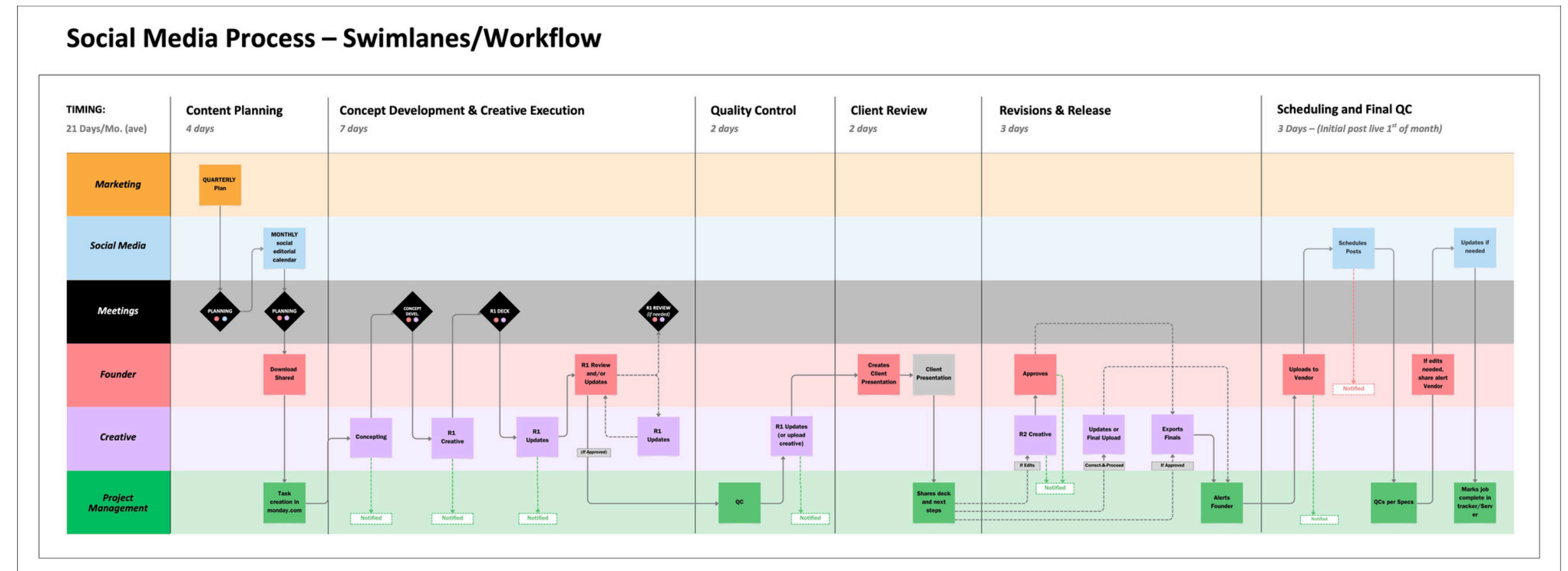
# Workflow Architecture

A structured creative production lifecycle replaced informal project handoffs and reactive execution.

## Production Phases

- Content planning
- Concept development
- Quality control
- Client review
- Revision and finalization
- Scheduling and publishing

*\*Each phase defined responsible roles, decision checkpoints, and expected outputs.*



## Operational Improvements

- Defined production lifecycle replacing informal handoffs
- Introduced review checkpoints across production phases
- Clarified ownership across marketing, creative, and project roles

**Outcome:** Creative work moved through a predictable operational framework with clearly defined ownership and structured review cycles.

# Operational Playbook

To support consistent execution, a documented operations playbook defined the full lifecycle of creative production.

Implementation: Introduced through internal team training sessions. Workflow playbook distributed across creative and project teams. Operational documentation integrated into onboarding for new contributors.

## Document Included

- Role ownership and RACI definitions
- Workflow stages and responsibilities
- Quality control standards
- Publishing and delivery procedures

**Social Media Workflow – SOP**

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**PURPOSE**  
Ensure a clear, repeatable process for planning, creating, approving, and publishing monthly social media content across a hybrid team.

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**SCOPE**  
Applies to all monthly social media posts from planning through final publication.

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**ROLES**  
Founder (F)  
Creative (C)  
Project Management (PM)  
Social Media (SM)  
Marketing (M)

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**PROCESS & RACI**

**1. Content Planning (4 days)**

- Quarterly marketing alignment
- Build monthly social editorial calendar
- Create tasks in Monday.com

**RACI:** R = SM | A = M | C = PM | I = F, C  
**Output:** Approved monthly calendar

**2. Concept Development & Creative Execution (7 days)**

- Concepting (R1)
- Creative development (R1)
- Upload creative or updates

**RACI:** R = C | A = F | C = PM | I = SM  
**Output:** R1 creative assets

**3. Quality Control (2 days)**

- QC against specs
- Flag issues or approve for review

**RACI:** R = PM | A = PM | C = C | I = F, SM

**Decision:** Pass to client review or return to Creative

**4. Client Review (2 days)**

- Create and share client presentation
- Capture feedback or approval

**RACI:** R = F | A = F | C = PM | I = C, SM  
**Decision:** Approved or revisions required

**5. Revision & Finalization (3 days)**

- Execute R2 creative if needed
- Export finals
- Upload to vendor (if applicable)

**RACI:** R = C | A = F | C = PM | I = SM  
**Output:** Final approved assets

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**6. SCHEDULING & FINAL QC (3 days)**

- Schedule posts
- Final QC per specs
- Confirm first post live by 1st of month
- Mark job complete

**RACI:** R = SM | A = PM | C = F | I = C  
**Output:** Content live + documented

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**TOOLS**  
Monday.com (tracking)  
Shared Drive/Server (assets)  
Client Decks (approvals)

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**SUCCESS CRITERIA**  
On-time posting  
Fewer revisions  
Clear ownership  
Reduced rework

**Impact:** The documentation created a shared operational language for the team and enabled consistent execution across distributed contributors.

# Operational Outcome

## Operational Results

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### **Implementing a structured operational framework produced several improvements:**

- Clear role ownership across projects and decision stages
- More predictable production timelines across marketing deliverables
- Reduced last-minute requests and reactive execution
- Stronger coordination between creative, marketing, and project stakeholders

**Result:** *The organization gained a repeatable operational framework capable of scaling creative production as project volume increased.*

# Case Study Overview

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## Creative Asset Management System

### Client Environment

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- A marketing organization storing creative assets in Dropbox without a consistent structure.

### Operational Challenges

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- Creative assets were difficult to locate, version control was inconsistent, and onboarding new collaborators required manual explanation of file structures.

### Impact

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- Time was frequently lost searching for assets and onboarding new collaborators required significant manual explanation.

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#### **Objective:**

***Design a scalable operational system that improves role clarity, project visibility, and delivery predictability.***

# File Governance System

A standardized asset management structure was implemented to organize files and ensure consistent storage practices.

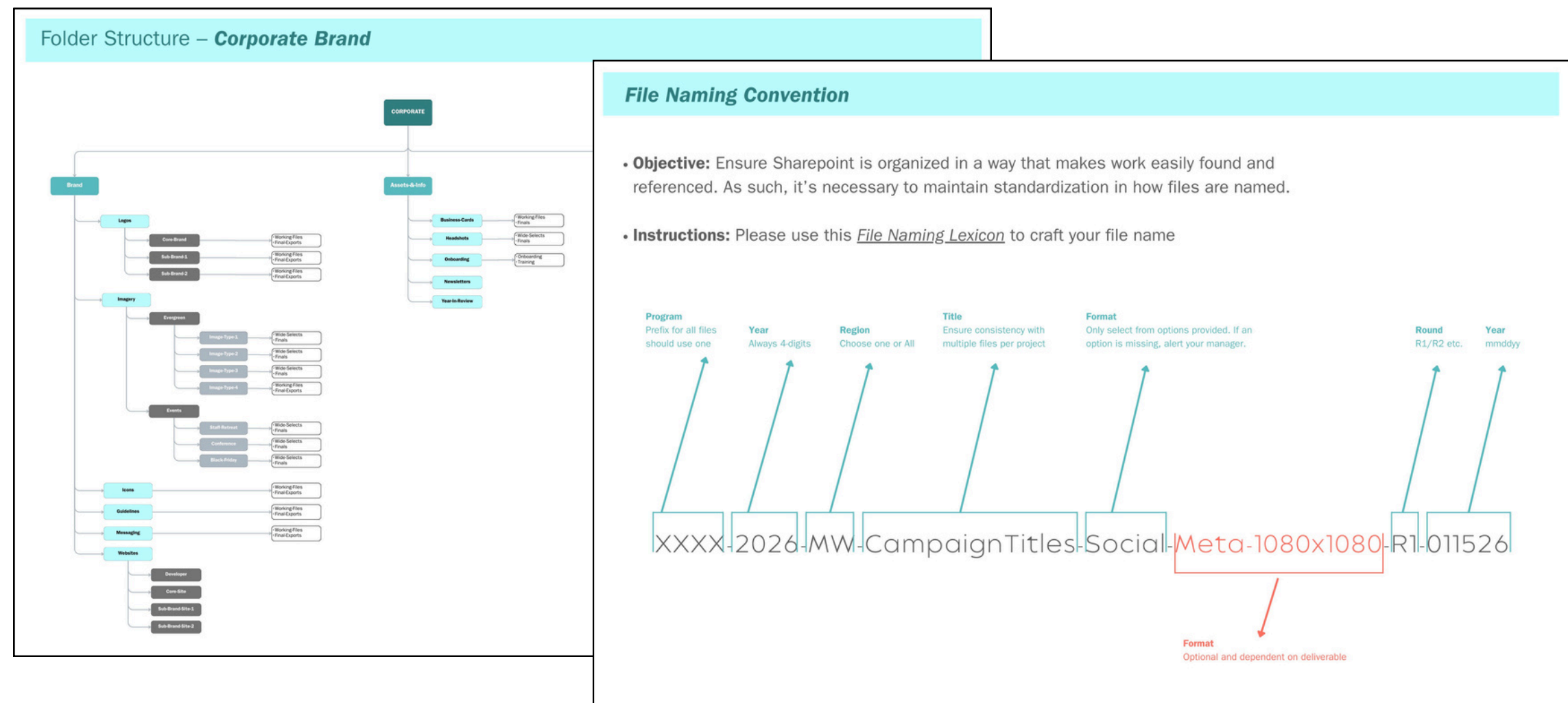
## System Components

**Corporate brand asset structure:** Centralized storage for logos, imagery, and brand guidelines.

**Program-specific campaign folders:** Dedicated folders organized by year and initiative.

**Standardized naming conventions:** Structured naming system enabling quick search and version tracking.

**Example Naming Format:** Program.Year.Region.Project.Deliverable.Format.Round.Date



**Outcome:** Assets became easier to locate, Duplicate file creation was reduced, creative asset governance became consistent, team could navigate storage with clarity.

# Approach

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## Building Operational Systems for Creative Teams

- Creative organizations often struggle not because of talent, but because operational systems have not evolved alongside the complexity of the work.
- DesignOps and CreativeOps ensure that operational systems evolve alongside the complexity of the work.

## Core Focus Areas

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- Operational architecture
- Workflow systems that clarify how work moves through teams
- Governance frameworks that define decision ownership
- Documentation systems that enable repeatable execution
- Systems thinking connecting tools, people, and workflows

**Goal:** Enable creative teams to deliver exceptional work through clear and scalable operational systems