



IT CLICKS. BUSINESS AT THE SPEED OF A CLICK.

WORKING WITH A CREATIVE AGENCY



The following overview will help you become familiar with creative processes and help you to understand your role in ensuring the success of your projects.

The Seven Steps to a Successful Project

1.

STEP 1 – ASSIGN A PROJECT MANAGER

Assign one company staff member as the decision maker and contact person for working with a creative agency. This person should be prepared to be available when needed, be ready to make decisions in a timely manner and be responsible for getting the necessary approvals from within your company.

2.

STEP 2 – CREATIVE BRIEF

It is important to establish clear direction at the onset of a project. This ensures that everyone has a common understanding of what is to be accomplished.

The best way to do this is to work with your creative agency's Account Executive to establish clear objectives and expectations on the outcome of your project. The Account Executive (AE) should ask you a series of questions so that they can create a design brief for the project. A design brief is important in defining project goals and objectives, identifying



Table of Contents

1. [Step 1 – Assign a Project Manager](#)
2. [Step 2 – Creative Brief](#)
3. [Step 3 – Initial Research](#)
4. [Step 4 – Concept Development & Refinement](#)
5. [Step 5 – Copywriting](#)
6. [Step 6 – Design Production](#)
7. [Step 7 – Final Production](#)

audiences and key messages, establishing a budget, setting a completion date, and identifying the desired outcome and how it will be measured. This should be given to the creative team and used as a reference throughout the design process.

Working closely and clearly communicating with your Account Executive is the best way to ensure your project's success. You must articulate your project objectives, establish processes and ensure that the creative agency has access to what it needs from you to complete the project on time and within budget.

**TIP**

Upon project initiation you should provide the agency with a listing of your competitors, along with any competitor and company communications you may have.

3.**STEP 3 – INITIAL RESEARCH**

An agency's job is to create strategic communications that will establish a distinct position for your company, your products and services. In order to do this effectively, they should work to understand your business and objectives. Their initial research should include a review of your competitor's and your company's current communications.

4.**STEP 4 – CONCEPT DEVELOPMENT & REFINEMENT**

Generally, an agency will create two distinct creative directions for your project. Upon presentation, you should weigh the merits of the design(s) against your design brief and communicate any refinements needed to your Account Executive.

The agency should refine the concept and present a comprehensive layout (comp) for approval. Before giving approval you should be satisfied with everything that will go into the final product; the overall concept and design style, the typography, the photographic style, paper and colors.

5.**STEP 5 – COPYWRITING**

If your agreement with the creative agency includes copywriting, they should provide you an initial draft of the copy for approval. You should weigh the merits of the copy against your design brief and communicate any refinements needed to your Account Executive. The agency will refine the copy and present a final draft for approval. Before giving approval you should be satisfied that the copy meets the communications objective.

Ideally, any revisions to the copy should be made before being placed into the design layout. Major copy revisions made after placement in the design layout will be more time consuming and may require a change order.

6.

STEP 6 – DESIGN PRODUCTION

This is when it all comes together. Any photography or illustration needed is developed and placed along with the final copy into the design layout.

Upon completion of the layout, your agency should provide you with a final comprehensive layout (comp) for approval. You should obtain any necessary internal approvals, and proof the comp carefully. Any refinements needed should be communicated to your Account Executive.

When you are ready to approve the project, your Account Executive should provide you with a Comp Approval form. It is important to have all your changes made before signing a final Comp Approval. Once the form is signed the project should begin final production preparations.

7.

STEP 7 – FINAL PRODUCTION

The final production phase includes file preparations necessary for either sending out to a printer, uploading to the Web, or creating the final product. Final file preparation processes should begin only after the Comp Approval has been signed – this ensures that the final approved design file is prepped.

Your creative agency should have a final prep, double-check process in place to ensure the highest degree of accuracy with their electronic files. If changes are made after the files are final prepped, the agency should prep and proof the files again to ensure accuracy.

For print jobs, the agency should provide printer's proofs for you to review. This is the final opportunity to make any changes before the job is printed. Before giving approval you should obtain any necessary internal approvals, and check the proof carefully. Any refinements needed should be communicated to your Account Executive and may require a change order. Once you have approved the proof, the job will be printed.

Your agency should attend all press checks to ensure the quality of your print job.

A COLLABORATIVE EFFORT

The design that you end up with, and the ultimate success of your project, is a joint effort. By following the above steps you will ensure that you are satisfied with both the end product and the process of getting there.