Process Steps

Understanding our project process will help us complete your work in an accurate, comprehensive and timely manner. In order to provide an accurate estimate, several things need to be addressed:

› **Project team.** Stakeholders who will be part of the development, review and approval process should be determined and available throughout the project. It is important to assign an internal project manager to serve as a point of contact. This person will manage day-to-day communications, send and serve as our main liaison on key decisions.

› **Scope of work**. A thorough discussion of the project—including ideal timeline, format, writing, editing, artwork and printing—will give us the information we need to devise a plan of action and working budget.

› **Print Estimates.** To obtain a printing budget, several specifications need to be confirmed:

➡ *Quantity* (remember to consider shelf-life). Also note that it is more cost-effective to print a larger quantity initially versus paying for smaller runs or to reprint at a later date.

➡ *Page Count.* Pages are broken down by signatures (a sheet of printed paper that is folded one or more times to become a single unit of several pages in multiples of four). Your document must fall within a standard number of pages: four, eight, 16, 24, etc. It must be a multiple of four or eight. The four cover pages: C1 (front), C2 (inside front cover), C3 (inside back cover), and C4 (back cover) are not included in the basic page count since they are normally printed using a heavier paper stock.

➡ *Format* (size of piece). If your piece will be distributed only as a PDF, standard 8.5 x 11″ default size must be used to accommodate in-house printers.

➡ *Paper choice.* Cover and text stocks, weights, coated or uncoated, and recycled content all need to be determined.

➡ *Color.* Process printing is divided into four colors (4C): Cyan, Magenta, Yellow and Black (CMYK). RGB is reserved for web only.

➡ *Binding.* This stage is when trimming, folding, perforating, collating and gluing is performed. Based on the paper stock and the page count, either saddle stitching (stapling) or perfect binding (pages glued together with a spine) are used.

➡ *Digital vs. offset.* Digital printing is used for small quantities when you need a fast turn-around. The quality has vastly improved, but is not recommended for projects with large images and ink coverage. Offset printing is for larger quantities (500 and higher) and allows for more quality control, ink options, paper sizes, cover finishes, etc.

› **Distribution.** How will the final piece be circulated? In addition to a printed version, will a PDF be needed for your website? Will you be handing it out at meetings or conferences? Do you need to mail it? Is it for a specific event or a marketing piece you will use over the next year?

› **Agreement.** A formal terms of agreement will be submitted for review. Upon approval, a client kick-off meeting will be scheduled. Detailed timelines and production options will be explored and agreed upon at that time.

Estimates

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Process Steps

How you want to be perceived by your stakeholders will guide our approach to the project. By talking about your objectives and the audience for the project, we will develop a strong concept and consider all possible options.

› **Availability.** The team's availability is reviewed, based on prior commitments such as other clients, holidays, vacations and travel and is taken into consideration.

› **Timeline.** The schedule is developed by working backwards based on your target delivery date. Aspects such as the team's availability as well as time for research, writing, proofing and printing are factored into the equation.

➡ Within a few days, we present a timeline for your review. Once approved, *any* changes in the schedule will result in two outcomes: the target delivery date will change, *or rush fees* will be incurred. If this occurs during the project engagement, we will revise the timeline and/or assign rush fees accordingly. We try to avoid this if at all possible.

› **Printing**. These estimates will be secured during timeline development in order to obtain competitive bids and secure printing schedules.

› **Marching Orders.** The kick-off conversation will conclude with a mutual understanding of what is expected of the entire project team. We will summarize that understanding in the scope of work in the agreement.

Kick off

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Process Steps

Producing content is complex. We will work with you to establish a theme, point of view and consistent tone to tell your story. We will also provide copy editing to make sure you present your organization in the most professional and favorable light.

› **Strategy.** Keep the project objective in mind as all the various copy elements are gathered:

➡ Determine articles, profiles and other pieces to be included in the document.

➡ Determine what style book to follow in the document, such as the AP Stylebook, the Chicago Manual of Style or a specific style book used by your organization.

➡ Decide who will champion and review all writing components, both inside and outside the organization.

➡ Select what elements should be included e, such as sidebars, pull quotes, infographics, charts, tables and acknowledgements. A page outline will be developed based on these decisions and components.

➡ Decide all content elements for the cover.

➡ Assign content creation to writers, either internally or externally.

› **Content Creation:** *internal.* Content provided by you must come to us in pristine condition. If it's right the first time you'll save time and avoid correcting erros late in the process. Your responsibilities include:

➡ Checking for factual accuracy. Double check dates, facts and figures.

➡ Verifying the proper spelling of all names, titles and middle initials.

➡ Making sure the correct contact information, links (any file that is added to the document) and web addresses are included.

➡ Checking spelling.

➡ Checking that all copy has been proofread against original versions.

➡ Making sure all internal stakeholders review and approve final copy before it is sent to us.

› **Content Editing.** When we receive your final, internally produced copy, we will edit it for style consistency as well as grammatical accuracy. We will return it for approval by the key stakeholders. When we get your final approval, the copy will move into the design phase.

› **Content Creation:** *external.* Content provided by us will be created in collaboration with you and your team. By working closely with you in determining the tone, style and subject matter, we are able to create messaging that best serves your project goals. Steps include:

➡ Working closely with internal point person, we will research and write content that aligns with project mission and goals.

➡ Content will be edited by us to ensure accuracy and to conform to your internal style guide.

➡ Content will be sent to you for detailed review by internal stakeholders.

➡ Revisions to content can be completed, as needed, to refine messaging.

➡ Final proofing will ensure alignment and accuracy.

➡ All internal stakeholders will review and approve final copy before it is sent back to us for design.

› **Document Format.** Copy should not be styled with all-caps, which have to be retyped in the design phase. This will help prevent potential copy errors. Also limit tab usage.

Content

3

Process Steps

Good design is realized through strong content, careful planning and methodical research.

❯ **Time frame.** How long will the design take? The process ranges from two to four weeks depending on the size of the project (16 pages vs. 80 pages, invitation vs. annual report). The clock starts when final, edited copy* is presented to the designer.

The scope of work may change once the copy is applied to the design. An amended budget will be submitted based on these factors.

❯ **Provided files.** Images and artwork need to be provided as individual files. We can't use images and graphics that are embedded in a Word document or PDF. Images (such as head shots) cannot be copied from websites. The artwork must be high resolution at the size it will be reproduced. Please check all files for size and resolution.

Why so long?

❯ **Research.** We'll scour stock image sites to find the right photos, artwork or illustrations for your project. These images are the foundation for conceiving the design direction.

❯ **Visualizing data.** Our goal is to create infographics, charts and table styles that present your data in the best light. A style will be developed and submitted for approval.

❯ **Realizing the design.** Once all of the elements are gathered, the physical design work begins. Fitting each component into a fixed area of space takes experimentation, creativity and finesse. A general design direction will be presented for approval. Any element that changes after this point will alter the aspects of the design.

❯ **Proof points.** We do our own internal proof to catch errors before sending proofs back to you. After a few internal rounds, we will send you a PDF proof for review by your team.

* Based on the project timeline, draft copy may be used for the design concept phase.

Design

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Process Steps

We want your piece to be perfect. That requires a thorough review phase and lots of eyes on task.

› **Internal proofing.** We conduct several rounds of internal proofs during the design phase before we send the first, full PDF proof to you.

› **Number of Proofs.** Three rounds of proofs are considered industry standard, and are noted in the initial estimate. If more proofing is required, additional charges (Author's Alterations, or "AAs") will be applied. We will alert you if additional costs will be incurred.

› **Changes.** At this point, changes should be minimal. Edits that are deemed extensive, such as new or replacement copy that requires the re-flow of a designed file, will be considered AA's and charged accordingly.

If revisions involve replacement copy, please make certain that new text matches the length of the amount being revised. Or cut/add the same amount from somewhere else in same paragraph or section. Otherwise, content will have to be adjusted elsewhere because the additional copy will create breaks in the formatted content.

Proofing method:

› **Conform.** The project manager should coordinate and collect ALL edits from anyone reviewing the proof and compile them into a single edited version. This will avoid overlapping changes and address internal questions that may arise when seeing the content in a more complete format.

› **PDF Comments.** The easiest way to manage these changes is by using the "Comment" editing feature in Adobe Acrobat. The "annotations" panel provides various methods for marking up the PDF. We recommend the following process:

➡ Right click to add sticky note. Insert any revised copy in the box.

➡ Please do not mark up edits using all-caps, indents, paragraph returns or any other specific type styling, including a specific font choice. These formatting procedures will be handled on our end, and they tend to cause more confusion in the proofing process.

➡ Consistently label the PDF file using names such as "P1" (Proof 1), etc.

➡ All changes need to be submitted during one of the three formal proofing stages. Individual changes that are sent via email may get lost in the shuffle. To ensure accuracy and to follow best practices, changes must be supplied in a traceable, orderly way.

› **Client sign-off.** Once we get final client approval, the document will move into the pre-press (print prep) phase.

Proofing

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Process Steps

Printing is a precise mix of art and science that requires several prep stages. With custom manufacturing, each stage of production or "touch" requires a variable amount of time depending on difficulty.

› **Time frame.** Average offset printing jobs run anywhere from six-10 business days. The more "touches" there are on a project, the more production time is required. Each schedule is customized based on the final product.

› **Print vendor.** The approved vendor takes the project requirements and schedules press time, orders paper, produces proofs, physically prints the piece and is in charge of client delivery.

› **Pre-press:** *design.* To ensure your file is ready for print, image conversion, color and font management and updating links (images and artwork) must be managed closely by us. These checks and balances prevent potential additional press fees and schedule delays.

› **File delivery.** The prepped file is then uploaded by us to the printer website or FTP (File Transfer Protocol) site. All specifications are reviewed. The print vendor needs a day to check and write up the project.

› **Pre-press:** *printer.* Files are prepared for production. This includes review of files for font, links, etc. The layout for each job is created. All images are separated into the four-color process to allow for printing.

› **Proofs:** Each job will have a high-resolution proof (for color review) and a low-resolution proof (for composition and text review) with all elements in place to present to the client for approval. The client reviews for color corrections and typos. . (Other than minor revisions, there are no content changes made at this point.). This process can take two to three days depending on complexity and whether or not changes are made to proofs.

› **Press room.** The print job is approved and plates are made, mounted on the press and printing begins. Press time varies based on both size (page count) and length of the job (quantity). Typical jobs are one to two days on press.

Plates are aluminum sheets that contain the images/copy separated into the four-color process (one plate each: cyan, magenta, yellow and black).
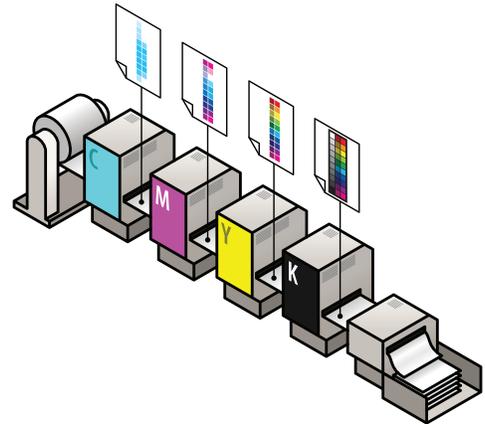
› **Bindery/Finishing.** Normal jobs will move from the cutters for trim and scores for folding and onto the stitcher for binding. The average process is two days. If job requires heavy ink coverage or uses uncoated paper, more time is needed for drying.

› **Delivery.** The final printed piece will be delivered to the client from the print vendor. Delivery specifications will be confirmed by the client and provided to the printer.

Printing

⑥

smyersdesign.com
kelloggconsultinggroup.com