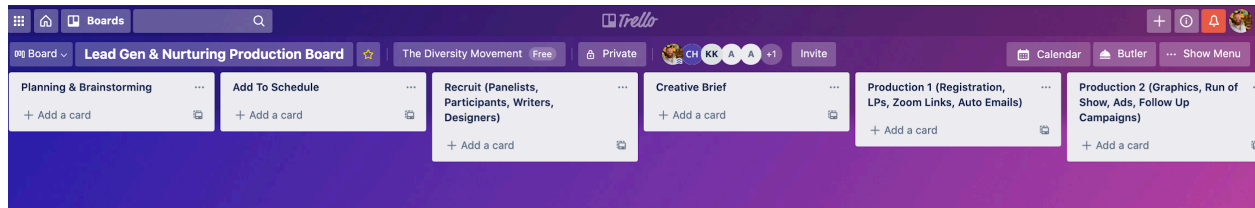


Campaign Production Process

How we ensure high quality creative, delivery and follow through for all marketing activities.

Production Board



Our base unit of production will be a Campaign. We will be using a kanban board to track each Campaign throughout its process from Ideation to Retrospective. If a design project, or something smaller, comes into our flow, we will still follow the majority of this same process to keep things consistent. The project manager will determine what steps each Campaign needs to follow. Each phase will have specific activity and will involve different parties depending on who our collaborators are for that specific campaign. For now, this board will track all campaign types (Outreach, Lead Generation, Lead Nurturing & Client Communication) but it is likely that we will separate out boards for each team at a later date.

For more information about Kanban based project management:

<https://kanbanize.com/kanban-resources/getting-started/what-is-kanban>

Production Board

<https://trello.com/b/y3zDQ3T7/sales-marketing-production-flow>

For our board, we have the following stages of development:

- Idea
- Planning & Brainstorming
- Add To Schedule
- Recruit
- Creative Brief
- Infrastructure Production
- Creative Production
- Analytics Production
- QA
- Promote
- Dress Rehearsal
- Opening Night
- Post Production
- Post Promotion
- Analysis
- Retrospective
- Ongoing

- Closed

Here is a rough overview of each stage. It will change depending on what is and isn't included as part of the campaign, but the phases will largely be the same. For instance, campaigns that include webinars will be different than those that are simply PPC campaigns.

Idea

At a high level, this is a campaign idea or communicated need that has a distinct target, focus and hypothesis. It will sit in the backlog until it's given enough priority, definition and staffing to move forward.

Planning & Brainstorming

Generally, this will be a meeting where we clarify and flesh out the scope, goals, staffing and expectations for this initiative. All the who, what, when, where and why's need to be worked out. We should gain enough clarity and insight from this meeting to add it to the schedule, recruit staff & participants and write the creative brief.

- Needs rough template for each campaign type

Add To Schedule

This is when we add this initiative to the production/editorial schedule and determine if the timeline and staffing needs align to our present capability.

Recruit / Creative Brief

At this phase we are lining up resources to staff the project. This could be designers, writers, panelists or participants. At the same time, we begin writing the Creative Brief. This document will clarify everything that is required to successfully run the campaign as well as the tactical and creative guidance that all staff will require to fulfill their part of the initiative. This should include guidance on tracking links and conversion targets. We do not move past this stage until both tasks are complete.

- Needs rough template for each campaign type

Infrastructure Production

This is getting all the base tech and operational pieces in place for the campaign. This includes but is not limited to: Registration pages, Landing pages, Zoom Links, Automated Emails, etc.

Creative Production

This is making everything look and sound good. Includes but is not limited to: Support graphics, ads, final copy for all pages and campaign materials, run of show, etc.

Analytics Production

Once everything is in place, we will implement any necessary campaign tracking links and ensure

conversion tracking is in place and working well. We will also develop the dashboard that will be used to track the campaign's progress.

QA

It's vital that before any campaign goes live, another person, other than the one who put everything together reviews all campaign materials, pages and tests all links and forms to ensure proper operation and tracking. This isn't complete till the testers activity is confirmed on the dashboard.

- Needs rough process based on relevant creative brief template

Promote

This is the phase where the promotional campaigns are run as dictated by the creative brief. Even in the case of an ongoing campaign, the initial build of the campaign should have a timeline of 4-12 weeks so we can assess and retro the campaign before moving it to the "ongoing" status for regular iterative improvement.

Dress Rehearsal

If there is a performative aspect to the campaign, like a webinar, ATDMA, workshop or panel, this is when we schedule the run through so everyone can test all the day of issues and clarify issues with the RoS.

Go Time

This status is go time. The event or launch is happening TODAY.

Post Production

Once the event is complete, the work isn't necessarily done. We need to process any video and post it wherever it needs to go like the portal and social channels. We also need to pull together any necessary reports, survey results.

Post Promotion

If there are any post promotion campaigns like email, giveaways or event content promotion, this is when they launch. They stay in this phase as long as is specified in the creative brief. If parts of this campaign are ongoing, a time should be specified to run through the rest of the process prior to moving it to Ongoing status.

Analysis

At the specified interval, we should go back and assess the campaign. Check the dashboard and dig into any interesting trends. Talk to the sales team to follow up on any leads generated to get a feel for quality. We should be able to determine whether the campaign met its stated objectives.

Retrospective

Once the campaign has run its course, a quick meeting with all involved should be called to review and retro the campaign. The coordinator should review the timeline, the deliverables and the results. The team should all give feedback for both the process and the outcome of the campaign and share what went well, what could have gone better and what was missing. Then we can have a general conversation about how to improve processes or add ideas for future similar initiatives. We may not be able to do this for every campaign, but it would be great to be able to.

Ongoing

Any campaign that is generating ROI beyond the initial test period can be considered for ongoing operation. Ongoing campaigns are assessed and optimized on at least a monthly basis at a special meeting for reviewing and optimizing ongoing campaigns.

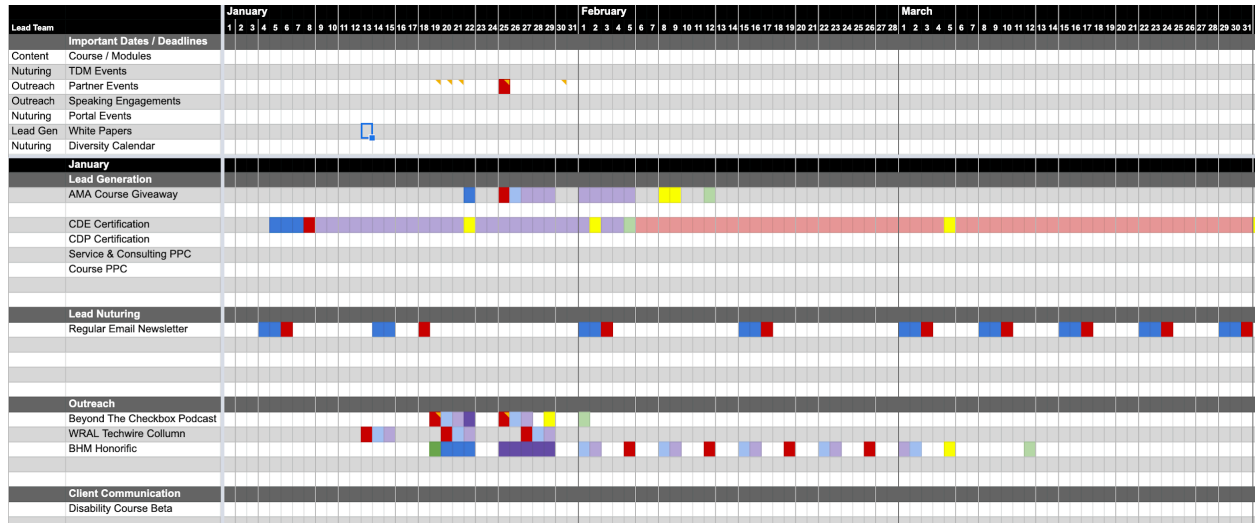
Closed

This campaign has lived a full life and either achieved what it set out to do or died trying. There is no failing, only winning and learning.

Special Status: Red Letter

Red Letter campaigns are campaigns that are high priority and will not be able to make their way through our process without special consideration. Generally this is because we are acting on a current event, righting a mistake or taking advantage of a new, time sensitive opportunity. They are urgent for a myriad of reasons. When a Red Letter initiative is on the board, it takes precedent and should be worked through the system ASAP. Red Letter campaigns should have daily standup meetings until they are through to the point in the process that their urgency drops. If a Red Letter campaign isn't important enough to push back timing or priority on most other campaigns on the board, it's not really a Red Letter and should be recategorized. Because they are disruptive, we want to limit the number of Red Letter campaigns we push through our process. Working after hours is generally not ideal, but sometimes necessary to get a Red Letter out the door. The goal is to use the whole process, even with a Red Letter, but by giving it priority and resources, we can complete it faster than other initiatives.

Production / Editorial Calendar



We have crafted a [new editorial calendar](#) that will showcase key deadlines and make generally visible the work involved in each initiative leading up to those deadlines as well as the target completion dates for each phase of work to stay well ahead of the deadline.

Along the y axis will be broken into 3 sections.

The first is Important Dates & Deadlines: this section is just to showcase key events and dates. This is not campaign focused, just more about what's happening. Not everything here will have campaigns, but we still need to know what's going on. Comments on particular cells will clarify what the event for that date is. In this section, the y axis is by type of events that are being communicated in the calendar as well as which "team" is responsible for that row.

The second is Ongoing Campaigns: Once a campaign has run through its initial testing phase and has been deemed, for whatever reason, to be continuing, it will move up to the ongoing section as it is no longer constrained by start and stop times. Reflection and optimization points will be communicated on that timeline.

The rest is for **New Campaigns and Initiatives by the Month** work will begin and then by the team the campaign or initiative is relevant to.

Along the x axis, it's simply the date, along a timeline. A color code is used to delineate the status or phase that a given campaign is in at that time. To change the color of a cell, simply type the corresponding # into the cell and conditional formatting will kick in to change the cell and text format.

Here is a breakdown of what phases each color represents along the x axis:



In any given campaign, on any given date, we can add comments for key details such as newsletter themes, podcast titles or event names.

Again, the goal is to have in one place, a rough overview of everything that's going on across all teams so we can plan and coordinate more effectively. The actual management of each initiative and the editorial calendars for each team can still exist outside of this document. The focus of this calendar is to communicate effort and timing for these efforts.