

# I wish I knew that before we started...

## BRANDING + MARKETING EDITION

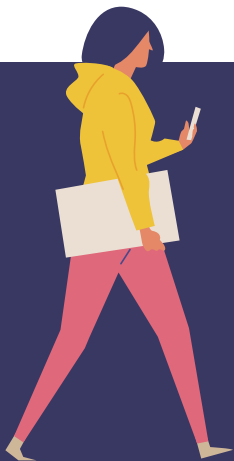
60+ Practical insights and tools to ensure increased productivity, collaboration, and project outcomes for building your brand, not your workload. To do more. Better.



# AN INTRO

There are many great creatives and marketers out there, but not all of them are necessarily the best matches for your company. My 25+ years in the industry has produced some awesome wins, but also some very tragic failures, in learning from those, I've been developing this list to help both my clients and my creative consultants get the most out of every project. I hope this can help you too.

Let's get into it...



## This is just the start...

We're creating a whole integrated suite of easy to use, but highly effective branding and marketing tools and workshops for the small business owner.

Make sure you're on the list for the latest updates and launches, sign up at: [iwishiknewthatbeforestarting.com](http://iwishiknewthatbeforestarting.com)

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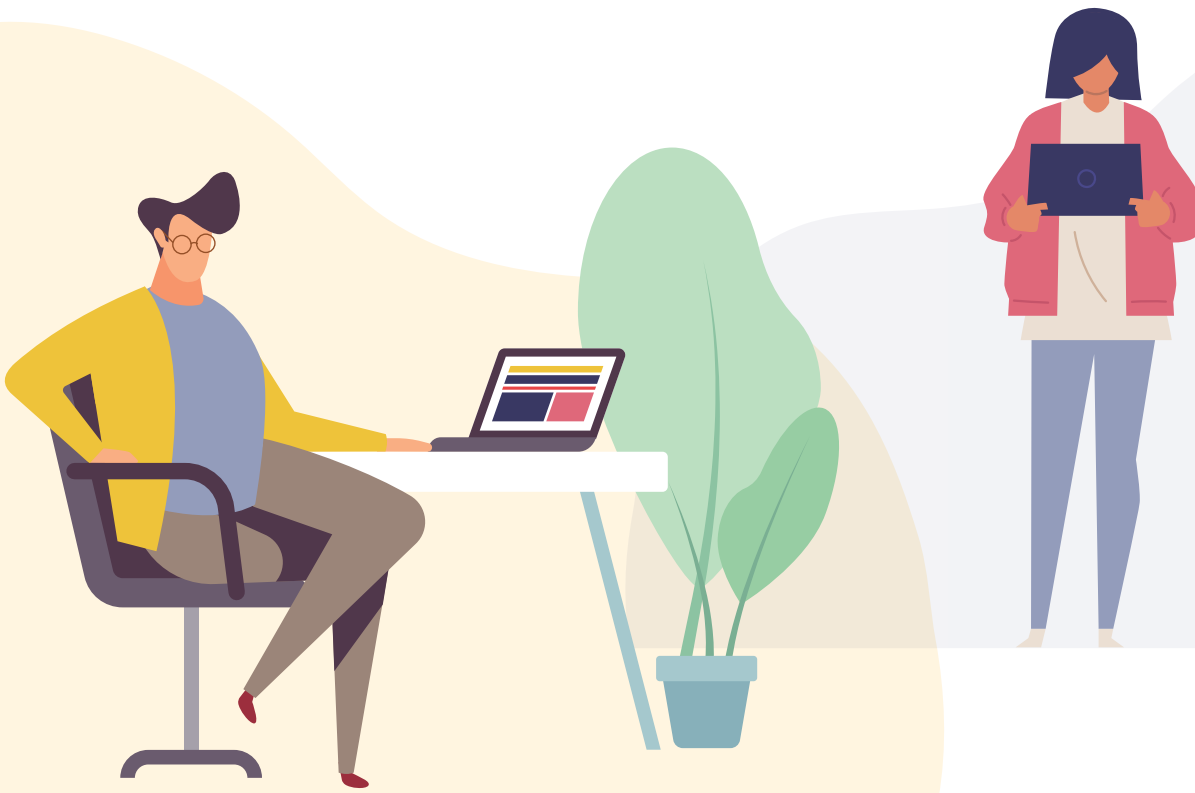
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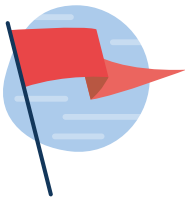
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**One last thing before we start,** sometimes those “little details” have special talents in creating **big problems!** So we added 2 crucial sections (highlighted with icons) into our guide to help you see and react to potential bad situations long before they materialize.

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## RED FLAGS

Unfortunately we've all seen them - Those red flags...

This is why we're waving them for you now, so you can see them coming from a mile away - those places where a project can go off the rails, money and time wasted, or good relationship ruined...

Can you turn red flags around? Of course, but only if you see them coming.



## If you ONLY do these things...

These are on our list of - Do Not Forget - They are simple, uncomplicated but if unchecked could land the project in heaps of trouble if not reviewed.



# PART 1: Your Project Prep



## Make sure you have a good project scope/creative brief?

The success and outcome of a project is usually known from the start, based on a solid and detailed brief, so plan, plan and plan. A great brief is a starting point to inspire your team and creative contractor. It should have just enough insight to challenge everyone and get them to think creatively about the problem - while concisely, clearly, and accurately outlining the project's parameters like budget and timelines.

### A BASIC BRIEF SHOULD INCLUDE:

- The project background - aka... Why you're doing it
- Your company's market position
- The project objectives and goals
- Target audience and competition
- Timelines and budgets

**Online Tools:** We love Google Docs, you can share with the team and get their feedback and input before sharing with the contractor. There are lots of free online templates to get you started.

**\*Quick Tip:** Ask yourself: Are you confident that this brief will inspire a great solution? If not, go back and tighten up areas of market position, audience, and competition.



**Poor planning simply lets someone else chart your company's direction and your projects outcomes.**

## What's your key message?

What is it that you want to communicate?

What are the project's primary and secondary objectives or needed outcomes?

Which platform are you using to communicate your message, as each has its own strengths and weaknesses?

Is the messaging reinforcing your mission, values, or goals with your audience?

**Online Tools:** We use The Brand Primer, of course.



**Don't expect great results with an average message and communications.**



## What research have you done?

How much can you provide in the way of industry research and inspiration?

Who are your target clients or audience and who are your key competitors?

If this is something you expect the contractor to do make sure it's in the scope and budget.

**Online Tools:** answerthepublic.com is a great online insight tool

**\*Quick Tip:** Surveys and interviews - of both current and past clients - are a really great place to collect relevant information and find out where you excel and where your gaps are.



**A client that doesn't know their industry, competitors or clients can't expect great outcomes**

“When everybody is planting apples a visionary plants oranges.”

- *Matshona Dhliwayo*

## Do you have Inspiration or project examples that you like?

We're not talking about what the competition is doing or something you want to copy, that never works, but finding similar styles, designs, and colour palettes can always be a great starting point for inspiration and creativity on a project to push it further.

**Online Resources:** Pinterest, Behance, Designspiration, dribbble...

**\*Quick Tip:** Create a shared folder somewhere and save your images and screenshots. And if feeling adventurous, organize the images using Google Slides - FYI you can change the page size in Slides to anything you like in page set-up.



**Don't copy other work, or let your designer**

## Running smoothly - Internally

Half of any project's success is knowing how to run it smoothly internally.

Do you know who all the Stakeholders and Decision-Makers are?

What do they need out of the project and their measure of project 'success'?

Do they have any timelines that might conflict with yours?

Your internal workflow can make or break timelines, budgets, and overall project success.



**A design/project by “committee” will always end up being watered down (to make everyone happy) and achieve half its potential with the expectation of its full goal.**



## What are your metrics or goals for a “successful project” outcome?

Are your goals clearly defined and documented so everyone knows?

For instance, new business acquisition, retention, downloads, followers etc.

Is it set up so they are trackable and measurable - even easily sharable (and understandable) by your team or company?

**Online Tools:** Use/Learn platforms that will give you measurable, relevant, and usable data like Google Analytics Some platforms will also give you the ability to do A/B testing to fine-tune (and invest better) in your Website/Ad/Messaging.

**\*Quick Tip:** Keep resetting your goals as a team, apply results to optimize for next iteration, and repeat.



## Do you have a long term strategy in place?

Compounding effort builds huge output, do you have a launch or roll-out plan in place for your project?

How will you support its success/momentum on a monthly basis?

How might you leverage Traditional, Social, Online, Media?

**Online Tools:** Project management tools such as Monday.com, Trello and similar combine strategy and execution in one convenient place.

**\*Quick Tip:** Know the difference between Strategy + Tactics? Strategy is an overarching plan or set of goals. Tactics are specific actions to accomplish your strategy.



**“Lets see how this goes” - marketing is an investment - Like a car needs, gas, maintenance and parts to keep going so does your marketing. Don’t waste your budget and resources on random one-offs.**

## Do you have the resource capacity to keep your project current/up-to-date?

Is there a resource plan/strategy/budget to keep things up to date like blog or social media posts, email responses, DirectMessages’s on social platforms or website pages, etc?



**Don’t let your efforts and reputation fall short, not to mention the time and investment you’ve spent on the project already - the project launch is only just the first stage of this race**



## Do you have a full list of project assets that you'll need?

What collateral, creative assets, might you need? This might include business cards, email signatures, signage, presentation deck, Social media headers, email templates etc.

**\*Quick Tip:** It's not always what you need now, but what you might need in a few months, it's more cost and time effective to get it done all together. Ask your co-workers in other departments if there's anything that could use the company's brand on it.



## Make sure you have your graphic assets in order?

This would include all your logos, images, illustrations, and brand guidelines on how to use them etc.

Are they easily accessible, shareable, in the right format with full specs included?

**Online Tools:** We use Dropbox and Google Drive to easily share all our files

**\*Quick Tip:** Logos: Adobe Illustrator (Vector images always work best in all situations),  
Images: at least 150dpi at 100% of usage size is the minimum - When in doubt ask a designer



**You don't have the original design files - Adobe Illustrator Files, High Res Quality Images, etc. Get them from your designer, photographer, videographer now - these things could take time and could significantly hold up a project.**

“Start where you are.  
Use what you have.  
Do what you can.”

– Arthur Ashe





# PART 1

# Checklist | Overview



## THE PROJECT SCOPE | HAVE YOU DEFINED YOUR:

- Market position
- Project objectives and goals
- Target audience
- Competition
- Timelines
- Budgets

## KEY MESSAGING | DO YOU KNOW:

- What do you want to communicate?
- The primary and secondary project objectives or needed outcomes?
- Which platforms are you using to communicate your message?
- Is the messaging/content reinforcing your brand mission, values, or goals?

## RESEARCH | HAVE YOU:

- Collected industry research and analysis?
- Collected design styles, colour palettes, photography, illustrations?

## INTERNAL PROJECT MANAGEMENT | DO YOU KNOW:

- Who are all the Stakeholders and Decision-Makers?
- What they need out of the project?
- How they measure project 'success'?
- Are there any timelines that might conflict with yours?

## GOALS, METRICS AND OUTCOMES | ARE THEY:

- Clearly defined?
- Trackable and measurable?



## LONG TERM STRATEGY | DO YOU:

- Have a launch or roll-out plan in place?
- Know how to support project success/momentum on a weekly/monthly basis?
- Know what collateral/creative assets that you'll want or need in the future?



## PROJECT ASSETS | DO YOU HAVE ACCESS TO:

- Logos
- Brand Guidelines
- Images, Photos + Illustrations
- Login details for any web or social apps



# PART 2:

## Creative Consultant or Agency Questions



### Have you seen their portfolio?

Obvious I know, but have they walked you through any of their projects to explain the project brief, their process, or final project outcomes?

**\*Quick Tip:** Just because they have done a lot of work in an industry doesn't mean they are a good creative fit with your project. What you save on research, you might pay for in lack of creativity.



**If all the projects were “concepts”. We all have to start somewhere, but you should understand the risks of working with a beginner.**

**If all the projects look the same, that's probably what you will get too.**

**If they can't show you their concepts/thinking - Essentially how they got to the final outcome.**

### Have you contacted their referrals or past clients?

Did you uncover that they work on time, on budget and produce work that meets or exceeds their past clients' expectations?



**If they can't offer contacts usually means the shown projects didn't turn out well, just because their project looks good doesn't mean the project went well from the client's perspective.**

“A referred brand is a preferred brand; and a preferred brand is a referred brand”

- Bernard Kelvin Clive



## What's their project process?

How do they keep things organized, productive, and efficient as possible?

How do they approach a new project?

How do they set up the project and assess its priorities and workflow?

What tools do they use to keep things on track and do they compliment your systems?



**No plan = weak action + poor outcomes.**

“Give me six hours to chop down a tree and I will spend the first four sharpening the axe.”

– Abraham Lincoln



## What's their discovery process?

How do they go about understanding who you are, your clients, your competition?

Is there an orientation process, are they asking and identifying the problem that must be solved?

Based on their experience, how will they find gaps, opportunities and the differentiations that will help in the creative exploration and success of the project?



**They don't ask any questions = Leaping to conclusions about how THEY might design or build something for you.**

## What's the time-frame of a project?

Do they create a list of all the project elements, resources and a work-back schedule with itemized tasks and project milestones to keep things on track?

Have they budgeted your team's feedback and approvals time?

What's their availability to complete the project if things shift?

**\*Quick Tip:** Do you know everyone who will need to sign off after each stage of the project?

Are THEY aware of their participation and the project schedule?

**IMPORTANT:** Everyone always over commits and under budgets the time things take to complete tasks - make sure expectations are as realistic as possible.



**See above, “By Failing to prepare, you are preparing to fail.” – Benjamin Franklin**



## What's their project review and feedback process?

How does the work/projects get presented and how does the collaboration and feedback process work?

How are changes/updates captured and tracked?

Which internal and external stakeholders might benefit from being in the presentation?

**\*Quick Tip:** With a project that involves multiple stakeholders, we've been presenting projects in Google Slides - This enables group comments to be tracked and shared.



**Ensure the stakeholders are aware of the project's scope, requirements, and outcomes.**



## What's the Proofing and Signoff Process?

How does the work/projects get proofed and signed off?

Who is accountable for the final sign off?

If its a printed piece make sure you see samples and/or printed proofs

**\*Quick Tip:** Share the project with someone outside the process so they can see/read everything with a fresh set of eyes. Hire a writer to edit proof the project - it's worth it.



**If its a printed piece ALWAYS get a printed proof - it will read + look differently, and it's exponentially cheaper than a re-print.**

**Make sure the cost proofs are included in the budget.**

“Feedback is  
the breakfast  
of champions.

- Ken Blanchard





## What process do they use to ensure originality?

What's their research process and policy to affirm that their work is not similar or has not been used in the same or similar industry?

Is the design from a template, has the template been purchased?

**\*Quick Tip:** Websites like tineye.com and Google Images can do a “reverse image search” that searches the web for “like” images - great way to find out how “original” the design is.



**Do not sign off on anything until you know it's original, you have all the rights for usage and know for how long usage (licensing) lasts on photos and illustrations.**

## Do they have collaborative partners and resources?

Who's in their network to help you with other project aspects or requirements?

How long have they worked with that person or company and which projects did they collaborate on?

Who's responsible in project managing them?

Who are they contracted to and who's responsible to pay them?

Who owns their work?



**All these points could turn into potential Red Flags on a project, do your diligence and ask as many questions as you need to feel comfortable.**

“Coming together is a beginning, staying together is progress, and working together is success.”

- Henry Ford



## Project Quote

Do they charge by the hour or total project?

Do their rates change on volume or type of work being done?

\*We quote all our projects on a tightly defined scope on a “per-project” basis, This allows the client to feel comfortable with ideation conversations and edits without feeling like every minute they might be charged - resulting in a less than optimal project outcome.



**No hard/firm quote = Poor understanding of project scope = Budget creep = No moving forward.**

## Exclusivity + Confidentiality

Do you need an NDA (Non-Disclosure Agreement) for your project?

Do you need a non-solicitation and/or non-competition contract limiting the agency’s or the contractor’s ability to compete and/or to solicit business in your industry?



**If a creative doesn’t want to sign with you, don’t sign with them - For all intents and purpose this is a partnership.**



## Contract

Do they provide one?

Does it include pricing guidelines for project budget or timeline creep?

\*This doesn't have to be complicated but it does need to cover the basics to protect all parties involved.



**No contract = no work.**

## Payment Terms

What are they?

\*There are many industry ‘standards’ but the common ones are usually based on a project’s size and length of time to completion. We Like the 30% - 30% - 40% with a project lasting 1-2 months? Longer ones are spread out more on a monthly basis.



**More than 50% up front.**



# PART 2

# Checklist | Overview



## THE VETTING | HAVE YOU:

- Have you seen their Portfolio/Reel/Published Projects?
- Have you contacted their referrals or past clients?

## PROJECT PROCESS | DO YOU KNOW:

- What's their project process?
- How do they set up the project and assess its priorities and workflow?
- What tools do they use to keep things on track?
- What's their discovery or orientation process?
- What's the time-frame of the project?
- Do they create a work-back schedule with tasks and milestones?
- Have they budgeted your team's feedback and approvals time?
- What's their availability to complete the project if things shift?
- What's their project review and feedback process?
- How does the work/projects get presented?
- How does the collaboration and feedback process work?
- How are changes/updates captured and tracked?
- Who signs off on the project from both client and creative side
- What process do they use to ensure originality?
- What's their process and policy to confirm originality?
- Is the design from a template, has the template been purchased?

## PROJECT RESOURCES | DO YOU KNOW:

- Who's in their network to help you with other project aspects or requirements?
- How long have they worked with that person or company?
- Who's responsible for project managing them?
- Who pays them and whom are they contracted to?
- Who owns their work?

## CONTRACT, PAYMENT, EXCLUSIVITY + CONFIDENTIALITY

- Do they provide a contract?
- Does it include pricing for project/scope creep?
- What are their payment terms?
- Do you need an NDA for your project?
- Do you need a non-solicitation and/or non-competition contract?

# PART 3: Project Wrap



## Ownership of Assets

Is the project work owned by the consultant and licensed to you, or do you own it outright?

Are the concepts or project work yours to keep and use? Is it noted and accounted for in the scope or contract?

If stock illustrations or images are used, who owns them, and what's the length of their licensing?

**\*Quick Tip:** Make sure ALL images and illustrations are licensed and not just downloaded from the internet, you could get sued for copyright infringement and/or pay a hefty buy-out even if removed.



**Not knowing and fully understanding this could cost you more than the whole project combined.**



## Project Back-up + Storage

Where will your files be stored and backed up?

**\*Quick Tip:** With the ease and cost of cloud storage, we save and share all the client's final files in a shared Google Drive + DropBox - We suggest setting up your own cloud storage and sharing it with the consultant so you always have access and control of it.



**They or you don't have a back-up/storage plan**

“Backing up your files isn't expensive, it's priceless - Always have a back-up plan”

- Brady Dahmer





# PART 3

# Checklist | Overview



## OWNERSHIP OF ASSETS | DO YOU KNOW IF:

- The project work is owned by you or consultant
- The concepts or preceding work yours
- Stock illustrations or images - owned by you or the contractor
  - What's the length of their licensing or terms of the stock?



## PROJECT BACK-UP + STORAGE | DO YOU KNOW:

- Where will your files be stored and/or backed up?
- Do you know for how long?

## There you have it...

## What did you think? How did we do?

Hope this was super helpful - We tried to make this list as simple but robust and informative as possible to make your next project run even smoother and garner ever greater success!

Brady



## Hey, are you on our list?

### We've got lots launching in 2021.

**THE COURSE** - Video Tutorials, Best Practices Frameworks, Project Templates, Editable Worksheets, and lots more.

#### UPCOMING GUIDES IN:

Photography and Videography  
Websites and SEO  
Mobile Apps  
Content Writing  
Social Media and PR

Sign up on the website to get the newest releases and special offers.



## Reach out and let's stay connected and inspired...

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