How the agency works.
Healthcare.

a process–MANUAL

developed & written
by ed burgoyne

Introduction

"How the agency works," is a reference manual that explains the process within an advertising agency.

This process manual is meant to be used as a general guide, since agencies will have different approaches to their own workflow.

This book of material is the result of over sixteen years of experience as a director of operations, production & creative services.

In later editions, the process manual will include an expanded process guide that will include web and broadcast projects.

This version has been customized for a Healthcare Advertising Agency and is based on process systems and procedures previously developed by Ed Burgoyne. This is a generic version that describes manuscripts and printed materials.

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agency—WORKFLOW

How work progresses through an agency.

The evolving workplace.

We all know what its like when the lines of communication break down. It might have been a simple instruction, or one that was catastropic. We know we need to improve the way we communicate so that a similiar breakdown never happens again. But that the approach you take to making the change, can be a smooth or rough road to ride. Don't be too quick to make knee jerk, impulsive changes. Take the time to examine how your agency does its work, and adjust, or reengineer the way the agency works building upwards with a strong foundation. Take the time to study your environment. Set real goals for your workflow. Be dynamic in your approach and set clear guidelines.

Although agencies are organic beasts, they can benefit greatly by reengineering themselves for better performance and profit. But it takes a strong commitment by everyone to adapt and radically redesign a company's process, organization and culture to achieve better performance.

There are some key elements that can make the restructuring ultimately successful.

- Have the support from top management, make sure they are committed to change and will support the process. Make sure they see the scope of what needs to take place, outline everything clearly.
- Move away from a paper based workflow system. An accounting system that has built in production, media and time-sheet systems are key elements in shortening the time it takes for your jobs to be completed. Up-to-the-minute financial reports at the lower project levels, mean greater profit and loss analysis earlier on. But you don't have to stop there, tie-in your agency's regular workflow to a central system where everyone has access to the same information. Every agency has some form of job jackets, estimates, schedules, purchase orders, client change form and general ledger. Moving these forms to a computerized system is key to accurate information exchange. Although technology can be an expensive undertaking, a computerized accounting and workflow system that is accessable to all department can easily increase your profitablity to cover more than just the cost of the new system.
- Information exchange on the creative side is also key in shortening the approval process. Is the agency using pdf files for client approval? Do you have an online client approval system or virtual workspace? Although these types of technology systems are sometimes more difficult to introduce into the culture of the agency. You'll find several agencies out there who couldn't live without them. You might even find that through your production and accounting departments is the easiest way to implement these types of systems as well.
- Remember, no matter what new systems you put into place, take care of your core staff. These people will make or break whatever new systems you put into place. Know that when you implement new systems that there is a time period of adjustment, a little confusion and some uneven starts. In many cases these new systems will also mean staff cuts or changes. With fewer people working the newer system, make sure they are well taken care of. Reengineering is tough enough, let alone without the good will of your staff. Keep everyone informed, set clear goals and structure and the world of change will be alot smoother place.

What is workflow?

Workflow can be described as the flow of information and control in a business process. All organizations have numerous business processes, and some of these business processes are of crucial importance and key to the survival and growth of a business. By managing these processes more efficiently, companies can reduce their costs and improve their product and customer service, giving them an important competitive edge.

Some basic examples of advertising business processes are estimating, purchasing, media planning, scheduling, time sheets, expense reports, production procedures.

This stepwise plan that is meant to complete specific tasks have at least two parts, first is the person or multiple people who perform the task or operation, the second is the mechanism, materials, software or hardware with which the activity is completed.

The combination of all these processes make up the 'infrastructure' of a company. Usually, this infrastructure is not documented, but just ingrained in the way people work. New people joining the company are simply taught the procedures and when in turn they leave the company, they teach their replacements.

Needless to say this is a less than desirable way of dealing with a company's infrastructure. To further improve and enhance the workflow process, it needs to be documented first, so that it can be reviewed and later updated and used for workflow management.

We look at workflow to:

· Streamline how work gets done, and applying individual skills to where they would work best.

· Decrease the cost of doing business by examining repetitive or similiar functions that can be combined or eliminated

· Provide accurate and current information, where computerized systems can be substituted for manual processes.

· Speed up the work processes to deliver faster service, without overworking the system. Introduce effeciencies can be introduced to reduce expenditures of time, money or materials.

· How supervision can be applied more proactively.

· Track, control and adapt the system as the companies needs change. Identifying bottlenecks that can be eliminated.

· Identifiying key cross-training opertunities, so that missing employees do not let production come to a halt.

· Streamline inter-department relationships.

Stability + Scalability = Profitabity

My approach towards reengineering workflow and how work gets created can be summed up with the above formula. I believe that by creating a stable streamlined environment to create art and ideas and by combining it with a scalable workflow systemit companies can handle any situation profitably. The system should be easy enough to use so that at anytime you can increase or decrease staff easily without affecting the performance of the entire agency.

The Agency
Critical Path of a Project

The following section details the typical workflow in an agency.

The main blocks are:

Client brief

Account Planning & The Creative Brief

Work Initiation

Start Up Meeting

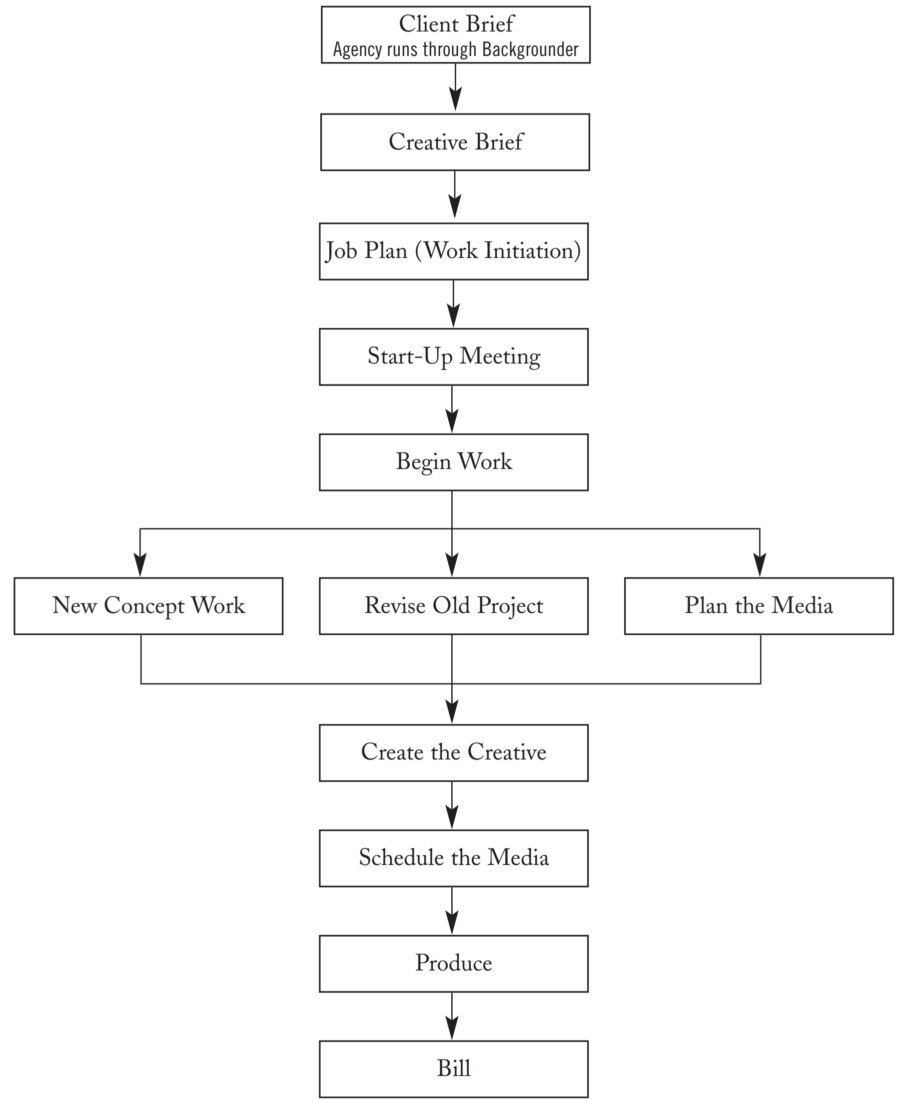
Concept, Revise and Plan the Media

Create the Creative

Schedule the Media

Produce

Bill



Critical Path –
Step 1 – Starting the process, the creative brief, the job plan & status reports

Element:

The client briefs the account planner and the account management team on the project(s) at hand.

Actions:

The Client,

- The client is responsible for providing the agency with a marketing brief, an RFP, and/or as little or as much information about a project that they choose to give. It is up to the Account Team to ask the client the right questions, using the ***agency backgrounder form*** to generate the Job Initiate/ Job Plan sheet to get the agency the information they need to get the project completed on time, on budget and on strategy.

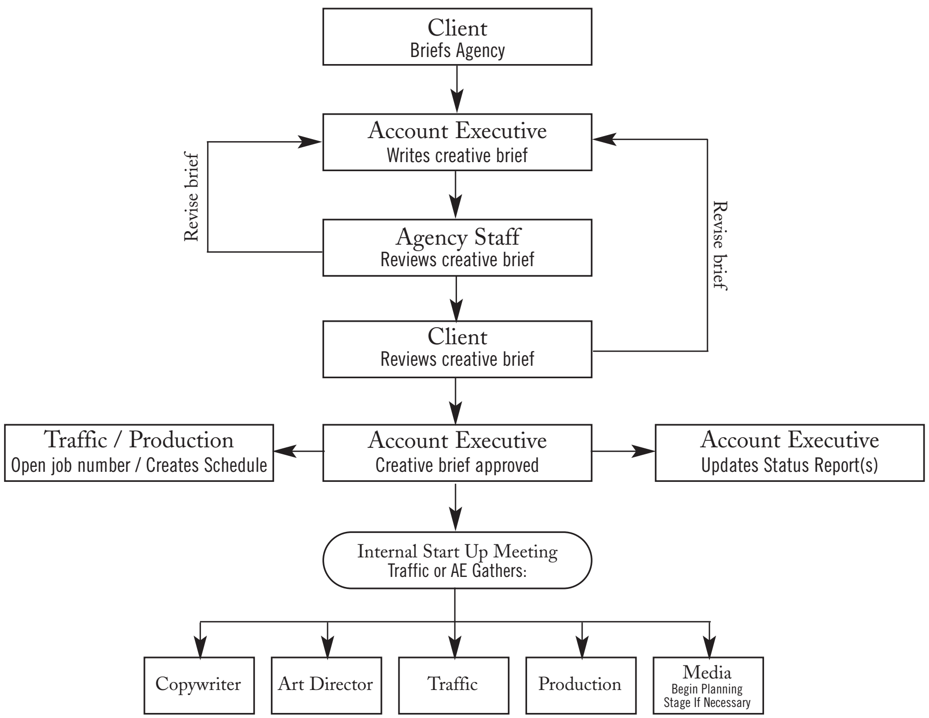
The Account Executive,

- The account planner & account executive generates an initial creative brief distilled from client information, prior background notes, focus group feedback and research.
- The account executive fills out a job number request and requests a job number from the appropriate traffic or production coordinator.
- Before a job can begin, a start-up meeting takes place.
  - For new creative work, the creative brief is presented and commented by the group at the meeting. Revisions are then made, the brief is completed and then submitted for client approval.
  - The creative brief and/or the job plan sheet is presented, at the start-up meeting with the creative, production, traffic and media and ae team(s).
- The account executive updates their weekly client status report. The agency has weekly meetings to review these status reports. Participants include creative, copy, traffic, production and account executives.
- At the completion of the weekly meeting, the account executives will revise the report according to any comments made at the meeting and E-mail or send interoffice copies to all participants and their supervisors.
- See side bar information on, "filling out a status report."

Traffic and/or Production,

- Traffic issues a job number, via a "job number request form". The traffic manager will check to make sure the form is complete, fill in the job #, client and product numbers, distribute copies.
- Traffic creates a "job bag" that is used to hold the estimates, copy and creative history hard copies for the job.
- Traffic sets upa briefing / job start meeting.

Critical Path – *Step 1 – Starting the process, the creative brief & status report*



Critical Path – *Step 1 – The status report and organizing client information*

Element:

Keep your client information up-to-date with status reports and your reference books.

Actions:

The Account Group,

- Review and construct a detailed Job Plan by utilizing the agency backgrounder/start up questionnaire.
- Produce a detailed creative brief.
- With the traffice coordinator, maintain the client status report. Keep a detail record of what your account is doing, by creating and distributing a client status report. Use the below fields for creating your report:

1. Project Name
2. Job #
3. Insertion date, due dates or end date
4. Ad sizes/colors
5. Components/elements/quantity
6. Status—last task completed
7. Next steps for that week
8. Responsibility of team, team assignments
9. Status of estimate: To be developed, In development, With Client or Client approved, etc.

- Organize and keep reference books for the following items:
  - Client Estimates
  - Media Schedules, Plans & Insertion Orders
  - Examples of each piece of creative in hard copy format.

Critical Path – *Step 2 – Schedules (times and events) & estimates – Creating a plan of action*

Element:

Create a client estimate and internal schedule.

Actions:

The Account Executive,

- Account executive briefs traffic and production of a desired creative due date(s), insertion date(s), print delivery date(s) or start-to-mail date(s). A pre-pro (pre production) meeting will take place to review the work.
- The AE is responsible for getting client approval of the estimates and schedules.

Traffic and/or Production,

- Production will generate an estimate, using the agency template based on information provided by the AE on the Job Plan.The estimate is then routed for internal review.
- Upon initial approval, the estimate is then entered into the accounting package. The final formal estimate is then circulated for final signoff.
- The approved formal estimate is then presented to the client for approval.
- Traffic (and/or production) prepares the schedule taking into consideration the needs of creative production and client needs.
- The schedule is then distributed to the AE to present to the client. Once the client has approved the estimate and schedule, work will then begin.
- Traffic will then distribute the schedules internally.
- Each step of the job is to be scheduled, including time for client to make internal reviews and obtain legal approval. All of the client's responsibilities should be bolded on the schedule. Keep in mind that the client will most likely review any schedules for approval. He/she could use the internal schedule or a condensed milestone version.
- Traffic gets all internal department approvals.

The Schedule:

1. Schedule(s) should never be presented to the client without prior approvals from all departments involved.
2. Schedule(s) should be generated only by the production/traffic dept.
3. Since the schedule(s) are sometimes developed before concept development, it is very important to keep in mind that the schedule may need to be revised as the project unfolds.
4. If traffic is missing pertinent information, it will delay the development of the schedule(s).
5. If the client, themselves miss any milestone dates, the account execs will be alerted to possible schedule changes. Account execs will need to alert the client that the end date will be jeopardized.
6. It is the account exec's responsibility to explain to the client that requesting changes at specific stages of the job can impact the final end date.
7. Traffic will alert all participants if they are needed to stay late or come in early for reviewing material. If that person is not available, they must arrange coverage and inform traffic, so as not to hold up the routing process.

Critical Path –
Step 3 – Beginning new creative work; the job order & approved media schedule form

Element:

Client approves estimate, and pre-approves media buys.

Actions:

The Account Executive,

- Responsible for client approval of the estimate, a signed media schedule form, and the appropriate start work - job plan form(s).
- Initiate and hold internal start-up and planning meetings.
- The account executive should create and distribute the preliminary media schedules.

Creative & Production

- In regards to all jobs not covered under a fee based arrangement, no jobs should be started without signoff of an approved estimate and/or media schedule.
- Upon client concept approval, the art director discusses execution options with production.

Traffic

- Traffic is responsible for tracking all work internally, making sure deadlines are met within in each department (creative or production) in order to accomodate the master schedule.
- Traffic initiates the estimate request / spec sheets using the information found on the account group's job request form. The production estimater will then circulate the estimate request form to the various departments for information and costs. Once completed the form will be created electronically, printed and signed by all parties.
- Traffic will gather all vital information and hard copies needed for work to begin. This information will be tracked and placed within a "job bag or jacket." Each round of changes will be tracked and placed back into the job bag so a job "history" can be created. The job history is vital in trafficing and keeping track of job information through the agency.
- In addition to keeping job bags for individual accounts, the traffic department should create a master reference book for each client that contains approved examples of the creative.
- Traffic will create it's own media flow chart with the publication(s), space closing, material closing, size(s), colors, pub contact name, phone number, extension dates and key codes if applicable from the media plan. Production should review and approve all sizes. The flow chart should route with the job. A combined media and print spec form can be created and used.
- Inconjunction with the media flow chart, a insertion order book should be kept for each client. It is also helpful to keep a publication spec book that is updated regularly with the most frequently used publications.
- Upon job completion, the traffic department should distribute a final hard copy example of the creative to the appropriate account team.

Critical Path –
Step 3 – The Manuscript Stage

Element:

Client approves estimate, and copywriting begins.

Actions:

The Account Executive,

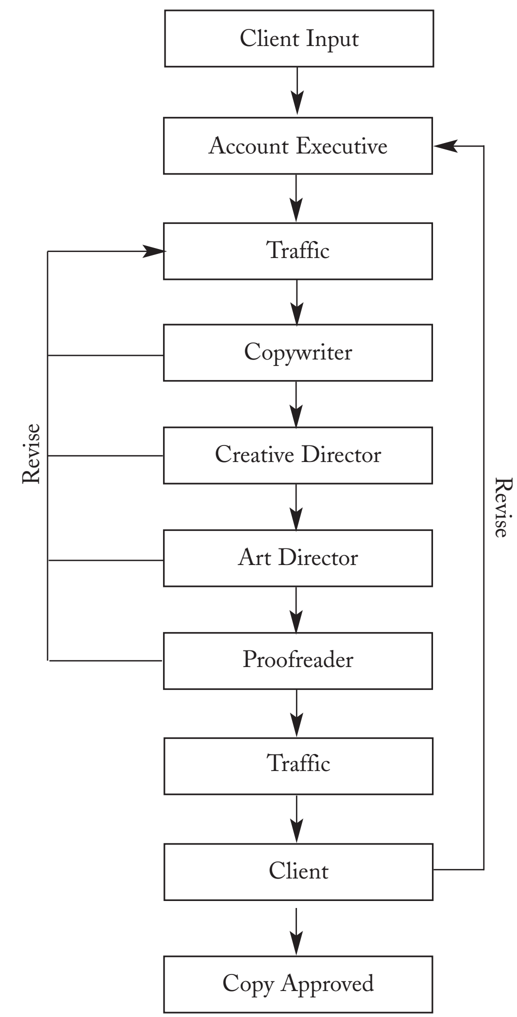
- Responsible for providing the copywriter with client materials.
- Initiate and hold internal start-up and planning meetings.
- Responsible for issuing detailed client change orders to traffic.

Copywriting

- Copy is developed by the copywriter. Copy works with creative in defining project parameters and creative concepting.
- Proofreading and final comments should be routed before circulating copy to client.
- Upon final approval, copy will give text to the art department.

Traffic

- Traffic is responsible for circulating copy between the AE, art director(s) and CD.
- Traffic will record all client changes with the accounting software or as change orders.
- Upon manuscript completion, the traffic department should distribute a final hard copy example of the creative to the appropriate account team.



Critical Path –
Step 4 – New creative & art direction

Element:

Starting the creative engine.

Actions:

The Account Executive,

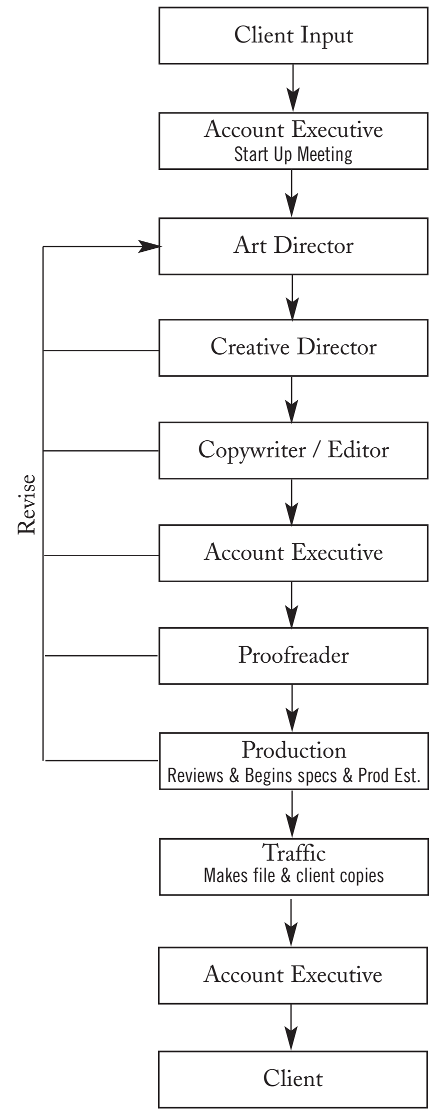
- The account team generates a creative brief distilled from client information, prior background notes, research or account planning and presents it to the creative team.
- The account group meets with the team to discuss the creative brief, the project, and to discuss the timelines.
- The account manager is responsible for all client copy and art approvals. The AE sends the client the artwork for approval keeping in mind the client submission guidelines. The AE will give to traffic a copy of what was presented to the client.

Creative & Art Direction,

- Once the manuscript process is under way, the CD will direct the staff to develop designs based on creative brief and approved copy.
- Be able to review work with CD prior to client meeting.
- Provide Traffic with a copy of the all the creative presented for the job bag.
- Meet with the production staff before presenting creative ideas, to confirm production costs will remain within budget.

Production & Traffic,

- Traffic will circulate the layout with the final copy manuscript as backup.
- Production will review the layout to determine if a revised estimate or production spec sheet is necessary.
- Traffic will work with the AR to prepare the client submission to the client requirements.



Critical Path –
Step 4 – Revising existing creative

Element:

Approval of additional charges (if any), client, media and internal schedules.

Actions:

The Account Executive,

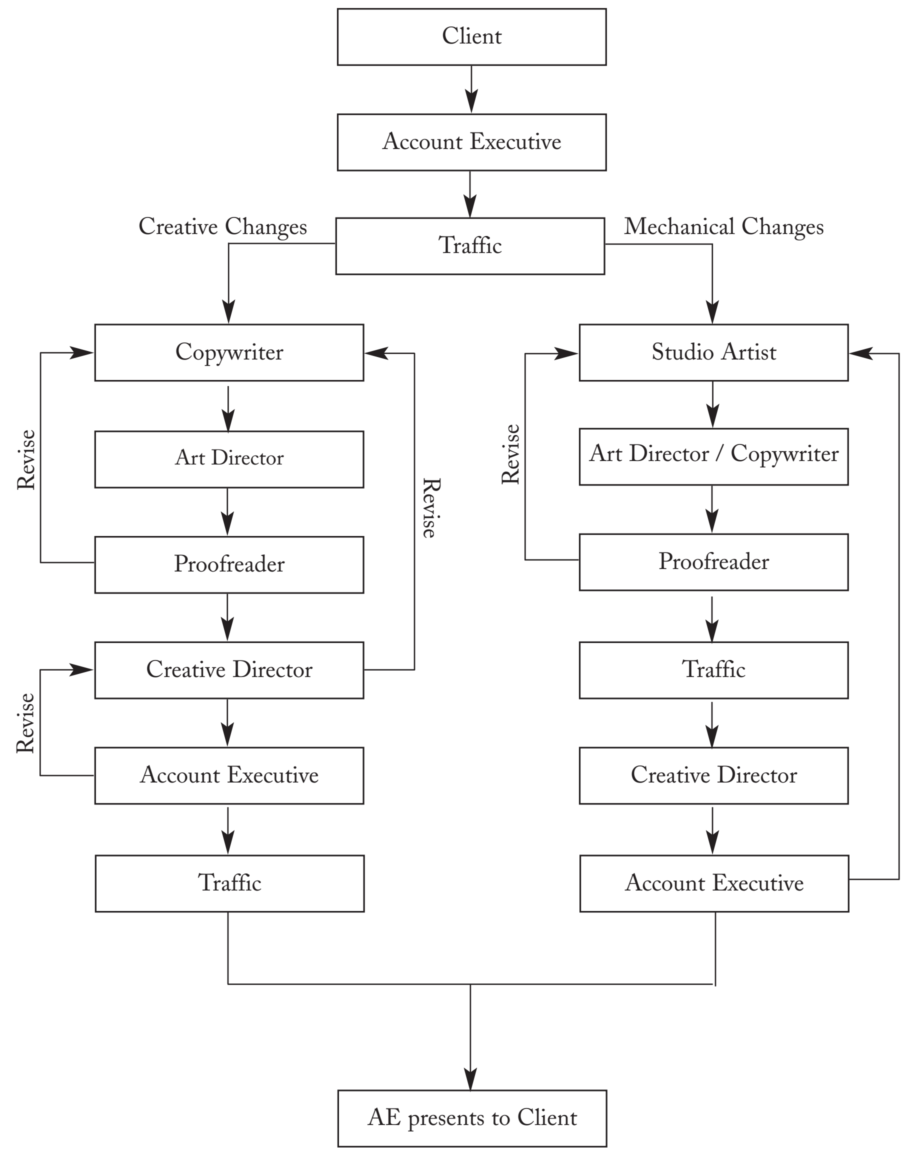
- Responsible for client approval of additional costs, an accurate media schedule form, and the appropriate change order form(s).
- AE reviews client changes, makes sure changes are cleary marked on the complete layout.

Copywriter and Art Director,

- When the creative is received from traffic, the copywriter reviews the changes and then gives the changes to the AD, who oversees the revisions.
- The changes are made by the art department then given to traffic for circulation.

Traffic & Production,

- Traffic will circulate the changes from the account exec. Traffic will ensure all change orders are entered into the computer system.
- Revisions must be clearly indicated on the reader. The art director should clearly indicate on the file what change order the files are.



Workflow –
Step 4 – The Media Plan

Element:

Create the media plan.

Actions:

The Account Executive,

- The account exec will work with the media department to prepare the media plan. The plan should be presented to the client with a clear-cut set of objectives to be achieved by the media expenditure. The plan should include a highlight summary of the strategy or strategies to fulfill those objectives.
- The account exec is responsible to brief the media department with as much information as possible before it is created.
- The account exec and media staff will make all continue to evaluate the performance of the media plan if needed.
- The account exec will produce media scheduling forms based on the approved media plan and distribute to the creative and production staffs.

The Media Department,

- The media planning staff will create a media plan that is specific and clearly states, but not limited to, the following items: who the media effort is intended to reach; whether broad reach or intense frequency is of greater importance; what seasonal factors may shape timing and weight levels across the period of the media buy; geographic requirements; creative needs (print or broadcast, need for color, editorial enhancement, etc.).
- Typically, the media plan will include other important information such as, an update on current advertising activities for the product or brand, market trend information on the product or service category involved, tracking data and quantifying research estimating audience size and characteristics of the media choices available to the planners.
- The Media Plan will include:

1. Target Audiences

The definition of the best prospects by demographics, geography, and lifestyle. This information is gathered early in the planning process and is most likely compiled through a syndicated research vendor like MRI.

2. The Competitive Scene

Information on competitive spending and media usage by direct competitors, typically put together by either the account group or in some cases the media department.

3. Primary and Syndicated Statistical Research

4. Brand's Past History

Positioning of the brand in its category with historic data on volume and share, together with user profiles, both demographic and lifestyle.

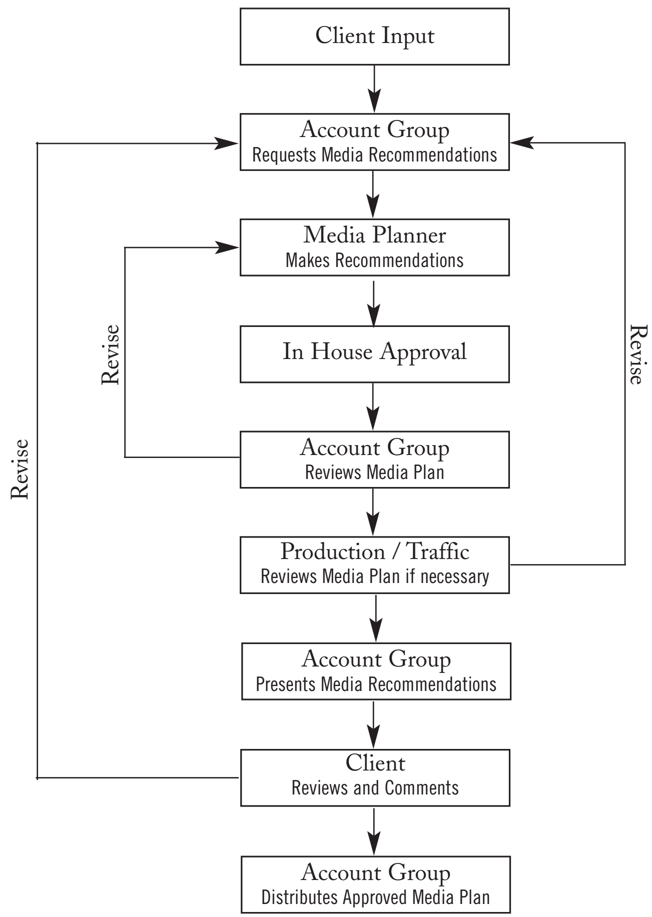
5. Seasonality Requirements

Information on seasonal variations in consumer consumption habits or purchase behavior. This should also cover category tradition (timing of new model introductions, clearance sales, holidays, etc.).

6. Geographic Factors

The whole pattern of historic and current variation in both category and brand development, by market and region, leading to adjustments in weight across the total geography involved.

Workflow –
Step 4 – The Media Plan



Workflow –
Step 4 – Internal routing of creative comps or production mechanicals

Element:

Routing internal creative,
client or production changes.

Actions:

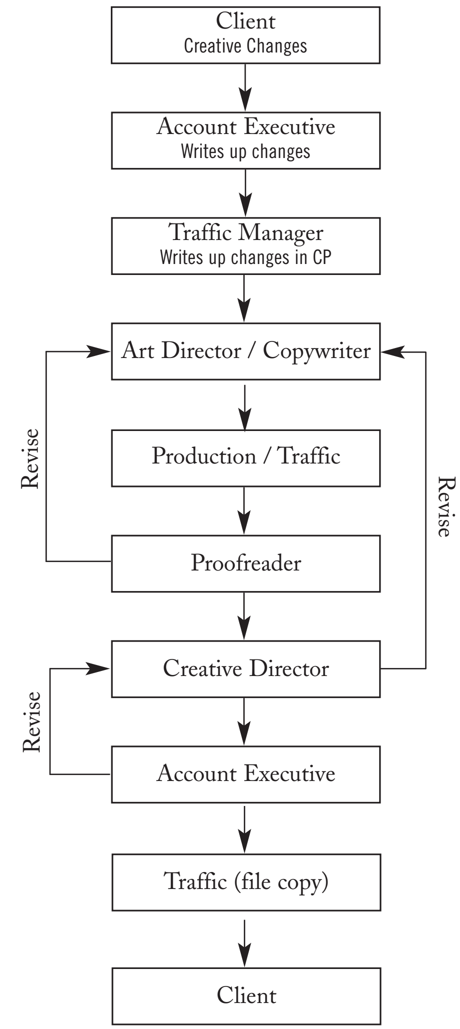
The Account Executive,

- For exccesive creative changes, the account exec discusses them directly with the copywriter and art director in a meeting. The appropriate creative or production traffic manager must be informed and present when comments are received.
- For simple copy changes, traffic can go over comments on an existing job with creative or the studio staff if they are easy to understand and minimal.
- Mechanicals are not to begin without client approval of the copy and layout. Changes must be encouraged at the initial copy/layout stage since sequential client changes can easily esculate agency costs.

Traffic

- Creative changes and approval steps are repeated until final client copy/layout approval—at which point the account exec will notify the traffic manager, and the account exec will sign off and approve going to the mechanical stage.
- Traffic will organize "routing parties" when scheduling becomes tight. However, the proofreader should always be given time to review the work on their own.

Typical Internal Proofing Sequences



Workflow –
Step 4a,b,c –
External Routing to the Client

Element:

Routing creative or media schedules to the client for approval.

Actions:

The Client,

- The client should be made aware of some important facts concerning their responsibilities in approving creative or media schedules.
- The client must designate who within the organization may sign approvals and authorizations. Once an authorization has been signed, changes can be made, but the client will reimburse the agency for all time incurred and materials purchased in their name.
- All client comments and changes must happen in a timely fashion. Otherwise it will effect changes in their schedules, due dates and costs.

The Account Executive,

- Account executive is responsible for circulating the creative, layout, copy, artwork, storyboards,scripts and media schedules directly to the client and for gathering all information needed in order for additional changes to be made, or to receive final approval.
- The account executive is also responsible for getting the changes back in a timely fashion, and to notify the client if those changes will effect the overall schedule, costs and due dates for their jobs.
- Although the account executive does get a "final signoff" from the client. The sign-off should not be used as a way the agency is exempt for issues that arise after the client has signed off. The account executive is responsible for ensuring that the client's changes were made to the client's satisfaction.

Traffic,

- Client changes and approval steps are repeated until final client copy/layout approval—at which point the account staff will notify traffic, and account exec will sign the "OK To Set/Begin Mechanicals" stamp.

Workflow –
Step 5 – Photoshoot & Art Creation

Element:

After client approves a creative concept, the art director makes final selects on execution style, photography and illustrations, if any are to be used.

Actions:

Art, Design or Creative director,

- Art director selects the photographer or artist. The art director then discusses with the production and account staff the costs of the artwork. I
- A photo schedule is then created. The Art Director must go through the production department for approval of all outside costs.
- Art director, production and art buyer coordinate schedule, costs, shoot(s) and/or illustration and inform traffic of status.
- Before the creative is presented to the client, the art director should review the work with the creative director for final approval.
- Account exec and/or art director present final art selects/final comps to client for approval.

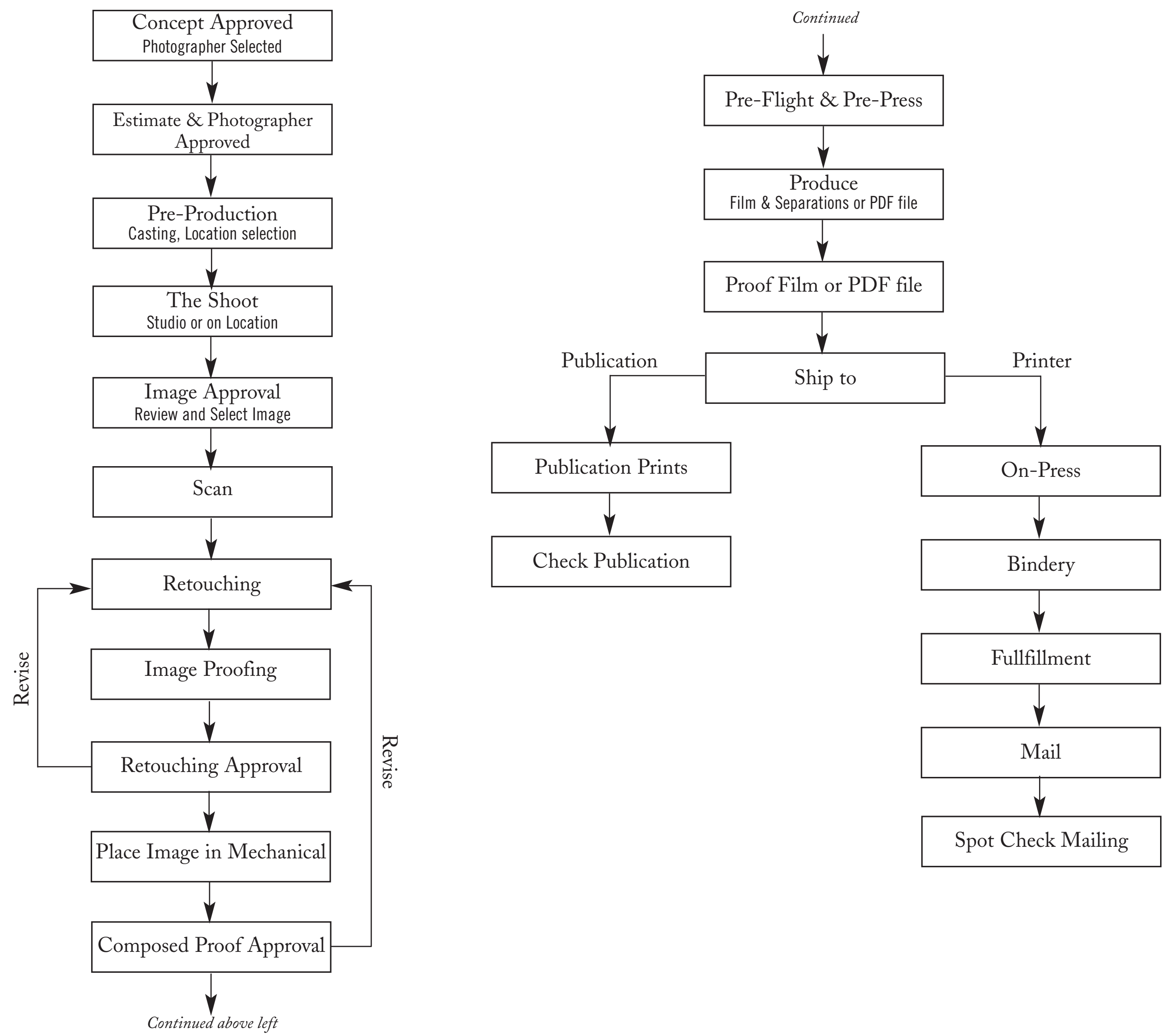
AE, Art Director, Production,

- Client approves art and traffic gives to production to begin retouching. If studio is handling the retouching, art director and/or production should discuss with the imager together.

Production,

- Upon retouched art approval, production may release for film and color proofs. The print production spec sheet should be revised as the artwork is being created and completed.
- Production and/or studio returns all art to traffic. The spec sheet should indicate if art is stock so that traffic will know what & when to return the art to the artist or what is to be filed away in the central files.
- Retouched art will be reviewed in a “loose” matchprint or kodak approval. The imager or production manager discusses the proofs directly with the art director and production. The creative director should also approve any major campaign creative work as well. Mechanicals, sizing for publications, etc., should not be held up for final art approval.

Workflow – *Step 5 – Examples of production workflow from photography*



Workflow – Step 6 – Scheduling the media

Element:

Client has approved the media plan - you can now create the media schedule.

Actions:

Account Executive,

- Media Schedule Forms must be filled out with all complete information. Typical information on the sheet includes the name of the creative, the publications the ad is running, the size, the insertion date, the publication material due dates and indicate any special information. Indicate if future insertions are pick up or new creative. Missing information can mean missed deadlines.
- On odd media, the account staff should meet with the creative and production teams to discuss the production issues.
- The media schedule should be updated if the media buys change during the media plan.
- Insertion orders should be checked against the media plan.
- It is the AE's responsibility to follow up with the departments to make sure you are meeting your deadlines. If the creative, copy or art materials come in late on your timelines, you must make sure that you change your media schedules to reflect a realistic date to meet the publications' closing dates.

Traffic & Production,

- Review the media schedule and the production timelines to confirm that the media schedule is achievable.
- Call all publications to review if the media schedule is accurate, check for correct sizes, pub specs and deadlines.
- Follow up with the publication to ensure that the materials have been received on time and will be inserted properly.
- Inform the account staff and media department if the publication gives different information than what is on the media schedule.
- Include a copy of the released materials in the job jacket.

Workflow – *Step 7 – Producing the mechanical, Starting the production process*

Element:

Client approves the copy and layout and account executive alerts traffic that it is "O.K. to begin creating mechanicals."

Actions:

Account Executive,

- Revise your time schedules now that you can begin the mechanical stage of your projects.
- The AE is responsible for providing the traffic department with a signed off, client approved creative.
- The account executive reviews the time schedule and end dates. Communicates with the traffic & production department on any scheduling changes needed.
- The account executive shall take into consideration the time schedules of the art studio for their work and plan accordingly.
- All new work for mechanicals must go through traffic. This is to ensure that the proper paperwork accompanies the project and that it will be logged in for billing purposes. AE's should not communicate with the art studio unless traffic is informed.
- The AE is responsible for releasing internally approved mechanicals to the client for final signoff. No mechanicals will be disked released by the agency without final approval of mechanical.
- The AE provides the traffic department with a signed off, client approved creative.
- The AE will present finished mechanicals to the client for approval. The AE will mark up the Client comments and/or approves on the mechanical(s).

Traffic & Production,

- Traffic will circulate the mechanical to the studio artist, using the latest back-up signed by the client.
- The mechanical will be circulated to the AD, AE, Production, CD and Copy before it is submitted to the client for final review.
- Revisions to the mechanical will be treated as with all client revisions and generate a client change order.
- Traffic alerts the art director of the "OK To begin mechanical" and requests that the final files be released to the production artist. It will be assumed for all projects that the studio will need to rebuild the comp file unless the art director has already built it to production specifications and has alerted traffic to this.
- Traffic hands over, in a routing folder/sleeve, the signed "OK To Set" stamped copy and layout, spec sheet, updated schedule, purchase order and folding dummy (for print) to the studio manager to begin creating electronic mechanicals. If the job is complex, the art director may need to be present as well.
- Routing is to the proofreader, copywriter, art director, creative director (if applicable), production and to an account executive. The account exec should always be last so that all questions can be answered. Mechanical reader, whether b&w or fiery, will have art as FPO. Mechanicals should never be held up for final art.
- Traffic repeats the above steps for any revisions or stamps the mechanical with an "OK for Disk/Release to Production" or an "OK for Disk/Release to Pubs."
- If the ad is sent as a pdf file to the pub via email, a copy of the Insertion Oder (I.O.) should have been already faxed to pub(s). If film is being sent directly to pub(s), a copy of I.O. must be

Workflow – *Step 7 – Building the mechanical(s)*

attached.

- There is a standard 2-day disk (CD) release upon approval of a project. If traffic is to give the disk to production for release, studio should provide traffic with two fiery printouts from the disk. One can be given to traffic to route to proofreader and account exec and then filed in the traffic job jacket. The other should be released to the printer (or client0 with a copy of the disk directory and disk release form. If a folding dummy is required, it should be included as well. B&W is fine for the dummy. If the disk is released after hours, traffic will run the output from the disk to proofreader and the account exec first thing next morning to make sure that what was released was indeed correct.
- Traffic keeps copies of backups, released mechanicals, disk directory and disk release form in the traffic job jacket.

Studio,

- The studio will not begin any work before all pertinent info is given and there are no outstanding questions. Art directors must let traffic know where the files can be easily retrieved, if they have not be given directly to the producion artist.
- The production artist gives traffic printout of mechanical(s) to route. Mechanical should always be printed at 100% and on a laser not a xerox copy. A “slug” indicating the agency job number, studio job #, pass #, file source, P.O.# and date must be on the reader. Traffic keeps the “OK To Set” copy and layout as the backup and attaches to the mechanical. Schedule and spec sheet are attached to the folder.

Workflow – *Step 7 – Final Review of Released Materials,*

Element:

Film/Blueprints/MP review of final released art for either a printed piece or adwork for publication.

Actions:

Traffic/Production,

- After the disk is released for film (generally 3 working days) the production manager will review the materials and submit them to traffic for agency circulation and approval.
- Traffic circulates the materials with the last client signed off mechanical hard copy.
- If the material is approved, the traffic department makes a color copy of the material and the film/proof is sent to the client for final approval.
- The client must sign off on the material before printing or release to publication is possible.
- If the client or agency makes changes, a change order is generated and materials are corrected if necessary.
- The production manager presents the materials to the agency (via traffic) for final review.
- Printed samples should be circulated within the agency for review.

Workflow – *Step 8 – Billing your projects, reconciling & reviewing account profitability.*

Element:

The job is completed and needs to be final billed.

Actions:

The Account Executive,

- Reviews the job edits, approves over charges, signals under charges and reviews with production to ensure all charges are in and job can be billed.
- Review the accounting report in a timely fashion to review what new jobs can be billed if possible.
- All Broadcast Production jobs should be reviewed by the Broadcast Producer. All others jobs including creative will go to the Production Director. These departments review all charges, make comments and sign off on all jobs.
- These accounting job jackets will then be returned to the Accounting Department.
- A copy of every invoice must go to the Account Group and to the Production Director.

Monthly Billing Process
Billing

Element:

Monthly Billing Review. At the start of each month, the accounting department will distribute for routing purposes a billing "edit" report for each individual job.

Actions:

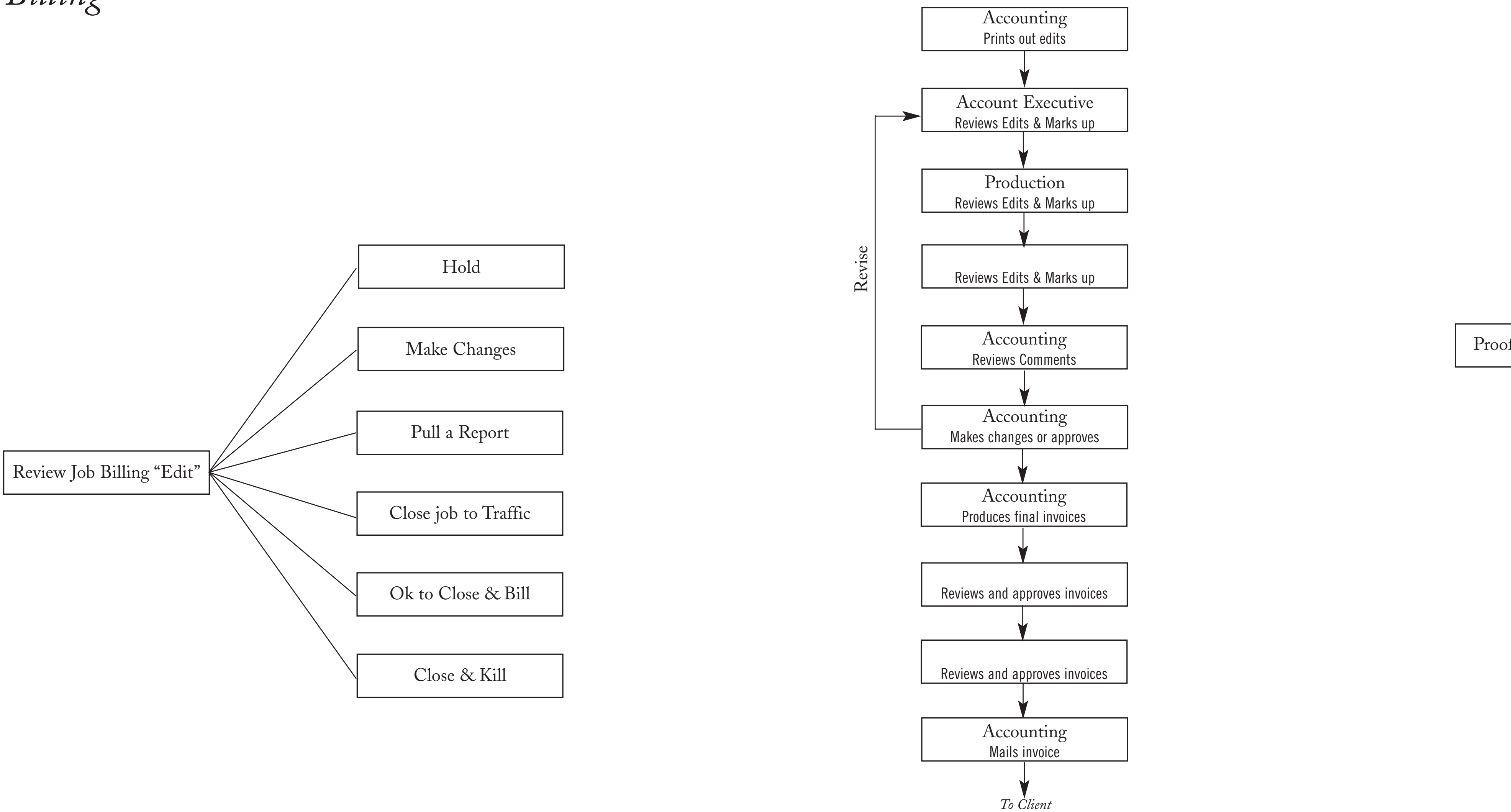
The routing process:

- Do not close a media, broadcast, radio or print production job for billing without confirming with the appropriate department head if all costs are in. Jobs should not be closed with outstanding costs.
- Within the first week of each month, accounting will generate a billing summary sheet for each individual job, called an "edit," they will then group them by product and client and distribute the "edits" for routing.
- Account Executives are responsible for going through the reports and marking each up each one and passing the edits onto production. This must be done within 2 working days of receiving the edits to ensure all jobs can be billed by the end of the month.
- Production will have 48 hours to review all charges, make comments and sign off on all jobs. The edits will then be returned to the Accounting Department, who will make the changes. This will leave time for a second round of review on any edits that need it. The Account Executive will then have 4 working days to approve any jobs in order to be billed that month. They must sign the invoices and return them to the Accounting Department.
- The Accounting Department will then have the time to backup and cut final invoices, for final management review to be mailed to the client.

How edits should be marked;

- After the "edits" for the jobs complete their routing from the account group, production, and supervisors, the edits will then be placed back into accounting for actions such as;
  Hold. Indicates job is still in progress, hours are not over, do not bill, hold for next month review.
  Make Changes. Make changes as indicated on the bill. Adjust time, mark time that is not coded properly, indicated adjustments in preparation for final billing.
  Pull a report. Indicate for accounting to pull a secondary report for reviewing outstanding purchase orders or time.
  Close job to traffic. Indicates that there should be no further time placed onto this job, and that by "closing the job to traffic" means that no further change orders are allowed on this job.
  Ok to close & bill. Indicates that this job is ok to bill, no further time or expenses are going to be billed to the job.
  Close & Kill. This indicates that a job is no longer active, or was only opened for estimating purposes. A job can only be killed if no time or expenses are on the job. If there are expenses, the costs must be marked as to where the costs should be transferred to.
- All changes to the "edits" will be group reviewed and signed. No party should hold onto the edits for more than 48 hours. A prompt review process will allow time for accounting to generate final bills for the month.

Monthly Billing Process
Billing



group-ACCOUNT

How to initiate,

track & bill your job.

The Account Group

Account Services, which includes the a vp or account service director, account supervisors and account executives, is the link between the Agency and its clients. Account Services plays the lead role in developing strategic direction for all accounts/projects, in being the Agency's advocate with our clients and in being our clients' advocate at the Agency. Account Services also has P&L responsibility for all accounts, as well as responsibility for forecasting revenue and meeting revenue/profit goals.

Account management roles include:

Ongoing management of the account

- Brand stewardship, navigation, architecture.
- Project leadership
- Day-to-day management of the account
- Budget management
- Ongoing market / competitive analysis
- Coordination, analysis and integration of research

Quarterly Client Reviews

- Business performance
- Financial performance
    - Hours vs. retainer
    - Product budget recap

Relationship Performance

- Strategy
- Creative
- Media
- Production
- Research

Points of Client Contact

- Daily status update - email/phone
- Responsibility as point person

The Account Group
Status Reports

The Account Group is responsible for maintaining status reports on each individual client.

They should reflect all of your open jobs, new work and work that needs to be billed.

Each status report should reflect the following information on all of your jobs: Job # & Name, Status of the Job, Next Steps and Milestone (deadline) dates.

The status report should be updated once a week. All account executives will review major points on their status reports at the Monday morning status meetings.

If you are unavailable to attend, you must have an account manager who is to represent your account at the meeting, prepared to go over your account status.

If your client's work status has changed during the week, it is your responsibility to inform the various departments and individuals. Do not assume an e-mail is the best format to transfer important information. A verbal verification ensures understanding. ALL work-related changes should be reported on a Job Change Form and distributed.

If needed, you should call a separate meeting for jobs require further detail.

The Account Group
Meeting Call Reports

All client meetings/calls concerning major decisions, budget information, nextstep changes discussed, require written call reports to be distributed within 48 hours after your meeting. Please distribute the notes to all attendees & department heads; your production, media and creative teams. These reports should also be issued for all major client/agency discussions, and internal planning meetings. Without these reports the different departments will work in opposite directions.

It is the account groups' responsibility to make sure all agency and/or client parties are informed.

The Account Group
Initiating Work

All new projects and project changes must be recorded on a project initiation form. To open a job there must be written input. A face-to-face meeting meeting between AEs and the creative and production teams before starting any decent size projects is mandatory.

When communicating with the client it is helpful to refer to the agency "backgrounder" questionnaire to better help you ask all the questions needed for starting a project. This form can be shared with the client so that they know what information the agency needs in order to get a job started.

Without the project initiation form, or job plan, no one will have a record of your changes or your request for work. This form must be given to the appropriate production, media, creative team, and account planning (when it's research-related).

E-mails are not the appropriate medium for job changes.

No verbal job requests.

All work for your clients, research, new business, media, creative and production require this form to be filled out.

Work initiated for creative,
Fill out all parts of the creative brief on the form in order for your job to start. Meet face-to-face with the creative person/team if possible. For all new or major revision jobs, you are required to have a start-up meeting.

Work initiated for production,
Upon approval of an ad or project, the Account Group is responsible for setting up a pre-production meeting with all parties involved.

A copy of the approved creative must be stapled to the project initiation form and handed to production. It is important that the approved version of the creative be handed to production with signed-off approvals. This will avoid errors in picking up wrong creative files.

Account Executives should never commit to a deadline without consulting with Creative & Production first. Client deadlines have a direct impact on cost and quality.

All Project Initiation Forms must contain key due dates, budget, quantity, size, color, pub/site list, media recommendation/information (including contacts, if there are client-dictated or non-standard publications), technology information, specifications, shipping information, and any other important pieces of information that would affect the use of the final produced materials and how this would affect the method of implementation.

The Account Group must also issue Media Schedule Forms to order Media space.

It is vital to give Production and traffic a copy of each approved Media Schedule Form.

The Account Group
AE Internal/Client Status Report Example

SINGLE CLIENT WEEKLY STATUS REPORT
DATE GOES HERE

Job #	Project	Description	Status/Action Steps	Start Date	Due Date
Product A					
xxx-xxx	Retail Campaign A	Creative Print Campaign	Client to be presented with Creative Brief	2/2	2/12
xxx-xxx	B to B Campaign	Creative Print Campaign for B to B Market	Completed	1/1	2/5
xxx-xxx	Stand Alone Ad	Produce Ad for March Insertion	In progress - photo shoot completed in retouching	1/15	2/1
xxx-xxx	Online Banner	Banner ad for Retail Campaign	Banners presented to client. Awaiting approval	1/15	2/24
xxx-xxx	eDM	edm for Retail Ad Campaign	3rd party list dropped 2/4.	1/15	2/4
xxx-xxx	Brochure	Brochure for B to B Campaign	Agency presented creative 2/14 awaiting feedback	1/15	2/1
xxx-xxx	Direct Mail	3 Wave Direct Mail Program	Way one complete, produce wave 2	1/1	6/1
xxx-xxx	Newspaper Ad	Full Page Ad for Newspaper	Release to publication	1/2	2/15
xxx-xxx	Trade Show	Trade Show for Product A	Estimate and produce schedule	1/1	5/1
Product B					
xxx-xxx	Retail Campaign A	Creative Print Campaign	Client to be presented with Creative Brief	2/2	2/12
xxx-xxx	B to B Campaign	Creative Print Campaign for B to B Market	Completed	1/1	2/5
xxx-xxx	Stand Alone Ad	Produce Ad for March Insertion	In progress - photo shoot completed in retouching	1/15	2/1
xxx-xxx	Online Banner	Banner ad for Retail Campaign	Banners presented to client. Awaiting approval	1/15	2/24
xxx-xxx	eDM	edm for Retail Ad Campaign	3rd party list dropped 2/4.	1/15	2/4
xxx-xxx	Brochure	Brochure for B to B Campaign	Agency presented creative 2/14 awaiting feedback	1/15	2/1
xxx-xxx	Direct Mail	3 Wave Direct Mail Program	Way one complete, produce wave 2	1/1	6/1
xxx-xxx	Newspaper Ad	Full Page Ad for Newspaper	Release to publication	1/2	2/15

The Account Group

The Project Initiation Form Example

Project Request Form

DATE: | **ACCOUNT MANAGER:**

CLIENT: | **FINAL DUE DATE (REQUIRED):**

PROJECT TITLE: | **JOB NUMBER:**

❑ NO START-UP MEETING REQUIRED ❑ START UP MEETING REQUIRED BY: ____________

DESCRIPTION OF PROJECT:

BUDGET CONSIDERATIONS: ❑ PROJECT JOB ❑ FEE AGREEMENT

PRELIMINARY SPECIFICATIONS (IF ANY, I.E.; size, color, format, length)

TEAM AD CW AE PM TRAFFIC

FIRST DUE DATE TO CLIENT

FIRST DUE DATE TO

A SEPARATE PAGE SHOULD BE USED FOR: PRODUCT/SERVICE DESCRIPTION, USAGE, PREFERENCES, COMPETITIVE SITUATION.
IF YOU ARE REVISING OLD CREATIVE, YOU MUST ATTACH A MARKED UP COPY OF THE LAYOUT TO THIS FORM

OLD JOB NUMBER OR REFERENCE:

The Account Group
The Media Plan

The media plan is a document and/or presentation that starts with a clear-cut statement of objectives to be achieved by the media expenditure. Commonly, it includes a highlight summary of the strategy or strategies to be employed to fulfill those objectives. The plan is based on an allocated budget for a specific period of time.

The media plan is a specific, logical statement that clearly sets out a number of factors, including, but not limited to the following: who the media effort is intended to reach; whether broad reach or intense frequency is of greater importance; what seasonal factors may shape timing and weight levels across the period of the media buy; geographic requirements; creative needs (print or broadcast, need for color, editorial enhancement, etc.).

Typically, the media plan commonly calls on a considerable, in some cases extraordinary, range of information. This will include an update on current advertising activities for the product or brand, extensive market trend information on the product or service category involved, and a wealth of tracking data and quantifying research estimating audience size and characteristics of many of the media choices available to planners.

For example, a comprehensive media plan will collect and analyze many of the following:

The Competitive Scene

Information on recent tracking of spending and media usage by direct competitors and, if appropriate, significant indirect competitors. A good media plan will give an overall assessment of the competitive scene, as well as an analysis by key price points, geography and seasonal segments.

Brand´s Past History

Positioning of the brand in its category with historic data on volume and share, together with user profiles, both demographic and lifestyle. In many larger-scale consumer categories, sub-sets by frequency of purchase or volume of usage are also included. If appropriate, information on pricing, packaging, distribution, and other marketing components are included where they might be significant in shaping the media effort.

Target Audiences

The definition of the best prospects by demographics, geography, and lifestyle. The unique characteristics of heavy users and brand-loyal users are important here as clues to sharpen targeting as accurately as possible.

Primary and Syndicated Statistical Research

Market and media tracking statistics are used to provide numerical detail for trend analysis and for matching up consumer profiles to media coverage patterns. Indexes of concentration are normally used here to highlight differences among the choices.

Seasonality Requirements

Information on calendar variations in consumer consumption habits or purchase behavior. This should also cover category tradition (timing of new model introductions, clearance sales, holidays, etc.) as well as the timing of promotions beyond obvious climactic conditions.

Geographic Factors

The whole pattern of historic and current variation in both category and brand development, by market and region, leading to adjustments in weight across the total territory involved.

The culmination of the research phase results in choosing specific space units, frequency, demographics and overall budgets. Media may select one publication versus another due only to a lower cost per pub, or they may schedule fewer publications in a more costly publication

The Account Group
The Media Plan

that has a better reach in the client's market.

Once the plan is completed, the media planner will create a media grid, that will translate each space unit into a dollar unit and total the estimated costs for each publication on the plan, and a grand total for the entire plan. This plan is then presented to the client.

The Account Group
The Insertion Order

The insertion order is the form that the media department generates to tell the publication that it must schedule a specific advertisement, for a specific date, for a specific size or unit. It will also specify the ad's position, and the subject or name of the creative. An ad number, or job number must also be included on the form that matches both the creative proof guideline and the insertion order ad number.

This form must accompany the publication materials when they are sent to the publication. Without this form, your pub materials will sometimes be ignored and you can miss your run dates, since it takes time for communication to flow through the publication.

The insertion order should say which reproduction material is being sent. If you send a copy of the form via fax, you must always send a proof of which ad is to run. The insertion order should also contain any notes should the material require special attention.

If the publication is picking up an old ad, you still need to send the publication an insertion order. The publication should also be called to see if they can still use the material that was sent previously. There is a set amount of time, that varies from publication to publication, in how long they will hold advertising materials.

The Account Group
Media Schedule Forms

Media Schedule Forms must be filled out with all of the information on the sheet. If the media and production departments do not have the full information filled out on the forms, your deadlines might be in jeopardy due to lack of information. It is your responsibility to work with the media department to make sure that these forms match the media schedule. It is the AE's responsibility to follow up with the departments to make sure you are meeting your deadlines. If the creative, copy or art materials come in late on your timelines, you must make sure that you change your media schedules to reflect a realistic date to meet the publications' closing dates.

The Account Group
Estimates

Estimates are based on the information you provide. You are responsible for getting all pertinent information to the production, media or broadcast department so they can generate your estimate.

Every production estimate must be signed by yourself, the production and account directors.

Please be wary of job cancellations on your projects. If a job gets cancelled, please review your costs to see what charges (internal or external) if any, can be billed to the client.

The estimates may include such items as photography/illustration fees and expenses, model fees, sets, styling, photo lab work, retouching or color separations, duplicate material, quantity proofing, as well as miscellaneous production expenses. Some of these estimate figures may come from vendors' price lists; others may constitute established agency experience averages; still others may represent the results of supplier estimates or competitive bids.

For print collateral work, that the agency is not producing, it is the agency's practice to pull at least one set of digital proofs (Kodak Approvals) before going to the final film stage. This digital proof is then marked up and sent to the printer along with the artwork on your disk. Your collateral jobs should reflect this charge.

The Account Group
Billing

You cannot close a media, broadcast, radio or print production job for billing without confirming with the appropriate department head if all costs are in. Jobs should not be closed with costs still floating around.

The Accounting Department will issue a report on all open jobs to each Account Executive within the first 3 working days of the month.

Account Executives are responsible for going through the reports and marking which jobs can go to edit or hold status, and return this report to the Accounting Department. This must be done within 2 working days to ensure all jobs can be billed by the end of the month.

The Accounting Department will issue edits for those jobs AE's request and attach job jackets for approval. Production will have a week to review all charges, make comments and sign off on all jobs. These jackets will then be returned to the Accounting Department, who will make the changes. This will leave time for a second round of review on any edits that need it. The Account Executive will then have 4 working days to approve any jobs in order to be billed that month. They must sign the invoices and return them to the Accounting Department.

The Accounting Department will then have 1 week to backup and cut final invoices to be mailed to the client.

The Account Group
Schedules and Project Planning

Planning your project:
Print production estimates are best prepared after your client has approved the layout and copy concept of an advertisement or an entire ad campaign, collateral or direct mail.

Be mindful of your deadlines. If you know a job milestone is going to be missed, please make everyone aware. With such tight deadlines, each missed date means that the agency can very easily **not** make a media deadline.

The continuous liaison between Production and Traffic is one of the prerequisites of cost-effective print production. After the original production timing schedule has been established, your print producer will cooperate with your traffic coordinator. Together they will prepare revised estimates, obtain necessary extensions of the material closing date from the publication, and help to create a smooth workflow.

So that creative and production steps may be executed with precision, a time schedule must be planned at the outset. It should work backwards from the closing or final delivery date when all material must arrive at the publication, or printed pieces arrived to the client.

The next major steps in the production of a print ad, collateral or direct mail are the estimating, bidding (if applicable), scheduling, and ordering of photographic or illustrative artwork and its preparation for reproduction.

Decisions on who who will be doing the retouching and scanning are just two areas that require cooperation between your creative and production groups that can influence effectiveness.

The Account Group
Typical Timeline

For a color advertisement, scheduled to appear in several magazines closing on August 1, such a plan might look like the following example. (Note that not all calendar days are working days.)

Start of creative work	May 28
Layout and copy approval date	June 8
Artwork order date	June 10
Artwork finish date	June 19
Start final mechanical date	June 20
Color scan order date	June 22
First color scan proof	June 25
Final color scan proof	June 29
Retouched artwork and mechanical finish date	July 2
Final client approval (if needed)	July 5
Mechanical to separator	July 6
First separator's proof	July 9
Final separator's proof (if needed)	July 14
Duplicate publications' mechanicals started	July 15
Duplicate publications' mechanicals ordered	July 21
Shipping date of all publication materials	July 28

Magazine closing dates are normally 6-10 weeks prior to the issue date, while newspaper supplements close 4-6 weeks before publication. Daily newspapers have closings of 1-3 days. Frequently, an entire production schedule will have to be pressed into a shorter-than-normal timespan, which usually results in costly overtime payments to suppliers, besides creating quality problems. In the labor-intensive graphic arts field, time truly means money—our clients' money.

The Account Group
Standard Timeline in Working Days for a Stand Alone, Non-Integrated Print Ad

For a color advertisement, scheduled to appear in several magazines, depending on the complexity will require 2-8 weeks. The following is a guide in working days. An average a 3-6 week schedule is used, depending on what final steps are needed.

Start of creative work	1
Layout and copy development	2-3
Internal Approval	1
Internal Changes	1-3
Client approval of creative	1-2
Revisions to creative	2-5
Final creative sign-off	1-2
Photoshoot	3-7
Selects chosen & scan	2-3
Retouching	2-7
Create Mechanicals	2-5
Internal Proofing	1
Client approval of composed ad	1-2
Last Minute Client Revisions (if necessary)	1-?
Produce Film/MP, or pdf files for pubs	2-3
Ship	1

The Account Group
4-Week Timeline for a Stand Alone, Non-Integrated Print Ad with no Photoshoot

A typical Newspaper or Magazine ad, done in 20-22 working days.

Note the quick client turnaround time. Add additional time if new photography is needed.

Creative Work	2
Layout and copy development	2
Internal approval	1
Production Cost Estimates	2
Agency Presentation to Client & Client Approval	2
Artwork creation (stock photo, illustration etc.)	5
Create Mechanical & Layout	2
Internal Proofing	1
Client approval of composed ad	1
Produce Film/MP, or pdf files for pubs	2-3
Ship	1

The Account Group
The Integrated Campaign

Total timelines to launch an integrated campaign can vary greatly. There can be a tremendous amount of difference in just deciding how much research and brand analysis is going to take place. A larger ad budget can mean more expensive and extensive production, and even the client's ability to commit to an idea can play into the time it takes to produce a campaign.

The 3 main parts of Launching a campaign are:

Market Analysis & Research

Creative Development

and Execution & Production.

Examples of Lengths to Completion from time of initial client input:

	Express	*Quick*	*Average*	*Extensive*
Market Analysis/Research	*0*	*3*	*6*	*8*
Creative Development	*0*	*3*	*5*	*6*
Execution & Production	*0*	*3*	*5*	*7*
In Market	*1*	*1*	*2*	*2*
Total weeks	**1**	**10**	**18**	**23**

Every agency and every client will be different. There are plenty of times that we all bang out an ad in a couple of hours, days or weeks. However, to produce a campaign that is relevant and effective you must apply the proper amount of time to produce the campaign.

The Account Group
Typical Steps & Timeline for Market Research

This is a typical schedule step form for providing market research for a new client or product.

Note that market research timing can vary greatly, depending on what type of material is being researched and to whom with.

Start up meeting	1
Estimate	2-3
Research	2-7
Questionnaire / Positioning / Discussion Guide development	5-10
Statement internal review	2
Initial client presentation	1
Copy due internally	5-10
Copy to client	2
Client comments & approval process	2-5
Recruitment and/or Translations (if needed)	3-5
Moderator Briefing	1
Focus Group Research	3-15
Moderator's report and analysis	3-5
Topline findings and strategic recommendations development	3-7
Research and strategy presentation to client	1
Approval of brand strategy and communications platform	1-5
Final Bill	5

Typical deadlines:
As short as a 7-8 week schedule to as long as 16 weeks.

The Account Group
Timeline for the Creative Development for an Ad in a Integrated Campaign

Typically creative development surrounds concepting (3-5 ideas) of one piece of the campaign, i.e. a journal ad. Please note that some creative development jobs may include additional rounds of concepting or market research that tests the concepts. Creative Development jobs do not typically include time or costs for producing art or materials.

Start up meeting	1
Estimate	2-3
Concept development	10-20
Concept internal review	2
Client Presentation	1
Copy due internally	5-10
Copy to client	2
Client comments & approval process	2-5
If needed...	
Additional Rounds of Concepting & Approval	3-7
If testing...	
Focus Group Research	3-15
Moderator's report and analysis	3-5
Topline findings and strategic recommendations development	3-7
Research and strategy presentation to client	1
Approval of creative concept	1-5
Final Bill	5

Typical deadlines:
As short as a 5 week schedule (additional time for testing) to as long as 12 weeks.

The Account Group
Timeline for the Production & Execution for an Ad in a Integrated Campaign

After the creative concepting part of the job is completed and the client has approved the concept, the agency will develop a production estimate for producing the ad.

Start up meeting	1
Estimate	2-3
Concept internal review	2
Copy development	5-10
Copy to client	2
Client comments & approval process	2-5
Layout development	3
Photoshoot (if needed)	5
Select shots and scan	3-5
Retouching	3-10
Layout to client & client comments	3-5
Mecanical development to client	5
Final client approval & final changes	4
Disk release	2
Review proofs	2
Produce mechanicals for publications (if needed)	3-10
Ship	2
Final Bill	5

Typical deadlines:
As short as a 5 week schedule to as long as 10 weeks.

The Account Group
Typical Steps & Timeline for Direct Mail or Collateral

A typical collateral or direct mail execution, done in 20-22 working days.

Note the quick client turnaround time. Add additional time if new photography is needed.

Start up meeting	1
Estimate	2-3
Concept internal review	2
Copy development	5-10
Copy to client	2
Client comments & approval process	2-5
Layout development	3
Photoshoot (if needed)	5
Select shots and scan	3-5
Retouching	3-10
Layout to client & client comments	3-5
Mecanical development to client	5
Final client approval & final changes	4
Disk release	3
Review proofs	2
Printing	3-10
Mail House	3-7
Mail	2
Final Bill	5

Typical deadlines:
As short as a 8 week schedule to as long as 10 weeks.

The Account Group
6 Week Timeline for a Typical 4-16 page Brochure with Printing

A typical 4-16 page brochure, done in 30-35 working days.

Note the quick client turnaround time. Some of these steps may be condensed when work continues simultaneously.

Creative Work (Up to 16 pages)	4
Layout and copy development	3-5
Internal approval	1
Production Cost Estimates	2
Agency Presentation to Client & Client Approval	2
Artwork creation (stock photo, illustration etc.)	5
Retouching	2
Create Mechanical & Layout	4
Internal Proofing	1
Client approval of composed ad	1
Printer Pre-press	2
Print on Press	3
Bindery (if needed)	2
Fullfilment and mail	2-3

The Account Group
Last note on deadlines

Take charge of your clients and their deadlines. Be mindful that accuracy does require a minimum amount of time to achieve.

For example, type changes, if brought in to the studio by 11AM, will be made by 5PM that evening. If brought in after 11AM, changes will be made by noon the following day.

Any jobs or projects requiring faster turnaround must be approved by the production director and possibly your client for necessary overtime.

If your work is leaving the office late, it is your responsibility to make sure either yourself or someone from account services is available to approve your jobs.

Internal Charges
In-house billable items

Depending on the capabilities of the in-house production and creative department, there are a number of products that can be sold directly to the client in a production estimate.

The following is a list of items that are considered chargable.

In-house color copies

Materials that the client requests for their internal meetings, i.e., posters/mounting, leave behinds, etc.

Discs that are used to transfer files to the client or vendor

The creation of .pdf files for publication use

Internal transfer of files electronically, via adsend, or ftp

Downloading of client requested files to disc

Internal color proofs, matchprints veloxs, etc.

Internal scans

HP 8000 (Color Plotter) Prints:

Standard Print is on Semi Gloss, Mounting is print spray mounted to 3/16" Black Foam Core

Size	Price	Price w/mounting
16x20	50	75
20x30	75	100
30x40	125	175

Account Team Members
Responsibilities and Roles

The Account Supervisor

While the account executives and account coordinators have much of the day-to-day contact with the client, the account supervisor is responsible for the relationship between the agency and the client. The account supervisor's main goal is to review all strategic and media decisions formulated by the various agency departments before delivery to the client and to review the creative concepts as to whether they meet the creative brief and the strategic goals and marketing plan of the client.

The account supervisor manages all of the assigned account executives and account coordinators/assistants to their accounts.

From a client view, the account supervisor analyzes the client's requests and marketing plan to produce a coherent, focused and most cost-effective/value-added communications plan that the agency can provide. This includes gathering client or agency prepared research, competitive analysis and existing marketing plans or a structure client/agency Q & A session and staying on top of products and markets in which the client operates.

From an agency viewpoint, the account supervisor acts as the main spokesperson for the agency, overseeing the execution of the approved communication programs, while identifying new business opportunities with the existing clients.

Other duties can include;

Presents and sells agency recommended communication plans, creative concepts and media plans to the client.

Maintaining direct, day-to-day client contact.

Receive client briefs.

Inconjunction with the account executives briefs creative, media, PR staff.

Provide clients with budgets and estimate updates.

Assists in client billing process and account receivables.

Writes client contact reports.

Prepares monthly revenue forecasts.

Account Executives

Team members have the primary client contact the "day-to-day" project management of the assigned accounts. The work with all of the agency departments to move projects through the agency. For example, they may meet with the creative director to review the creative issues, with the pr director concerning publicity, with the traffic department concerning scheduling and traffic.

They are responsible for gathering information on clients, products, and competition needed for the agency backgrounders and start-up meetings.

Duties will include;

Updating information pertinent to the status of all jobs, producing the client status report.

Produce timely contact reports.

Produce and distribute job requests and change orders.

Makes sure the sign-off of various agency documents including creative blueprints & estimates.

Meet with the senior management group to inform them of all client activities.

Account Coordinator or Assistant Account Executives

The account coordinators provide administrative support and back-up for account services.

They are responsible for supporting the account group which may include;

Setting up meetings.

Setting up or conducting research.

Account Team Members
Responsibilities and Roles

Developing presentations from materials provided

Following up on jobs and projects internally and externally when requested.

Make travel arrangements, provide shipping instructions.

Set up internal and external meetings.

group-PRODUCTION

The role

of production.

The Production Department
Responsibilities

The Production Department is responsible for coordinating all in-house and outside preparation of materials, whether the medium is printed, electronic or digital.

Traffic and Production

Estimates

The Purchase Order

Purchasing

Schedules

Job Bags & Histories

Client Artwork Policy

Workflow & the Studio

The Production Department
The Production Manager

The production manager is responsible for estimating all agency jobs, including all creative or production services and for external out-of-pocket costs from outside vendors.

The production department is responsible for creating the estimates and pricing for all agency services, this includes internal hours, in-house charges and estimates/pricing from outside vendors.

The production manager issues all purchase orders for the agency, reviews all vendor invoices and to ensure that the price quoted to the client matches the final billing.

The production manager maintains and develops relationships with vendors, always seeking out the best possible service and price.

The Production Department
Estimates

Production prepares each estimate based on the Project Request Form and/or the media schedule. Any information not supplied on this form will delay or alter the preparation of an estimate.

Estimates take 3 days for standard jobs, and 5 days for jobs that need vendor bids.

Based on Production Manager availability and AE input, general approximate budgetary numbers may take less time.

The Production Department will obtain at least 3 competitive bids on all ads and projects if deemed appropriate. Although our final choice of vendors will weigh in each vendor's ability to meet our quality standards and timelines.

Estimates must always be approved by the Account Executive, Production Manager, the Account and Production Director.

All changes to an estimate must be approved by the Account Executive, Production Manager, Account Director and Production Director.

The Production Department
The Purchase Order

Purchase Orders must be filled out for all items and services ordered.

The Purchase Orders are generated using the accounting computer system. The Purchase Order must note the client, job number, date, date of delivery, corresponding line number for the Accounting system (see Production for a list of numbers). Also be sure to include whether the purchase is taxable or non-taxable and an estimated cost.

Two copies of the Purchase Order (white and yellow) will be sent to the vendor, with instructions to attach the yellow copy to the invoice they submit. Keep a copy for your records.

Entering Purchase Orders into the system has a dual purpose: 1) to be sure we do not receive more than one invoice for the job and 2) to ensure a job is not billed out until all invoices are in.

The person responsible for filling out the P.O. must sign the invoice upon receipt and forward to accounting. When signing invoices you must initial, with the date of approval, job number and accounting line number.

If an invoice is over estimate by $1,000, or more than ten percent over the estimated amount, it must be co-signed by the responsible Account Executive.

The Accounting Department will not enter any invoices which have not followed the procedures listed above.

In addition, the Accounting Department will not pay any vendor invoice over $1,000 unless we have: a) been paid by the client or at the very least b) billed the client for this expense.

The Production Department
The Purchase Order

Purchase Orders must be filled out for all items and services ordered.

The Purchase Orders are generated using the accounting computer system. (or by hand) The Purchase Order must note the client, job number, date, date of delivery, corresponding line number for the Accounting system (see Production for a list of numbers). Also be sure to include whether the purchase is taxable or non-taxable and an estimated cost.

A copy of the Purchase Order (white) will be sent to the vendor, with instructions to attach a copy to the invoice they submit. Keep a copy for your records. One copy goes in the po book and two copies go to accounting.

Entering Purchase Orders into the system has a dual purpose: 1) to be sure we do not receive more than one invoice for the job and 2) to ensure a job is not billed out until all invoices are in.

The person responsible for filling out the P.O. must sign the invoice upon receipt and forward to accounting. When signing invoices you must initial, with the date of approval, job number and accounting line number.

If an invoice is over estimate by $1,000, or more than ten percent over the estimated amount, it must be co-signed by the responsible Account Executive.

The Accounting Department will not enter any invoices which have not followed the procedures listed above.

In addition, the Accounting Department will not pay any vendor invoice over $1,000 unless we have: a) been paid by the client or at the very least b) billed the client for this expense.

The Production Department
Creative Purchases

All outside purchasing must be accompanied by a purchase order.

The Creative Department and Account Staff may not buy artwork, photography, or creative services without approval from the production department. The production department will generate a P.O. for all outside art purchases.

The Production Department
The Traffic Manager

The traffic manager is responsible for scheduling work throughout the agency. Once a job has been opened, whether through the traffic or production person, a step-by-step schedule and due dates should be created, with each step assigned.

Every day the traffic manager will prepare a status report of all active jobs in the agency, giving each job a status. This report should be sent to everyone within the agency.

The traffic manager keeps track of and moves jobs from one completed step to the next.

As changes in timing occur, whether client, production or internal creative, the traffic manager should be informed so an accurate schedule can be created.

In cases where there is a conflict of schedules, the traffic manager will alert the management team as to the problem or conflict and allow the management team to make a decision.

The Production Department
Traffic & schedules

It normally takes 2-3 days for a print production schedule to be generated on long term projects.

All type changes, if brought in by 11AM, will be made by 5PM that evening. If brought in after 11AM, changes will be made by noon the following day.

NO work will be accepted after 3:30 p.m. to be released the same day.

Any jobs or projects requiring faster turnaround must be approved by the Client in writing for necessary overtime, based upon staff availability.

Upon final approval, the production department needs 1-2 days to prep an electronic file. On final sign-off from the client, a disk will be shipped to the printer within two working days.

The Production Department
Traffic & routing Work

When routing the agency work, please keep in mind that it takes time to circulate the work through out the agency. It is the traffic manager's responsibility to make sure that the work is routed properly. If a key person is not available to sign off on the work, you must notify the proper supervisor or account team to ensure that their is a replacement signature.

Key signatures for routing work:

Comps for internal presentation:
- Art Director
- Copywriter
- CD

Comps for external presentation:
- Art Director
- Copywriter
- CD
- AE
- Partner / VP

1st Mechanical:
- Studio
- Art Director
- Copywriter
- Creative Director
- Production
- Account Services

Revisions:
- Studio
- Art Director
- Copywriter
- Creative Director
- Production
- Account Services

Final Mechanical:
- Studio
- Art Director
- Copywriter
- Creative Director
- Production
- Account Services
- Client

Note that both the account team and the creative team need to check in with the traffic department before leaving for the day. If someone is not available to stay to sign off on the project in which they are responsible for, they must let their supervisor and key personnel on the project know. It is the individual's responsibility to brief the designated person on the project.

The Production Department
Job Bag & Histories

Traffic keeps the main "history" of the actural job, while, production histories are the responsibility of the Production Department. The Studio is also in charge of their own job bags (for billing purposes). They are not to be moved from the individual areas. Traffic is responsible for maintaining all type and proof histories in job jackets. If you need anything from a jacket, make a copy of it and return it immediately. Do not remove a job bag from the traffic area.

It is the responsibility of the studio artists and/or freelancers to return all job bags to the Traffic Department upon completion of the job cycle.

The Production Department
Client Artwork Policy

Upon receipt of client or outside vendor artwork it will be logged with the Traffic Department and labeled. The Traffic Department will fill out an art information sheet for the artwork. This will include client, job used, rights usage, copyright info, original source, return address and artwork return instructions. Artwork not being used should always be held with the Traffic Department.
No one should have misc. chromes, slides or original art in their possession.

Unless otherwise noted, Production will file all artwork upon completion of a job in the art files.

group-STUDIO

The production studio

& artwork creation.

The Production Studio
Responsibilities

The Production Studio is responsible for the preparation of all in-house and outside mechanical materials, whether the medium is printed, electronic or digital.

Starting Work & Routing

Artwork Creation Procedures

Artwork Naming Procedures

Artwork Filing Procedures

Typefaces

Guidelines & Mechanicals

Freelance Artists

Outside Board Artists

Releasing to Disk

The Production Studio
Starting Work & Routing Work

Starting Your Work

The job jacket is your friend. Do not start any work without a job ticket and job bag. Only the traffic or production people can generate job tickets from the Account Executive's project initiation form.

Do not accept work initially, directly from an account executive or art director. Once you have a job ticket and a deadline, the art director can interact with the studio as long as needed.

Upon completion of the work order (job ticket), please return your revised printouts, disk, or requested project with the job jacket. The Job Bag must be accompanied by the actual printed job at all times.

Routing Your Work

All job histories submitted for changes should be clearly marked. Upon making the changes, do the following: update the revision number and date, add your time spent to the time listed in the guideline, spellcheck the document and save the file. After spellchecking, sign off on the laser proof that the document has been spellchecked.

When handed a project or ad, note whether original file is to be worked on or if the file is to be called up and "SAVED AS" under a new job number description.

Do not add or change colors in a file without approval.

Use templates where applicable. Templates should be set up for common jobs for major clients.

The Production Studio
Artwork Creation Procedures

All files are on the Client Server by alphabetical order. Within these hard drives there are folders for each client. Under each client are folders for each job number. Each job number contains folders for common art, media, copy and jobs. The "jobs" folder holds the client's jobs by job number.

No one is to work off of their local hard drive for any reason.

Save your work as you go along.

Files should be set up to the document setup.

The agency guidelines must be attached to the file.

The Production Studio
Artwork Creation Procedures
The Slug & Fpo images

- Slugger is a program that creates a job slug for each quark mechanical. Fill the slug information out as completely as possible and use it as part of every print out.
- In the Art Production Library there is an FPO flag:
  - The FPO flag shown below is used to alert the staff that the studio is missing the final artwork from its files. As these images are created the studio will be supplied with the new image name and its document path.

- All FPO elements e.g., die-cut, photo, lasered type, etc. are to be indicated using the custom color "~FPO/Do not print."
- Create FPO page trim.

The Production Studio
Artwork Creation Procedures
File Preparation Checklist

The file provided by the art director is to be utilized primarily as a blueprint for the final layout mechanical. Files from the creative department should be rebuilt entirely or checked completely if utilized as the final mechanical.

If there is anything that is not clear or needs to be resolved in regards to recreating or rebuilding the file properly, note on the printout so that it can be addressed before the next proofing pass.

The primary function of studio is to prepare electronic artwork and pre-press files to the highest standards both from a typographic and pre-press stand point.

The following is a checklist that should be used to ensure quality control.

- Replace all art and photos with repro-quality images located on the “Art_FINAL” folder in the appropriate job file. Any art not found in this folder is to be considered FPO and noted as such until indicated otherwise. In no case should any art be introduced to this folder without prior approval. All art must be placed in and linked to the appropriate “Production Servers”.
- Open the picture boxes to the required bleed. Be sure to indicate if an image has been rotated or if any additional retouching is required to accommodate the bleed.
- Check font usage dialog box to ensure that no fonts have been altered by using the stylized attributes, as in “B Helvetica «Plain»,” not “Helvetica «Bold».”
- Check the document’s colors to ensure it matches the print production specifications. This includes indicating:
  - The proper color models, CMYK, Pantone, etc.
  - Spot color(s) and/or process separation.
- Check that the color model’s definitions and values are consistent with the encapsulated files and/or any other companion pieces.
- All drop shadows and gradated art must be replaced by art created in PhotoShop.
- All fonts in an embedded EPS file you’ve created must be converted to outline, please remember to save an original version of the file for later editting.
- In Illustrator both the document setup>print & export and the attributes should be set to an output resolution of 1200 d.p.i.
- All Truetype fonts must be converted to postscript.
- Check typography for excessive tracking and/or horizontal/vertical scale (+/− 3 should be considered the ideal maximum).
- When possible keep type at whole or half point size units to avoid excessive rip time with high end output devices.
- Check either for an attractive rag or a good reading break, address kerning, especially at headline sizes, consistent paragraph spaces and proper formatting.
  - Use a single hard return to indicate proper paragraphs and a soft return (shift + return) to break lines.
  - Proper quotes (’98, “”) via smart quotes in Quark, prime marks (8¢ 3¢¢), created with in Symbol w/option + 4, not hash marks (' ").
  - Use of rule above/below. Charts must be rebuilt correctly to facilitate fast revisions and ensure exact spacing and formatting.
- Use the feature called “Indent Here” to quickly align text from

The Production Studio
Artwork Creation Procedures
File Preparation Checklist

where you place your cursor. the remainder of the paragraph will be indented at that point. The Keyboard shortcut is command-backslash. It works great for bulleted items (Is in this short article)

• Use hanging punctuation.

The Production Studio
Opening Files in Quark & Flightcheck

In Quark,

When opening an existing document, always select use custom preferences.

Never adjust an existing H&J definition without renaming the copy.

In Flightcheck,

Use the Agency's custom FlightCheck Preferences and Ground Controls.

It is very important that the proper preferences are in place when performing a flightcheck to a document. These settings are set for how we pre-flight our jobs.

The Creative Department
The Style Guide

The “Style Guide” is the agency’s typographical guide on how type is treated on the printed page. All agency’s have their own unique set of rules to follow on how type is layed out into a mechanical format. Although it is recommended that the agency style guide be followed from the initial client presentation of the layout, it is sometimes not necessary. However, it should be noted that unless specific requests are made, all print files are changed at the mechanical stage to match the agency style guide to create consistency. There may even be some client specific mandatories or exclusion’s that are followed in addition to the agency guide.

It should be noted that the guide is intended to follow typeographic rules, rather than word processing ones.

For example, a copywriter might use an underscore in manuscripts to indicate the use of *italic* in the final piece, i.e., to always set a book title or publication in italic. Overall underscores are always replaced with italic.

- Correct use of a hyphen (-), en dash (–, represents the word “to”, “through” or “from” as in 9–5; never “and”) or em dash (—, for parenthetical observations). The style is for no spaces before or after any hyphens or dashes.
- No double spaces after punctuation. No double dashes, use an em dash instead.
- Always use nonjustifying spaces or “command backslash” to align characters.

  Use an en space (when Standard Em Space is off) to align single- and double-digit numbers.
- Do not use the Zapf Dingbats “n” (□) character styled with an outline to create a ballot box, it will not print correctly on some high-resolution output devices. Instead use the font Universal News with Commercial Pi font and use its “h, M or N” characters (□, □, ▫) which are true open ballet boxes. You may have to adjust its size or apply a baseline shift value to align them properly with the text.
- Center type by centering optically. If necessary, hang punctuation as with justified or flush right text.
- Type set in initial caps, as used in headlines or subheads should be set without a period at the end.
- Ellipsis is three periods...with no spaces on either side. It does not need to get an extra period at the end of a sentence. If using a proper ellipsis with additional punctuation, be sure to add a slight space (periods..., with) after the ellipsis and a full space after the secondary punctuation.
- Dashes and hyphens—have no spaces on either side. Adjust manual kerning, if necessary to equalize the space on either side of dashes and hyphens, especially when used with numerals, i.e., 1-800-70 / 1-800-70
- When using dashes with numerals or all cap letters, adjusted to center vertically.
- The appearance and readability of consecutive capital letters or numerals of three or more in text can often be improved by adding additional tracking and reducing their size 97–90%. e.g., from between one-quarter to one point at a 10 point size. When possible replace stylized small caps with the proper font and adjust for additional tracking.

The Creative Department
The Style Guide

- The copyright symbol (©) should not be followed by a spaceband; in a properly mastered font it will have a built-in "shoulder" and should be followed immediately by the date. e.g., ©2001 TD Waterhouse
- All punctuation, dashes and spaces should have the same style, color and format as the word preceding it; e.g., **Panasonic®,** our voice acti...
- All punctuation should be placed inside quotation marks. This rule can be broken to ensure clarity.
- These style standards have been incorporated within can be placed into custom XPress Preferences, these include Small Caps, superscript, subscript and superior.
- There should be no spacing separating an asterisk and word in the text; in the footnote below, however, an asterisk should be followed by a space.

** Footnote style: Footnotes are separated from the text block either by a space, never smaller than the general line spacing of the text of the text area, or by a thin rule.*

- Avoid using a typeface in which you use excessive tracking or horizontal/vertical scaling is used. (+/- 3 should be considered maximum for tracking). It's always better to find and use a typeface that is designed with the attributes you want rather than distorting one.
- Use the agency Font Database, contact your production manager for additional font additions or modifying existing faces.

Quark Shortcuts

Nonbreaking spaceband	Command + space
En space/figure space	Option + space
Nonbreaking en space	Command + option + space
Flex space at 100% (as defined in preferences)	Option + shift + space
Nonbreaking flex space	Command + option + shift + space
Discretionary hyphen	Command + hyphen
En dash (number ranges)	Option + hyphen
Em dash (parenthetical)	Option + shift + hyphen
Opening quotation mark	Option + [
Closing quotation mark	Option + shift + [
Opening single quotation mark	Option +]
Closing single quotation mark or apostrophe	Option + shift +]
Flush right	Option + tab
New paragraph	Return
New line	Shift + return
Discretionary new line	Command + return
New column	Enter
New box	Option + enter

The Studio
The quick guide

Starting Work:

Do not to accept work from an account executive that:

1.) Has no job number, deadline, creative brief or work order.

2.) Without the Traffic Coordinator's knowledge. Get a job number!

Two days before presenting your work to the client:

Reach out to the traffic and production department, let them know if / when you need extra help, mounting, etc.

1.) Make sure an extra set of what is presented goes to the traffic department.

2.) If your layouts need to be proofed, let the traffic dept. know ahead of time!

Buying artwork, stock-art, photography, or hiring outside comp artists:

Do not purchase or hire anything/one without pre-approval by the broadcast or print production department and a purchase order is issued.

1.) When the art does come in, please notify/give it to the traffic department to keep track of.

Client approval:

When your layout has final approval, hand it off to the traffic person.

1.) Print out a copy of the layout with the file name on top.

2.) Mark up the hard copy with any comments. Mark any text or art that is FPO as FPO. Any questions for production or the ae? Write it down.

3.) Printout a disk directory as to where your file is located.

4.) Please be aware of the entire process of your job. Turning your layout into a mechanical takes time.

Routing:

Once the studio makes your layout into a mechanical it will be routed to you.

1.) Please take the time to get a good look at the layout. Things might have changed from your inital layout do to production adjustments.

2.) If you want to make any adjustments yourself, talk to the production/studio staff and then get a copy of the file from the studio. DO NOT pick up a mechanical file from the server. Feel free to meet with the production staff to go over changes that are difficult to explain in written form.

Style Guide:

Yes, there is a "Cossette-Post" style guide. All of your layouts will be adjusted to fit into the agency style guide for consistency. We have provided the style guide for reference.

1.) If you want to differ from the style guide on a perticular job, please meet with the studio and production manager.

Saving your work on the Server:

Do not save your work on your local harddrive.

1.) Use the Server called "ELVIS" and the volume called "Creative A-Z" to save your work. Save your work in the client folder within a folder that has a job number. Refer to the attached sheet.

2.) Never write over an old job file to begin a new job. Make a copy of the file using a new name. Always save your work using the agency naming convention.

The Production Studio
Artwork Naming Procedures

The agency requires that everyone follow a common artwork naming convention. The following are some general rules and examples.

- Always Identify the File. Begin with the Nine-Digit Job Number. i.e. 525ADV002
- A Short Description or Page Number for an Artfile is Extremely Helpful. i.e. pg2photo1
- Do Not Use the Following Characters when Naming a File: &, %, /, \, :, ;, ?, +, [,], (,), *, @.

The Production Studio
Artwork Filing Procedures

If your in the production department, use the server called "ELVIS" and the volumes labeled "Production A-E, F-M, T-Z" to save your work. Never save your artwork or files on your local desktop.

In this server there are hard drives (volumes) with individual "client" folders in alphabetical order.

Each of these client folders contains: folders for the master logos, individual job folders and a folder for client web access. The "jobs" folder holds the client's jobs by job number. Never write over an old job file to begin a new job. Always save your work using the agency naming convention.

Each job on the production servers are separated into two folders:

The Production folder.
This is the folder where the production department begins their job. Only start new creative jobs when the appropriate creative/art/design director places all of your files in the "PRODDROP" hard drive on Elvis. Or an existing and approved mechanical exists in the Production volumes.

When a comp is to be made into a mechanical, the studio should go through the following procedure:

a.) Directing the comp images into the production folder. If you pick up files from the "CREATIVE A-Z" volume, make sure you DO NOT LOSE the original set of files in the "CREATIVE A-Z" volume. Leave the original comp files intact! You are making a new copy of the files to be converted into a mechanical.

c.) Sort the files you just collected into the appropriate folders in the production mechanical. Make sure you place the vector art (i.e. adobe illustrator files) and the hi-res art into the Art_Final folder.

The Production Studio
Artwork Filing Procedures

Collected Folder

This is the place where we store the final artwork that was either released to the vendor, "collected for output," or received from the vendor. Do not touch or alter any material in this folder.

Remember to save all work as you go along.

Quark Mechanical Versions

Each time a job is routed, please add the revision # to the end of the job file name to indicate the new version. Please keep your "old" versions in the "OLD" folder.

New Job Labeling Syntax
000AAA999_NYT_Description_01

Job Number

Pub†

Revision #

New Art Labeling Syntax
000AAA999_Description_01

Job Number

Revision #

The Production Studio
Artwork Filing Procedures

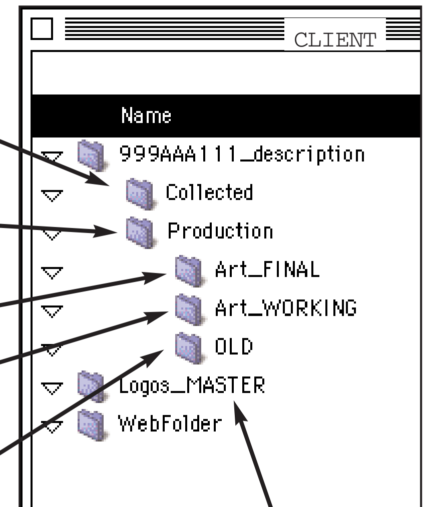
"Collected" Folder:
Should ONLY contain entire collected files that were sent to press or to client which includes PDF's

"Production" Folder:
Should ONLY contain Production Quark Files and 2 ART folders

"Art_FINAL" Contains all Art that is complete and ready for press

"Art_WORKING" Contains all Art that is not Finished or is Lores.i.e."work in progress"also your psd files

Place OLD Quark Files Here.



"Logos_MASTER"
Is where ALL Finished logos are kept. NO Client Logos Should Be in either ART Folder Unless they are Job

The Production Studio
Typefaces

Work off of fonts on (insert location here) only. If you need a typeface that isn't on your local drive, copy over the typeface from the "fonts" folder located in the "insert location here."

Only open typefaces from your local hard drives "Font Library."

Use the agency recommended Adobe Type Selection, and keep all named fonts selected from within one company brand's library.

The Production Studio
Freelance Artists & Outside Board Artists

All freelancers must fill out a timesheet and hand them in weekly with a proper invoice listing name, social security number, total hours multiplied by the hourly/day rate and a total amount due.

All invoices submitted for payment will be paid within two weeks.

The agency offers no medical benefits, vacation or personal time for freelance workers.

To optimize printing time and schedules, check with everyone in the area prior to printing a large file.

We ask that all freelancers be conscientious in regard to conserving paper and supplies.

There is a phone located in the electronic studio for emergency and important phone calls. No personal phone calls are to be made or taken on this phone.

Do not move any equipment.

Do not upload or download any software.

Do not put your own fonts on the computer.

Do not replace the desktop pattern.

Do not change, update or delete software on your machine.

The Production Studio
Releasing to Disk

Once a job is OK'd to be released to disk, please follow the below procedure:

Open the mechanical and check for:

- Correct size, colors & bleed
- Updated guidelines
- All gradations are in Photoshop
- Proper logos and trademarks
- All artwork and logos are reproduction quality
- All colorized Tiff files (used in Quark) are correctly translated to EPS Duotones.
- Photos are scaled in photoshop to within 10% of the actual size in Quark.

Run Flightcheck & Collect for Output:

- Check RGB vs. CMYK
- Proper resolution
- Correct artwork files
- Read flightcheck report for problems to solve

Collect Job to Disk

- Place a copy of collected files in "Final Mechanical Folder"
- Collect to CD-Rom or Zip
- Label Zip or CD-Rom
- Print a copy of the mechanical in color to size (If possible) FROM THE DISK.
- Print a copy for the job bag
- If 4 C, print separations.
- Attach Pantone color chips to Mechanical if appropriate.
- Mark all color breaks, FPOS, PMS Colors, varnishes, trim marks and/or print a copy of the layout if needed.
- SIGN the Approval Form.
- RETURN DISK WITH PRINTOUTS AND JOB HISTORY TO TRAFFIC.

group-CREATIVE

The creative guide to artwork creation.

The Creative Department
Responsibilities

The Creative Department is responsible for execution of the client brand and creative briefs.

Starting Work & the Job Jacket

Artwork Purchasing

Artwork Handling & Retouching

Creating a Comp or Mechanical

How to Name and Save Your Files

See Production Studio for:

Artwork Naming Procedures

Artwork Filing Procedures

Typefaces

Style Guide

Guidelines & Mechanicals

Freelancers artists & Outside Board Artists

The Creative Department
Starting Work & the Job Jacket

The Creative Department is not to accept any work directly from the Account Group without the Traffic Department's knowledge. All changes to existing projects should be run through the Traffic/Production Department as well.

Do not start a job without the project initiation form, without a Brand/Creative Brief, or a job number.

The Creative Department
Artwork Purchasing

The Creative Department is responsible for initiating all printing spec sheets. All specs must be reviewed with the Production Department prior to releasing to client or obtaining bids. Once approved, no one will change specs at the release of a project without prior production notification and client approval.

Upon approval to order art, Creative should check with the Production Department to ensure art is reproducible for the particular ad or piece, and that all the artwork's uses are taken into consideration. It is the combined effort of the AE, Creative and Production teams to ensure that the artwork purchased meets all of the client's requirements.

You must have prior approval from the Production Department to buy photography, art, or creative services. Production will fill out a Purchase Order, listing the usage and amount agreed upon.

The Creative Department will also sign off on all art vendor invoices. In the case of an overage, the person must write a brief explanation of the additional charges on the invoice.

The Creative Department
Artwork Handling & Retouching

Upon receipt of client or outside vendor artwork it will be logged with the Traffic Department and labeled.

However, all purchased art is the responsibility of the Creative Department when it is in the agency's possession. Any artwork or photography to be returned must be labeled as such prior to handing over to the Production Department.

Please follow the artwork log in procedures with your traffic or production person.

All conventional artwork ordered by Creative must be in "scanable" form (able to wrap around a drum scanner). Any artwork not on flexible board runs the risk of being damaged when it's wrapped. If supplied artwork is not in scanable form, Production will shoot a transparency to scan with the loss of one generation, affecting the quality of reproduction.

No outside retouching of any artwork is allowed without prior permission and communication with the Production Department.

The Production Department will maintain awareness of the final artwork's use so that any retouching is done in the correct color space and resolution. This information is vital to the successful completion of your artwork.

The Creative Department
Creating a Comp or Mechanical

Any files which contain mock artwork or low-res scans not intended for reproduction must be visibly marked "FPO". We have an FPO tag in the Guidelines master page (in the EP Folder under 'Guidelines'.) FPO must also be marked in bold type next to the Guideline.

All files should use the agency file naming system.

All files should be sized using the document setup for page size.

All agency guidelines are to be set in standard format, which can be copied from the Guidelines master page set up in the "EP" Folder under "Guidelines."

All jobs must be placed in the "JOBS" folder by respective account. See the Artwork Filing Procedure in the Studio section of this book.

The Creative Department is not to set any electronic files using fabricated or customized colors. Choose colors from the Pantone Matching System instead. Remember that these colors may be simulated if the ad or project is running in 4/C process. Note all colors used in the guideline.

Any stock photo used in comps must be labeled at the bottom of the file next to the guideline. The listing must include the stock photo house and the photo number.

The Creative Department
How to Name and Save Your Files

Use the Server called "ELVIS" and the volume called "Creative A-Z" to save your work. Never save your artwork or files on your local desktop.

In this server there are folders for each client in alphabetical order. Under each "client" folder there is folder for each job #.

Each of these client folders contain folders for individual jobs. The "jobs" folder holds the client's jobs by job number.

Using the template on the "Creative A_Z" to start a new job. Remember to start a new job you must have the correct job number and use it to save your work. Never write over an old job file to begin a new job. If you need to make a copy of the file using a new name. Always save your work using the agency naming convention.

The job folder
This is the folder where the art department begins a job. All comp artwork should remain in this folder. Only low-res or comp work should be placed in this folder. If any hi-res art comes in during the comp stage it should be placed in the production mechanical folder. MARK your Individual art files with the agency naming convention.

When you are ready to release artwork to the production department do a collect for output, and place your files in the Prod Drop Folder. YOU MUST NOTIFY production to pick up and use these files.

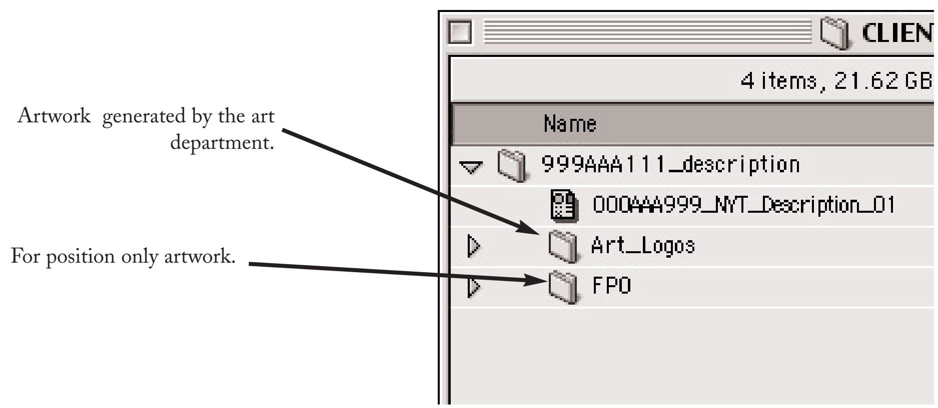
The Creative Department
How to Name and Save Your Files (con't)

New Job Labeling Syntax
000AAA999_NYT_Description_01

Job Number Pub† Revision #

New Art Labeling Syntax
000AAA999_Description_01

Job Number Revision #



SPECIAL SECTION

ADDENDUM ~ I

network–AND YOU

Where to save your work,

& how to use the network.

Where should I save my work?

The answer is, “on your designated server.” You should never save your work or client files on your local hard drive. Our servers are backed up on a regular schedule. Individual workstations, however, are not backed up. If you lose files on your workstation, they are gone forever.

Please use the following servers for your work:

Private Files:
Server 1

Account Executive Files:
Server 2

Creative & Production Files:
Server 3 - Elvis

Elvis & FullPress ~
The Creative & Production Server

It is extremely important that all work being done for a client in a creative or production capacity be located in designated locations. We now use an enterprise-level server with specially-integrated network software to help us complete our work faster. Our new file management software is called FullPress and uses a Sun Server which provides:

- A fast way to share images and documents
- A quick way to spool print jobs (so your Mac doesn't have to wait while the printer processes the job)
- A speedy way to work with complex images, using an OPI system.

The OPI system (which stands for Open Press Interface) automatically creates low-resolution versions of images for placement and substitutes high-resolution images for them at print time.

Although much of what FullPress does is actually hidden from what you do on the Macintosh, behind the scenes is a rather complex interaction where the server is rendering images for different resolution needs and spooling information to the various printers in the agency.


Public volume


High-res image volume


Low-res image volume


Web-ready image volume

Elvis & FullPress ~
The Basics - Selecting the Right Volume

Types of Volumes

FullPress does much of its work behind the scenes and on the fly, necessitating file management conventions that differ from slower, more traditional server environments. The FullPress system uses three types of server volumes to organize files:

- ***High-res image volumes***
  Original high-res image files must be kept here.
- ***Low-res image volumes***
  The server automatically generates low-res FPO (For Position Only) versions of images on high-res volumes and puts them here.
- ***Web-ready image volumes***
  Versions of images and documents that are ready to use on the Web appear here automatically as JPEGs or GIFs, depending on the original file type.

Which Drive Should I Use?

If you are a creative or design staff person you should be using the volume on Elvis labeled: *Creative_Comp_A-Z*

If you are a production staff person you should use the drives labeled: *Production_A-E*, *Production_F-M*, *Production_N-S*, and *Production_T-Z*

If you need to transfer files from the Creative/Design Dept. to the Production Dept., use the *ProdDrop* volume.

If you need to transfer files from the Production Dept. to the Creative/Design Dept., use the *CreativeDrop* volume.

FPO volumes corresponding to the high-res production volumes may be mounted by studio personnel when low-res images are desired for distribution to clients, etc., or as necessary.

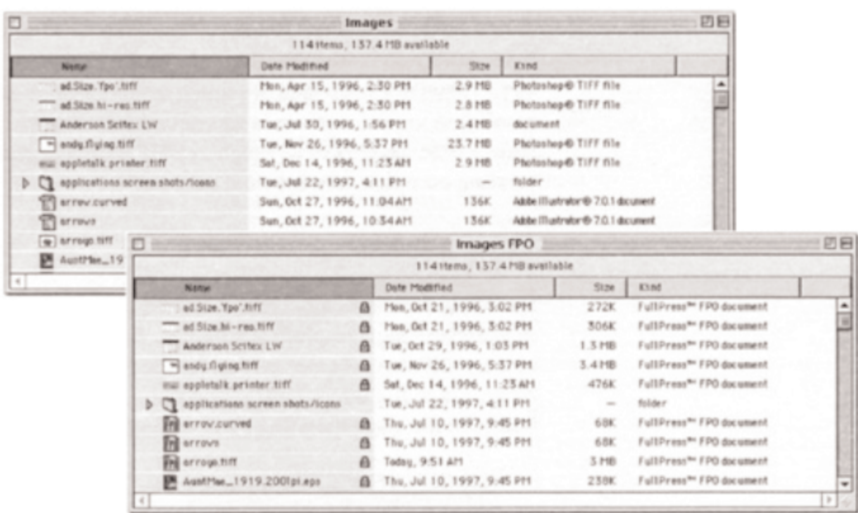
Elvis & FullPress ~ *The Basics – Working with OPI*

What is an FPO?

In the FullPress environment, an FPO (For Position Only) image is a low-resolution *view* of a high-resolution image. As a general rule, you should not use FPO images or mount the FullPress FPO server volumes except when necessary for certain client needs.

Creating an FPO

FullPress automatically creates low-resolution FPO views for all images on the FullPress high-resolution volumes. FPO views appear on their own FPO server volumes and have the same file name as their high-resolution counterparts. See diagram below.



Using FPOs

The FPO images are locked so you can't actually change their contents. If you want to change the images themselves, you must edit the high-res images to which the files refer.

To incorporate FPOs in your work, simply import, link or get an FPO image using the built-in image placement facilities of the Mac program you're in. If you apply an attribute to the FPO image (changes in cropping, tinting, skewing, etc.), FullPress will make the same change to the high-resolution version of the image at print time. This makes FPO views ideal for sending to clients who request working versions of our files for their own explorations.

Renaming, Moving or Deleting Images

FullPress FPOs use the same file names as their corollaries in the high-res volumes. If you change the name of the high-resolution image, the FPO version will reflect the same name change.

Elvis & FullPress ~ *How to Print & Use the Print Spoolers*

With FullPress you may choose between three ways of printing:

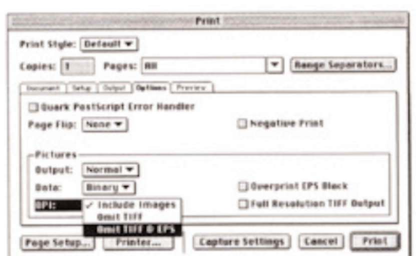
- ***Through the LQ (Low Quality) spooler***
  This method allows Elvis to send information directly to the printer without monopolizing your Mac's system resources. The LQ spooler is the fastest way to print and should be used whenever possible to minimize printer traffic.
- ***Through the HQ (High Quality) spooler***
  This method is slower than using the LQ spooler, but yields presentation-quality output.
- ***Directly from your Mac to the printer***
  This method is the slowest way to print, because it uses your workstation's system resources to transfer information to the printer.

In the Chooser (on your Mac workstation) you'll find two queues for the Canon Color Copier 1100.

The first spooler, called *Studio_1100_HQ_Print Spooler,* will print 300dpi images to the Canon Color Copier.

The second spooler, called *Studio_1100_LQ_Print Spooler,* will print 150dpi images to the Canon Color Copier. The LQ spooler prints in nearly 1/3 the time it takes to print directly from your Mac.

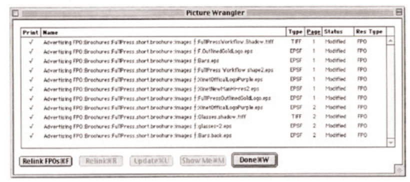
In order to use the spoolers properly, you must change the "OPI" setting in the Quark Print box (under "Options") to "Omit TIFF & EPS." See diagram below.



Note: This setting will only work with files saved on the Elvis server.

Elvis & FullPress ~ *Quark XT - Picture Wrangler*

Picture Wrangler is a QuarkXpress XTension which should be used instead of the Quark Picture Usage dialog box.



With Picture Wrangler, you can:

- Automatically find and relink high-res and FPO images. You can update links individually by holding down the control key.
- Update or relink images in one-button "batch mode" instead of updating individually.
- Collect high-res or FPO images and the Quark document for output.
- Save the image list to a text file [apple key + s]
- Resize the Picture Wrangler dialog box so you can see the entire path name.

Relinking FPOs

To relink the FPOs in a QuarkXpress document to the FPOs on the server, select the "Relink FPOs" button. If unable to find the FPO image automatically, Picture Wrangler will prompt you to browse to relink the image.

Relinking high-res images

Holding down the "Option" key changes the "Relink FPOs" button to read, "Relink Highs." Selecting this button causes Picture Wrangler to relink all of the pictures in the document to the high-res images.