

# Strategizing and Reporting Like an Agency

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#elevateuga17 2

### So, you have a plan – now what?



			Q1 – FY18					
		July	August	September				
	S	Civic Thought Leaders // Various Messages // All Year (ABI	Hads)					
dia	aign			ATL Business Leaders // Economic Vitality September-November				
Media	Campaigns			Fall Season // Various Messages September-November (primarily home game days)				
	0		Various Audiences // Great	Commitments // August launch (mircosite)				
	nal	Forbes Top Public Ranking // July	Double Dawg Initiative // Aug	USNWR – Best Colleges Rankings // Sept				
tts	National	EOY Campaign Update // July	Growing Endowed Faculty Positions // Aug	GB: Baldwin // Sept 11 GB: Nzengung // Sept 18				
Projects	te	UGA Joins GTSATBD	EOY Research Funding Increase August	Business Learning Community Phase 3 // Sept 15				
	State		August     Aug 14       Science Learning Center // Aug	UGA Farm Tour Sept XX Center for Molecular Medicine // Sept 20 Sept 28				
Based	a	Downtown Renaissance July	Welcome UGA // Aug 7-18	Lake Herrick // Sept				
Event E	Local	Community Impact story - TBD	Dawg Day of Service Aug 26	Community Impact story – TBD				
х Ш	snd							
	Campus							

## **Follow 8 Simple Steps**

- In order to keep everyone on the same page, on schedule, and delivering your best work, it's important to set up a standard process.
- This is the Project Process we are using in the M&C division that is based on how agencies manage projects for their clients.
- You can use this process (and the templates we've developed to go with it) as a starting point for you to strategize and report like an agency.



#### 1 WEEK

#### **STEP 1** Brief Review/Planning

Creative Brief, establish goals/KPIs for campaign

- The Creative Brief is your roadmap, contract, and fallback support throughout the project (when in doubt, go back to the brief)
- Ask your "client" to fill out the Creative Brief or do it for them after a discussion about the details of the project
- Be specific on your key metrics so you can gauge success after the project ends
- Use this as the basis for the rest of your planning...

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ould we like I on we want to onality more of our p come through	Call to Action fhat would we like them to do? • Action we want them to take		Key Message					
Target Audience         To whom are we talking?         • Primary Audience         • Secondary Audience         Call to Action         What would we like them to do?         • Action we want them to take         Personality         One or more of our personality trait should come through in every communication.         Image: Image of the train of the University of Genria brain to highlight will help you communicate with a consistent voice.         Image of the University of Genria brain to highlight will help you communicate with a consistent voice.         Image of the University of Genria brain to highlight will help you communicate with a consistent voice.         Image of the University of Genria to highlight will help you communicate with a consistent voice.         Image of the University of Genria to active the Matter-of-fact         Stype Use your judgment for how bold or subtle, formal or casual the pince is. then choose or create a corresponding palette.         Image of the University of Genria is a contexponding palette.         Image of the University of Casual the pince is then choose or create a corresponding palette.         Image of the University of Casual the pince is then choose or create a corresponding palette.         Image of the University of Casual the pince is then choose or create a corresponding palette.         Image of the University of Casual the pince is then choose or create a corresponding palette.         Image of the University of Ca	What is the ONE idea we must tell t	hem?						
more of our p come through	-114-		What is the ONE thing we are sayin audiences to take away?	g with this piece exactly? What do we wa				
come through	lanty		Proof Points					
			Why will they believe us?					
nication.		very	Include key reasons to believe our key message—meaningful facts, research results, 3 <sup>rd</sup> party confirmed rankings, customer testimonials					
Optimistic	nistic 🗆	Focused	Considerations					
e-honored	-honored	Committed	Requirements, challenges, reporting requests? Mandatories, restrictions?					
			Identify any requirements and brand considerations that impact format, copy visual elements, deliverables or reporting.					
			Key Dates	Tactics & Owner				
Confident Earnest Humble			What key dates do we need to know?	Are there specific places we n to promote this message?				
	ole 🗆	Smart	MM/DD — Milestone	External				
ect		Matter-of-fact	MM/DD — Milestone MM/DD — Milestone	Tactic 1     Tactic 2				
				Tactic 2     Tactic 3				
			Budget	Internal				
Constant and the place is. then choose is then		How much money do you have to	Tactic 1					
		Tactic 2						
	Summer and the second	pare de l	• \$\$	Tactic 3				
sual								
	e							
			What does success look like?					
			<ul> <li>Grow metric 1 by x%</li> <li>Reach X number of metrics</li> </ul>					
e a o mal sual d	a al	sual the piece	sual the piece is, then choose	spindt from of the object is then choose souther spend? sorresponding palette. • \$\$ • \$\$				



Present project plan to the client

- Now, take the Creative Brief and expand it into a Project Plan
- Project Plans are for the "worker bees" and contain the finite details like dimensions, tactics, etc.
- For higher ups, create a Project Summary to showcase all of the work being done on the project

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Project N	Project Name														
Creative M	lessage														
Brand Value Pr The University of Georg improve the world.		II lead, discover and serve because	logether wi	are on a relentiess pursuit to											
Key Message															
Key message here.															
Proof Points															
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Marca Law		a.1		0		VERS	ITYO	F			Proj	ject S	umm	ary	
Are there specific pro- channels? External • Tactic 1	External 2.A			Key Metrics What does success look like? • Grow metric 1 by x% • Reach X number of metrics	GEORGIA Priject: [Name] Bate: [Select Date] Account / Leat: [Vame] Job. No. #										
Tactic 3 Internal     Tactic 1     Tactic 2					Objective   Objective 1  Objective 2  Objective 3					Date: [Select Date] Account / Lead: [Name]					
Deliverables		envices that will be generated for the project			Key Message					K	ey Metri				
Producta/Services Deliverable 1	Description Size, recipient, note		Due data MM/DD	Reviewer / Date Office/Initials/Date	Message 1					Metric 1     Metric 2					
Deliverable 2	Size, recipient, note		MM/DD	Office/Initials/Date				-			Metric 3				
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		(	Colui	mns story	Internal • Tactic 1 • Tactic 2 • Tactic 3										
			Colui	Editing mns story	Other Support     Support 1     Support 2     Support 3	ort									

## **Other templates**

We also have 2 supplemental planning documents, to be used as-needed:

- 1. A Social Media Plan to help align messages and timing of social media activations
- 2. A Media Plan to outline the deliverables and owners of various media actions (generally used when media is not tied to a larger project)

UNIVERSITY OF	Social M	Iedia Plan							
GEORGIA	Client: Due date: Requested by: Job No.: Date: Submitted by: Approved by:	[Who has requested this project] [Select Date] [Name] [#XXX] March 12, 2017 [Name] / [Select Date] [Name] / [Select Date]							
roject Name									
Overview & objective	ind resources required to achieve this project's	s objectives?	GEORGIA		Media Pl	an			
his section defines the boundaries a			GEORGIA		Project manager: Content lead:	[Name] [Name]			
Call to Action What would we like them to do?	Platforms What types of messages and platforms w	vill be used for this project?			Design lead: BVP lead: Job No.:	[Name] [Name] [#XXX]			
1. Action 2. Action	Account Frequency Facebook XX	Audience Cost Ext GA Fam \$XX	Media Event		Submitted by:	[Name]			
Key Dates Pre-promoM. DD, yyyy StartM. DD, yyyy	Message: Facipsam et, ut ut quiasped e cus.Delesequis ratia vendaes maximus dolene sandaep ersperovitem facerciis e hilibusti teacitat lis dis Twitter XX	es estibus dolorias mossimi, tem res	Overview						
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Considerations Requirements, challenges, reporting requests? Mandatories, restrictions?	hillouti tesotat lis di Instagram UXX Est 0A Family List objectives Message: Faciosam et. ut ut quiaspeed quia douptatur? Qui omnia								
Identify any requirements and brand considerations that impact format, copy, visual elements,	cus. Delesaquis ratis vandase maximus es estbus dolorias mossimi, ten res dolene sandage ensperovitem facerois sum fugiandis diat et optatin culteni hiltitoust estat ils dis Key messaging   What are the ideas we must tell them?								
deliverables or reporting.	Brasphat         XX         Ext GA Family         SXX         Sadipscing elltr, sed diam nonumy eirmod tempor invidunt ut labore et dolore mag duration and es enservinue as estibus dolorias mossimi, tem res dolene aandee enservinue facerias aum folgenia dullet of patient culleni         Sadipscing elltr, sed diam nonumy eirmod tempor invidunt ut labore et dolore mag diam voluptua.								
	hillibusti tescitat lis dis		Media availability   What access will the media have? To whom? When?						
	Linkedin XX Message: Facipsam et, ut ut quiasped cus.Delesequis ratis vendaes maximus delene sandaep ersperovitern facerciis	es estibus dolorias mossimi, tem res	Consetetur sadipscing elitr, sed diam erat, sed diam voluptua.	nonumy eirmod te	mpor invidunt ut labo	re et dolore magna aliquyan			
	hillibusti tescitat lis dis YouTube XX	Georgia Family	Media Team Who needs to part of the review process?	Media/ audie What are the targeter	l outlets? Whi	y Metrics at does success look like?			
	Message: Facipsam et, ut ut quiasped cus.Delesequis ratia vendaes maximus dolene sandaep ersperovitem facercia :	es estibus dolorias mossimi, tem res	Name, Office Name, Office Name, Office Name, Office	Outlet Outlet Outlet		Metric 1 Metric 2			
	LAST UPDAT	ED ON: 0/0/00 0:00:00 AM   Page 1 of :	2 Name, Onice						
			Timeline						
			Description	Due date	Reviewer / Date	NOTE			
			Item						



Team Kickoff/Asset Development

- Time to get to work
- The timeline for this step is structured to allow for layering of multiple projects in one timeframe
- Timelines may be shorter depending on the project and how many other projects are in process
- Internal reviews are key; always show your team before showing your "client"





Client Review 1: Present to client and get feedback

- Presenting in person is best, but not always necessary
- For faster projects adjust the timeline for reviews and changes



Client Review 2: Present to client and get feedback or approval

- Rinse and repeat
- Again, adjust timeline as needed and if time is of the essence, this can step be cut entirely



Launch and Monitor

Recommend changes (if needed during campaign)
 Finish project, gather data/hand off to Leslie for reporting

Client Review 3: Final Presentation to client

- One final presentation and approval necessary before moving forward, then it's time to press the "launch" button
- This part is easy to overlook, but pay attention and make sure to monitor while your project is live
- After the project is launched, be sure to gather data related to your key metrics from the Creative Brief
- Make a plan to gather the data before you reach this stage or you'll miss something





- Use a Project Report template or customized report based on your needs
- Report on what you agreed to in the original Creative Brief
- Provide additional data if they are unusual/noteworthy

#### Archive Project and Results

- Store your reports in a central, backed up location
- Use past reports to guide goals the next time

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**STEP 8** 

UNIVERSITY OF		Project	Report
GEORGIA		Campaign: Date / Time:	[Name] [Select Date]
Project Name			
Overview			
The University of Georgia tackles the n discover and serve on a relentless pure			nspiring those who will lead,
Goals			
Campaign key message here that high value proposition.	lights the ONE t	hing we want to say	and connects to the brand
Results			
Total campaign reach:	XXX, XXX		
Total livestream reach:	xxx		
Web			
Website:	XXX, XX	X	
Website: Total unique visitors (Jan25-31):	XXX	κx	
Website: Total unique visitors (Jan25-31): Total users on site during speech:	XXX XXX		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES:	XXX XXX	KX Google, Facebook,	
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website:	XXX XXX Direct, 0		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website: Total clicks:	XXX XXX		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website:	XXX XXX Direct, 0		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website: Total clicks: Website:	XXX XXX Direct, 0 XXX		
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Website: Total users on site during speech: Source of traffic: NOTES: Website: Total clicks: Website: Total clicks: Emails	XXX XXX Direct, 0 XXX		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website: Total clicks: Website: Total clicks: Emails Archnews:	XXX XXX Direct, C XXX XXX		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website: Total clicks: Website: Total clicks: Emails Archnews: Total livestream reach: Media Relations Total number of media stories:	XXX XXX Direct, C XXX XXX XXX		
Website: Total unique visitors (Jan25-31): Total users on site during speech: Source of traffic: NOTES: Website: Total clicks: Emails Archnews: Total livestream reach: Media Relations	XXX XXX Direct, C XXX XXX		

# What if I only need one or two assets?

- Simply reduce the process down to the 3<sup>rd</sup> and 4<sup>th</sup> steps to ensure you have the time needed to develop and review the assets
- You may still want to fill out a portion of the Creative Brief to make sure the assets are developed with the right audience and goals in mind, but it depends on the deliverable



## **Example: WelcomeUGA Project Brief**

**Objective:** Welcome students to campus and increase understanding and pride in the university among students by creating, packaging and promoting content that demonstrates UGA's mission and brand.

Key message: Welcome to the 2017-18 academic year! The University of Georgia is a storied institution that inspires those who will lead, discover and serve because together we're on a relentless pursuit to improve the world.

Proof points: See brand messaging map

**Considerations:** Rebrand to adhere to brand guidelines. Use new logo where possible. Re-use select content, but also create new pieces based on brand messaging

## **Example: Project Brief (cont'd)**

Key dates: 8/6: Move-in, 8/13: Freshman Welcome, 8/14: First day

Other support:

- Filming, editing, uploading President's welcome video
- Taking photos of various activities (Move in, Freshman Welcome, first day of class, etc.)
- Sending out class profile release
- Coordinating with other units in a Welcome group meeting (Housing, DAR, SA, GR, Admissions, etc.)
- Providing Welcome toolkit to campus communicators/social media users

Target Audiences: Primary: New students

Secondary: Returning students Tertiary: Faculty/staff

## Example: Project Brief (cont'd)

#### Calls to Actions:

- Engage with Welcome website
- Follow our social accounts
- Watch the welcome video

#### Tactics:

- *External:* UGA.edu promo redirect; WelcomeUGA website; Incoming class profile release, infographic; Social media, geofilters; eGaMorning mention; Social ads/promoted; President's welcome video; Email to alumni/GR
- Internal: Archnews; Digital signs, pole banners, posters, bus cards; Tate, dining signage; Columns photo cutline; Photo booth, social booth

Personality: Optimistic, committed

Tone: Inspiring, ambitious

Style: Casual, bold

## **Example: Project Brief & Project Plan Templates**

	Due date: 8.4.2 Requested by: Matt Date: June Submitted by: Matt	t Chambers 9 22, 2017	<b>GEORGIA</b>	Account / Lead Content lead: Design lead: Submitted by:	Matt Chambers Kellyn Amodeo, Jasmine Pruett Lindsay Robinson Matt Chambers	Products/Services UGA.edu Top Festure Alumni Email	Description A top feature redirect will be coded into UGA.edu from Aug. 6-20 HTML email that has graphic linking to President's welcome video and a written	08/04		
	Submitted by. Matt	Chambers		odomiaco by.	Har Onenacia	Welcome UGA Website	message from him Refreshed welcome.uga.edu with new look, updated content	08/04		
lcomeUGA			WelcomeUGA			Social Media graphics	Social media graphics that relate to WelcomeUGA website content as well as move-in, first day and Glory Weeks events	08/04		
						Geofilters	1080 x 1920; Web optimized PNG under 300KB, Needs at least 1 day,	08/03		
get Audiences imary: New students	Objective Welcome students to campus and increas		Creative Message	Creative Message  GAMorning WelcomeUGA will be mentioned in eGaMorning the week of Aug. 7						
condary: Returning students tiary: Faculty/staff	university among students by creating, par demonstrates UGA's mission and brand.	ckaging and promoting content that	Brand Value Proposition			Social Ads/ Promoted Posts	A promoted post for the President's welcome video as well as one encouraging likes on the Facebook page			
o Actions	Key Messages		The University of Georgia inspires those who v	vill lead, discover and serve because togethe	r we are on a relentless pursuit to	President's Welcome Video	A short video from the President welcoming campus to a new academic year	08/1		
age with Welcome website	Welcome to the 2017-18 academic year! T institution that inspires those who will lead		improve the world.			Archnews	An Archnews with a graphic linking to the President's welcome video and a written message from him	08/1		
tch the welcome video	together we're on a relentless pursuit to in	nprove the world.	Key Message			Bus Cards	11" x 17" horizontal (w/ bleed), Campus Transit, Must submit 5 days before reservation	07/2		
<b>Aetrics</b>	Proof Points			Wekcome to the 2017-18 academic year! The University of Georgia is a storied institution that inspires those who will lead,						
ome video views (social and YT) I media engagement, reach,	Why will they believe us? See brand messaging map		discover and serve because together we're on	a relentless pursuit to improve the world.		Digital screen- Grady Digital screen- Tate Center	1280 X 720; jpg, Grady (Stephanie Moreno; steph@uga.edu) 16:9 or 11x17; jpg/png, Student Affairs (Don Reagin; dresgin@uga.edu), Will accept	08/0		
npressions I follower counts							YouTube video. Monitors have no audio capability. Hasn't been tested.			
ome website page views	Considerations		Proof Points			Digital screen- FACS	16:9 or 11x17; jpg/png, FACS (Cal Powell; <u>icpowell@uga.edu</u> ), include .psd	08/		
nality	Requirements, challenges, reporting requirements and to adhere to brand guidelines. Us		See brand messaging map			Digital screen- Admin building	16:9 or 11x17, Provost (Camie Williams; camiew@uga.edu )	08/0		
ore of our personality trait	select content, but also create new pieces					Digital screen- Terry	1600x1200; jpg/pgn, Terry (Jared Brown; browni@uga.edu.), No sound, Avoided video			
me through in every cation.			The states	Geele	V Matuica	Digital screen- Engineering Digital screen- Career Center	1920x1080, Engineering (Mike Wooten; mwooten@uga.edu)	08/0		
uring  Tenacious imistic Focused	Key Dates What key dates do we need	Tactics	Tactics Are there specific promotional channels?	Goals What would we like them to do?	Key Metrics What does success look like?	Digital screen- Career Center	1920x1080, Career Center (Darin Parker; <u>charterBurger</u> ) Limits video 1 minute or less in a format that may be embedded into a Powerpoint slide. 1920x1080; iop/onc. Education Jene Williams; imm@uae.edu. PPT Slide	r 08/0		
e-honored Committed	to know?	External • UGA.edu promo redirect	External     UGA.edu promo redirect	<ol> <li>10,000 YouTube views on the President's welcome video</li> </ol>	Welcome YouTube views     Welcome video social views	Digital screen- Vet Med	1920x1080; jpg/png, Vet Med (Dajie Debin; dajie@uga.edu), PPT slide	08/0		
	8.6.2017 — Move in 8.13.2017 — Freshman Welcome	WelcomeUGA website	<ul> <li>WelcomeUGA website</li> <li>Incoming class profile release,</li> </ul>	<ol><li>40,000 social views on the President's welcome video</li></ol>	<ul> <li>Social media engagement</li> <li>Social media reach</li> </ul>	Digital screen- Franklin College	720x540; jpg, Franklin (Alan Flurry; aflurry@uga.edu), Provide 4:3; standard and wirkserman	08/0		
Tone Choosing specific traits of the University of		<ul> <li>Incoming class profile release, infographic</li> </ul>	infographic	<ol> <li>100,000 social engagement</li> <li>800,000 social reach</li> </ol>	Social media impressions     Follow count	Digital screen- CAES	820x544; jpg/ png, CAES (Megan McCoy; mamm@uga.edu) , PPT Slide	08/0		
brand to highlight will help you icate with a consistent voice.	Other support	Social media, geofilters     eGaMorning mention	<ul> <li>Social media, geofilters</li> <li>eGaMorning mention</li> </ul>	<ol> <li>5. 1.8 million social impressions</li> <li>6. Increase followers on Facebook,</li> </ol>	Welcome website page views     Welcome website bounce rate	Digital screen- Public Health	820x544; tiff, Public Health (Heather McEachern; hivey@uga.edu)	08/0		
fident Inspiring test Ambitious	<ul> <li>What else is being done?</li> <li>Filming, editing, uploading</li> </ul>	Social ads/promoted	<ul> <li>Social ads/promoted</li> <li>President's welcome video</li> </ul>	Twitter and Instagram by 10% 7, 8.000 page views on		Digital screen- Ramsey Center	871 x 492 (landscape) & 720 x 1280 (portrait), Ramsey (Christina Reynolds; christina reynolds@uga.edu)	08/0		
the Smart ct Matter-of-fact	President's welcome video • Taking photos of various activities	President's welcome video     Email to alumni/GR	Email to alumni	Welcome.uga.edu 8. Decrease Welcome.uga.edu		Digital screen- University Cable	Graphic Slide Creations - 1280 x 720 @ 72 dpi; jpg/psd. Krystal Pintar (kpintar@uga.edu	08/0		
	(Move in, Freshman Welcome, first day of class. etc.)	Internal     Archnews	Archnews	bounce rate by 5%		Posters- Residence Halls	11x17* Vertical; pdf/jpg, Student Affairs (Stan Jackson; ugaslan@uga.edu),	07/2		
judgment for how bold or subtle,	<ul> <li>Sending out class profile release</li> <li>Coordinating with other units in a</li> </ul>	Digital signs, pole banners, posters, bus cards	<ul> <li>Digital signs, pole banners, posters, bus cards</li> </ul>			Posters- Tate and Memorial Hall	up to 11 x 17"; pdf/ jpg, Student Affairs (Tate info desk)	07/2		
casual the piece is, then choose a corresponding palette.	Welcome group meeting (Housing, DAR, SA, GR, Admissions, etc.)	Tate, dining signage	Tate, dining signage     Columns photo cutline			Posters- Miller Learning Center	11x17*	07/2		
	<ul> <li>Providing Welcome toolkit to campus communicators/social media users</li> </ul>	Columns photo cutline     Photo booth, social booth	<ul> <li>Photo booth, social booth</li> </ul>			Tate- Bridge banners	3x15' to 7x22', Student Affairs (Stan Jackson; ugastan@uga.edu), Professionally printed banners only	08/0		

#### **Example: Project Summary**



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## **Final thoughts**

- Plan ahead:
  - Planning leads to less confusion, better end results, and clear key metrics to measure success.
  - Planning allows you to layer multiple projects and keep everything in order (and keep you sane-ish!).
- Think of this process and the templates as **communication tools** for you and the people you work with to use.
- This is just one way you can do this feel free to make it your own. (This is a work– in-progress for us, too.)
- Process and templates will be available at brand.uga.edu this week.



# THANK YOU! Any questions?