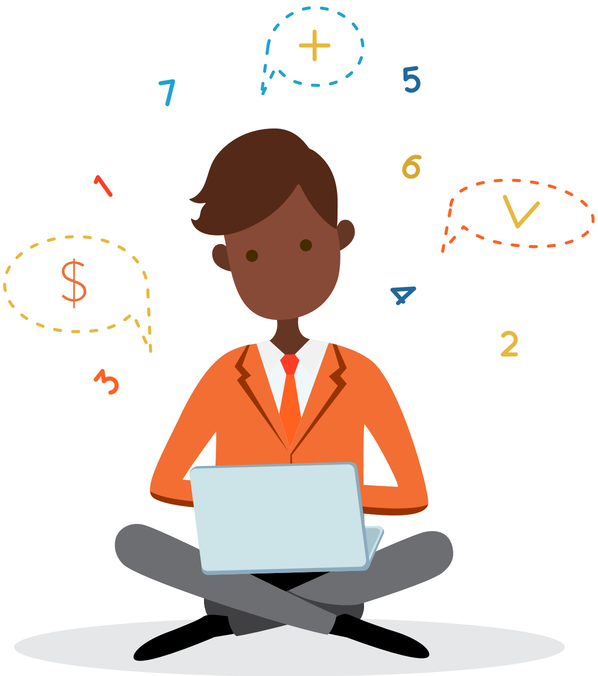
CREATIVE PROCESS BEST PRACTICES

VOLUME 2

THE KINETIX GROUP

MARCH 2021



Initial Scope of Work (SOW) / Hours Estimate

Typically the account person develops the project SOW based upon their experience working on similar projects. Sometimes, however, the project is new or unusual and requires additional upfront work to estimate costs accurately.

- If the project you are building an SOW for is not something you've done previously, or it appears to need more creative or editorial work than normal, you should loop in your creative partners and request an estimate of the hours/cost of the job based on the project overview. This will help ensure that you are estimating their hours correctly.

- Estimate the number of hours you anticipate setting aside for all vendors and review it against the total budget.
- Account teams should communicate how many hours/budget they have available so that teams and creative partners can work together to determine what can be done within those hours. Being clear about what is needed upfront will be helpful in maximizing budget hours. It's always best to ensure that your team lead is aligned with your budget before proceeding with the project.

Engaging the Creative Team

Writers often have to translate notes, journal articles, or data into flowing copy and designers need to translate ideas into design. However, when working on a new project, they may miss key components of the desired product. Client style preferences and annotation requirements, for example, should be clarified early on.

The creative brief can be a useful tool to help ensure that everyone working on the project has the key information necessary to meet the objectives of the project.

The Creative Brief

- Ideally, a creative brief is where all the project details should be housed. Not every project requires an in-depth brief so TKG has developed two options for the creative brief:
  - **Abbreviated Creative Brief**
  - **Creative Brief**
- If the project is very straightforward or something the account person and the creative team have done previously you may want to use the abbreviated version of the brief.
- For new programs or projects, launches, and other more complex assignments, use the full-length brief to ensure that you capture all pertinent information relating to the project.
  - Even if you do not have all of the project details upfront, filling in a creative brief can help the account person ask the client the right questions upfront.
  - If the project deliverables or timing changes, the creative brief should be updated and recirculated to the designer and writer.
  - If the creative team is new to a client or project, it can be helpful to share samples of previous work to give the writer/designer an idea of the program/product's overall look and voice, or of the client's style and preferences. Any editorial or branding guides should also be shared prior the development of the the project.

Abbreviated Creative Brief

BACK

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Internal Project/Abbreviated Creative Brief

The purpose of this document is to communicate important project details to your creative partner team. This document is for internal use and should not replace a formal client-facing project brief. This document can be attached in an email to your creative team or the fields can be copied and pasted into the body of an email.

Please note: Some fields may need to be expanded in order to view all content.

Project Details	
Project Name	
Client	
Brand	
New Project or Update to Existing Project	
TKG Contact(s)	
Job Details	
TKG Job Number	
Client/HPRC Job Code	
Project Description	
Brief Description	
Final Format (i.e., digital, print or POD)	
Estimated Length (i.e., pages, slides, etc.)	
Key Dates	
First Draft Due to TKG	
Estimated MLR Submission Dates	
Date of First Use	

Creative Brief

BACK

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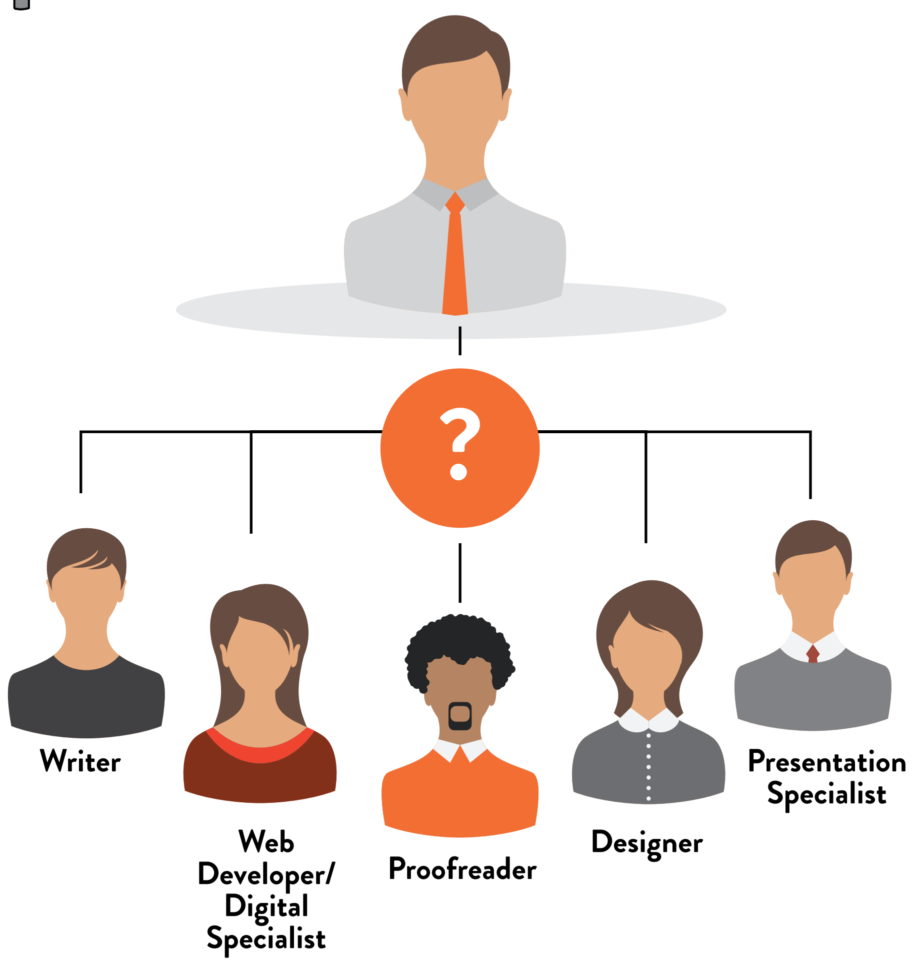
Project Details	
Project Name	
Client	
Brand	
New Project or Update to Existing Project	
TKG Contact(s)	
Assigned Writer	
Assigned Designer	
Job Details	
TKG Job Number	
Client/HPRC Job Code	
Project Description	
Brief Description	
Final Format (i.e., digital, print, or POD)	
Estimated Length (i.e., pages, slides, etc.)	
Final Audience	
Tone	
ISI Required	
Speaker Notes Required	
Speaker Notes Format (i.e., bullets/paragraph/title on each/other)	
Speaker Notes Tone	
Annotation Requirement (i.e., format/requirements)	
Project Nuances/Client-specific Mandates	
Is this project based on an existing design template or is it a new design? Include examples of styles/designs that have worked well in an attachment	
Key Dates	
First Draft Due to TKG	
Client Comments Due	
Estimated MLR Submission Dates	
Estimated Date of First Use	
Print Requirements	
Production Details	

Scheduling Kick-off Meetings

Not every project requires a formal kick-off meeting. For smaller projects, using the creative brief to start a project may be sufficient. If it's a brand-new project, a launch, or something more complex requiring additional explanation or discussion, a kick-off call should be scheduled to ensure that you provide all the key information needed and align the entire project team on the client deliverable and timing.



Creative team participation is project dependent. On some projects, the designer and writer may never need to interact. On other projects it can be helpful to have open communication between the writer and designer throughout the process.

It can also be a good practice to include the creative team in project discussions with the client. This direct participation can help the creative team gain a clearer picture of the client's direction and feedback, and provide opportunities to ask questions.

Timelines

- A project timeline captures key milestone dates and may include such points as: kickoff, research, manuscript/layout development, client reviews, annotating, MLR submission, and approval. This helps ensure alignment and sets realistic expectations for everyone involved in the project.
- For projects with a quick turnaround you may not need to create a timeline but should still provide clear direction on timing to your creative team verbally or through email.

Best Practices:

- Work backwards from your due date
- Always build in buffer time
- Clarify what EOD means to all involved
- Remember to factor in holidays

– Collaborate on the project timeline with the creative team. Understanding the timeline upfront helps everyone plan and manage their time to ensure that the project is delivered to the client on time.

– Clear and consistent communication throughout the process is key. If the timeline changes throughout the life of the project (e.g., the client takes longer than expected to give feedback) be sure to let the creative team know so they can adjust their schedule and plan accordingly.

Communication

- Constant communication between the account teams and the creative team members they are working with is key.
  - Once a project is in process and the creative team is working on it, the creative team is responsible for managing their own time and workload. If they feel there may be an issue with meeting the agreed-upon deadline, they should notify the account lead. However, you should consider doing an interim check-in to make sure the project is progressing as expected.
  - Proactively communicate to your creative partner when a project may come back to them so they can plan accordingly and set aside time.
  - Remind creative partners to email creative services when they have availability or if they know that they will be unavailable for a period of time.
  - If a designer or writer repeatedly isn't meeting deadlines, you should speak with them candidly about this to determine what the issue is.

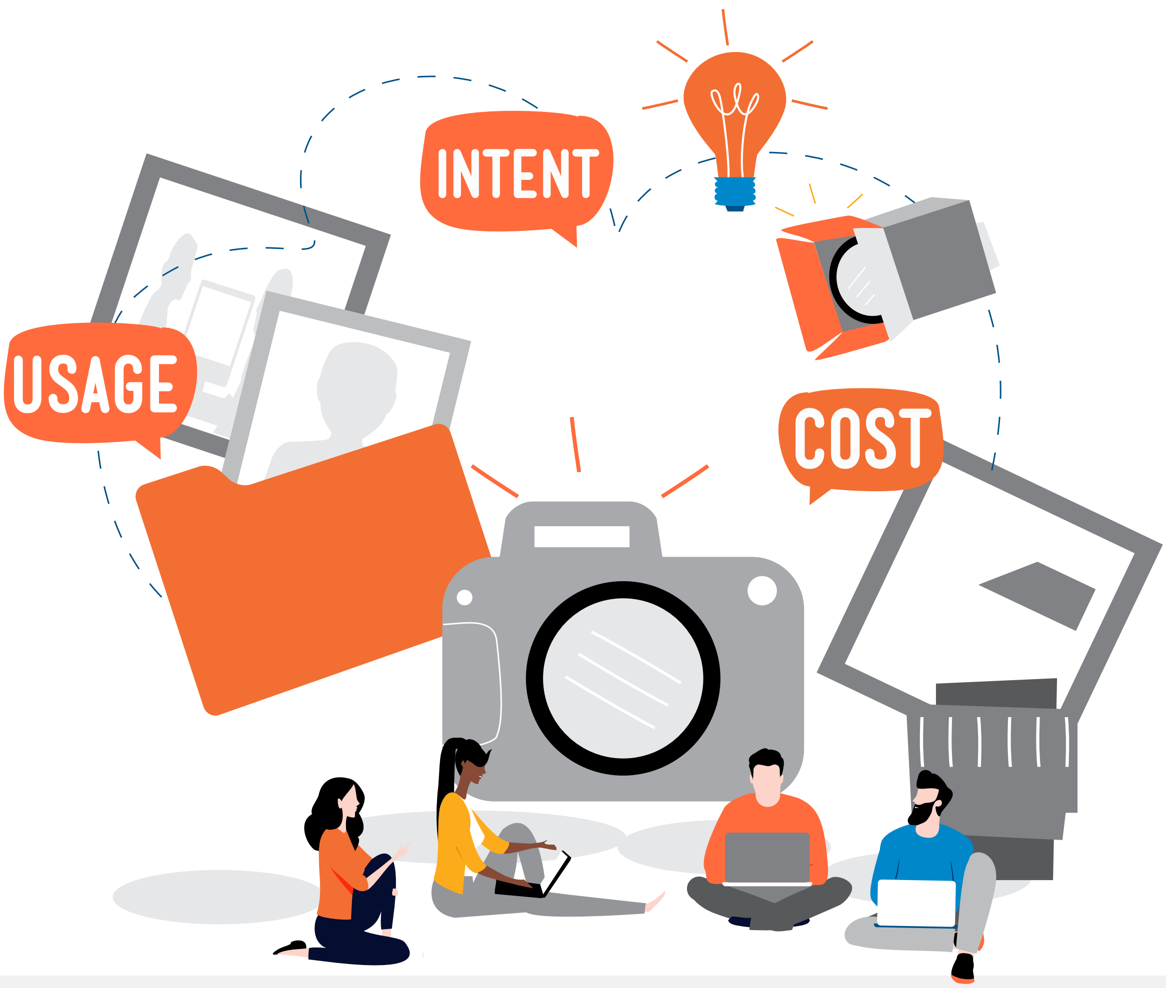
PDF Markup for Creatives

- When providing feedback or revisions to the designer, be sure to include all comments on the PDF itself. If you include some comments in an email and some on the PDF, changes may be missed.
- If revisions are extensive and/or require a change of direction, set up a call with the designer rather than try to convey everything through email.
- If you receive feedback from multiple people, be sure to compile everything into one PDF containing all comments. Going through multiple versions is time-consuming for designers and more likely to result in errors.
- Use the comments toolbar in Adobe to provide clear and specific direction on changes that need to be made. Review the PDF comments prior to sending to ensure that all changes are clear and directive (as opposed to being open-ended).
- Discuss how to name files and communicate your preferred version# format to avoid version control issues.
- Make sure you understand all comments being passed along to the creative team. Comments that aren't clear to you are likely to be unclear to the designer as well.

! Remember to review all changes to ensure the designer didn't miss anything.

Stock Image Purchases

- If there are mandates from the client on the types of images that should (or should not) be used, that should be communicated to the designer upfront.
  - Some clients have their own stock image library that you can use so it's important to ask before purchasing stock images.
- Align with your team on the process for ordering, paying for, and billing back stock images.
  - If you do need to purchase stock images or other graphics, ask your team lead whether there is an existing stock image account or plan that you should use.
  - Discuss the process for billing the client back for any stock image costs with your team lead.
- You may need to provide photo rights or usage agreements as part of the review process. All of this information should be available through the stock image site that was used to obtain the image.



Referencing and the Proofing Process

- References should be discussed with the writer at the beginning of a project. If there are existing references that should be used, the writer should be made aware of these and should be provided with the references.
- If a client requires a certain style of referencing (such as American Medical Association [AMA]) or annotating, the writer should be made aware of this ahead of time.
- The proofing process is extremely important and, at minimum, resources should be reviewed by an editor prior to submission and then again before final approval to print.
- Resources with a more complicated format or layout (pocket, tri-fold, etc.) may require a mock-up or comp of the piece from the printer to ensure that the layout is correct before doing the entire print run.
- A final proof of the resource should be done to ensure that nothing has been lost in the design process.

Things to check for:

- Content and page numbers flow correctly
- Animations flow properly
- Headers and footers are correct
- No typos
- Referencing is accurate and formatted properly
- Speaker notes fit on one page
- Ensure that hyperlinks are active and that end matter is included (job code, ISI, PI, logos, disclaimers)

Print Production Process and Project Completion

- Client needs and preferences vary when it comes to printing. Discuss with your client ahead of time whether they will be printing materials or if they would like TKG to handle the printing process.
- If TKG manages the printing process directly with the printer, it's important to bring the designer into the printing process to ensure that nothing is lost in translation between the account lead and the print vendor.
  - The designer should review the print spec form to ensure that all specs are listed accurately and that any unique layout directions are captured before the spec form goes to the printer.
  - If the project lead schedules a call with the printer, include the designer on the call. They may be able to provide insight or specific direction for the printer that the account team is unaware of.
  - If the printer makes any changes to a file, the designer needs to be made aware of that and should be sent those files so that everyone has the same version of the final working files.
  - If the account lead is able to request samples of a printed resource, they should share one with the designer. It's helpful to the designer to see the finished product, particularly if it's unusual layout or more complicated design.
  - A digital version of the final file should also be shared with the writer as it is helpful for them to see the finished product.

Post Project Completion

- Final versions of files should be housed in a central location that is easily accessible to the entire project team.
- Final files should be clearly marked and filed accordingly.
- Any project learnings should be shared internally and with the creative team if appropriate.