



The Deliberate Creative Podcast with Amy Climer Transcript for Episode #013: Moving Creative Ideas

August 20, 2015

In today's episode we'll explore tools and tips to move your team's creative ideas into reality.

Amy Climer: Welcome to [episode #013](#) of the Deliberate Creative Podcast. Today's episode we have a special guest, Vicky Cassidy of Grid Productive. Vicky works with teams and individuals to help them be more productive in order to accomplish what they want to get done including creative projects. I've known Vicky for a couple of years now and I've seen the results of her coaching in other people, and I'm actually just about to start working with her myself to help me be more productive and effective in my own business, which I'm super excited about.

Today Vicky is talking about where teams often get stuck when they are trying to implement a creative project and what to do about it. She shares some tools that teams can use and then at the end, she tells a great story about how one team she worked with implemented a creative project. Here's Vicky.

Amy Climer: Vicky welcome to the Deliberate Creative Podcast. I'm so glad you're here today.

Vicky Cassidy: So excited to be on the podcast, Amy.

Amy Climer: Thanks. Tell us a little bit about your background, who you are and what you do.

Vicky Cassidy: Sure. I run a business called Grid Productive. What I do is I help small businesses become more efficient and more productive. This happens in a bunch of different ways but what I often find is that small businesses are being ineffective because maybe they don't have the technology solutions that they need, or they have poor task management or project management skills so I help teach them how to be better in those areas. Also, I take a look at what their business operations are like. How they run things at the high level and then try to figure out where we can streamline things and where we can put in processes that will make things run more smoothly.

Amy Climer: That's great. One of the things that is a trend throughout this whole podcast is the Creative Problem Solving Process and the fourth stage of the Creative Problem Solving is Implementation and I talked about that in [episode #007](#). Implementation basically means you





take this fairly well developed idea, but now you're putting it into action and making it reality. I have seen time and time again teams and individuals just stumble and fail during this stage because things happen. It's hard to implement something new that no one has done before and so I'm wondering as a productivity coach in the work that you've done, you've probably seen this as well.

Vicky Cassidy: Absolutely.

Amy Climer: I'm wondering what ideas do you have and if you could kind of walk us through some of those processes of how do you successfully implement creative projects?

Vicky Cassidy: Sure. I'm sure what I'm going to say, actually I know for a fact that what I'm going to say isn't going to blow anybody's mind, but I think it's something that's so simple yet people struggle to do it. I think the most important thing you have to do first is make a plan. How that plan is laid out or what is entailed in that plan can really vary. Sometimes with creative projects people have these really clear visions and these really clear goals of what they are working on and maybe there are some obvious milestones in between and then we can take those milestones and break them down into tasks. Sometimes on the other hand, the vision is really clear but sometimes the intermediate steps kind of have to develop as we go. I think specifically for creative projects, you kind of have to get started before you know exactly what things are going to look like and so you have to address those two different types of projects in different ways.

Amy Climer: What are some ways that you might address a creative project where you don't know what those steps are further down the road?

Vicky Cassidy: What I would try to do is focus on what's the first big milestone we need to get to. If you know what that kind of first big thing you're going to hit is, how do you work backwards from that and break down actionable things that you can be doing in the meantime just to meet that first milestone, not necessarily to finish up the project. Once you hit that first milestone, what's the process for deciding the next milestone and kind of going through that iterative process over again?

Amy Climer: Have you seen teams struggle with this or do you feel that like once they know that much, it's pretty clear?



Vicky Cassidy: I think a lot of teams struggle for two reasons. They either get too bogged down in the details and they are so focused on making a plan that they don't actually start because they think their plan isn't perfect and they think that that can certainly be a hindrance or I see teams that make a really loose plan and get to that first milestone, but then they don't really put any process into place to make sure that they get that iterative starts again so that they kind of lose steam in that first phase.

Amy Climer: Maybe you could talk about both of those situations. What recommendations do you have to help them move forward?

Vicky Cassidy: For that first group, the one that is too bogged down in the details and can't get started, I would say that if you're starting to get frustrated because you're working on the plan and it feels like that's all you've been doing and you haven't actually done any work, I think we've all been in those situations where we're meeting about meeting about meeting and we're not actually accomplishing anything. I think the best advice for those people is just to set up a work group meeting and just actually do some of those things that you identified as step 1, 2, and 3. I think those are often the things that are easy to identify and it's kind of like 4, 5, 6 and so on that might take a little bit more thought. Just get started and you'll see that things naturally start to progress and you start to move forward. I think at that point, once you have a little bit of momentum, then you can go out and plan out some of the other iterative steps to get to that first milestone.

Amy Climer: There is some really interesting research that when groups or individuals are making progress towards something, it helps motivate them and they get more excited and then they make more progress.

Vicky Cassidy: Absolutely.

Amy Climer: It's kind of this iterative cycle. What about the teams on the other side of the spectrum where they aren't very good at developing those steps and they are sort of struggling in that way?

Vicky Cassidy: I think being really open and trying to understand why. Is it lack of motivation? Is it lack of structure? Is it because they don't have the right tool? There could be many reasons that people fall into this category and I think if you can identify the root of the problem, then you can be more specific about how to address it. If it's because you don't have a good tool to work on, maybe somebody takes that as a follow up and finds a tool that will be convenient and



easy for the group to use to make that task cluster, to generate those To Do's. Just being a little bit more focused as to why they are struggling and then building in whether that's weekly, monthly or whatever it might be, a check in with everybody that's appropriate to have in the room. Just kind of a check in to say, "Here's where we are. Here's what we've already figured out. How do we make sure that we're kind of continuing that momentum next week, next month?"

Amy Climer: Thinking about those check-in meetings, do you have a specific process that you recommend that groups sort of follow in those meetings so that they do stay on track and not get completely side tracked and bogged down in the details?

Vicky Cassidy: Nobody loves a status meeting. I think they can be, for the most part, pretty boring. So making sure you've got the right people and not any extra people that don't need to hear the comments or aren't going to contribute anything. Just don't include those people if they are not going to add value and they are not going to get any value out of your meeting, but also just make sure it's really quick and dirty. If you're going down the list, make sure as things come up, just add them to a follow-up list that can be taken by whoever that issue is going to be solved by instead of trying to solve all of the problems in that check-in status type meeting.

Amy Climer: What do you think is the optimal length of time for that kind of meeting? I'm sure it would vary.

Vicky Cassidy: Yes it totally varies. I think trying to keep into half hour or shorter would be my recommendation but I think it's hard to generalize because some status meetings might be awesome if they are five minutes. It's just like "Let's grab a cup of coffee and as we walk from the coffee machine back to our offices then that's our status meeting." Sometimes it might need to be a little bit more formal where you sit down and have your spreadsheet of whatever tool you're using up and going through things one by one.

Amy Climer: That's what I was thinking. I've worked with companies where they even have standup meetings where they intentionally stand up because they want this meeting to be five minutes or less and just get a quick update. I think you don't get the yawns and the boringness.

Vicky Cassidy: Absolutely.



Amy Climer: This may be getting a little detailed and nitpicky here, but when do you think it's best to have an in person status meeting versus just some email blast or kind of a summary sent out over email?

Vicky Cassidy: I think that really depends on the culture of the organization. I think email in some organizations, if you get 600 emails a day then the status report is probably going to be something that goes down to the bottom of your priority pile, but if you have a culture where email is treated differently where there maybe isn't such a high volume or these types of things are expected to be treated via email, then it might be appropriate to do it that way. I also know that there's a ton of really cool tools. Slack is one that comes into mind. That's like a communication tool. A lot of companies that are virtual that don't have a central office use Slack as a great communication tool and they do status updates through tools like that. It might be in person meeting, it might be email or maybe there's another tool that will solve the problem for you.

Amy Climer: Let's talk about tools for a few minutes. I'm wondering if you can expand a little bit on Slack as far as what is that and how does it differ from a typical email? Also if there are some other tools you would recommend that teams look at to help them just be more productive and efficient together.

Vicky Cassidy: Sure. Slack, and I say this with a little bit of a caveat because I've actually never been a user of Slack myself, I've just read a lot about it and seen other people using it, but basically it's a communication tool that's meant to replace internal email. There's topic boards by project or for a specific team like the marketing team, the HR group whatever it might be and you communicate kind of like chat but everything is saved and searchable, and you can drag files there. Let's say you and I are meeting about some milestone. We're trying to meet for a project, I can throw a file in there and then that file is searchable by anybody that has access to that conversation. Instead of things living in people's individual email boxes, all of that is kind of housed centrally and you can search and find all of that information much, much easier than you can in email.

Amy Climer: Yeah, we've all had that experience. We're like, "Oh my gosh. I got this email and I can't find it." No matter how you search, you can't find it. Do you have other tools you can recommend in addition to Slack or instead of?

Vicky Cassidy: Well Slack is really meant to be a communication tool. I think there's also really great project management or task management tools that teams can take advantage of. Two



that come to mind are Asana and Todoist. They are both cloud-based project management, task management tools that I think are really great for the average user. I think when think project management tools, they might think of things like Microsoft Project which I think it serves its purpose in the corporate PM project management world, but for the average user, it's not something that will help them at all.

Amy Climer: Why is that? I haven't used it.

Vicky Cassidy: First of all, I think it's complicated to use from a technology perspective, but it also doesn't give you the flexibility. It's not intended to be like, so my task is to email Amy about this particular topic to get the ball rolling on this task. It's meant to be like very serious milestones and very serious meetings that we're going to have. It's just a lot more rigid. They are not really designed for day to day use of the average person.

Amy Climer: Asana and Todoist, they are flexible you think?

Vicky Cassidy: Correct. The beauty of those tools is they are super easy to learn to use. They are those tools that you self implement. So you sign up for an account. You can sign your team up for an account. It's very clear how to make a project, how to make a task, how to assign it to other people. I think those are the types of tools that if anybody spends a half an hour playing around with that they understand how it works and can use it moving forward.

Amy Climer: I was working with this organization last year and we were doing a project and I thought, "Oh my gosh. Asana is going to be the perfect tool for them." I looked into it. I started learning it myself and then I presented it to them. What was really interesting is just the reaction of what happened and that they were open. They were like, "Okay. We'll try this out" yet pulling them away from email and going to Asana instead, it was like pulling teeth. I just want to ask if you had any suggestions on how do you kind of bring a tool like that in which you in some ways is kind of revolutionary and can be so valuable, but it does require some buy in and people to get into it.

Vicky Cassidy: Yeah. You have to get people to commit. I think the biggest issue I see with any technology project is that if you have this really amazing thing but nobody is using it then it doesn't feel like it's that amazing. Getting people to commit is a really, really big part of using an effective tool and that's some of the front work that I think could really benefit a team to be a little bit more agile and react more quickly in the long term is doing that work upfront. I think especially the key people that are going to be part of the project it's the conversation that you



need to have early, you need to demonstrate the value of the tool that you're going to use. If it's a really email heavy work culture, explain maybe why email isn't a good solution for this project and just really get that buy-in ahead of time. Depending on how difficult it is, it might be kind of mini project before you actually start your creative project that you're working on, but it would hopefully be worth it at the end.

Amy Climer: I think there's that whole old adage that people hate change. I don't know that they really hate change, but sometimes it's just hard to get into it and to try something new.

Vicky Cassidy: Yeah and I think the biggest recommendation I can make with tools is also that you always want to pick the simplest tool that's going to solve your problem. I think another reason a lot of times people abandon tools is that it's overly complex and so people start using it and they are like, "Nah, I just don't understand it" or they are only using 10% of the tool and it feels really bloated. I always recommend people figure out what are the things that they need their tool to do for them and then find the tool that does that in the simplest way. That way, you're saving yourself a headache of learning something complex or having something that you're only using a small part of it.

Amy Climer: That is so true. I think a lot of times when I've looked at tools, I'm like, "Oh this one has all these extra features," but then really in the end it's like I'm not going to use those anyway so why bother.

Vicky Cassidy: Right.

Amy Climer: We've talked a little bit about tools. I want to go back to just this idea of as a team working together and trying to be productive, I wonder if you have any other recommendations that we haven't talked about as far as teams trying to implement a creative project or also if you have any stories of examples that you've seen of either successes or failures. That will also be interesting to talk about.

Vicky Cassidy: Sure. This applies definitely to teams. I think it also applies to individuals, but I think people get stuck in trying to make something perfect and there's a saying perfect is the enemy of good enough. Often times what that minutia that you're trying to put into that like last 10% of something really is not going to impact the project in any meaningful way so getting something to the point where it's good enough, trying it out whatever it might be, actually doing it and then getting feedback from that new process you put in place or whatever your project is,



then you can come back and make the necessary changes rather than focusing on those last couple of things forever and never actually getting it implemented.

Amy Climer: Yeah. I think perfection is a huge barrier a lot of times for creative projects.

Vicky Cassidy: When they've had the eighth meeting about a specific one detail of something, I always ask them, "How difficult will it be to course correct this later if it doesn't work out as you want it to?" That tends to kind of snap people into a different mindset. "Okay, if we make the wrong decision here, here is what's going to happen and it will be an extra hour of work or we'll have to send out these extra communications or whatever it might be to change it." So just kind of thinking through what are the consequences of doing this wrong, how do we course correct it if it doesn't work perfectly sometimes is what you need to just pick an option and move forward.

Amy Climer: I think that's a great question to ask people because often we don't even think about that. We're like, "Oh we have to get it right" but then when you back up, you're like, "Well actually we don't have to get it right on the first try." I'm wondering if you have any stories that you can share with us, some examples of teams that you've worked with where you've seen maybe gone from one end of just complete kind of a mess then you helped them through understanding some of these tools and then they were able to be more creative and productive.

Vicky Cassidy: I have an example. I was working at this IT company and we were trying to roll out a new pretty different training process for our customers. People were really resisting because it seemed like it was going to be this huge change. We weren't really getting buy-in from a lot people. But me and this core team of people that wanted to do this felt really strongly that this would be effective. What we did is we kind of set a really rough outline for ourselves of how we wanted to develop the tool that we would be training on. We kind of pieced it together, made sure it was again good enough. It wasn't necessarily perfect and then we picked a couple of pilot customers to try the tool out on. We did a really good job of setting expectations. "Hey this is a first pass. You guys are in the pilot. We're doing this so that we can gather feedback about how this training process goes." People weren't necessarily upset that things didn't maybe go exactly as planned but instead they felt empowered to provide feedback and to improve this process for future people or for future trainees.

We did that with the pilot, got some great feedback, made a bunch of changes to the training program for the next group and then did pilot #2. That went much better. We got even more



feedback and as we actually had customers using this training process live, that kind of gave us the buy-in from those people that we were getting resistance from ahead of time because they saw both how the clients used it, how it improved the work that they need to do because they had better skills from this training program. They really got kind of start to see the big vision that we did from the beginning.

Amy Climer: That's a great example particularly of prototyping. "Let's just put it this out there. Let's do a little pilot. Let's see what happens." I love what you said about how the customers initially maybe the fear was that they would feel put upon or frustrated, but actually they were excited and empowered and wanting to provide the feedback.

Vicky Cassidy: Yeah, it's all about framing it. If we said, "Hey, we've got this new training module that you must complete, with the amount of kind of issues that we ran into with it, I'm sure we wouldn't have gotten nearly as good a feedback than when we said, "Please treat this as a pilot and tell us how we can make this the best product we could possibly make.

Amy Climer: That's great. That's a good example. We're kind of coming to a close here and one of the things that I do in this podcast is at the end of each episode, I give listeners a challenge for the week related to whatever we're talking about. I'm wondering if you have a challenge you can give listeners this week related to implementing a creative project.

Vicky Cassidy: Sure. Going back to our conversation about tools, I listened to your past podcasts, [episode #007](#) about implementing creative processes and you didn't talk a ton about tools so I think maybe a good challenge for your listeners would be to come up with that list of requirements of what they want their task management or note taking tool to do and then try to do some research online of what opportunities or what tools there are out there that would do those things.

Amy Climer: Great, I love it. I would definitely put a link on the show notes to all the tools that you mentioned – Todoist, Asana, Slack - all those so people can find those easily.

Vicky Cassidy: Great.

Amy Climer: Vicky if people want to learn more about you and your work, where can they go?

Vicky Cassidy: You can find me on my website GridProductive.com. You can also find me at Facebook and Twitter with the same handle, @gridproductive.





Amy Climer: Awesome. Thank you so much for being on the show, Vicky. I think the stories you shared and the resources will be a big help to people trying to implement creative projects.

Vicky Cassidy: Great, thank you so much for having me.

Amy Climer: Thank you so much Vicky for sharing your expertise and time with the Deliberate Creative Podcast audience. If you all want to access the show notes and find all the resources that Vicky shared, head on over to ClimerConsulting.com/013. I want to close up this episode by reading a new listener review. This one is from "Participant 5" and it is titled Great Practical Insight, 5 stars. They say, "Amy has unbelievable understanding of group dynamics and unlocking potential. She has a talent of telling stories and giving examples in a way that is very entertaining. I'm only a few shows in and find they are ending too early." Thank you so much Participant 5. What an awesome kind review. I really appreciate that. If you're a listener and haven't written a review yet, head on over to iTunes or Stitcher and write a review for the Deliberate Creative Podcast. You can do this right from your phone. It's super easy. I'll put a link in the show notes for directions in case you want step-by-step directions on how to write a review on iTunes. I love reading them. They definitely motivate me and more importantly, they help other people find this podcast and figure out if this is the right podcast for them to listen to.

As you move forward this week, work on the challenge that Vicky post to you. Check out some of those tools that she suggested. I've used both Todoist and Asana. I'm going to check out Slack. I've heard about it. I've heard great things about it, but I haven't checked it out so I'm going to do that next week and then I'm going to share my thoughts with you in the comments section of the show notes. I'd love to hear yours. Go to the show notes, write a comment. Let me know what you think about the tools that you tried. You're also welcome to ask questions in the comment section. If you have a question about anything that's shared in the podcast episode or if you have ideas for this podcast, feel free to leave those in the comments section of any of the show notes. You're also welcome to send me an email. You can do that right from the website, ClimerConsulting.com. just go to the contact page shoot me an email. I'd love to hear from you, love to hear your insights, your questions, your thoughts, your feedback about the podcast. This podcast is for you so tell me what you like, tell me what you don't like. I'll make some adjustments or I keep doing what we're doing whatever works.

Hope you all have an awesome creative week. I'll see you next time. Bye!