



TEAM BASED PRODUCER PROCESS MODEL

Makr Consulting

HOW THE AGENCY WORKS

Every agency needs a road map.
Use this guide book to build on— to develop your own unique presentation.

This workflow model is for an agency that has producers working together with account managers to lead projects and facilitate teams.

HOW YOU SHOULD WORK.

This is a guide
to show critical paths for completing work.

Process means nothing, if it prevents the creation of great work. Learn to follow the key steps, but also learn when and where to adapt them (even on a project-by-project basis) to ensure that your team creates and produces the best work possible. It's more important to set and establish the rules and expectations for how the work gets done, then the way it gets done. It's okay to be out of your comfort zone, that's where great ideas can form and develop.

PRACTICE ISN'T ALWAYS PERFECT.

At the core of the creative agency is an understanding that you make stuff. Sometimes its out of the box coolness, sometimes its the norm.

At the core of the creative agency is an understanding that you make stuff, you get your hands dirty and you step out of your comfort zone in order to make things happen. This document may look tidy, and for the most part you will be surprised how often you follow most of the steps. However, that doesn't mean you shouldn't collaborate with others in new or unique ways or add/lose steps to accomplish a task. Creating great work requires the whole team to work together.

Remember, solving creative problems isn't always a linear process (it can be very iterative at times). Following a path helps you to check off the boxes — helping to make sure that when things do go off track you are still headed in the right direction.

TEACH WANTED BEHAVIORS, AGENCY VALUES & PROCESS TOGETHER

No process will cover every project scenario. So how do we know when to use the map or go off the road? When the team shares organization values, they know what behaviors to display to influence good decision making.

In the next few pages, we are going to show some examples of how sharing your agency values will show how employees should exhibit behavior in your firm.

Displaying good behavior that matches your agency's values is important to your sustained growth as an agency and organization. It tells people how they should behave as an individual, as a team and with clients. Develop your own language so employees can model proper behavior in your organization.

The Producer Process

Before you start

Assess the client brief & ask

Avoid risk *during* the project, by assessing risk *before* starting the project.

Assess the project, the risks & the real client need.

Every project is worthy of having the agency review a potential client project. However, it's up to the team to decide if the project is a good fit for the agency.

To help make a decision, I suggest using a "Project Back-grounder," that lists out all of the questions needed to determine the SWOT risks of a particular project. A group in the agency (hopefully the potential team that would work on the project like an account lead, a project lead, creative lead, media lead, etc.) should review the risks as a group to determine if the project is right for the agency.

Discuss the strengths, weakness, opportunities and potential risks of the project. Once the group decides if the project is a go, you then inform

the client the best way to approach the project (before you scope) —be strategic about a client's ask. Your job is to be a partner, as well as a marketing and creative guide to your client. This may mean that a project as it is scoped or even envisioned by the client may not be the proper project, step or marketing approach that you feel is right to undertake.

As a creative firm, you should be a partner in formulating what projects you should take on. Otherwise you risk being used and viewed as a production partner not a marketing, strategic or creative partner.

01

PROJECT BACKGROUNDER

Develop a clear plan for a project...

by asking questions up front.

What is it & why should I do it?

A Project Backgrounder is a list of questions that you ask the client at the beginning of a project. Use backgrounders to help you remember the key information you need in order to scope a project or to perform a SWOT. Asking questions up front will help your team, to determine the size of the project, the size of the team, the need for external resources, and if the project needs a certain level of strategic or creative thinking.

Requires some dialogue with the client and both the account and producer leads. Multidisciplinary the views the better for helping to initially scope the project. Plan for some time to interact and fill out in collaboration, try not to scope a project without starting with and completing a backgrounder. Use the backgrounder as a tool for marketing, communication objects, and technical needs.



PROJECT BACKGROUNDER

How to use it:

The project backgrounder is a document that you can customize on to build your own. Here are only a few typical questions:

Be prepared: Get your facts and figures in place before you do a scope of work.

Be self-critical and ready to follow-up with clients: A project backgrounder is only useful if you get real answers!

<p>Project Backgrounder:</p> <p>BASICS</p> <p>Synopsis of what's being asked</p> <p>Budget</p> <p>Timing</p> <p>Who's on the Client's team</p> <p>SCOPE</p> <p>Strategy</p> <p>Creative Development</p> <p>Campaign, project or product?</p> <p>Production</p> <p>Post Production</p> <p>Media Placement</p> <p>STRATEGIC BACKGROUND</p> <p>Project Background</p> <p>What's the Client's background information on this job?</p> <p>What's the client asking the agency to do?</p> <p>What's the competitive environment?</p> <p>Who are the consumers?</p> <p>Strategic Viewpoints</p> <p>What's this specific project's strategy?</p> <p>How does this fit in to the overall strategy (for the client or brand)?</p> <p>What's the relevant research?</p> <p>How does the agency perceive the product/brand?</p> <p>Positioning / Position Statement</p> <p>What's the agency being tasked to do on this job?</p> <p>What's this brand's positioning?</p> <p>How does this fit in with the overall corporate positioning?</p> <p>The Task</p> <p>What are the client's objectives for this project?</p> <p>What are they expecting to accomplish?</p> <p>What are the basics we need to communicate? What are the mandates?</p> <p>The Audience</p> <p>Who are we talking to?</p>	<p>What do the consumers feel about the category, the brand, the product, the company and the competition?</p> <p>What do we want the consumers to feel or perceive at the end of the project?</p> <p>What do we want the consumers to do?</p> <p>Where are we driving the consumers?</p> <p>Why should the audience care about the positioning?</p> <p>How should we communicate with the consumer? Tone, voice.</p> <p>CREATIVE DEVELOPMENT NEEDS</p> <p>Brief Objective (Brand Awareness, Product Sales, etc)</p> <p>Campaign Project Lifespan</p> <p>Target group (Primary/Secondary)</p> <p>Other Brand/Campaign Creative/Strategies/References</p> <p>ASSET/PROJECT PREPARATION</p> <p>Brand Guidelines</p> <p>Graphics/ Logos/ Fonts /Etc.</p> <p>Information Architecture</p> <p>User Flow/User Experience</p> <p>INTERACTIVE:</p> <p>Brand site</p> <p>Standard flash banners</p> <p>Rich media ad units</p> <p>Campaign site</p> <p>Mobile application</p> <p>Online game</p> <p>Social media application</p> <p>Web videos</p> <p>CONTENT:</p> <p>Live Shoot</p> <p>Commercial</p> <p>Short Film</p> <p>Documentary</p> <p>Brand Film</p> <p>Animation</p> <p>Print Ad</p> <p>Physical Product</p>	<p>Experiential</p> <p>Viral</p> <p>TRADITIONAL SPECIFICATIONS:</p> <p>Print Advertising</p> <p>Direct Mail</p> <p>OOH</p> <p>POS</p> <p>NONTRADITIONAL:</p> <p>ASSET GENERATION</p> <p>Design Development (Graphic Design/Illustration)</p> <p>Live Action Shoot (Partner/Director:)</p> <p>Stock Footage/Photography</p> <p>Sound Design</p> <p>Sound Mix</p> <p>3D Rendering</p> <p>2D Rendering/Compositing/ Animation</p> <p>Post-Production of Footage (Offline/Online Edits, Grading, etc)</p> <p>Music: Licensed/Original</p> <p>SCHEDULE</p> <p>Start date</p> <p>Creative review dates (#of revisions, time frame for approvals)</p> <p>Tracking strategy and dates</p> <p>Animation/build dates</p> <p>Alpha delivery</p> <p>QA schedule</p> <p>Approval deadlines (including client/legal reviews)</p> <p>Final delivery date</p> <p>Launch date</p> <p>On Air Date</p> <p>Media Post-launch optimization</p> <p>Source file delivery dates</p> <p>TECHNICAL CONSIDERATIONS</p> <p>Screen Resolution</p> <p>OS Compatibility</p> <p>CPU/Processor Speed Requirements, ETC</p>
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02

PERFORMING A SWOT ANALYSIS

Develop a clear plan for a project...

by evaluating the project, client and agency abilities.

What is it & why should I do it?

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. A **SWOT Analysis** can be carried out for a specific project, evaluating a new client or even parts of a project. This analysis leads to a richer understanding of what the project or organization can offer, the key weaknesses that need to be worked upon in order to succeed, and where to bring in external or internal team partners for assistance.

Completing a SWOT Analysis involves identifying and mapping the internal and external factors that are assisting or hindering you, the client, the team or the agency in achieving your goal. The SWOT Analysis provides a good framework for reviewing current strategies and directions, or even to test an idea while exploring solutions. It is particularly helpful to do a SWOT Analysis before the start of a project.

Requires dialogue with colleagues/peers and team members. (The more multidisciplinary the views the better!) Plan for some time to interact and fill out in collaboration over a day, add to the chart as new information arises.



SWOT ANALYSIS

How to use it:

A SWOT Analysis can be made for an entire organization, but also for individual departments, programs or projects. Complete each of the quadrants in the worksheet according to what you see as your or your organization's strengths and weaknesses as well as the external opportunities and threats that may help or hinder you.

Here are some tips to help you further:

Be prepared: Get your facts and figures in place before you do the analysis.

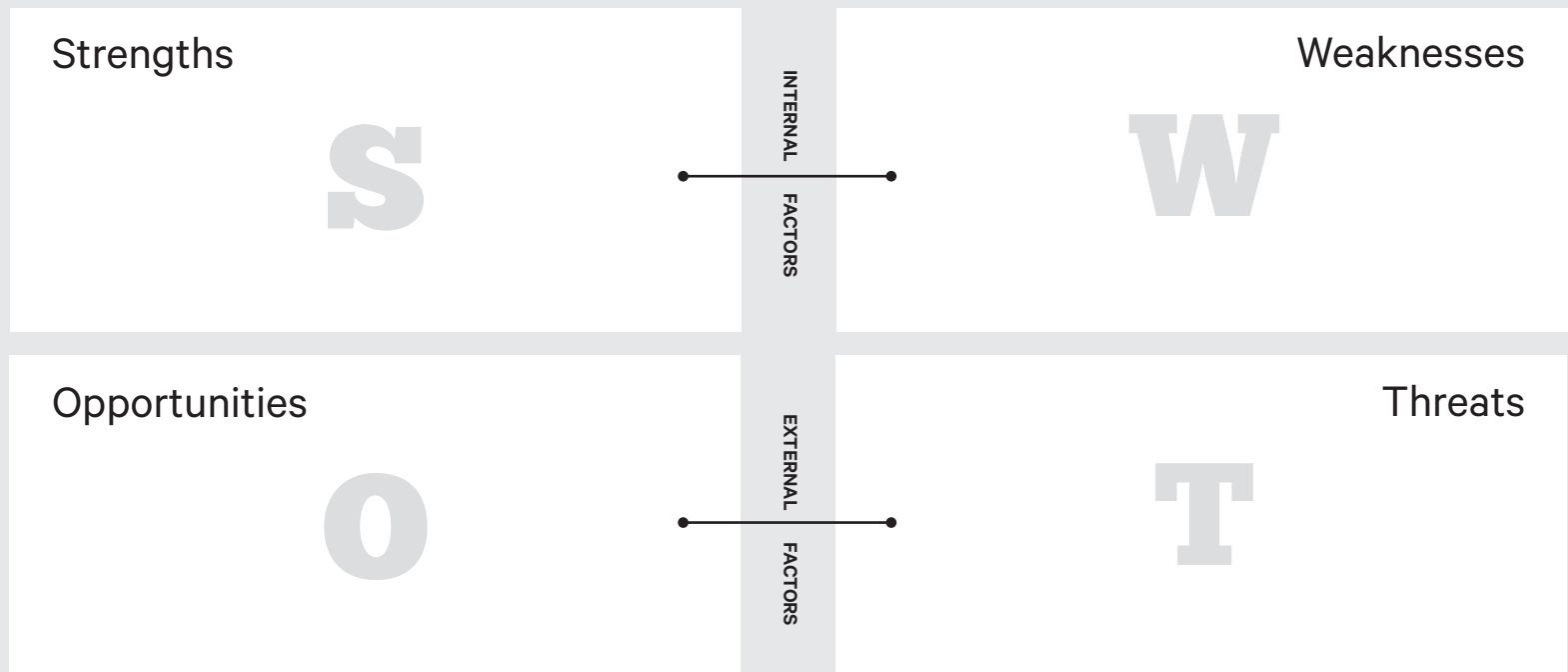
Be self-critical: SWOT Analysis is there to stimulate critical reflection, not just to please yourself and/or others. Be open and don't get defensive. It is normal to have weaknesses as well as strengths, and to

see both threats and opportunities. Sometimes talking about weaknesses or threats can even help you recognize strengths and opportunities.

Test your analysis with others: Include others or maybe even ask an outsider (like your partner organization) to do the same exercise and compare their views with your findings.

Repeat the analysis: As you go on with your work, new learnings and factors are bound to come up. Re-visit the SWOT Analysis to align your work and its course regularly during the project.

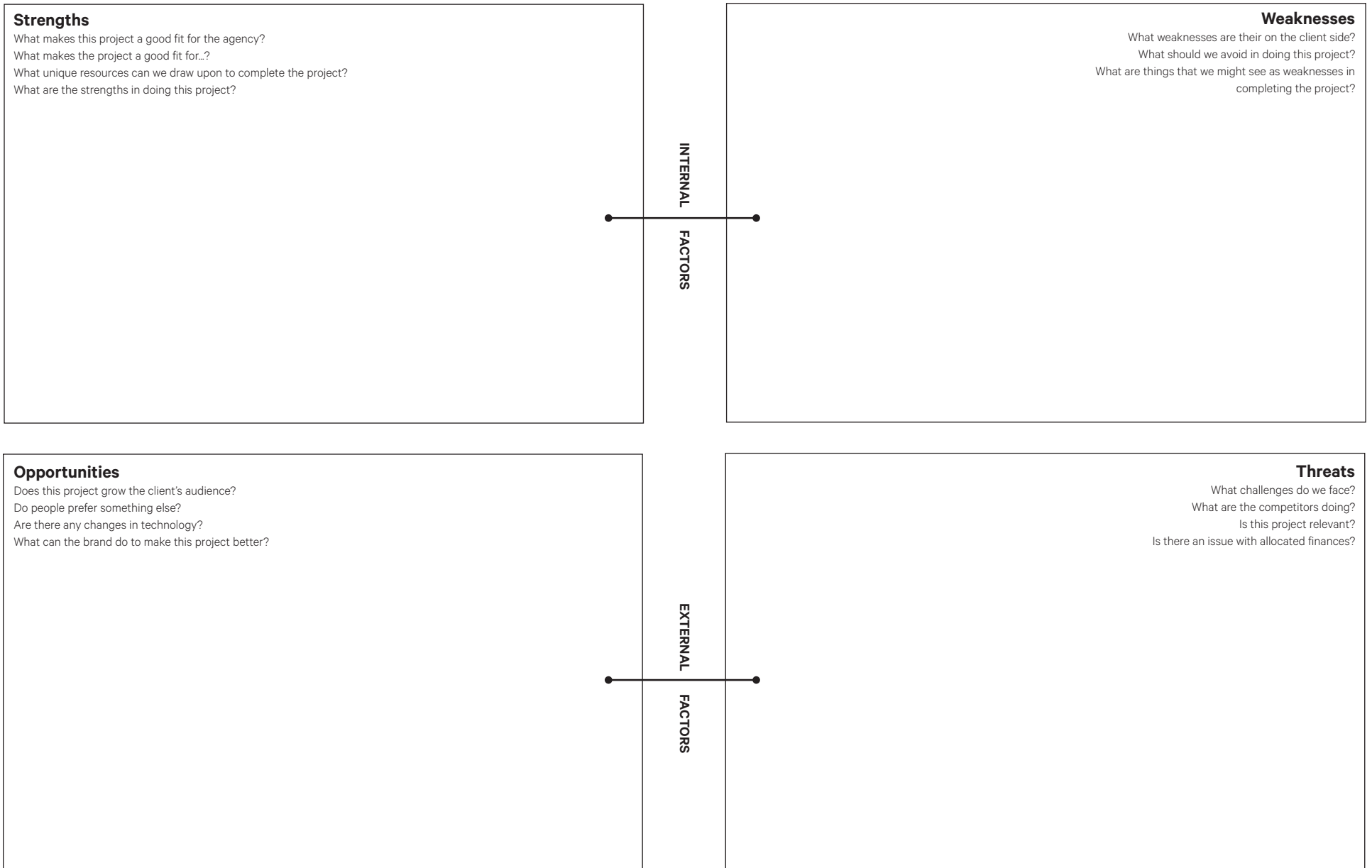
Use it as a guide: Don't rely on SWOT too much – it's a guide that can help scope the way for further development.



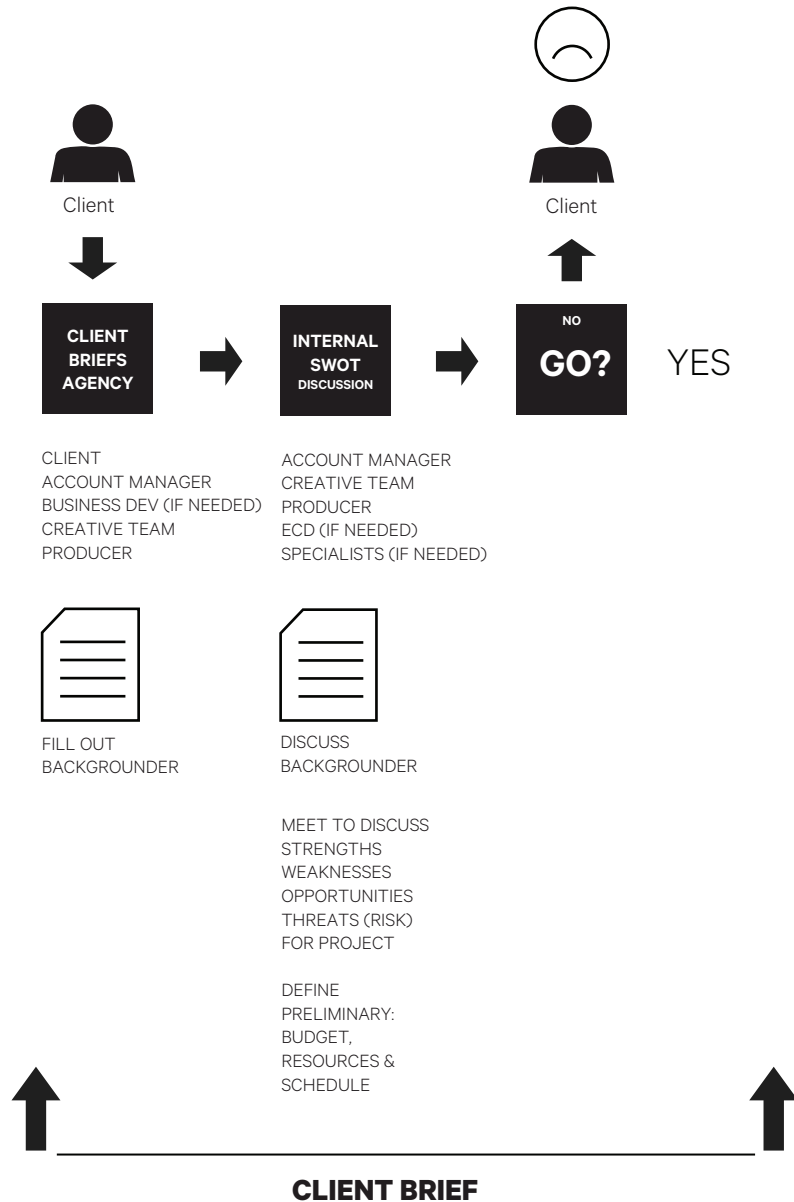
I want to develop a clear plan...

by evaluating how I am doing and what my options are

SWOT Analysis - 02



01 & 02: ASSESSING THE ASK - EVALUATING THE CLIENT BRIEF / RFP / RFI



When we first receive a client ask, it is our *ONE* opportunity to *SHAPE* the ask.

While some projects may be pretty rigid and seem straight forward, others can benefit greatly by shaping the project "ask." This is the place where you can look at options for approaching the ask, the phases of work included in the project, negotiations for timing and budget.

We do this before we invest the time in scoping the project.

03

Define the project & estimate costs.

Defining a project and how much it's going to cost is an important step in the process.

Estimate based on resources needed

This is the time where you assess available resources (who's going to work on the project internally and externally), how long it's going to take, and how much things are going to cost.

You may find yourselves coming up short and still passing on the project, you may also decide at this point to take on the project if it makes sense from a relationship or agency new business standpoint.

So who's the lead in this case? Well it depends. For most if not all projects, the lead is the assigned producer. If it's for a new client, new business or something beyond the norm, an account team member may take the lead.

In all cases, the producer will build the scope-of-work. The producer connects with the team (the specialists) who help to scope out projects, or functional leads who help to assign potential team resources. The producer will also define the production resources, such as the production team or outside resources / services required for the project.

The team lead will build out a schedule (with input from the team) and create an internal cost estimate in the financial system that will be used to estimate the scope of the project.

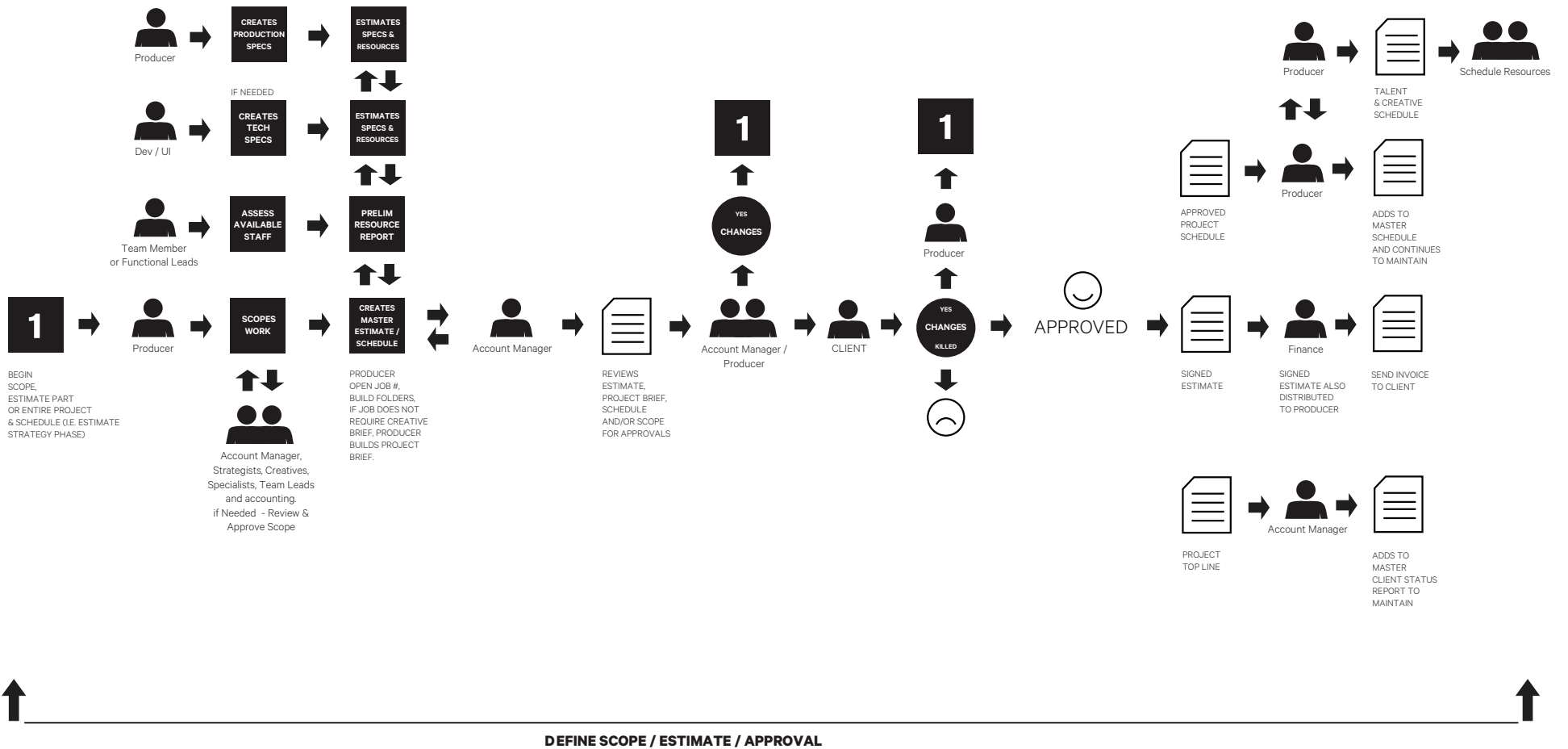
Both the schedule and estimate is then routed and approved by the team lead.

The producer will complete the scope-of-work, together with the account person on the team, they will present to the client.

If needed, modifications are made (and even a second SWOT process).

However, once the project is approved by the client, the assigned producer will set up folders on the server, schedule the work, inform accounting of billing requirements and set a time and date for the project kick-off.

03: BUILDING A SCOPE & ESTIMATING THE PROJECT



04

The Creative Brief— telling the story.

Defining a project and how much it's going to cost is an important step in the process.

Clarity is very important. At a creative shop, what you are going to be tasked to do, is, well, kind of vast. Having some direction will save you from spinning your wheels on an assignment. A clear creative brief spells out the challenges, but also places some limitations so you don't burn through all of the budget before completing the assignment.

For creative or strategic assignments it will fall to the assigned account manager, or your internal strategist to generate a brief. In both cases, the brief gets approved by the client before work begins.

At this point if you are asking yourself, I just got a brief from the client, can't I just run with that?

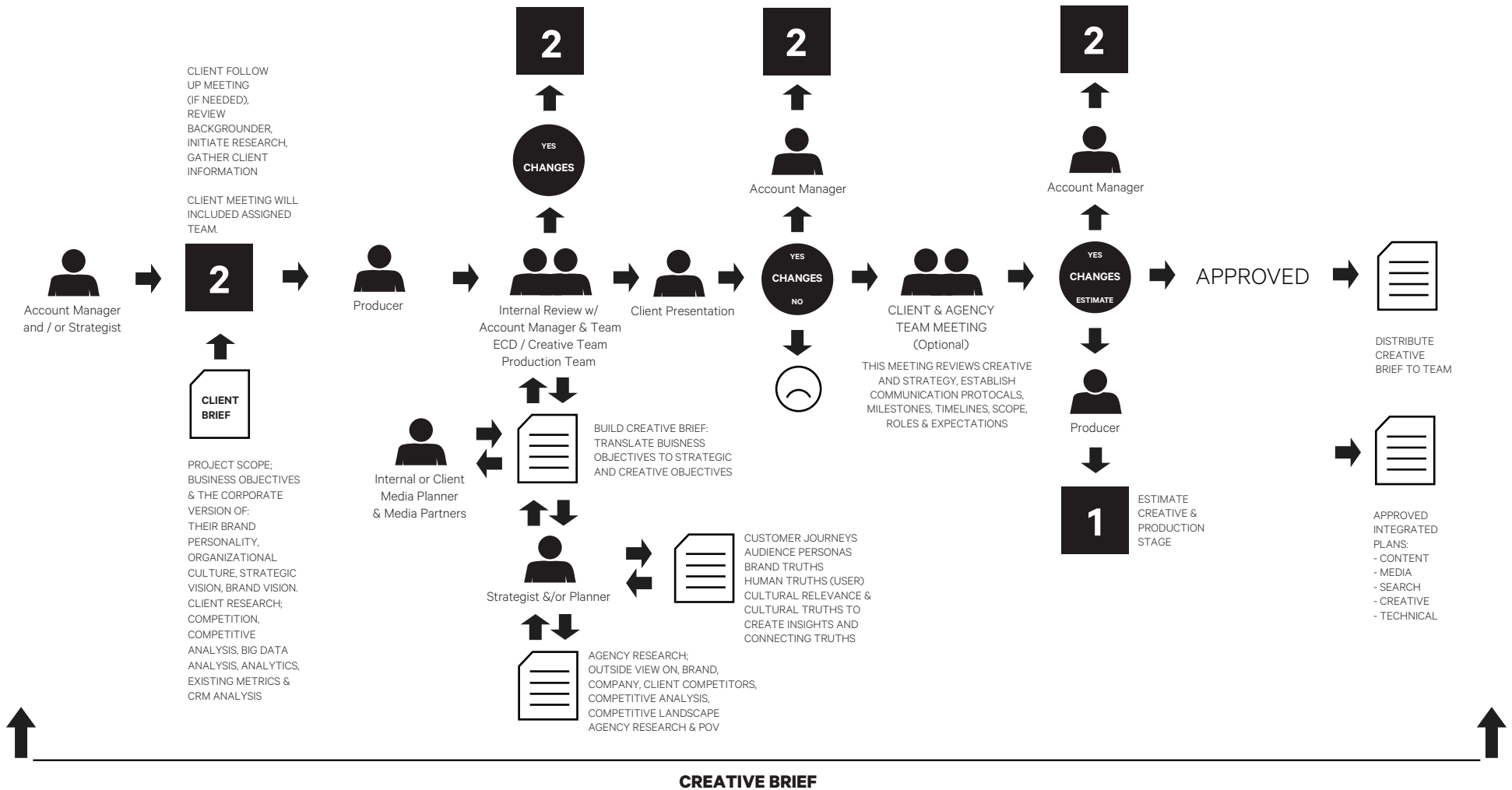
Nope.

In an agency a brief needs to be augmented in a few ways. There may be a whole strategic exercise that either was completed or needs to be completed as part of the creative assignment. You need to add your timing, and your budget information. But more importantly, you need to question the (client) brief itself. Is it the true ask? Or, has the client forgotten something?

Complete the brief and get the client to sign off. Have them approve it, just like you make them approve scopes of work. This helps to prevent scope creep and helps set expectations.

Remember, you are not only storytellers, you are storybuilders. And as storybuilders, its up to you to work from a strong foundation. It's up to you to make sure the agency has a brief that makes sense and the team can build from.

04: BUILDING A CREATIVE BRIEF



04

What's in a Creative Brief?

Defining a project and how much it's going to cost is an important step in the process.

Writing a real creative brief requires a partnership between agency and client, business and creatives. It requires discovery and some strategic thought. It also shouldn't consume the entire ideation phase of a project just to write what you are going to do.

- A brief is suppose to be brief.
- The brief is the what to be done. The creative is the how.
- A brief defines the creative need and scope for a particular project engagement.
- A brief is one the most important parts of the creative process.

The brief process also uncovers the hidden soft-values that your client finds important, helping to build an understanding of what drives your client's brand.

While the questions that are often asked on the creative brief have changed throughout the years, the reasoning for the creation of a brief remains the same;

What is the problem that needs to be solved or the challenge that needs to be overcome?

By answering this question, you will always save time and money – by giving clarity, constraints and defining goals. A good brief leads to better creative work, and it makes remuneration fairer, by setting goals. Fundamentally, writing a creative brief should be considered a part of the discovery phase, as both marketer and creative agency work together to answer the questions posed on the brief to help develop both discovery, insights and ultimately the role of the communication. The brief is also supported and built by the results of research, observations, and previous experimentation or work. While the brief itself is not meant to answer the problem (or project) posed, the information it contains helps to support further discovery which leads to the formation of associational thinking, resulting in the creation of innovative business or creative ideas.

Find out more about building a creative brief at: Adsubculture.com



CREATIVE BRIEF

How to use it:

The creative brief is meant to answer a set of questions that form the constraints of the creative project framed in a way that meets the projects objectives.

They don't always ask the same questions either. The end objective, will always twist the way the basic questions of a brief are asked. For example is the objective of the project to persuade or increase awareness or even general publicity?

The basic questions on a brief are:

Where are we now? This would include the current beliefs and perceptions about a brand, product or service. This may also reveal specific insights in how we can motivate people to take the action the brief desires.

Where do we want to be? This would be the desired change of belief, perception, or creating awareness around a new belief. This could also include what action do you want people to take.

What are we doing to get there? How do we motivate people to take action, or what connection can we make in order to promote a change in a belief. How can we challenge conventions to gain or provoke attention. What's the big idea (or driving idea for the brand that will act as a catalyst for change?

Who do we need to talk to? This would include the target audience(s) or community. From demographics to psychographics, there age and income to interests, lifestyles and habits. We can also ask, where do we need to engage people, how and in what context.

How will we know when we arrived? This defines the desired outcome of what we are going to do, make or build.

Questions to answer may include;

Project Background

What's the background to this job?

What's the client asking the agency to do?

What's the competitive environment?

Who are the consumers?

Strategic Viewpoints

What's this specific project's strategy?

How does this fit in to the overall strategy (for the client or brand)?

What's the relevant research?

How does the agency perceive the product/brand?

Positioning / Position Statement

What's the agency being tasked to do on this job?

What's this brand's positioning?

How does this fit in with the overall corporate positioning?

The Task

What are the client's objectives for this project?

What are they expecting to accomplish?

What are the basics we need to communicate? What are the mandates?

The Audience

Who are we talking to?

What do the consumers feel about the category, the brand, the product, the company and the competition?

What do we want the consumers to feel or perceive at the end of the project?

What do we want the consumers to do?

Where are we driving the consumers?

Why should the audience care about the positioning?

How should we communicate with the consumer? Tone, voice.

The Basics

What's the scope of the media?

What's the budget?

What's the timing?

Who's on the team?

05

Kicking off the project.

Kicking off on the right foot.
Before you fall flat on your face.

By now, I hope you are forming the idea that there many types of projects the agency handles, some that may fall under the larger “creative strategy” umbrella and some that are more production oriented.

Any type of project requires a start up meeting.

For main creative or strategic assignments it will fall to the assigned account manager to set up a meeting with the client. The project manager will set up the meeting with the team internally.

For production job starts, the producer will be the main lead is initiating and holding the job start meeting.

In either case, the account lead is then responsible for following up with the client or the team with a recap of the meeting, next steps.

The producer inconjunction with other team members (including the account manager) with following up with the client in regards to any outstanding issues.

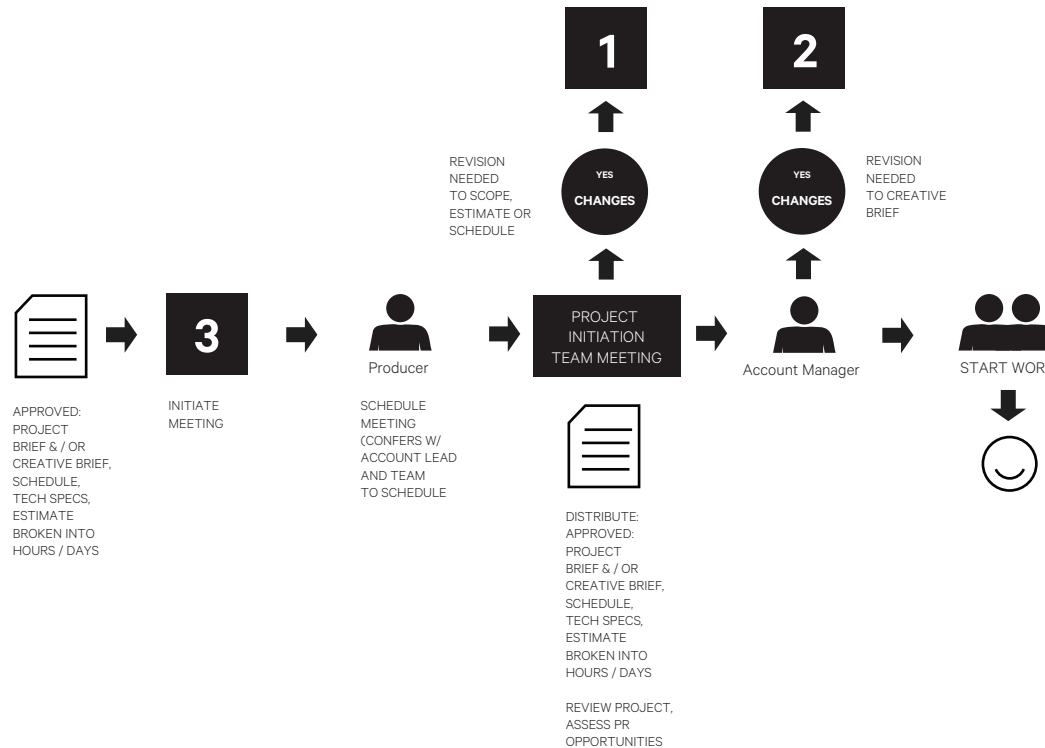
There are THREE common ways to start a project;

Have an internal kick-off meeting and go.

Have an internal meeting first, then a client kick-off meeting.

Have a client kick-off meeting, then an internal kick-off meeting.

05: INTERNAL KICK-OFF MEETING



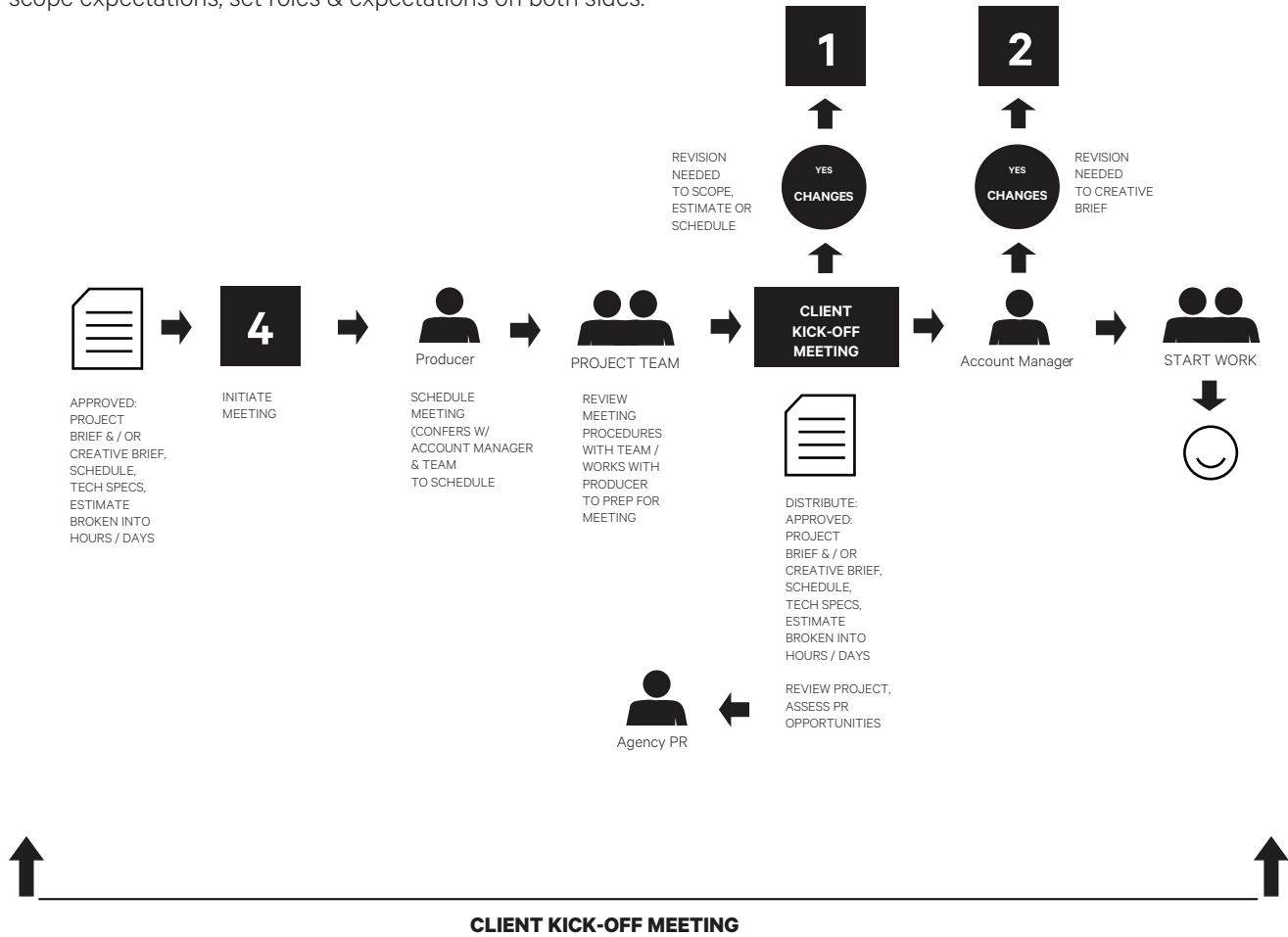
When you and your team meet for the first time, set the stage for how you are going to work, your team's "rules of the road," how you are going to communicate, when and how frequent you are going to meet, when you are going to have check-ins, and what is to be expected of the team during each phase of the project.

NOTE PROJECT START (IS INTERNAL) & KICKOFF MEETINGS ARE EXTERNAL & CAN BE SWAPPED, DEPENDING ON NEED TO INVOLVE CLIENT IN STARTING WORK



05: CLIENT KICK-OFF MEETING

Just like in your internal kick-off meeting, establish how agency & client will communicate, future milestones, timelines, future scope expectations, set roles & expectations on both sides.



06

Multiple project paths

Different types of projects follow different types of paths.

Some projects are complex, some may follow existing strategic thinking, some may be production or media only.

How you scope a project determines its path through the agency.

In section 04 we saw the creative brief being created. However, some projects may require more complex and deeper strategic thinking. In the end, both approaches have the goal of developing strong creative briefs to work off of.

Projects can be a combination of phases, or start at a particular stage;

Projects paths may look like this,

Strategy -> Media -> Creative -> Design -> Production -> Release

Creative -> Design -> Production -> Release

Design -> Production -> Release

Production -> Release

Or like this for interactive,

Strategy -> Media -> Creative -> Design -> Development -> Release

Creative -> UX / Design -> Development-> Release

Design -> Production -> Release

Production -> Release

Or react to media needs,

Media -> Strategy -> Creative -> Design -> Production -> Release

Media -> Design -> Production -> Release

Planning -> Media -> Design -> Production -> Release

Media -> Production (resize) -> Release

06

The Strategic Process

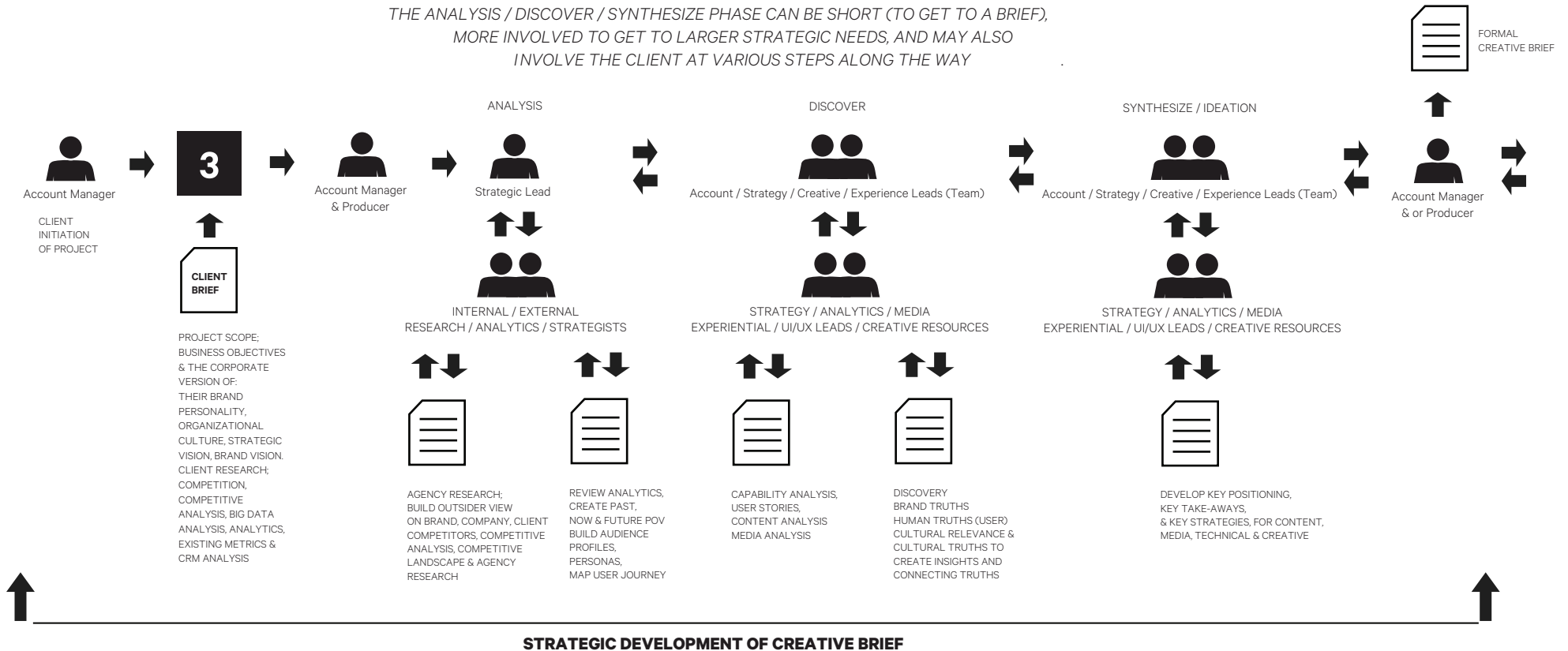
The Strategic Process for your agency depends on owning your own thought leadership and perspectives.

What you do during the strategic process should be geared towards the specific needs of the client and brand. While you may not do all of the steps involved in the process for every client, you should be aware of what goes into its development.

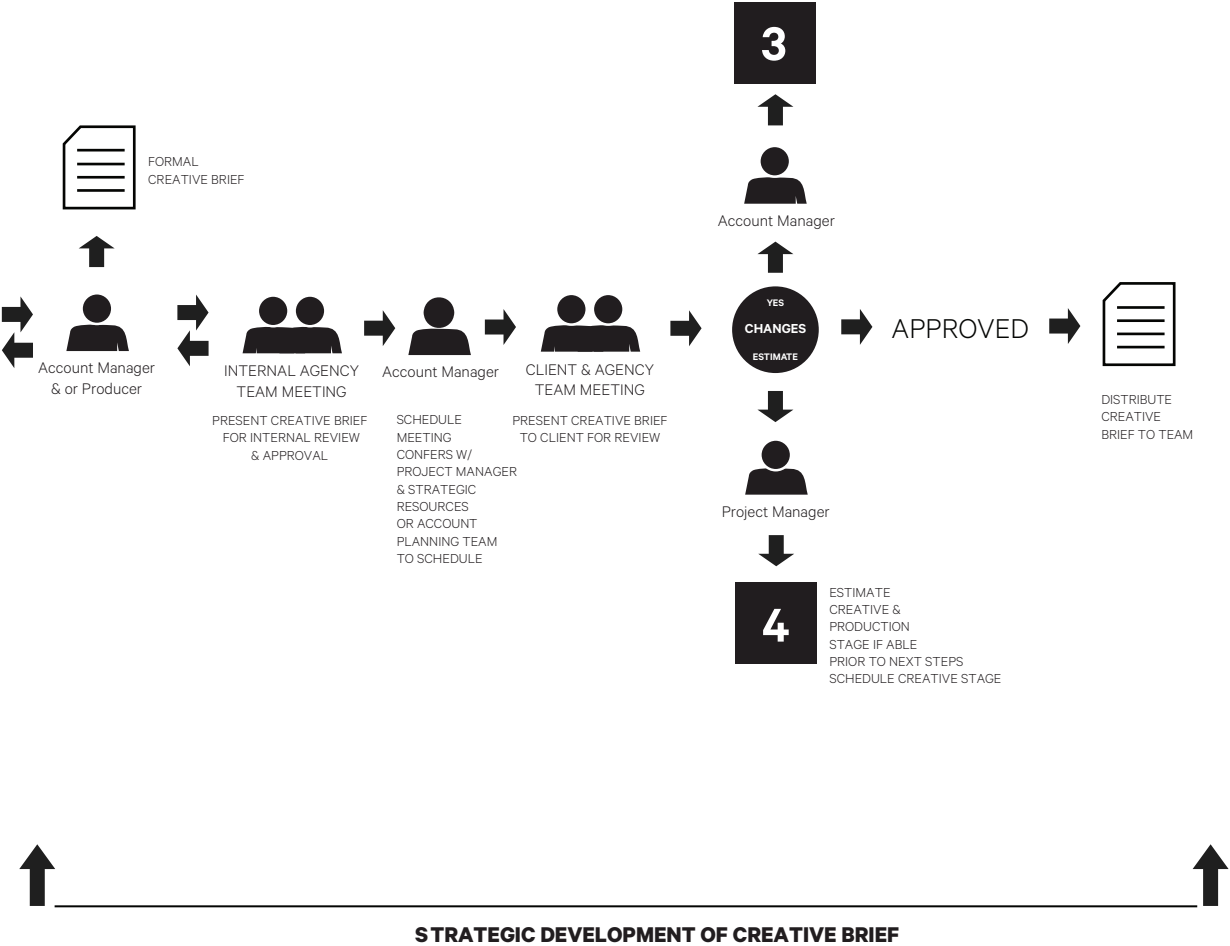
Work towards developing your own strategic process that takes a stand in specific thinking and points of view. This is why clients hire an agency, to help them along in developing marketing and communication platforms that best reach their brand's consumers.

06: The Strategic Process

THE ANALYSIS / DISCOVER / SYNTHESIZE PHASE CAN BE SHORT (TO GET TO A BRIEF),
 MORE INVOLVED TO GET TO LARGER STRATEGIC NEEDS, AND MAY ALSO
 INVOLVE THE CLIENT AT VARIOUS STEPS ALONG THE WAY



06: Presenting The Strategic Process



07

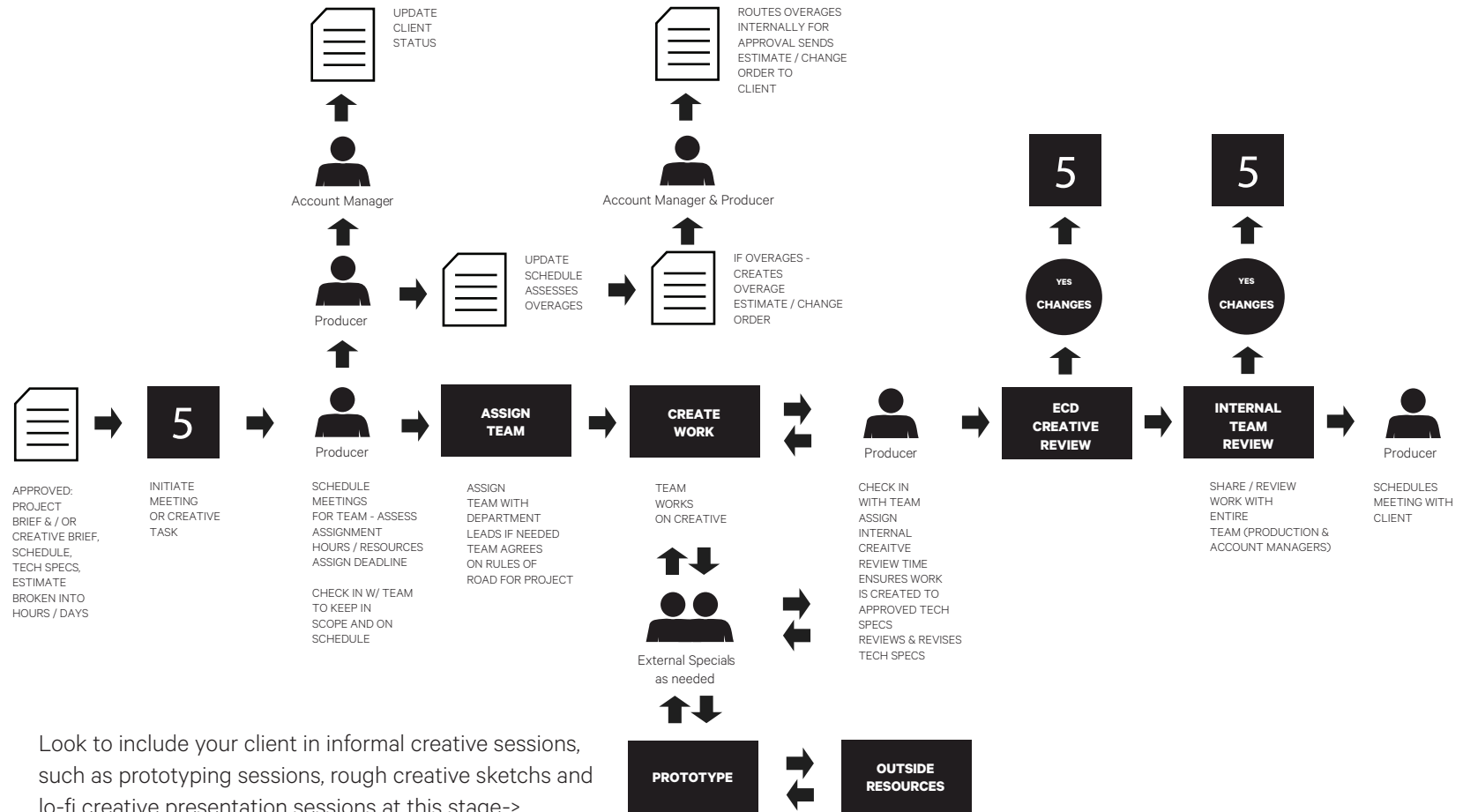
The Creative Process

The agency (and team) should treat every project as a creative assignment.

Once the project initiation or job start meeting happens, its off to the races. It's important during the creative phase that everyone works as a team and checks in with each other at this stage. The biggest risk is blowing schedules or budgets. This is why you depend on each other to keep the entire project on track.

Team leadership happens this way during the creative process, the **producer** keeps the team on task, keeps track of the master schedule and overall resource costs, keeps track of the production schedule and potential resource costs and need changes, **the account manager** keeps the client informed and happy, plays an important role in leading strategy and business thinking and leads client meetings.

07: Concepting Process / Phase



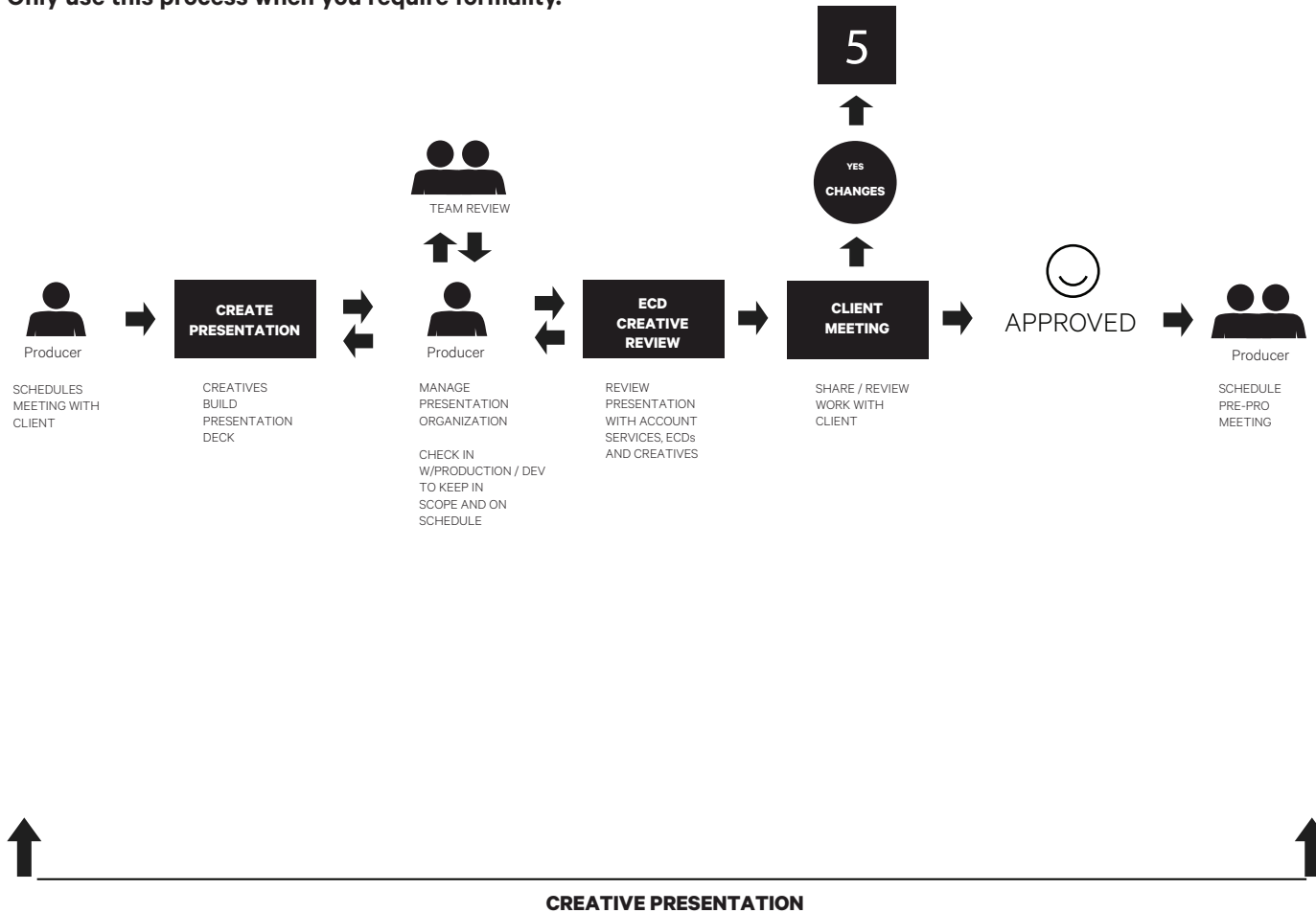
Look to include your client in informal creative sessions, such as prototyping sessions, rough creative sketches and lo-fi creative presentation sessions at this stage->



07: Creative Presentation to Client

While this is one approach to presenting creative, look to build more informal client / agency working styles & sessions where the client is part of the team during the creative process..

Only use this process when you require formality.



08

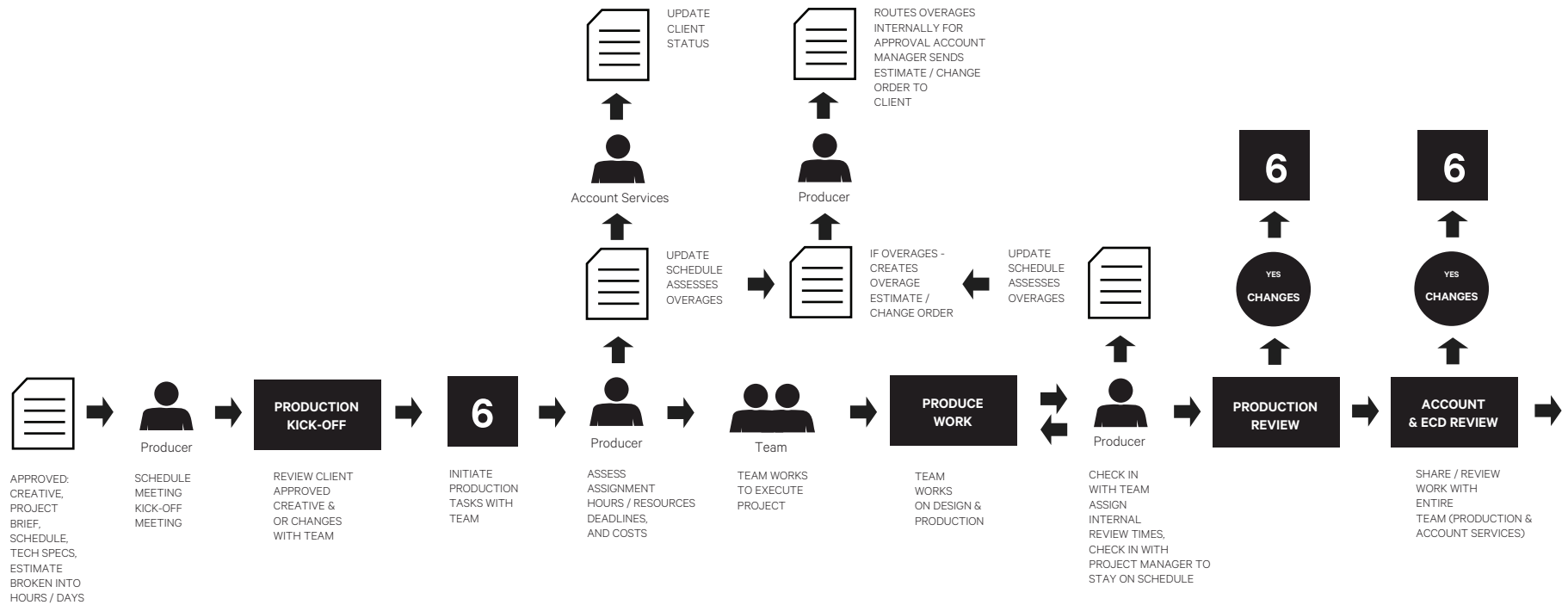
The Production Process

A large part of your culture should be the fact that you make stuff. Craft is important to your success and you should care about the production process.

Production at an agency can range across media, platforms and well almost anything. Sometimes you hire people to help out, sometimes you make it and sometimes it is a large collaboration with outside resources.

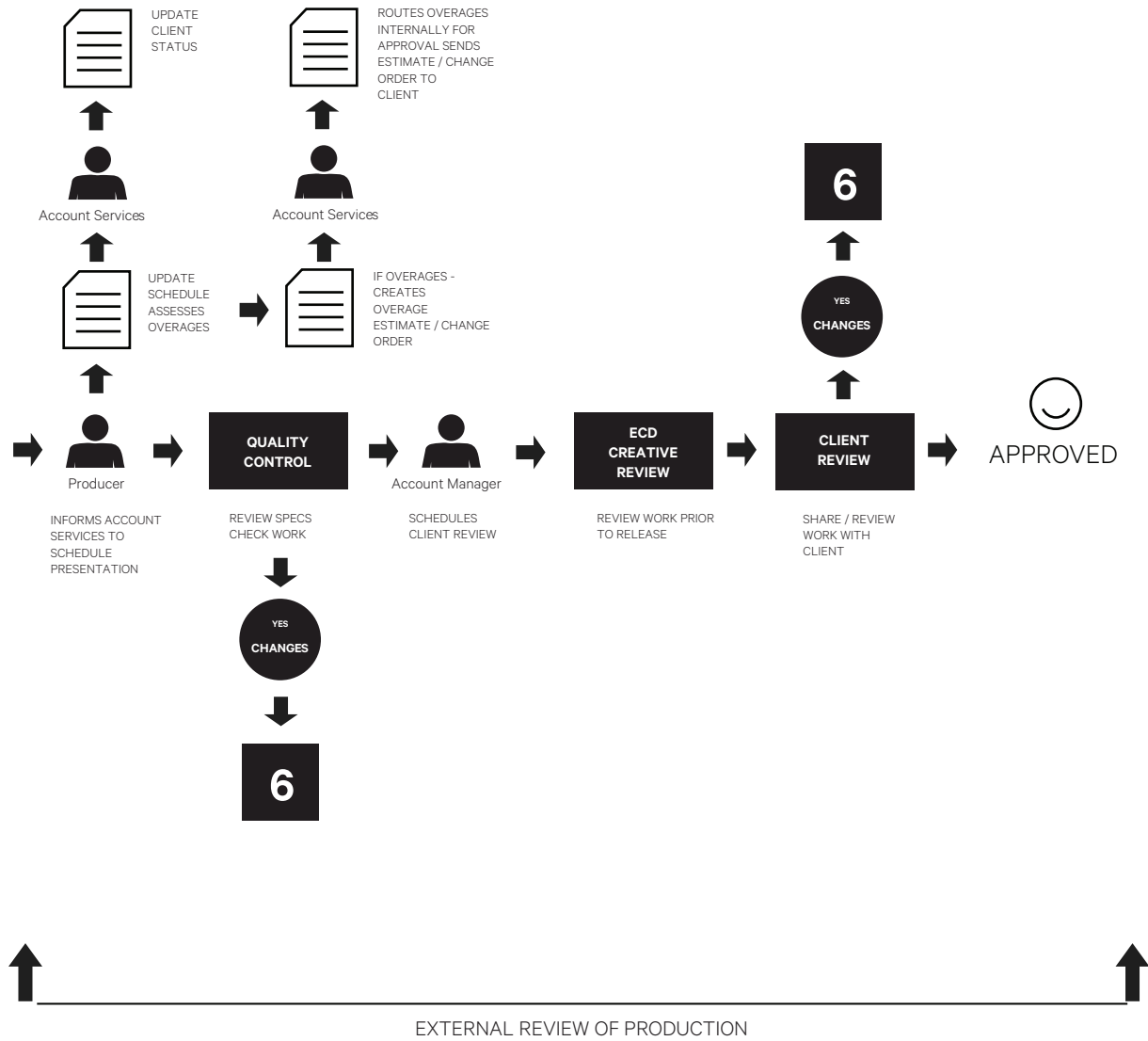
Your producers are very important during this phase of a project. They are the team leaders – the conductors running the train. However, that doesn't mean they work in a vacuum. Part of what makes an agency special is your attention to craft. That means that the entire teams play a role in your production process.

08: The Design and Production Phase



↑ _____ DESIGN & PRODUCTION / PROCESS TO INTERNAL REVIEW _____ ↑

08: The Design and Production External Client Review Process



09

Quality Control Process

Last call for quality control. An important step in the process.

The last step in your process is quality control. No matter what type of project the agency produces or creates, we all participate in making sure the work that gets out is as perfect as it can be. While our lead here at this stage is the project producer. You owe it to our entire team to participate with a clear head at this stage in the work.

Take the time, double check it, play with it, test it, check all links, go over the entire user experience, phone numbers, web addresses, spell check, etc. This is your last chance to get things right and the last thing you need is to get a format or phone number wrong, some grandma in the Midwest is going to be pretty cross with you if her number winds up on some social media contest site instead of your clients.

08: QA & DELIVER

