Creative processes

More effective creative, more efficiently.

Proactive is more efficient than reactive

Logos are needed for new services, products, and partners.

- Check to see if we have required logos on file. If you're unsure, request it from the client.
- Request assets at the first client meeting.
- **We need vector logos (EPS, AI, or SVG). Anything else is a bandaid. If we can get by with a PNG now, we will still need a vector file later.**
- Ask for a contact in their design, marketing, or PR departments.
- **We can no longer use non KP assets without rights statements and model releases. Ask the client for written permission before submitting the asset for use, and upload it to Wrike with the assets.**

We may not have the same knowledge of the project or client as you.

- Ask yourself, "Does the designer have everything needed to complete a v1?
- Take the guesswork out of edits. Ambiguity wastes time.
- Be descriptive.

Copy needs to be properly formatted in a Word doc, or PDF comments before being submitted.

- The **Editorial Style Guides** are available to everyone. Please familiarize yourself with them.
- Please learn how we treat **times, dates, em dash, en dash, and hyphens**.
- We copy and paste your edits. If you want to say February 2, 2023, but provide the edit as 2/2/2023, you might receive 2/2/2023.

Ensure inbound edits make sense from a member's perspective before passing them to design.

- Include a marked-up PDF for edits and redesigns.
- Adjust client edits, add, or make suggestions as needed.
- Address client questions in the markup before sending to a designer.
- **With each hand off, interpret, clarify, anticipate, and proof with a critical eye.**
- Check footnotes/endnotes

Will the edits effect other content?

- It can take a designers eye to know if an edit will create other problems, but sometimes it's obvious.
- Square peg in a round hole?
- Removing three sentences and replacing it with four paragraphs is more of a redesign than minor edit.
- **Thoughtfully edit and proofread all content BEFORE it goes to design. This is especially true in charts, tables, or other info graphics.**

When adding information to a web page, make sure it makes sense on the page

- Where should it go?
- Is content treated the same from page to page. Does each page have a heading? If one page has a subhead, they all should.
- Do we have all the information to make it consistent with other content?

If the client or job has specific needs, personality quirks, expectations, or content, drop it in the original brief.

- We can help you win buy-in with this information and save you time and energy.

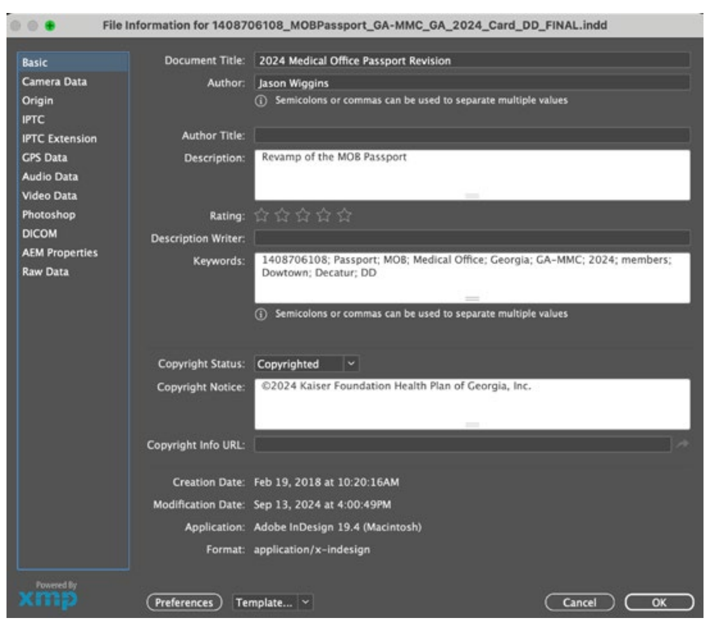
Get a seat at the table

- When the level of effort is greater than minor edits such as a campaign or large project with multiple touch points, let's meet with final decision-makers and stakeholders.
- The goal is to understand their preferences and to listen for what might not be said.
- From there, we can get them to agree to objective goals and avoid subjective design by committee.

Does this job need a kick-off meeting?

- Sometimes a 15 minute call is worth dozens of emails.

General tips



Wrike

File names tend to be too long.

- We know we're in Georgia, we know we are KP, no need to include KPGA in a file name.
- Use **standard abbreviations**.

Industry standards for dimensions

- W x H, with width first.
- Using the W and H when providing dimensions ensures everyone is on the same page.

Filling out Wrike intake forms and fields:

- Complete the fields with proper grammar.
- We copy and paste these forms directly into the files Meta data, EDAM, and the Marketing Portfolio.
- Anyone with the PDF can view the Metadata, it needs to be member friendly.

Web page edits

- Print the page to PDF
- Mark up or copy/paste the text and mark changes.

If you are making edits to a national job or one from another region, please get native files.

Design

Proofing responsibility falls on the consultant and client.

- Proofread content BEFORE it is designed and again before approving FINAL or PRINT.
- Minor edits can cause content on other pages to reflow.
- Always expect the unexpected.

Image requests can be too specific

- Image searches can consume considerable time.
- Provide loose, general direction.
- If you have very specific needs, the **EDAM** and all images are available to everyone to search.

Our brains recognize word shapes, not just individual letters.

- We use all caps and italics intentionally and sparingly.
- Both slow word recognition and can be problematic with ADA compliance.
- Reserve italics for publication titles, foreign words or phrases, reports, periodicals, and bound works eight or more pages in length.

CTA best practices

It's easy to overdo CTAs and QR Codes.

- Brochure: one memorable CTA. It can also include 1 or 2 secondary CTAs
- Emails: only include one short, simple CTA to ensure it stands out. The more links you put in your email, the more you distract the reader from the primary CTA.
- Flyers: include just one memorable CTA.
- Handouts: include one memorable CTA
- Letters: In most cases, you'll want to focus on one CTA to avoid distracting the reader. Sometimes you may need to include 1 or 2 secondary CTAs.
- Mailers: In most cases, you'll want to focus on one CTA to avoid distracting the reader
- Postcards: stick to one CTA. Readers should know what you want them to do at a glance.

Proposed Creative Brief

These new questions serve several purposes:

- Ensure job details are thought through and all assets are collected.
- The more detail provided, the better we can serve you and the client.
- Provide the creative team with insights into the why behind each job.

Business need. Examples:

- Increasing penetration
- Delivering a quality of care message
- Introducing new information
- Boosting a specific metric
- Reacting to competition

Demographic details. Be specific

- “Moms” is too general.
- “New moms who recently joined KP and have not seen a KP Primary Care Physician” is better.

Demographic motivators

- Based on available info, hypothesize what is motivating this person or someone in the group.
- What is their goal?
- What do they most value?

Demographic friction points.

- What challenges hold them back?
- Do they need information, encouragement, or empowerment?
- Do they have physical limitations or a medical condition?

Desired audience action

- Don’t assume they know what you want them to do. Tell them.

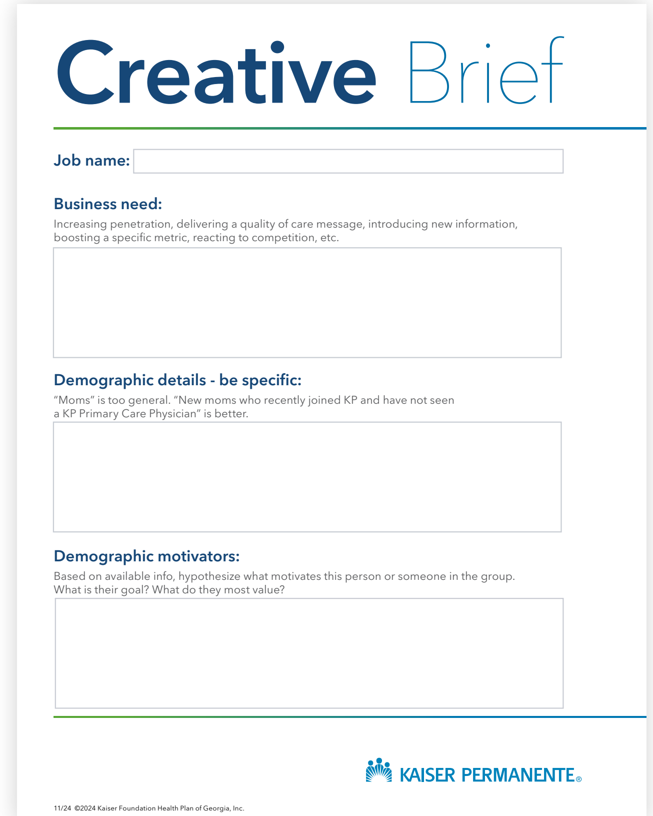
Key message / CTA

Success metrics

Mandatory elements

Consultant pain points

- What personality or politics do you need help overcoming?
- Are stakeholders disengaged?
- Help us win buy-in for you.


Creative Brief

Job name:

Business need:
Increasing penetration, delivering a quality of care message, introducing new information, boosting a specific metric, reacting to competition, etc.

Demographic details - be specific:
“Moms” is too general. “New moms who recently joined KP and have not seen a KP Primary Care Physician” is better.

Demographic motivators:
Based on available info, hypothesize what motivates this person or someone in the group. What is their goal? What do they most value?

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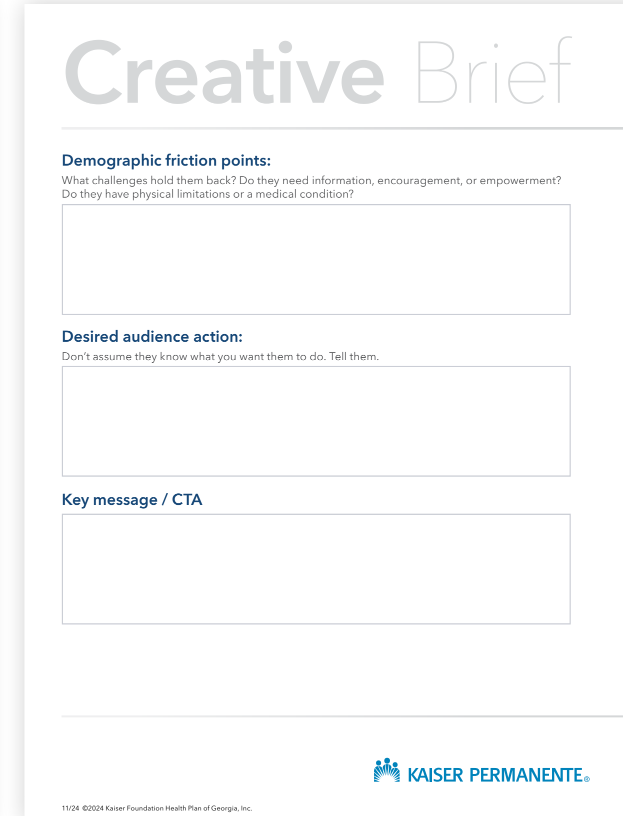
Creative Brief

Demographic friction points:
What challenges hold them back? Do they need information, encouragement, or empowerment? Do they have physical limitations or a medical condition?

Desired audience action:
Don’t assume they know what you want them to do. Tell them.

Key message / CTA

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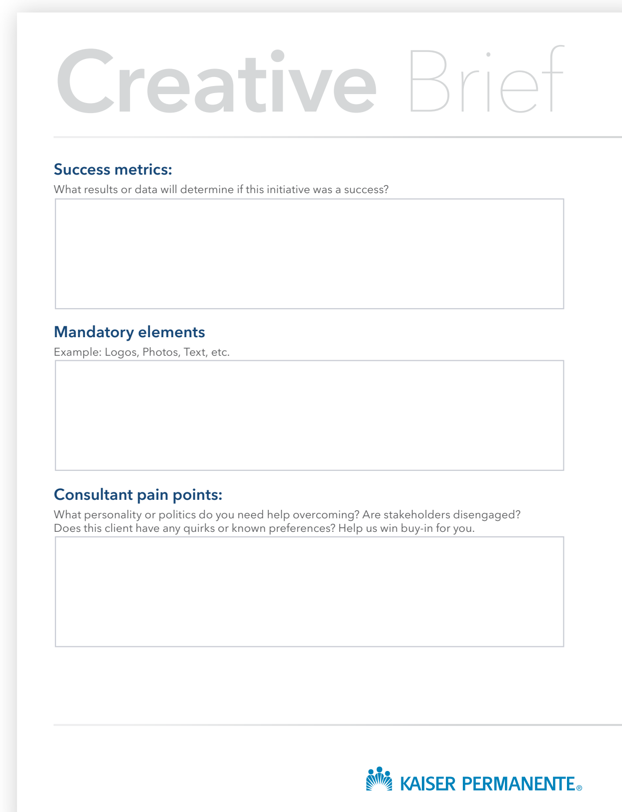
Creative Brief

Success metrics:
What results or data will determine if this initiative was a success?

Mandatory elements
Example: Logos, Photos, Text, etc.

Consultant pain points:
What personality or politics do you need help overcoming? Are stakeholders disengaged? Does this client have any quirks or known preferences? Help us win buy-in for you.

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Project Name Abbreviations

When initiating a job in Wrike it's helpful to follow our naming conventions guide for consistency, brevity and searchability. As a rule of thumb, we ask that you use the national and regional abbreviation guidelines provided.

What's in a job name?

Every job should follow the same format:

- Job#_ProjectName_GA-MMC_GA_Year_Deliverable Abbreviation

What should I avoid in the job name?

- Repetitive things like deliverables or dates
- Illegal characters (i.e. periods, blank spaces, double underscores, asterisk, parentheses, etc.)
- Obvious terms (i.e. 'KPGA', 'Promo', 'Revision')

List of project name abbreviations:

ABC: Atlanta Business Chronical

AJC: Atlanta Journal Constitution

AU: Atlanta United

Braves: Atlanta Braves

CMC: Comprehensive Medical Center

COA: City of Atlanta

County: Client's name only
Rockdale, Forsyth, Dekalb, Cobb, etc.

Falcons: Atlanta Falcons

FEBP: Federal Employee Benefit Plan

FEDS: Federal Employees

GrwCamp: Growth Campaign
Chronic, KP101, Excellence, Demand, GrntCamp
Condense by how you would search (**Maternal** or **Housing**)

HMO: Health Maintenance Organization

Hospt: Hospital

KPCRWR: KP Corporate Run Walk Roll

KPIF: Kaiser Permanente Individual and Family

KPSA: Kaiser Permanente Senior Advantage (Medicare)

MCH: Maternal Child Health or Maternal Health

MdLrg: Mid/Large

MHV: Mobile Health Vehicle

MOB: Medical Office Building

OE: Open Enrollment

OB: Obstetrician

OTC: Over the counter

Pgrm: Program

Pharm: Pharmacy

USG: University System of Georgia

SG: Small Group

SHBP: State Health Benefit Plan

SNP: Special Needs Plan

TRICARE: TRICARE

WFH: Work from home

WM: Weight Management

ZOO: Atlanta Zoo

Deliverable Abbreviations

FEDS: Federal Employees
Adv: Advertising
Artcl: Article
Aud: Audio
Bnr: Banner
BenSmy: Benefit Summary
Bndr: Binder
Bio: Biography
Bklt: Booklet
BrdGd: Brand Guidelines
Brch: Brochure
BS: Buckslip
Cal: Calendar
Camp: Campaign
Card: Card
Chrt: Chart/Graph
ComPln: Communications Plan
CpyBlk: Copy Block
DigScr: Digital Screen

DrHng: Door Hanger
Ebk: E-book
Email: Email
Env: Envelope
EOC: EOC
FAQ: FAQ
Flr: Flyer
Fldr: Folder
Frm: Form
FrmWks: Framework
Graphic: Graphic
Icon: Iconography
ID-Crd: ID Card
ID-Hld: ID Holder
Info: Infographic
Ins: Insert
Inv: Invitation
Kit: Kit
Lab: Label

Ltr: Letter
LtrHd: Letterhead
Logo: Logo
Mlr: Mailer
Map: Map
MktPln: Marketing Plan
New: Newsletter
Otdr: Outdoor
PhtShtPln: Photo Shoot Plan
Photo: Photo/GIF
PlyBk: Playback
PdCst: Podcast
PUBnr: Pop-up Banner
PC: Postcard
Pstr: Poster
PPT: PowerPoint
PrsRls: Press Release
PjtPln: Project Plan
PromoGraphic: Promotional Material Graphic

QA: Q&A
RS: Rate Sheet
RchMM: Rich/Multimedia
Scrpt: Script
SlfMlr: Self Mailer
SgnDis: Signage/Display
?????: Stakeholder Plans
Stkr: Sticker
Svy: Survey
Tbltop: Tabletop
TlkPt: Talking Points
TPd: Tear Pad
Video: Video
WlCrd: Wallet Card
WyFnd: Wayfinding
WebCont: Web Content
WhtPr: White paper
Wrap: Wrap

Questions from the team

Q: Proofing request workflow - in Wrike, there's a workflow option for a proofer, but historically, the consultant (or maybe it's just me) works outside of Wrike to send the files to a proofer, and I CC James/Gretchen to those emails, then I submit final edits in Wrike. Is there a way to internalize the proofing process in Wrike so that can be handled inside the system and have steps or a communications template for the consultant to follow?

A: This is an excellent thought that we are currently exploring. Stay tuned.

Q: When entering a project, I am unsure if I am putting information in the right areas. For instance, project description vs project background. I want to ensure I enter project details clearly and correctly for design. Also, I am not sure I am addressing comments in the correct places in Wrike. Usually, I will respond right below where I was tagged but maybe I should put my comments and responses somewhere specific. I want to ensure consistency with the rest of the group.

A: It's easy to get confused on this topic. The comments should be under the task assigned to you within the project. If it's under review that's where the comments should go.

Q: I have always wondered what goes into "Finalizing" a project. Are you changing the file in any way, saving it somewhere, or putting a magical, final gloss over it? Sometimes, requests for Final 2s come up, and I want to know how much of a pain point it is for you to pick it back up and touch it.

A: **Approving for FINAL should be 100% ready to go, thoroughly checked, and approved by all stakeholders. Making a FINAL2 should be a rarity.** After a file is complete, we upload it to EDAM, Share, and the Marketing Portfolio. A FINAL2 causes us to undo and redo that work.

Most edits take 15 minutes minimum by the time we download, review, edit, and upload the file. If that file has already been sent to FINAL, it will take longer.

FINAL needs by file type:

FINAL (Static):

- Usually straightforward.
- ADA compliance adds time.
- Best-case scenario, a double-sided flyer could take a few minutes to finalize.
- Large documents with images and tables can take an hour plus.

FINAL (Customizable fields):

- A few form fields may add an extra 5-15 minutes
- Pages of form fields can take hours to get right.
- Very buggy process.
- Other regions use outside vendors, adding days to each project.

PRINT:

- More standardized and typically don't take as long to create. But, money and production time are on the line.
- More time reviewing the final files, colors, bleeds, die-lines, etc.
- The fancier the file, the more to check.
- When preparing a FINAL24b, we comb through every detail, as if it was the first time. This is time-consuming, but necessary.

EMAIL:

- Files are tested across dozens of email clients on various operating systems and devices.
- Even minor revisions are retested.
- Usually takes less than 10 minutes.
- We have a limited number of tests.

WEB:

- We generally work on live sites and not in a development environment, so it doesn't usually add much time unless we need to change the layout.