What to Expect When You’re Working With an Agency or Independent Contractor

Brought to you by the DCI Creative Design Team
What to Expect Today...

• Who we are
• What we do
• Creative design model
• Our partners
• Current agency and independent contractor (IC) offerings
• Agency vs. ICs (when are they a fit)
• Production vendors
• Template options

• A quick view of our portfolio
• Processes and tips:
  - Where/when/how to launch a project
  - Billing need-to-knows
  - Tips for providing the best creative brief and feedback
  - Miscellaneous reminders

• Wrap Up
• Questions
Digital & Creative Innovations
Digital & Creative Innovations (DCI)

Who we are

Implementing best-in-class practices on formal compliancy reviews for websites, apps and collateral for our organization

Guidance on user experience, SEO, domain acquisition, user testing, special functionality, analytics, accessibility, content, or information architecture

Confirmation that you’re adhering to brand and digital governance policies at IEEE on your new or existing site or app or your IEEE.org section

Oversight of external agencies and contractors, ensuring brand compliant creative results and cost savings

CONTACT US AT: digital-innovations@ieee.org | creative@ieee.org | branding@ieee.org
Digital & Creative Innovations (DCI)

Creative Design & Brand

User Experience

Digital & Creative Innovations

Brand Architecture

creative@ieee.org | branding@ieee.org
Creative Design & Brand

Our Support Level

- Project **management** and brand oversight
- Creative **consultation** and brand guidance
- **Proactive** outreach
- **Visual identity** assessment
- **Brand communications** and education
What We Do Every Day

Facilitate “unmistakably IEEE” quality creative work while saving the organization time and money.

- Engage with partners and agencies in a fast-paced, deadline-driven environment
- Work with suite of agencies and industry professionals on strategic, creative needs throughout the organization
- Streamline requisition, invoice and billing processes
- Assess needs, deadlines, deliverables, budget, requirements, resources
- Track all project communications and outcomes, including archiving of project history and final source files for ability to reference later
- Provide brand guidance and creative consultation so caliber of creative and brand meets expectations
Our Value Add – “One IEEE”

Ambassadors of the IEEE brand

- Creative, brand, and digital
- The thread that pulls all branded projects together at IEEE
- Elicit cost savings by price negotiation, reuse of templates

Oversee implementation of the IEEE brand governance guidelines to protect the IEEE brand value on all marketing collateral and digital efforts

We have established POs with a suite of agencies and ICs

Account holder for stock image subscriptions
Creative Design Model
The Hybrid Approach

A “suite to suit” your needs

- Expanded services to include a suite of agencies, independent contractors and production vendors

- A range of services covered, including design, copywriting, website development and coding, branding, videos

- Launched IEEE Brand Experience site for better access to self-service templates, tools and resources

IEEE Brand Experience
Who are our partners?
Who are our partners?

*From all facets of the organization...*

- MSD — Product Marketing, CCBM
- MGA/Membership
- CA — Awards, IEEE Foundation, IEEE History Center, Strategic Research
- FA — Facilities, Member Discounts
- EA
- PUBS
- TA — MCE, Societies, Future Directions
- IEEE Standards Association
- IEEE-USA
- Volunteers from Regions, Sections, Branches, Chapters

*From all regions across the globe!*
“One IEEE” Collaborative Approach

Routinely engage in cross-team collaborations to align necessary components and stages in order to manage outcomes of deliverables.

EXAMPLES:
- Email campaigns —> BDRS
- Exhibits, social media, ad placement —> CCBM
- Trademark/brand —> Legal

And many more connections!
Our Creative Resources
Creative Agency and IC Offerings

Project managed creative services

Production Vendors

Brand oversight & creative expertise

Handmade Interactive
Agency vs. Contractor
When to use an agency vs. an independent contractor (IC)

**The choice depends on several things...**

**Use an AGENCY if:**
- You need to develop a larger campaign with multiple components
- **One Stop Shop** – staffed with copywriters, art directors, and the sourcing resources for print production
- Project requires **strategy planning and research development** – zoning in on your specific need and audience
- Bandwidth for faster turnaround
- Full proofreading/copy-editing services (whereas ICs run general spellcheck on your supplied copy)

**Use an IC for:**
- Edits and rework of existing collateral such as ad suites, pull-up banners
- Smaller-scale or one-off projects with ample turnaround
- Specific or **unique skill-set** is needed. Example: copy writing, animated PPTs
- For Word templates/PowerPoints... some do not specialize in this area
- Typical for small-budget projects: **lower hourly rate**; most cost effective
When an agency is a fit

Examples of why we work with an agency

Ideal fit for particular needs:

- Overall larger projects with aggressive timelines
- Large marketing and branding campaigns
- Extensive copywriting with creative components
- New concepts & special design
- Rebranding
- Sub-brand logos & brand guidelines
- E-blast campaigns
- Site design & development
Agency Portfolio Highlights

Brand campaigns and beyond
When an IC is a fit

Examples of why we work with an independent contractor

*We are continuously researching and assessing suitability of potential contractors – let us know if you have a reliable source familiar with IEEE.*

**Ideal fit for particular needs:**

- Sub-brand logos/brand guidelines
- Infographics
- T-shirt or promo item graphics
- Digital elements (banner headers, carousel imagery)
- Edits to existing collateral and template rework
- Copywriting services
IC Portfolio Highlights

Quality of creative is not compromised
Production Vendors

Examples of why we utilize these vendors

Ideal fit for particular needs:

- Straight reprint of collateral
- Local print vendors can deliver to warehouse
- Ideal for rush turnaround of basic collateral needs
- Edits to templates via Consumer Graphics Portal
- Branded promotional items
When to use a template
No Budget? Look for Templates First

Template use – numerous options and several ways to get what you need

- “Pre-branded” but still versatile
  1 Use “as is” or edit yourself
  2 Agency/IC can revise/edit via Creative Team
  3 Online ordering portal for edits and production

^7x10” full-page print ad modified to include logo and copy edits and slight resize for publication

^Image replaced on advertisement, can be enlarged for use as poster

IEEE: Fostering technological innovation for the benefit of humanity.
Consumer Graphics Portal

Contact us for more information and to gain access

- Online ordering portal for edits to templates and print production
  - Offerings include editable flyers, full-size and table top banners
  - New templates still coming for trifolds, table covers, hanging banners

- Credit card orders through portal
- Vendor will make requested edits and supply e-proof
- Ship to warehouse or directly to your location/event
- Order history for tracking and inventory

^ Email creative@ieee.org for login credentials for Consumer Graphics portal
Go-To Processes

*Top 6 Tips and Need-to-Knows*

- Project work flow
- When and how to launch a project
- **Tips:** Best practices for creative briefs

- **Tips:** Best way to supply feedback
- Billing need-to-knows
- When to consider using a branded template
Typical Project Life-Cycle

Creative Project Workflow

INITIATION/SCOPING

1. Project Request
   - Stakeholder (internal partners, volunteers) initiate request via on-line creative form or via creative@ieee.org
   - Creative Brief supplied to stakeholder for completion
   - Creative Brief goes to DCI Creative Design Team for review

2. Creative Brief Intake & Estimating
   - Creative Project Manager (CPM) reviews request, determines appropriate resource(s) i.e. agency/IC/production vendor
   - CPM schedules kick off call or meeting (KOC/KOM) as needed
   - Agency/Independent Contractor (IC) develops estimate
   - CPM reviews estimate(s) to confirm pricing & deliverables per established scope

3. Estimate Approval & Timelines
   - Estimate sent to requester/stakeholder(s)
   - In order to proceed, approved estimate must be supplied with stakeholder signature and associated GL account
   - Timelines established and formalized by DCI/agency/IC and shared with stakeholder(s)
   - 50% of total project cost applied in next billing cycle

4. IDEATION/EXECUTION
   - Creative development begins
   - Initial concepts sent to DCI for review/rework as needed
   - 1st round (R1) concepts go to stakeholder(s)
   - Cohesive feedback is supplied via Teamwork project link to Agency/IC for rework as needed
   - R2-R3 sent for feedback/final approvals
   - Formal final approval supplied
   - If applicable, assets delivered for print/production, approval of supplied proofs

5. DELIVERY
   - Agency/IC delivers final assets via Teamwork link
   - If applicable, print samples delivered
   - Final project invoice from agency/IC sent to IEEE in next monthly billing cycle
   - DCI initiates payment processing of final 50% via internal journal transfer (JT) through Accounts Payable (AP) within established SLAs
   - Archival of all source files by DCI and close of project in Teamwork Project Management system

6. IMPLEMENTATION/ LAUNCH
   - Deliverables launched via established communications vehicles and distribution method
   - DCI holds postmortem meetings/feedback/learnings applied
   - Project surveys sent
   - If applicable, assets uploaded to Promo Library by end of following quarter
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**IMPLEMENTATION/LAUNCH**

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LEMENSATION/LEARNUNG

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ONGOING: Pipeline Discussions, Portfolio Case Studies
Satisfaction Surveys, Agency/IC Feedback
Reminders: What to Expect ...

How DCI keeps things on track to support best outcomes

1. Project Request
   - DCI confirms receipt and responds with questions
   - Submit a creative brief
   - Brief is reviewed by DCI to determine needs and best fit, agency or IC
   - Project goes live
   - Depending on scope of project a kick-off call with designer/agency may be set up
   - Estimate provided (must be signed and returned with GL# to begin)

2. Creative Brief Intake & Estimating

3. Estimate Approval & Timelines

4. Creative Development & Approval

5. Closeout

6. Deployment & Followup

INITIATION/SCOPING

IDEATION/EXECUTION

DELIVERY

- DCI guides creative and approval process from 1st round through final deliverables
- Upon completion, assets delivered
- DCI will also archive for future access
- If print is required, DCI works alongside printers to establish print specs and delivery schedule
How to Launch a Project

It all begins within the IEEE Brand Experience website

For use by staff and volunteers:

- Submit your request
- DCI reviews and follows up

Under “Contact” tab, go to: “Creative Contact Form”

or reach out to creative@ieee.org
The Creative Brief

WHERE’S THE BRIEF?
Importance of the Creative Brief

Clients and agencies are typically not in agreement on whether clients provide clear assignment briefings to agencies...

According to an Association of National Advertisers report, agencies and their clients are less than satisfied with how the creative process works.*

*Enhancing Client/Agency Relationships — 2015 ANA Survey Research Executive Summary
Both clients and agencies agree on the importance of better briefing to foster a more productive client/agency relationship.

Did You Know?
- Only 27% of agencies believe clients do a good job in this area.
- 0% and zero percent strongly agree!

However, 58 percent of clients think they perform well on briefs!

The brief is the foundation of the agency work product.

A good brief is a good investment for all.

Bad briefs can negatively impact results, undermine agencies and cost clients both time and money.

According to an Association of National Advertisers report, agencies and their clients are less than satisfied with how the creative process works.*

*Enhancing Client/Agency Relationships — 2015 ANA Survey Research Executive Summary
Tips for Providing the Best Creative Brief

Three Key Elements

- **Summarize the Objectives**
  - Input stakeholder’s desired outcomes and end goals
  - Strategic value to IEEE

- **Define Your Target Audience**
  - i.e., member grade, demographic, age, gender

- **Execution Specifics**
  - Deliverables, deadlines

Simpler project requests may not require a full brief — ask your Creative Project Manager.
Lack of actionable feedback can impact your project negatively

**Did You Know?**

- Only 36% of agencies agree that the client approval process works well.
- Only 2% and only 2 percent fully agree.
- The survey showed that 58 percent of clients agree that the approval process works well.

**OUR GOAL:**

Timely, clear, cohesive, consolidated and actionable feedback gets the best results and saves time and money.

*Enhancing Client/Agency Relationships — 2015 ANA Survey Research Executive Summary*
Project Feedback

Lack of actionable feedback can impact your project negatively

Did You Know?

Only 36% of agencies agree that the client approval process works well.

Only 2% and only 2 percent fully agree.

The survey showed that 58 percent of clients agree that the approval process works well.

Complexities of the IEEE organization can pose many challenges in this area.

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IEEE
Examples of Feedback
And tips for providing better feedback....

- Be clear
- Be concise
- Be descriptive
- Be disciplined
- Put it in writing
- Try to convey what works, what doesn’t, and why
- Consolidate feedback
- Okay to use post-its or “comments” in Acrobat to mark up edits for more clarity
- Ask if a call to discuss feedback is easier
- Make sure to note if it is approved “as is”
- Remember to copy the Teamwork alias/DCI!

“We don’t like it”

“It does not have the impact we hoped.”

“Our logo looks too small. It is getting lost on the page.”

“This does a great job showing the benefits of our product. Approved”

“The stakeholders like option A and C with the colors of B.”

*More on How to Give Insightful Feedback on Creative
Closeout

A few billing details

- If scope is exceeded due to additional client rounds or beyond agreed deliverables, a revised quote or new estimate for work will be supplied for signature and GL.
- Final 50% of project is billed in next monthly billing cycle once job is complete.
- Jobs that are begun and completed within the same month will be invoiced in total.
- DCI will process invoices with those agencies and ICs for whom we have established POs and submit to AP.
- AP will initiate an internal Journal Transfer (JT), charging back against your associated GL account #.
- End-of-year billing rules have been established by Legal and Sourcing.
Your Opinion Is Important to Us

Agency and IC Performance Evaluation Criteria

✓ Research and Planning
✓ Strategic Development
✓ Account Service and Management
✓ Creative Practices
✓ Production Practices
✓ Media Practices
✓ Deliverables
✓ Accountability
✓ Finance and Admin

We appreciate your feedback via satisfaction surveys, project post-mortem meetings and touchpoints

I've invited you to fill out a form:

Ask the Digital & Creative Innovations (DCI) team about Q4 creative needs now

Looking for concepts for collateral, print, or web design? How about interactive design, HTML email marketing, or advertising design and copy? Or maybe you just need a creative or brand consultation to get you started.

Don’t wait until it’s too late. Get in touch with the Digital & Creative Innovations team today. We will give you the guidance you need to make the most of your business goals and budgets dollars within a timeline that makes sense.

Please note: As year-end approaches, we cannot guarantee project completion for 2016 billing, particularly with larger efforts. The later the project is identified, the more likely rush rates may apply or higher-priced agency resources will be needed to deliver for 2016. We are happy to work with you to assess what is doable by year-end with your budget!
Some Final Points and Reminders

Streamlining your project process includes:

- Per Legal and Sourcing, estimates must be signed, including corresponding GL# to begin any project.

- A Teamwork email alias should be included in any correspondence pertaining to your project. (DCI supplied)
  Example: 347509_427138@messages.teamwork.com

- Early reminder: Year-end projects should be requested with ample time for proper follow-through and must be completed before year-end in order to bill within that year.

- Remember, we are here to manage your project through the process and will help with any of your questions. Please ask if you need assistance!
Coming Up Next This Year...

More information and workshops...

- 3rd Annual Jr. Brand Ambassadors Workshop on Take Your Child to Work Day – April 26, 2018

- We’ll announce our next Digital Summit dates soon!

- More to come on workshops with information on our processes and new additions to the IEEE Brand Experience site

- Do you have an idea for a workshop? Let us know!
Any questions?
Thank you for joining us!

Please respond to our survey on this event so we can better serve you in future sessions.

CONTACT US AT: digital-innovations@ieee.org | creative@ieee.org | branding@ieee.org