Strategizing and Reporting Like an Agency

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Division of Marketing & Communications
Agenda

1. Big picture
2. Step-by-step review of our process
3. Example: WelcomeUGA
4. Final thoughts
### So, you have a plan – now what?

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<thead>
<tr>
<th>Media Campaigns</th>
<th>Event Based Projects</th>
<th>Institutional Priorities</th>
<th>Editorial Content</th>
<th>Rankings/Scholarships</th>
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<td>Event Based Projects</td>
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<td>EOY Research Funding Increase August</td>
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<td>Growing Endowed Faculty Positions // Aug</td>
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<td>New Faculty Tour Aug 14–18</td>
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<td>Downtown Renaissance July</td>
<td>Science Learning Center // Aug</td>
<td>Business Learning Community Phase 3 // Sept 15</td>
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<td>UGA Farm Tour Sept XX</td>
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<td>Center for Molecular Medicine // Sept 20</td>
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<td>Turfgrass Research &amp; Education Facilities Sept 28</td>
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<td>Community Impact story – TBD</td>
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<td>Community Impact story – TBD</td>
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#### Q1 – FY18

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<tr>
<th>July</th>
<th>August</th>
<th>September</th>
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<tr>
<td>Civic Thought Leaders // Various Messages // All Year (ABH ads)</td>
<td>ATL Business Leaders // Economic Vitality September-November</td>
<td>Fall Season // Various Messages September-November (primarily home game days)</td>
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<td>Various Audiences // Great Commitments // August launch (mircosite)</td>
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- **Media Campaigns**
- **Event Based Projects**
- **Institutional Priorities**
- **Editorial Content**
- **Rankings/Scholarships**
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.
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...
STEP 2: Collect Feedback/Client Signoff

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
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)
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”
Presenting in person is best, but not always necessary

For faster projects adjust the timeline for reviews and changes

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
STEP 6 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

**STEP 8** Archive Project and Results

• Store your reports in a central, backed up location

• Use past reports to guide goals the next time
What if I only need one or two assets?

- Simply reduce the process down to the 3rd and 4th 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
WelcomeUGA

Creative Message

Brand Value Proposition
The University of Georgia inspires those who will lead, discover and serve because together we are on a relentless pursuit to improve the world.

Key Message
Welcome to the 2017-18 academic year! The University of Georgia is a storied university among students by creating, packaging and promoting content that demonstrates UGA’s mission and brand.

Key Metrics
Welcome.uga.edu page views
10,000 YouTube views on the Welcome video
40,000 social views on the Welcome website
1.8 million social impressions
8,000 page views on the Welcome website

Key Dates
8.13.2017 — President’s welcome video
8.6.2017 — President’s welcome video
8.8.2017 — President’s welcome video

Tactics
1. President’s welcome video
2. President’s welcome video
3. President’s welcome video

Goals
What would you like them to do?

Key Metrics
What does the goal ask for?

Deliverables
Type of products/services to be generated for this project.
**Example: Project Summary**

**Project Summary**

**Project:** WelcomeUGA  
**Date:** 6.23.2017  
**Account / Lead:** Matt Chambers

**Objective:** Elevate student's excitement and increase understanding and pride in the University among students by creating, producing and distributing 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. 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.

**Target Audiences:**
- Primary: New students
- Secondary: Returning students
- Tertiary: Faculty/staff

**Tactics & Owners**

- **Deliverables:**
  - A top feature redirect (M&C)
  - Providing Welcome toolkit to campus communicators
  - On-campus photo booth (M&C)
  - Dining common digital signage (M&C)
  - Tate banners (M&C)
  - Bus cards (M&C)
  - Pole banners (M&C)
  - Email to alumni (DAR)
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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?