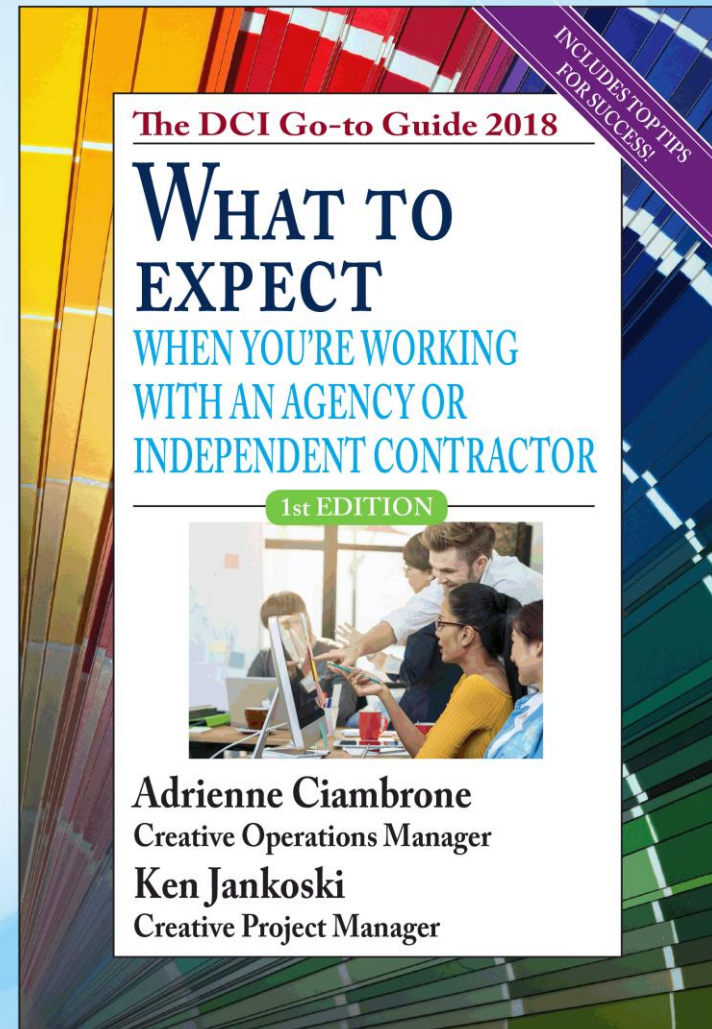


What to Expect When You're Working With an Agency or Independent Contractor

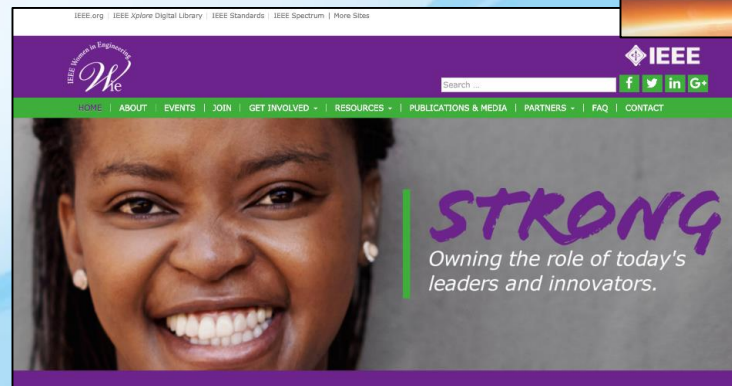
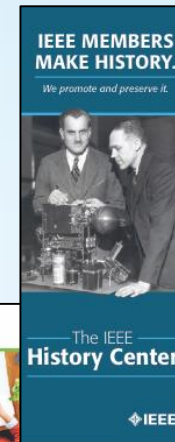
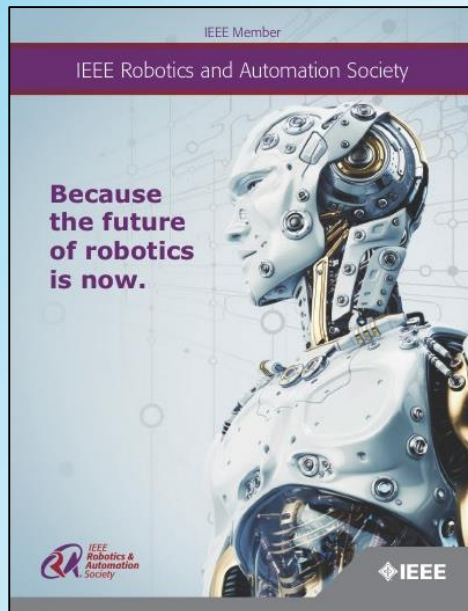
*Brought to you by the
DCI Creative Design Team*



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

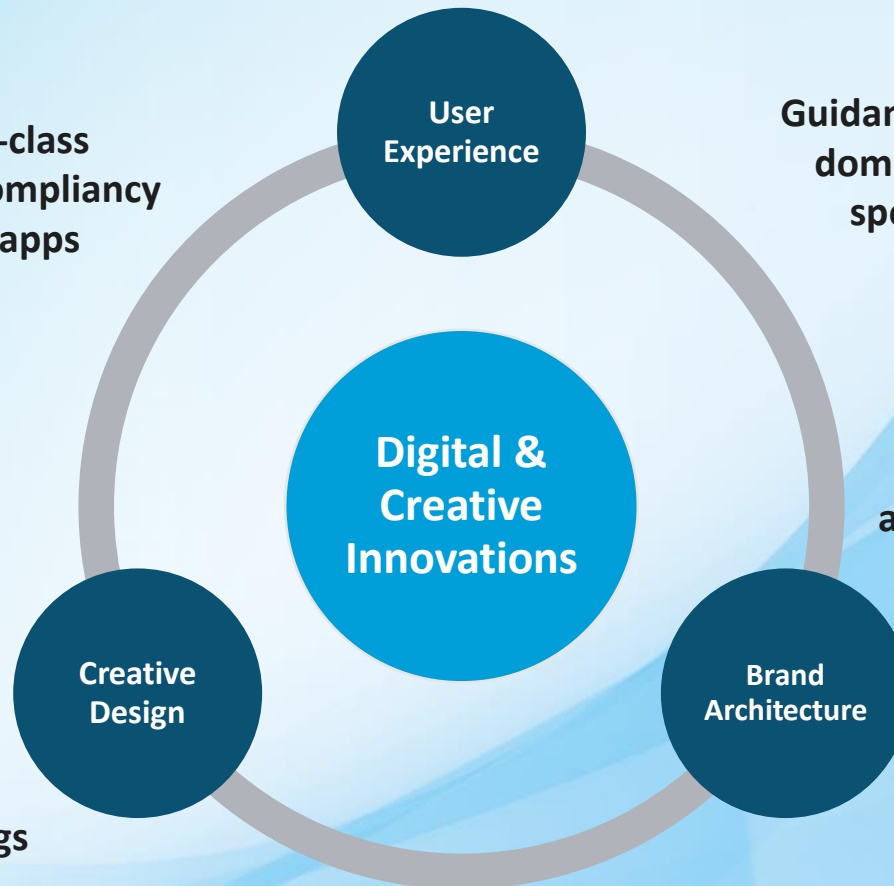


Digital & Creative Innovations (DCI)

Who we are

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

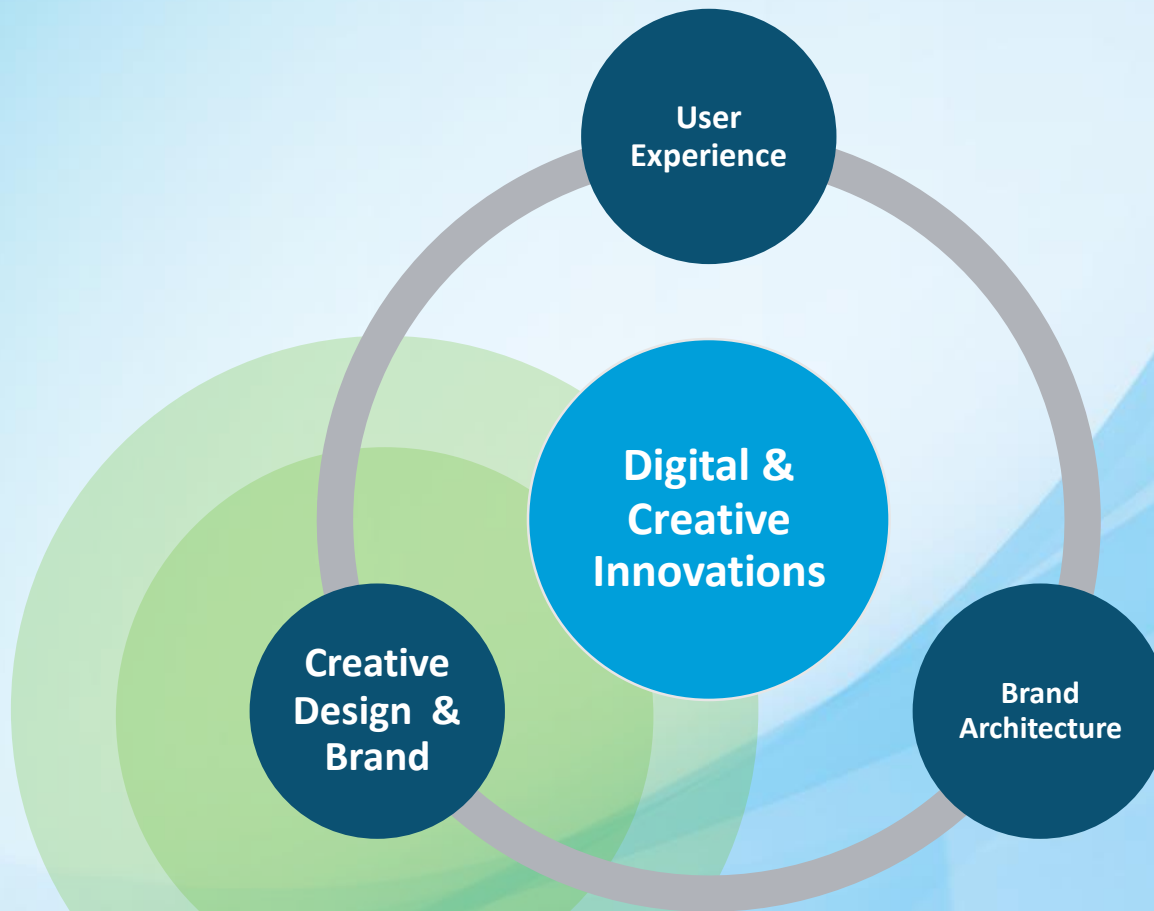
Oversight of external agencies and contractors, ensuring brand compliant creative results and cost savings



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

Digital & Creative Innovations (DCI)

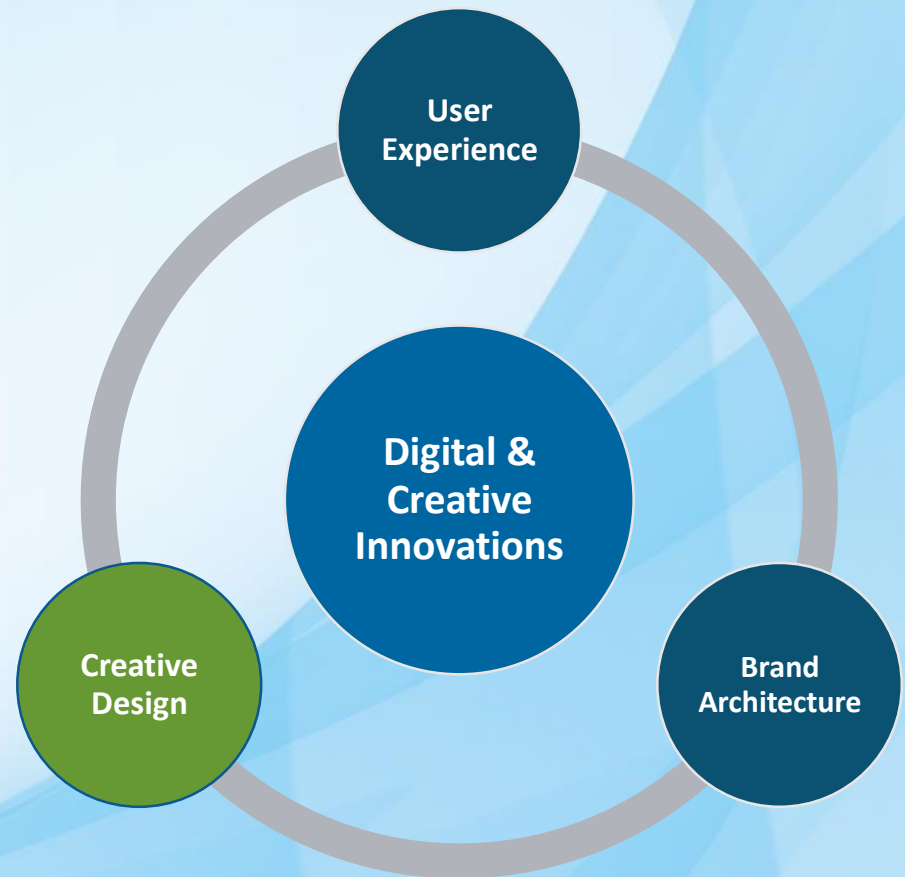


creative@ieee.org | branding@ieee.org

Creative Design & Brand

Our Support Level

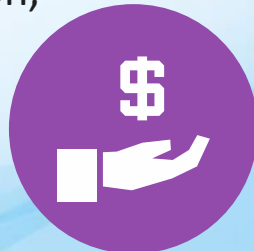
- Project **management** and brand oversight
- Creative **consultation** and brand guidance
- **Proactive** outreach
- **Visual identity** assessment
- **Brand communications** and education



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

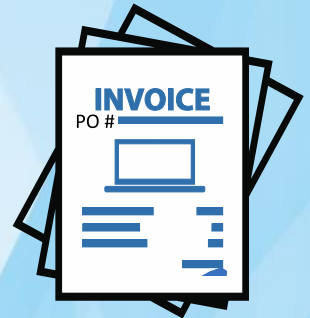


Our Value Add – “One IEEE”

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

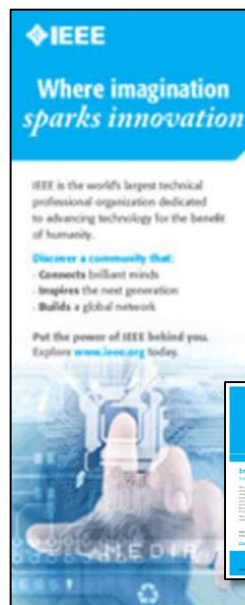
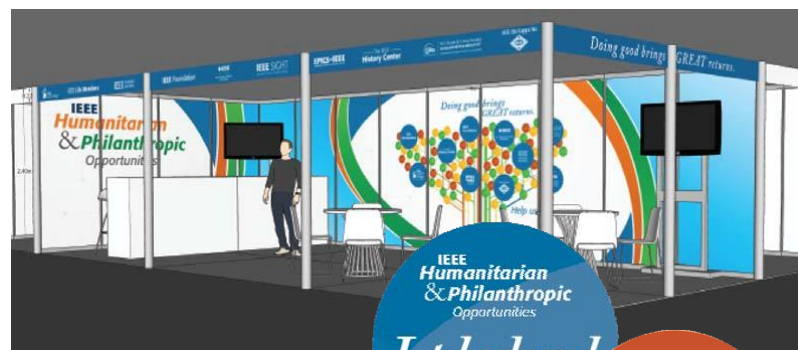
Creative Design Model

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



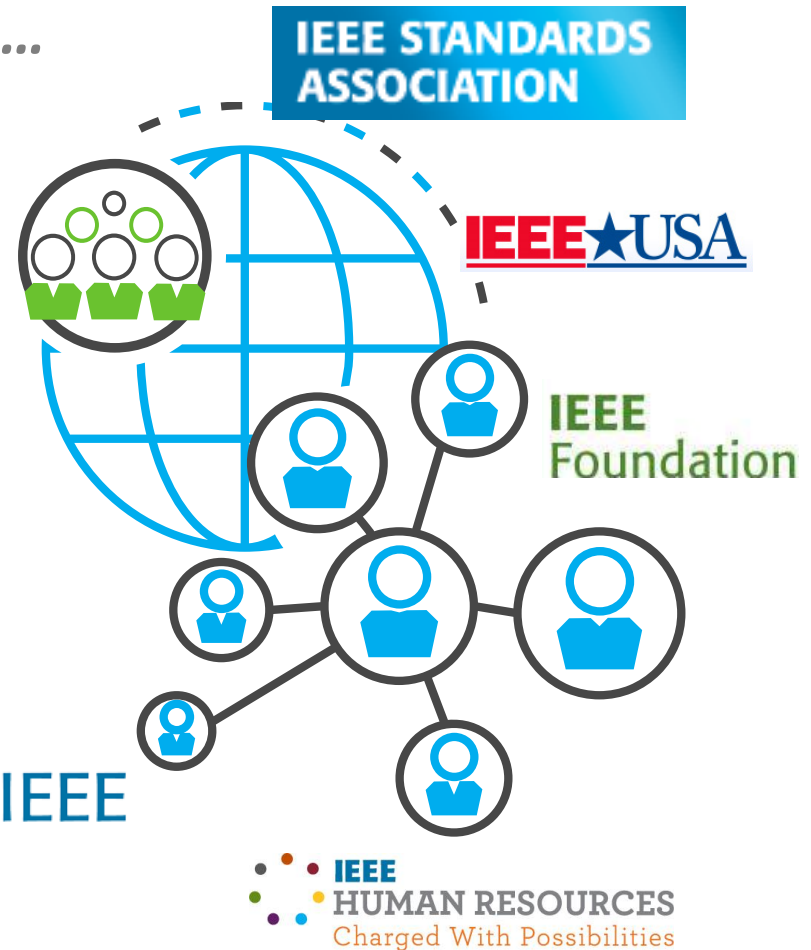
Who are our partners?

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

InsideIEEE



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



BNO A creative agency

csidercommunications
strategic thinking + creative insight



**THOMAS
DUHAMEL**



Production Vendors



Brand oversight & creative expertise



think**dm2**

interface guru.

CISNEROS DESIGN

berlin rosen



kivvit

RUBY WINDOW



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 copy writers, 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:

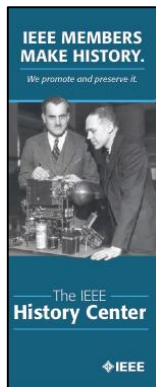
- ▶ Overall larger projects with aggressive timelines
- ▶ Large marketing and branding campaigns
- ▶ Extensive copywriting with creative components
- ▶ New concepts & special design
- ▶ Rebranding
- ▶ Sub-brand logos & brand guidelines
- ▶ E-blast campaigns
- ▶ Site design & development

Agency Portfolio Highlights

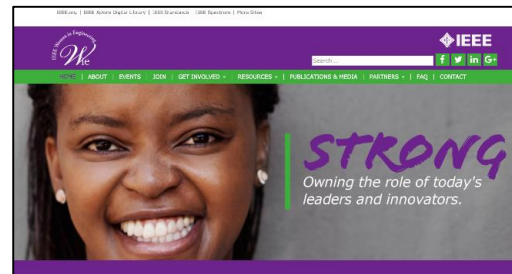
Brand campaigns and beyond



EPICS IN **IEEE**
Engineering Projects In Community Service



IEEE LearningNetwork



IEEE Collabratec

IEEE blended learning PROGRAM

IEEE rebooting COMPUTING



When an IC is a fit

Examples of why we work with an independent contractor



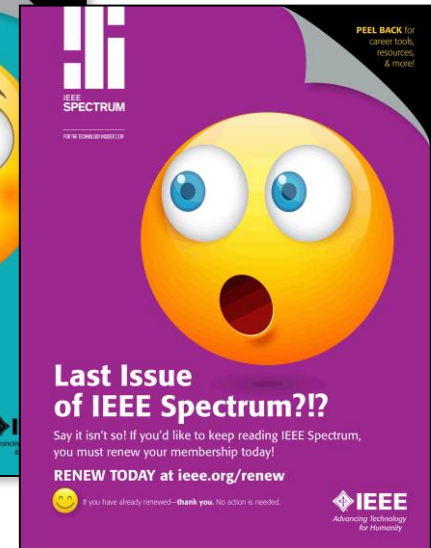
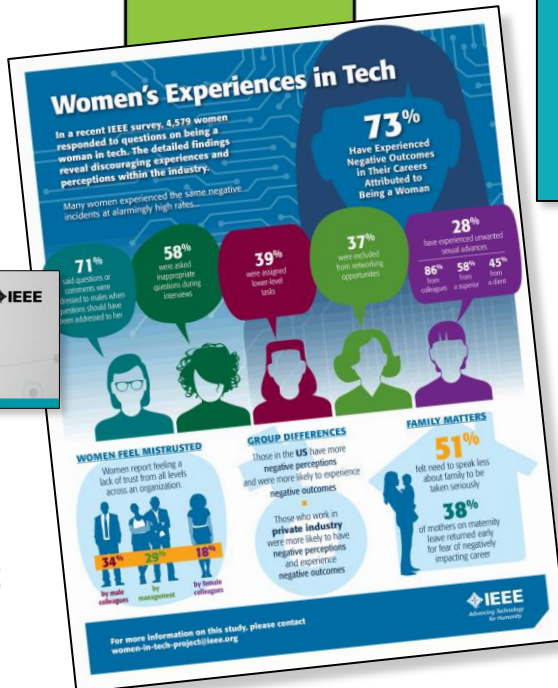
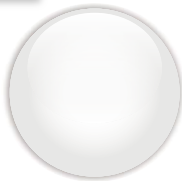
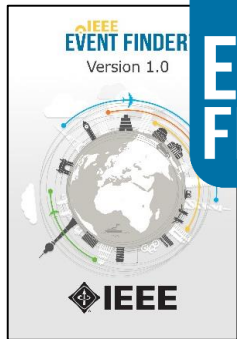
***We are continuously researching and assessing suitability of potential contractors – let us know if you have a reliable source familiar with IEEE.**

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

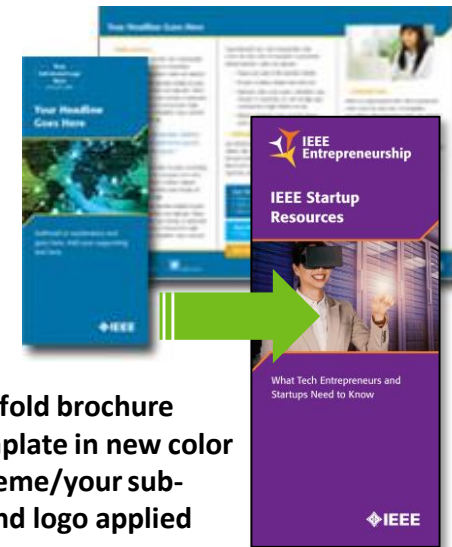


When to use a template

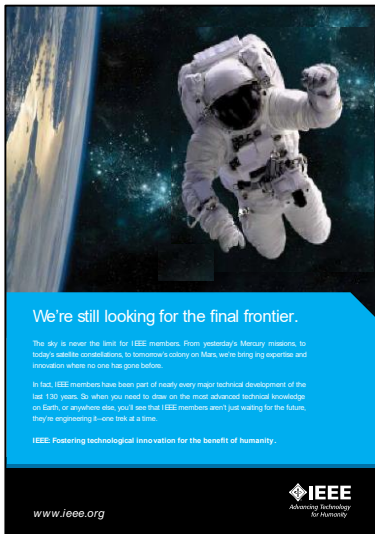
No Budget? Look for Templates First

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

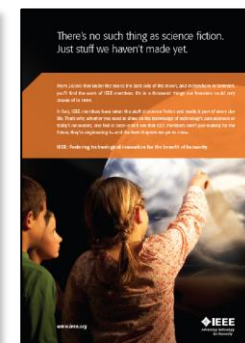
- ▶ **“Pre-branded” but still versatile**
 - 1 Use “as is” or edit yourself
 - 2 Agency/IC can revise/edit via Creative Team
 - 3 Online ordering portal for edits and production



>Trifold brochure template in new color scheme/your sub-brand logo applied



^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

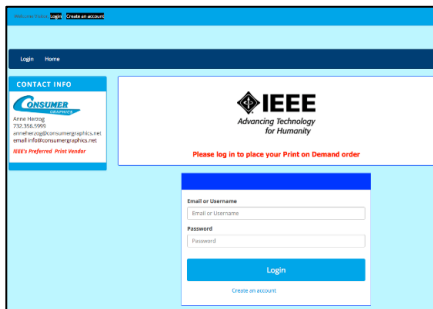


Consumer Graphics Portal

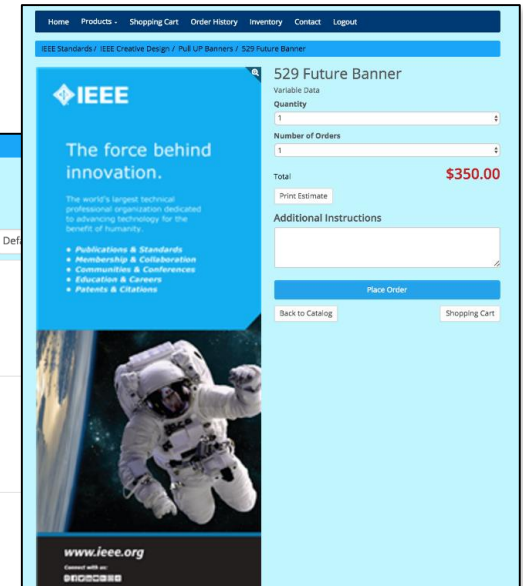
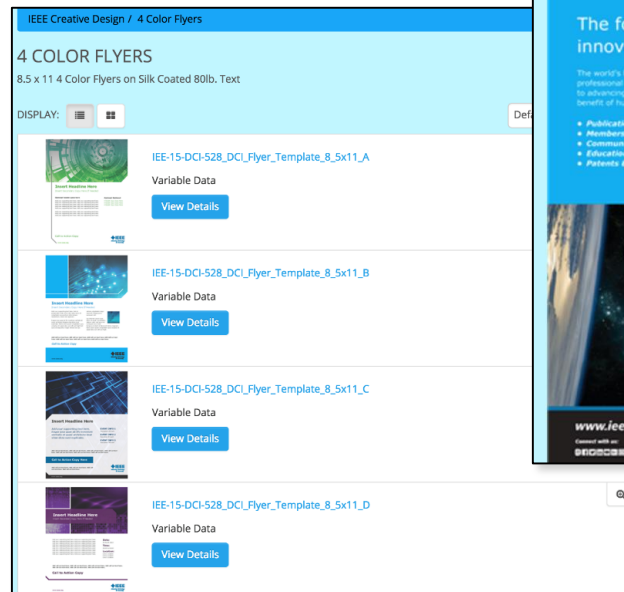
Contact us for more information and to gain access

► 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 trifold, table covers, hanging banners



^ Email creative@ieee.org
for login credentials for
Consumer Graphics portal



- 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



Go-To Processes

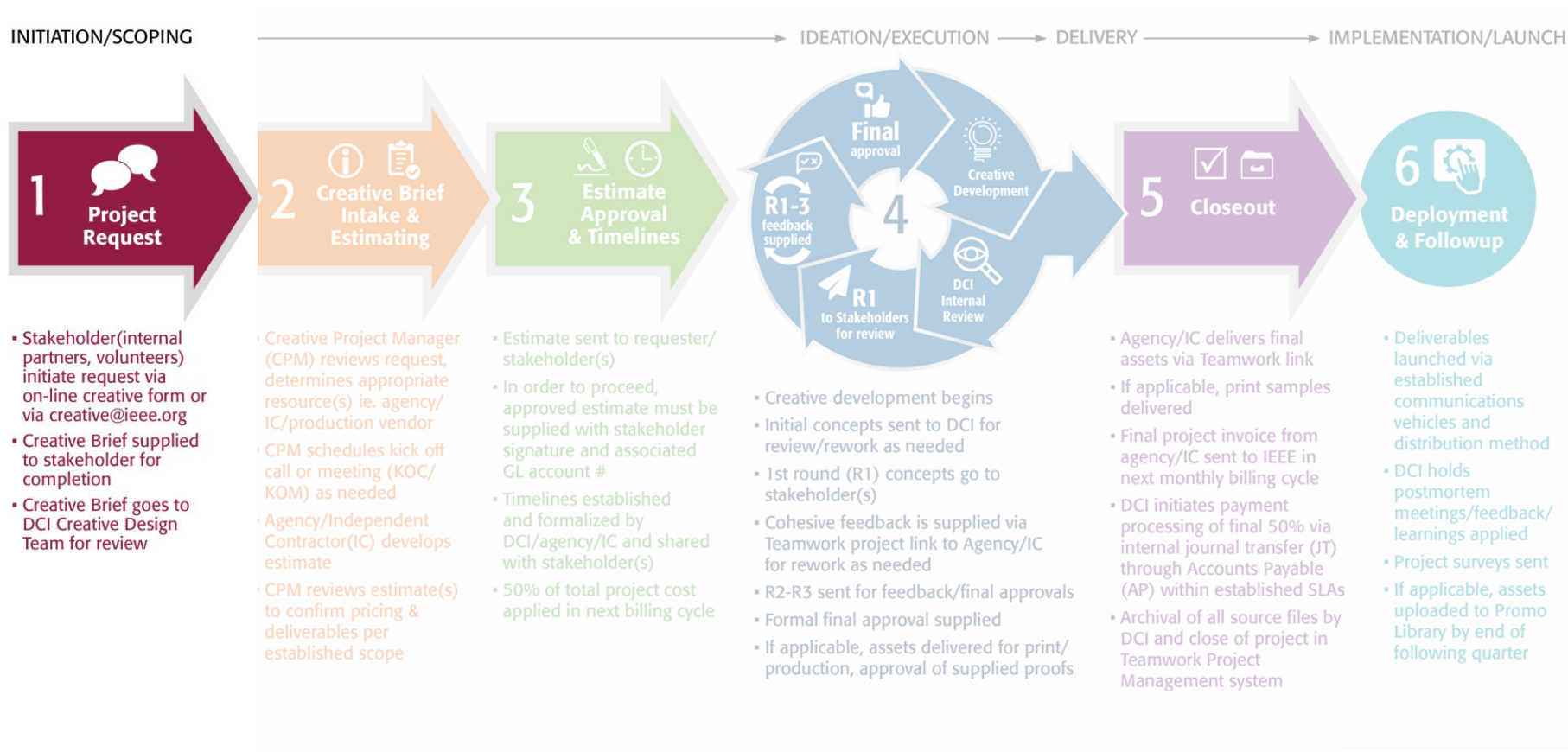
Top 6 Tips and Need-to-Knows

- ▶ 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



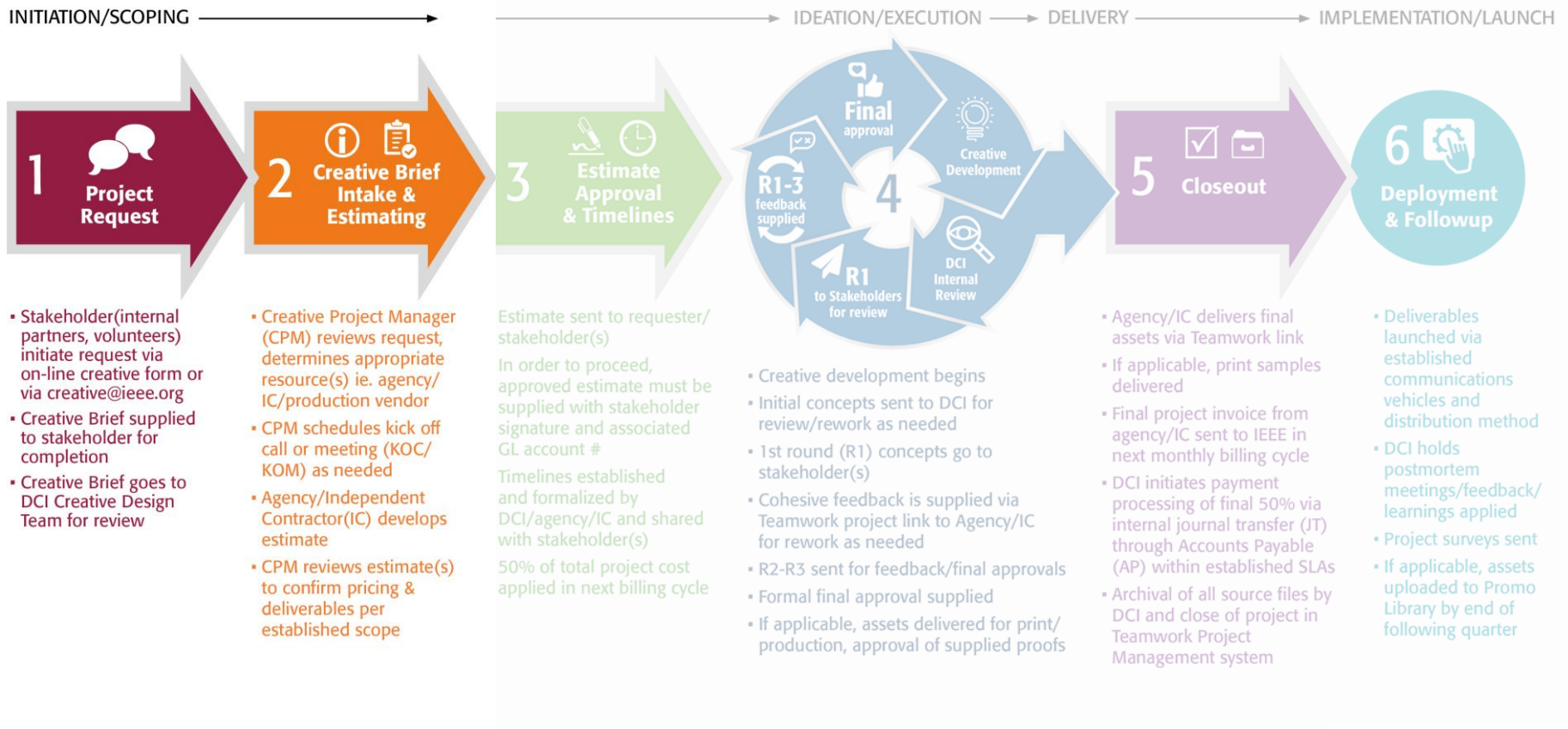
Typical Project Life-Cycle

Creative Project Workflow



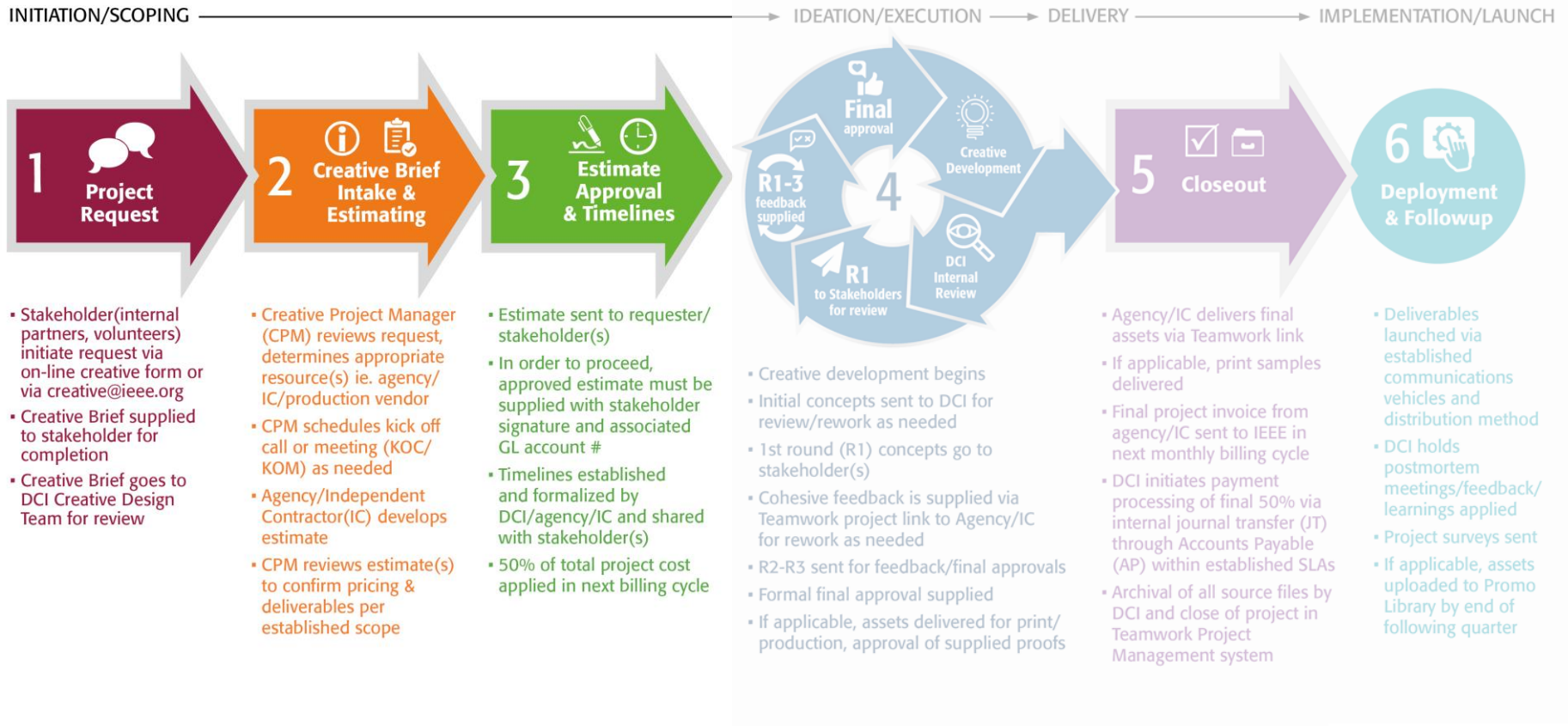
Typical Project Life-Cycle

Creative Project Workflow



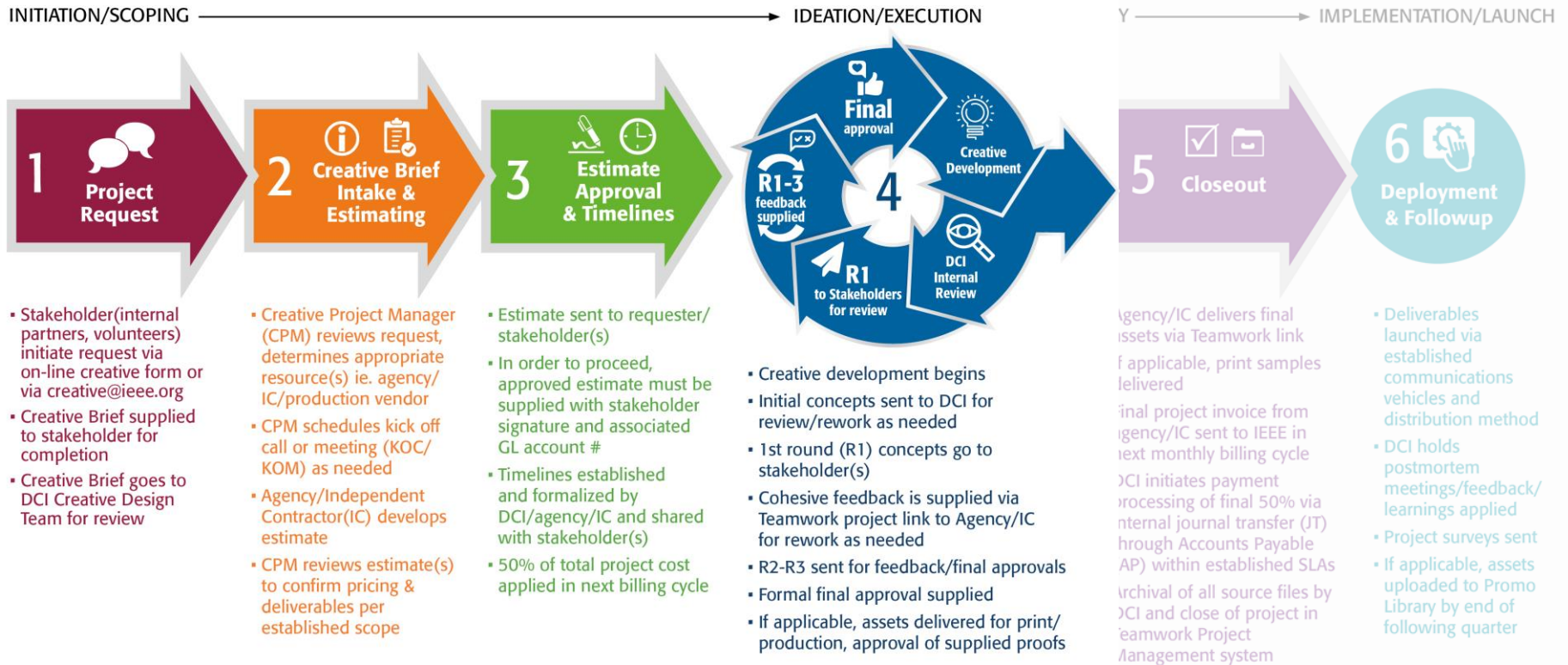
Typical Project Life-Cycle

Creative Project Workflow



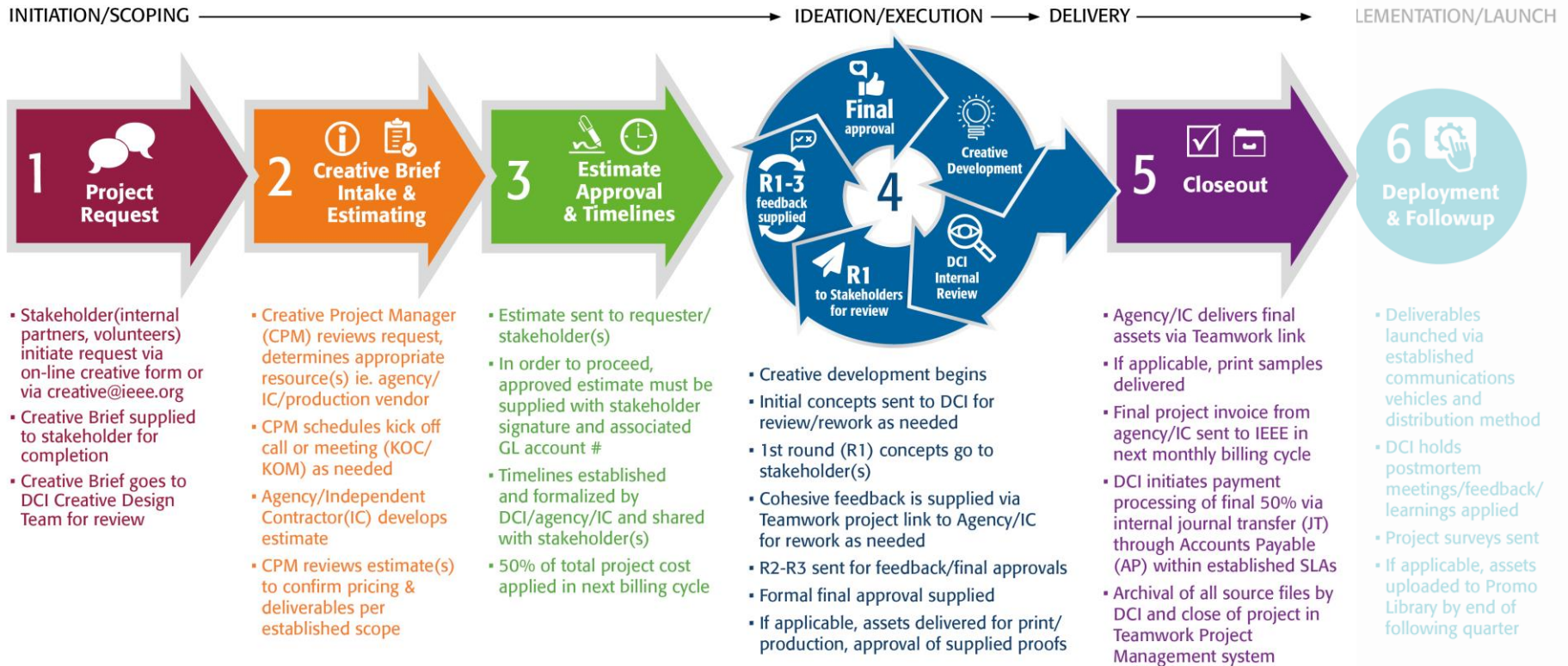
Typical Project Life-Cycle

Creative Project Workflow



Typical Project Life-Cycle

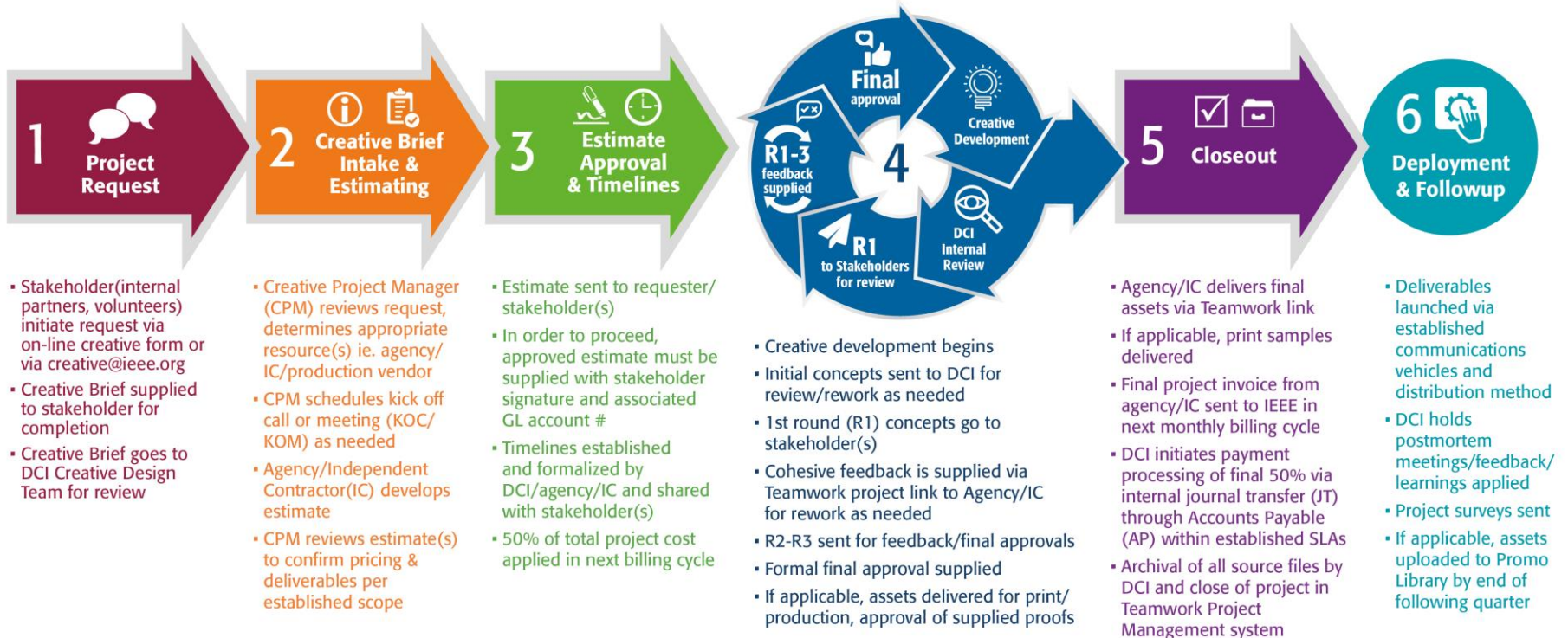
Creative Project Workflow



Typical Project Life-Cycle

Creative Project Workflow

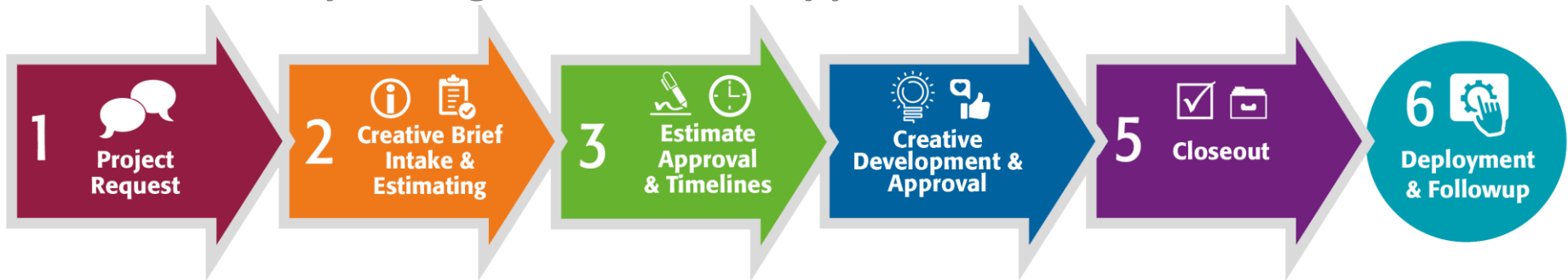
INITIATION/SCOPING → IDEATION/EXECUTION → DELIVERY → IMPLEMENTATION/LAUNCH



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



INITIATION/SCOPING

- 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)

IDEATION/EXECUTION

- DCI guides creative and approval process from 1st round through final deliverables

DELIVERY

- 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

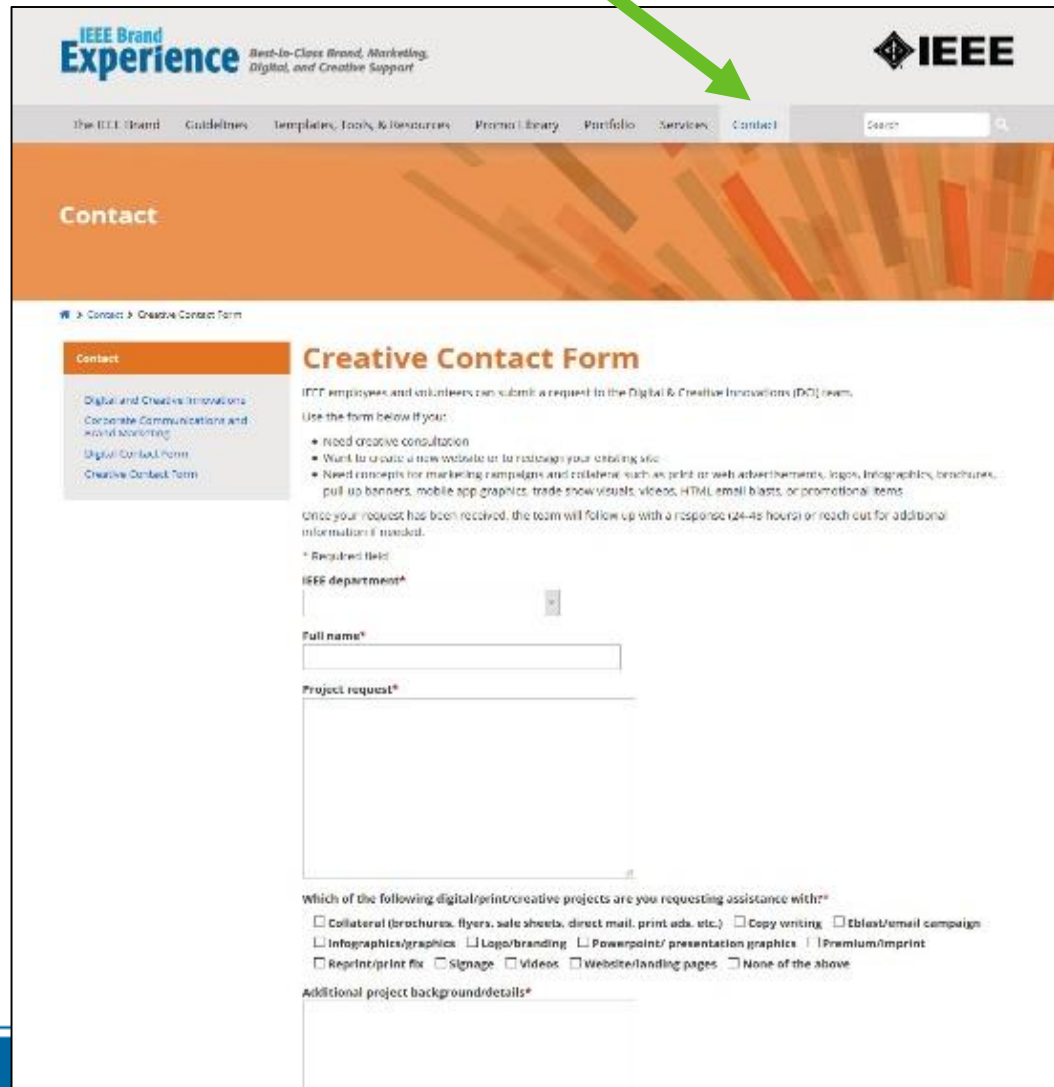
It all begins within the IEEE Brand Experience website

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 screenshot shows the IEEE Brand Experience website. A green arrow points from the text "It all begins within the IEEE Brand Experience website" to the "Contact" tab in the navigation menu. The "Contact" tab is highlighted, and the "Creative Contact Form" is displayed. The form includes a sidebar with links to "Digital and Creative Innovations", "Corporate Communications and Brand Marketing", "Digital Contact Form", and "Creative Contact Form". The main content area is titled "Creative Contact Form" and contains instructions for submitting a request, a list of project types, and a section for additional project background details.

IEEE Brand Experience Best-in-Class Brand, Marketing, Digital, and Creative Support

IEEE

The IEEE Brand | Guidelines | Templates, Tools, & Resources | Project Library | Portfolio | Services | **Contact** | Search

Contact

W > Contact > Creative Contact Form

Creative Contact Form

IEEE employees and volunteers can submit a request in the Digital & Creative Innovations (DCI) team. Use the form below if you:

- Need creative consultation
- Want to create a new website or to redesign your existing site
- Need concepts for marketing campaigns and collateral such as print or web advertisements, logos, infographics, brochures, pull up banners, mobile app graphics, trade show visuals, videos, HTML email blasts, or promotional items

Once your request has been received, the team will follow up with a response (24-48 hours) or reach out for additional information if needed.

* Required field

IEEE department*

Full name*

Project request*

Which of the following digital/print/creative projects are you requesting assistance with?*

☐ Collateral (brochures, flyers, sale sheets, direct mail, print ads, etc.) ☐ Copy writing ☐ Email campaign

☐ Infographics/graphics ☐ Logo/branding ☐ Powerpoint/ presentation graphics ☐ Premium/imprint

☐ Reprint/print fix ☐ Signage ☐ Videos ☐ Website/landing pages ☐ None of the above

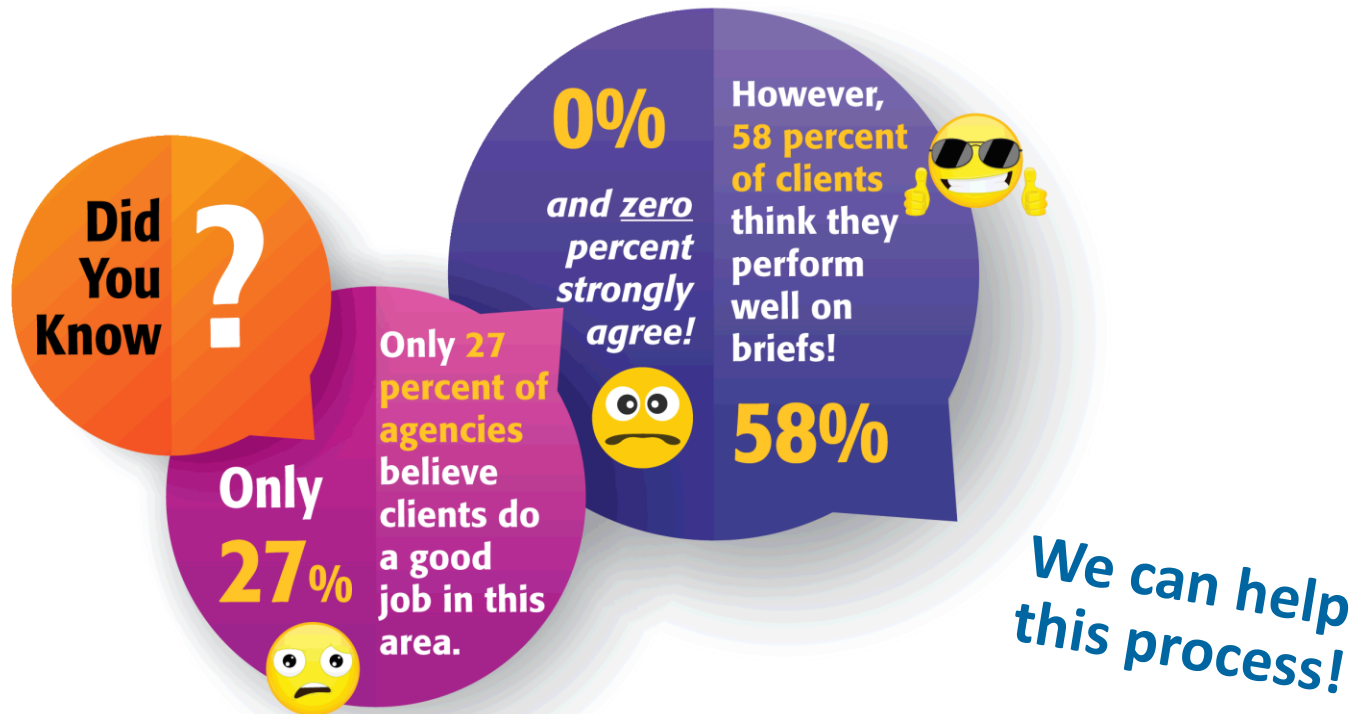
Additional project background/details*

The Creative Brief



Importance of the Creative Brief

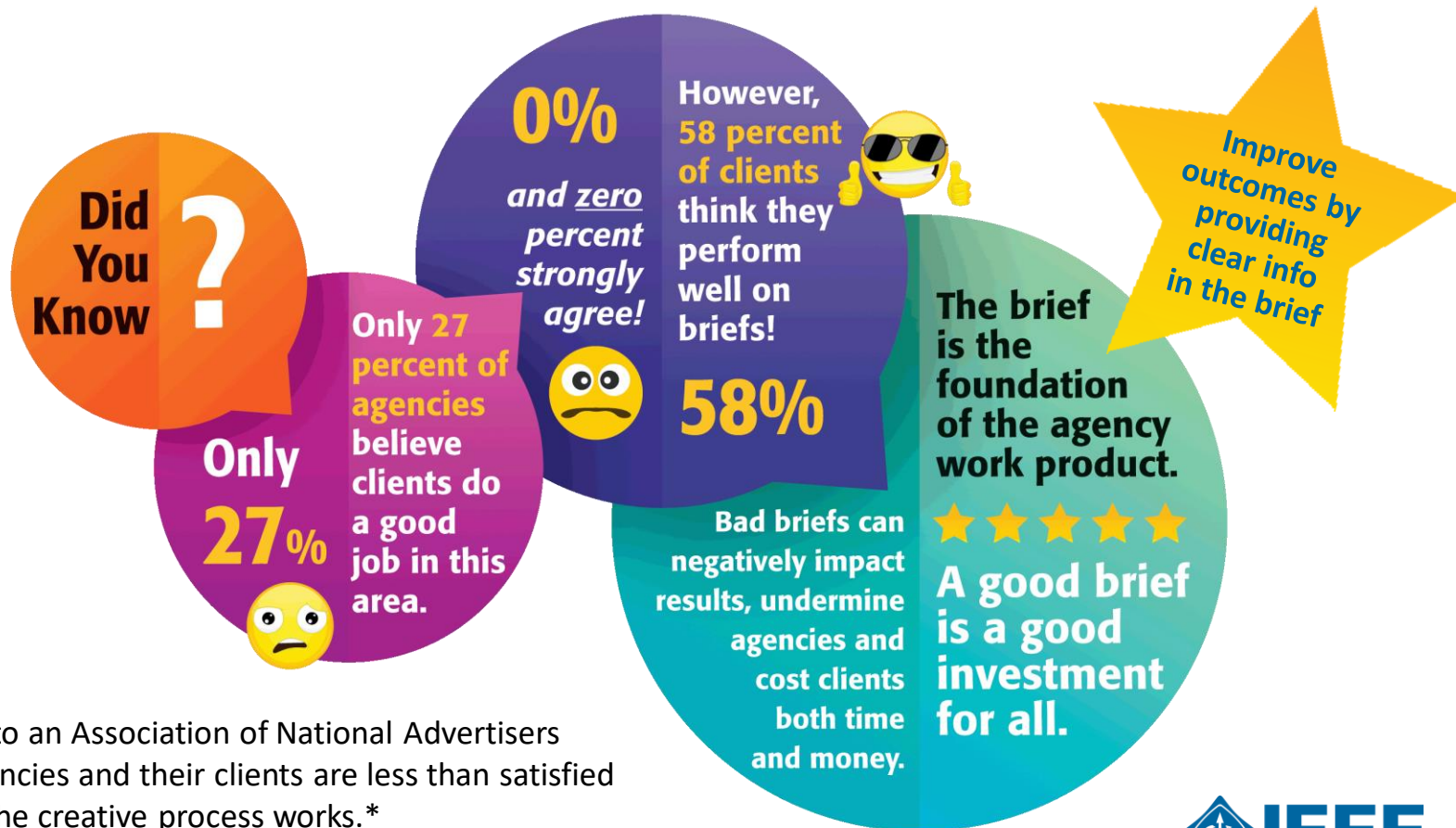
Clients and agencies are typically not in agreement on whether clients provide clear assignment briefings to agencies...



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

The Creative Brief Is a Key Driver for Success

Both clients and agencies agree on the importance of better briefing to foster a more productive client/agency relationship.



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

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

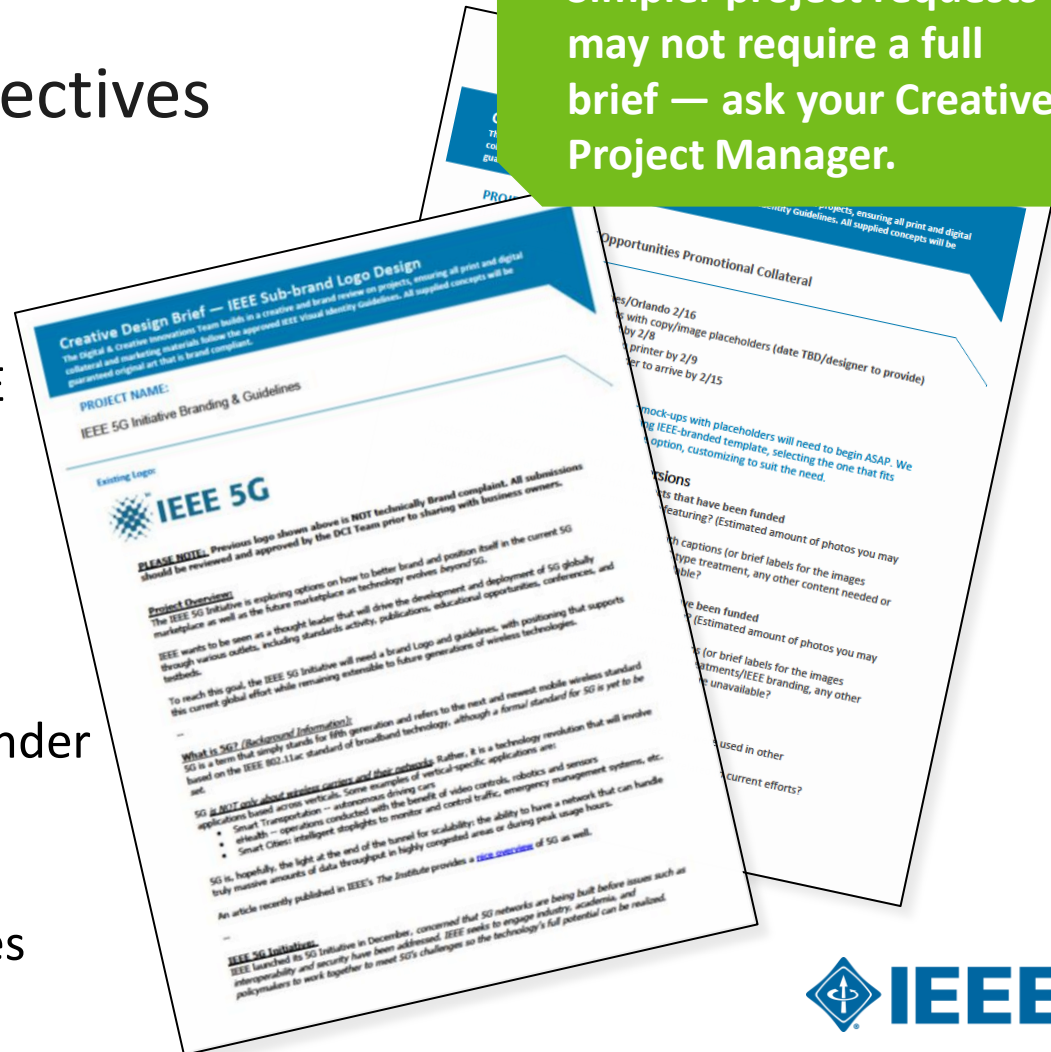
➤ Define Your Target Audience

- i.e., member grade, demographic, age, gender

➤ Execution Specifics

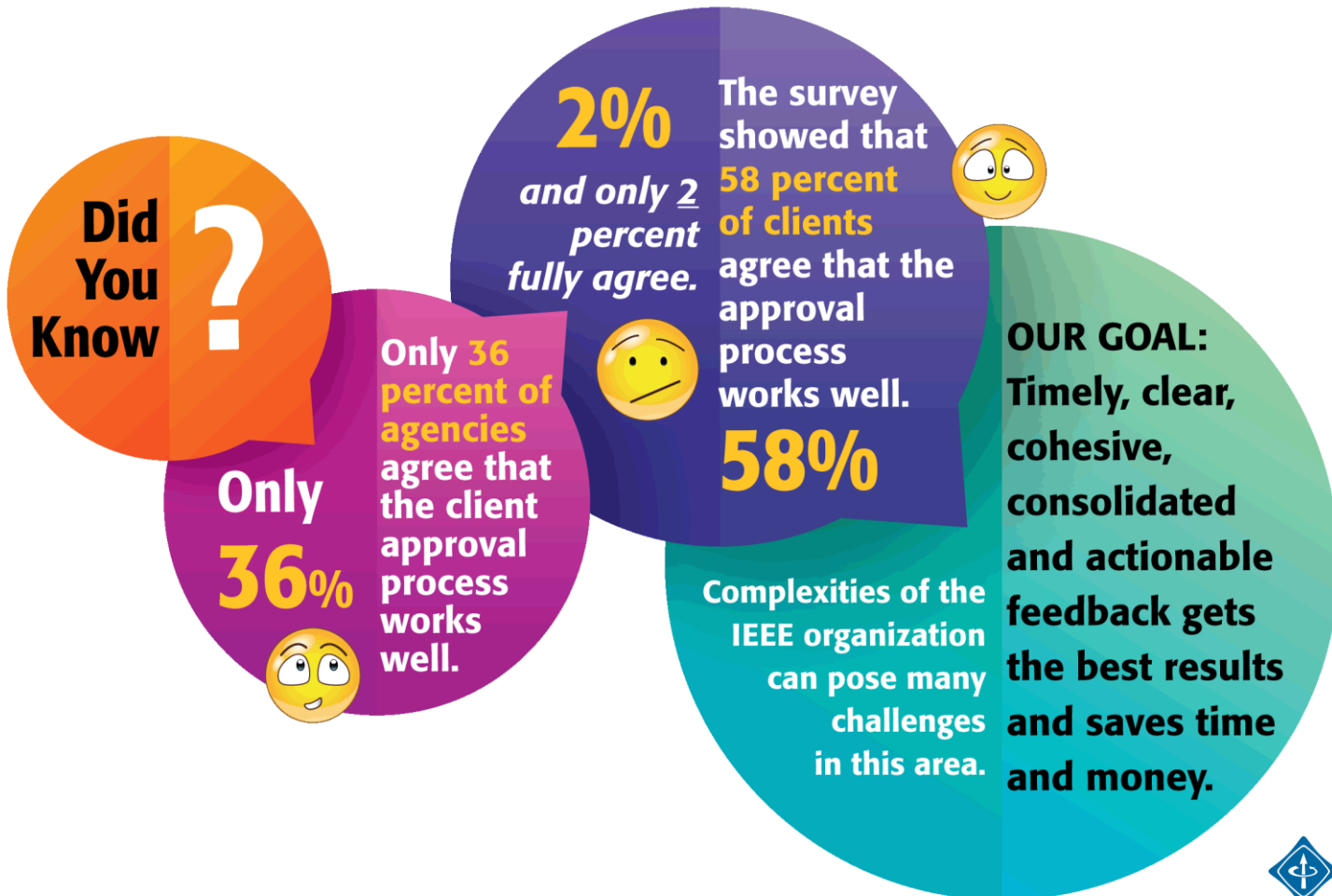
- Deliverables, deadlines

Simpler project requests may not require a full brief — ask your Creative Project Manager.



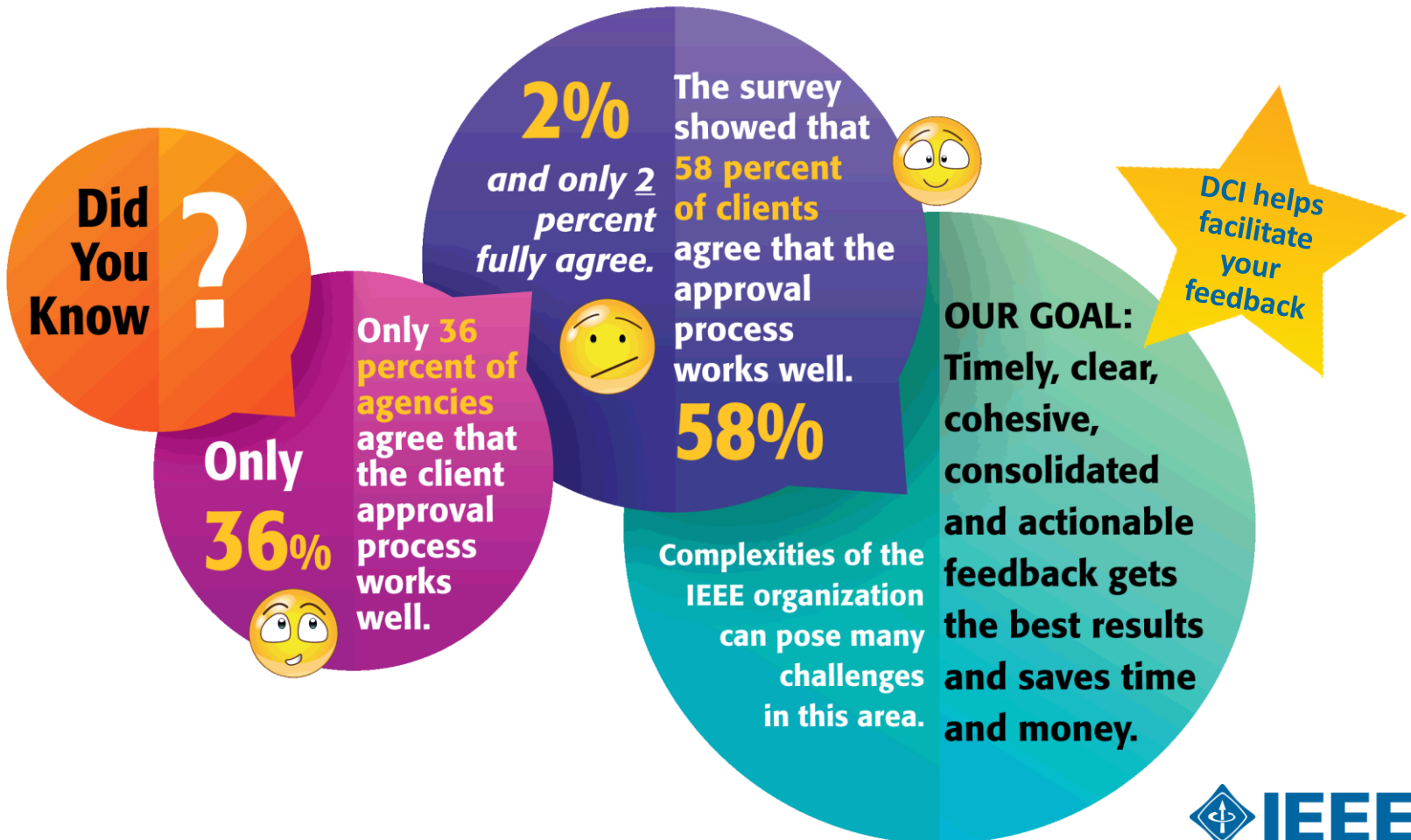
Project Feedback

Lack of actionable feedback can impact your project negatively



Project Feedback

Lack of actionable feedback can impact your project negatively



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."

^Better, but try to clarify why.

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

^Yay!

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

^Good—this is actionable!

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

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 solicit 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!

FILL OUT FORM



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**

IEEE Brand Experience



- ▶ 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

