

INTRODUCING THE

MARKETING WORKSPACE



A GUIDED TOUR THROUGH **PROJECT
MANAGEMENT** WITH **PODIO**

Project Management

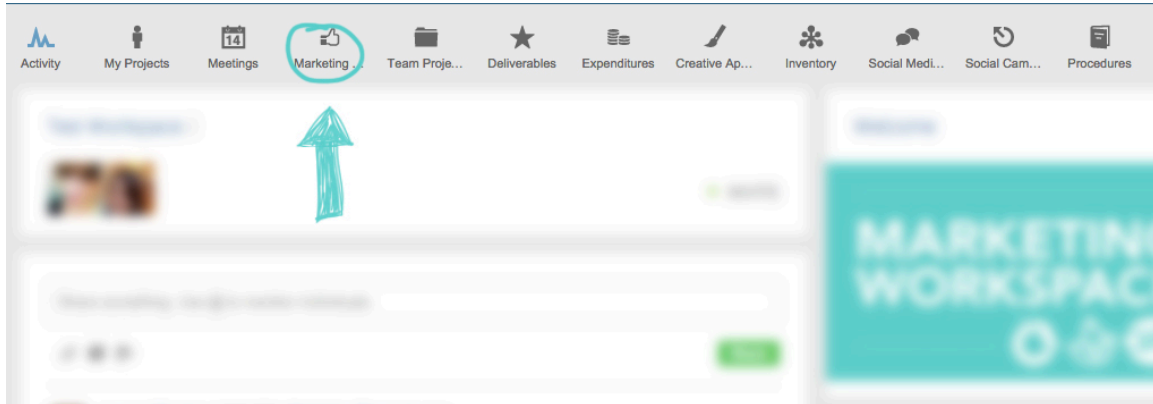
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Marketing Requests

THE PROCESS

App(s) Referenced: Marketing Requests



Submission Process:

Faculty and staff are required to submit an official request for marketing resources. A form is required for, but not limited to, the creation of or assistance with following items:

- Brainstorm / Marketing Meeting Request
- Events
- Marketing Materials (Design, Photography, Video, Print, Promotional)
- Social Media
- Website

Request Management Process:

- (1) Requests are submitted through web-form fed directly to app.
- (2) Ashley will mark as approved or rejected and assign Project Manager (PM) after hearing from Teresa.
- (3) PM will update status and progress of project directly in the **Marketing Requests** app and upload any final documents (files, images, etc.) necessary upon completion of request.
- (4) PM will manage correspondence with requester outside of Podio

Team Project Management

THE PROCESS

App(s) Referenced: Team Projects, Deliverables, Expenditures, Creative Approvals

A screen shot of items outlined below is included on the following page.

Entering a New Project:

- (1) Project Manager (PM) will enter project details and define team in the **Team Projects** app by selecting *Add Project*.
- (2) **PM** will then add all requested content and tasks as individual items in the **Deliverables** app, set budget when appropriate, assign them to the desired project team member and link them back to the main project using the **related project** field.

Managing Deliverables:

Project Team Member will be responsible for the management of their deliverable for the remainder of the project, including uploading any creative for approval and archiving using the **Creative Approvals** app (see page 7 for further details on *approval and proofing* process).

Budget Management:

The majority of any project's budget will likely be set in the **Deliverables** stage. If the Project has additional budget not associated with deliverables, **PM** will enter all necessary information in the **Expenditures** app, making sure to complete the **Related Project** field to ensure all information stays linked.


Follow Up:

Three fields on the **Team Projects** sheet are set-aside for post-project follow-up: **ROI**, **Cost Per Lead** and **Conclusions**. After the project has wrapped, the **PM** will enter all relevant information in these fields including any *weaknesses* noted and a recommendation for if the project or event should be repeated. This will help our archive and growth tracking.

* Project Name


Jessica's Super Fake and Really Extravagant Project


Project Manager

 **Jessica Render**
Digital Content Coordinator

Add/Remove

Team

 **Jessica Render**
Digital Content Coordinator

 **Merritt Wakefield**
Engagement Specialist

Add/Remove

Project kick-off and end dates

Tue 9 | December 2014 — Sat 27 | December 2014

Budget

\$ 1,000,000.00



Enter total approved budget here.

Allocated Funds

500,000.00 USD



This number pulls from how much you've spent on related deliverables.

Remaining Funds

500,000.00



How much of your budgeted is left.

Project Description

A really excellent description of my super fake project would be here. It would provide a general outline of the project.

Goals and metrics

What are we hoping to accomplish?

Target Audience

Who are we trying to reach?

Results: ROI

10,000 new students

Results: Cost Per Lead

\$5

This section is to be filled out upon completion of project.



Results: Conclusions

- Concluding thoughts on project or event.
- Where do you see room for improvement? Time, resources, execution, etc.
- Would you recommend this project or event to be repeated?

Files

Choose a file

Tags

Add tags...

Tasks

Add task...



Your related deliverables and expenditures will be linked below.

Related items

DELIVERABLES 1

Personal Projects

MANAGING INDIVIDUAL WORK

App(s) Referenced: My Projects

For those wishing to manage individual projects and to-do lists, this is the section for you! You are in charge of how much or how little you choose to use this section.

Filtering View: If you want to see **only your projects** when you login to this section, you will need to create a filtered view.

- (1) Click the funnel icon near the top of the screen
- (2) Filter by **Project Manager** and select yourself
- (3) On the left, click the green **save** button
- (4) Title the view with **Your Name**
- (5) Save your view and exit

Meetings

MANAGING ACTIONABLE ITEMS

App(s) Referenced: Meetings

Scheduling a Meeting: In the **Meetings** app, select **add meeting**.

Linking Related Deliverables: If the meeting will be discussing items already in development in Podio, you can specify and link to these items using the **related deliverables** field.

Minutes: The meeting facilitator is responsible for taking and inputting meeting minutes and *actionable items* following the meeting.

Assigning Actionable Items: Decisions made in the meeting that require action will be entered as a **task** by the *meeting facilitator* and assigned to the appropriate team member.

Follow-up: The following meeting will begin with an update on all assigned tasks from the previous meeting.

Creative Process

APPROVAL AND PROOFING

App(s) Referenced: Creative Approvals

Submitting Work:

Completed design, video or any other creative work needs to be submitted through the **Creative Approvals**. To start approvals and proofing:

- (1) Enter the app and select **Add Design**, upload or link to your work. Be sure to input **Related Project** field when your work is tied to a larger initiative.
- (2) Add **Creative Director** as *Requested Proofer* to submit your work. Work will be marked as “Approved” or “Edits Requested” and any notes will be added in **Comments**.
- (3) Once approved, select your requested proofers. For print materials, this should include the **Project Manager** (when applicable), **Creative Director** and at least one other team member of your choosing. Proofing for web content can be limited to the **artist** and **creative director**.
- (4) Once work has been approved by Creative Director or CEO **and** proofed following the requirements outlined above it can be sent to the printer or published following standard operating procedures.

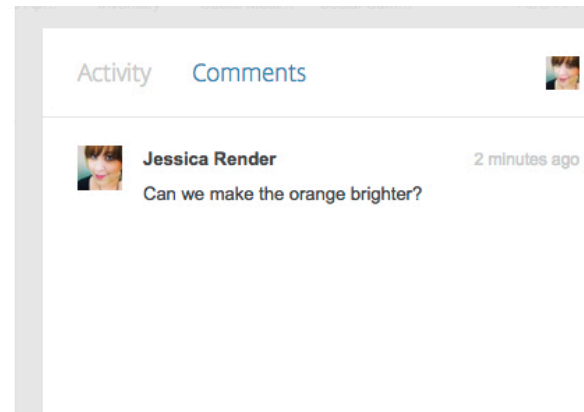
Note: If you are unable to upload or link to your project, a file path may be provided in the **notes** section.

Proofing Process:

If you are assigned to proof a creative piece please enter your comments (any notes, corrections, etc.) in the **Comments** section of in the **Creative Approvals** app.



Add image



Inventory Management

MANAGEMENT AND ORDERING PROCESS

App(s) Referenced: Inventory, Expenditures

For Print Materials:

Managed By: Office of CEO (Ashley), Artist or Project Manager

Managed through Inventory. Office of CEO (Ashley) will manage inventory and keep track of when new items need to be ordered and either order them herself or alert artist to need.

New items: Create or connect expenditure if none exists **“create new item”**

For Promotional Materials:

Managed By: Office of CEO (Ashley)

Managed through Inventory. Office of CEO (Ashley) will manage inventory and keep track of when new items need to be ordered and proceed with ordering.

New items: Create or connect expenditure if none exists **“create new item”**

For Other Items

Managed By: Office of CEO (Ashley)

Any other items needed for Inventory will be added at discretion of the Office of CEO (Ashley).

Budgets and Spending

TRACKING PROCESS

For Donations and CSR:

Managed By: Office of CEO (Ashley)

Create or connect expenditure if none exists “**create new item**”

For Projects

Managed By: Project Manager

Things mentioned in project + deliverables descriptions.

Create or connect expenditure if none exists “**create new item**”

For Campaigns:

Processes related to expenditures for the following are currently being decided.

- Ad Words and Web
- Social Media
- Radio
- Television

Social Media

CALENDAR AND CAMPAIGN MANAGEMENT

Assignments:

Here.

Content Calendar:

Here.

Content Creation:

Here.

Campaign Management:

Here.