Process & Best Practices – Basecamp TO DOs_d8

Section 1: General TO DO Guidelines

- Assignee (and Other) Acronyms:
  - DCS: Director of Client Services
  - AM = Account Manager
  - PM = Project Manager
  - OM = Operations Manager
  - CW = Copywriter
  - AD = Art Director
  - DD = Designer / Developer (Web)
  - SEM = Paid Digital Specialist
  - SEO: Search Engine Optimization Specialist
  - SMM: Social Media Marketing Specialist
  - DOT: Director of Training
  - MB: Media Buyer
  - AC: Accounting
  - MS: Marketing Strategist (Sales)
- Clearly explain the task or problem at hand, with as much detail as possible
- For projects that are urgent (needed same day), AM will add "[URGENT]" to the TO DO's name field
- Use Boosts to express thank-yous (rather than a new post/comment)
- If responding to Basecamp via email, remove your email signature
- For revisions from Clients, review them first to assess clarity/practicability — do not wait for Assignee to find (later down the timeline) issues that need to be resolved before the task can be completed (creating delays unnecessarily)
- For Bios/Profiles, always provide the Client's curriculum/curricula vitae and Bio Questionnaire
- When providing copy from Clients, be sure to include it in an editable (copy-able) digital format – no image-based versions that require typing labor. If there is no editable (copy-able) digital-format file of the copy being provided, specify that in the Notes section of the TO DO so that OM/PM can allow for the additional labor to type the copy.
- Retainer TO DOs will have Status Modifiers. Sold-project TO DOs *may* have Status Modifiers (See Assignee Responsibilities, Section 3)
- FOR RETAINER PROJECTS: Assignees and AMs will re-assign TO DOs to appropriate parties during the production process. E.g., when the TO DO *Review Client Bio [CW]* is copy-complete, the Assignee will re-assign it to the AM and add the Status Modifier *#AM Review.* (See Section 3: Status Modifiers). Most retainer TO DOs, therefore, will be closed by the AM.
- Keep follow-up commentary honest and frank (but still polite/professional) and as brief-yet-comprehensive as possible. The goal is not less reading; it's less confusion.
- Remember to tag Roya in any Basecamp posts you want her to be aware of.

Section 2: Assigning TO DOs

Assigning Client-Requested or Internally Generated Tasks

This applies to *all* creative-assigned TO DOs, new, templated, internal HS work, or otherwise.

After the initial contract…

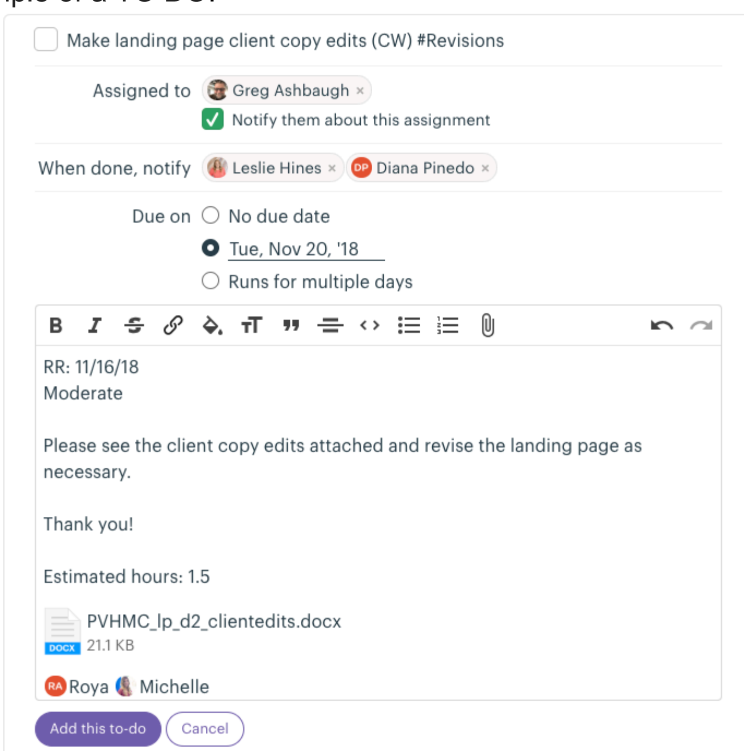
- AM receives a request from the client (or Stewart).

- AM creates the TO DO (applies to New-Contract Tasks, as well).
  - Project Name (title of the task) begins with a verb. (E.g., Write copy. Port pages over from existing site. Design brochure. Launch PPC Campaign.)
  - Title of the task is followed by the Creative Indicator in parentheses. (See acronyms on Page 1.)
  - AM assigns the TO DO to OM and PM. This should help make assigning TO DOs easier. For example, while an AM is in a meeting receiving feedback, they can immediately add it into a Basecamp TO DO and assign it to OM and PM instead of having to wait and come to talk to them about it after the meeting. This should also help minimize interruptions for all involved.
  - Include the desired Due Date
  - AM adds own name to the "When done, notify" field
  - In the Notes section, AM includes:
    - Date request received (RR). E.g., RR: 10/29/18
    - Level of urgency: Low, Moderate or High. For anything "urgent" (needed same day) AM will add "[URGENT]" to the task name.
    - If the TO DO is internal (not requested by the Client, such as "Update Yahoo! Ads"), specify this as "Internal Request" or "IR"
    - The assets referenced. E.g., "Revise Brochure" would necessitate including or attaching the Brochure and the revision input. "Make changes to Landing Page" would require including the URL of the Landing Page (even though all URLs will already be present in the Message Board).
    - All assets, info and details necessary to complete the task (unless in the Docs & Files section), such as…
      - *CID*
      - *copy document(s)*
      - *Web Outline(s)*
      - *CV and Bio Questionnaire for provider profiles*
      - *advertising specs – size, color, sides, bleed, pub name, etc.*
      - *photo (if possible) or description of outdoor advertising space, such as sign or billboard*
      - *audience demographics/profile – specific to each ad or project*
      - *specific gateways*
      - *specific needs, requests and/or expectations*
      - *client preferences (including what the Client dislikes)*
      - *files*
      - *Images*
      - *logos (in vector format)*
      - *account manager notes*
      - *call recordings*
      - *login information (WP, FTP access, domain registrar access, etc.)*
      - *backup files*
      - *FOR DIGITAL/PPC: URL for Website or Landing Page to which we'll be sending traffic*
      - *FOR DIGITAL/PPC: Geographical targeting details*
      - *FOR DIGITAL/PPC: Demographic targeting information*
      - *FOR DIGITAL/PPC: Specific treatments (topics) to promote/focus on*
      - *FOR DIGITAL/PPC: Destination phone number for Call Tracking setup*
      - *FOR DIGITAL/PPC: Monthly budget/spend*

        - *FOR DIGITAL/PPC: Goals and key performance indicators (KPIs)*
        - *Any other relevant information*
        - *When in doubt, ask*
    - Also in the Notes section, AM cc's OM and PM (so that when they reassign the TO DO they'll still be in the loop of the TO DO's progress).
    - If the AM sees a compelling (non-personal-preference) reason to assign the TO DO to a specific creative, list the preferred CW or DD in the Notes section of the TO DO. (Examples of a valid compelling reason include things like the DD who has done all the figuring and work up to this point, or the CW who has the greatest familiarity with the style, subject matter, client work, etc.) OM and PM will do their best to accommodate the assignment request based on creatives' availability and workload.
    - AM hits "Add this TO DO"
- PM and/or OM reassign the TO DO to the appropriate team member based on availability and workload
    - This means most TO DOs for Creatives will be assigned by PM or OM

Examples of TO DOs

- Examples of TO DO names
    - *Revise design per Client's feedback*
    - *Write a Flyer for X upcoming event*
    - *Make Client's edits to Dev Site*
    - *Update photos on Live Web Site*
- Visual example of a TO DO:



Section 3: Assignee Responsibilities

Responsibilities

- Assignee will check his/her Assignments list on Basecamp early and often (several times throughout the day), as urgent projects can and do come up.
- For Retainer projects, Assignee will add to the Notes section of the TO DO the estimated hours of labor required to complete the TO DO (not the entire project).
- For new, sold projects, the Assignee will need to be aware of the budgeted hours, and therefore must check for their allotted labor hours in Harvest. Remember that the budgeted/allotted hours pertain to the entire project, not just the TO DO.
- Assignee will make OM or PM aware of overdue projects, projects that are unlikely to be completed by the due date, or an abundance of projects that complicate the workload or timelines. Assignee will document the estimated hours difference this in the TO DO as a Comment. (E.g., if the estimated labor is 4 hours, but it's looking more like 6, specify that 2 additional hours are needed so that PM can update the Forecast.)
- Assignee is responsible for maintaining a current percentage-complete status in the TO DO's name field. E.g., for *Write Website Content [CW],* the CW will change the name of the TO DO to *Write Website Content [CW] #In Process (25%).* This should be done anytime the Assignee leaves a particular TO DO to work on something else. (See Status Modifiers detail below.)
- If a TO DO cannot be completed due to lack of information or assets (or some other non-Assignee reason), the Assignee will add the *#Info Needed* Status Modifier and reassign the TO DO to the AM or other appropriate team member. Once that problem has been resolved, the new Assignee will reassign the TO DO back to the original Assignee, deleting the Status Modifier.
- For any project, the Assignee is responsible for assigning the next-step TO DO to the appropriate party. E.g., once the AD completes *Design Brochure [AD],* the AD is responsible for assigning *Review D1 Brochure [AM]* to the AM.

Status Modifiers

- Problem:
  - Currently, Basecamp does not make it easy for Management to quickly see the status of any particular Project/TO DO. But it's important that they be able to. Our new "checklist" TO DOs system will resolve this for sold projects, but not for retainer projects.
- Solution – Retainer Projects:
  - The Assignee will add a Status Modifier after the Retainer Project Name in the same field of the TO DO. This Modifier will make it possible to quickly know where in the process the Retainer Project is at any given time.
- How to do it:
  - The Project Name and the Status Modifier will be separated by a hashtag (#).
  - There are only seven Status Modifiers, specified and explained below.

- Each Status Modifier is the responsibility of the assignee at the time the Status changes. E.g., when CW finishes copy, he/she will add #AM Review to the TO DO name and reassign the TO DO to the AM.
- The TO DO will be closed by the Account Manager after the Project advances to the next step in the process. For example, the Project "Write Brochure" would not be marked as completed when copy has been written but, rather, after it has been reviewed, revised, proofed (if relevant), AM-approved, and ready to advance to the Design phase.

STATUS MODIFIERS for SOLD PROJECTS

Status Modifier	Explanation
#In-Process (XX%)	Once the Project has been started, ***Creatives*** will add this Modifier, of course *with* a specific percentage number. This will give others an idea of the progress made so far. The percentage number (an estimate) should be updated after each expenditure of labor on that Project.
#InfoNeeded	If and when a project is in need of information in order to restore forward momentum/progress, the ***Creative*** needing the info will add this Status Modifier to the TO DO and change the assignee to the name of the person from whom the information is requested in order to put it on their work plate. Once the information is provided, the assignee name will be changed back to the original assignee (copy, art, dev, etc.).
#AcctgHold	If a project is put on hold due to lack of payment or another accounting reason, the ***Account Manager*** will add this Status Modifier. When this happens, the assignee will be changed to the Account Manager’s name.

STATUS MODIFIERS for RETAINER PROJECTS

Status Modifier	Explanation
#In-Process (XX%)	Once the Project has been started, ***Creatives*** will add this Modifier, of course *with* a specific percentage number. This will give others an idea of the progress made so far. The percentage number (an estimate) should be updated after each expenditure of labor on that Project.
#AMreview	Once the Project has been written, designed, web-dev’d, etc., ***Creatives*** will add this Modifier. Simultaneously, ***Creatives*** will change the project assignee to the Account Manager’s name so that it becomes the AM’s TO DO. Once the review is complete, it will be reassigned to the writer/artist/developer and given the Modifier **#Revisions** (continue reading).
#ClientReview	When the project goes to the Client for review, ***Account Manager*** will add this Status Modifier. The TO DO’s assignee at this stage will be the Account Manager.
#Revisions	After AM Review or Client Review, if there are revisions, the ***Account Manager*** will add this Modifier to the TO DO’s name and change the assignee to the name of the writer, artist or developer doing the revisions.

#Proofing	When a project is sent to proofing, the ***Account Manager*** will add this Modifier to the project name. If the proofer is a Basecamp participant, that person will become the Assignee. If not, the AM will remain the assignee.
#InfoNeeded	If and when a project is in need of information in order to restore forward momentum/progress, the ***Creative*** needing the info will add this Status Modifier to the TO DO and change the assignee to the name of the person from whom the information is requested in order to put it on their work plate. Once the information is provided, the assignee name will be changed back to the original assignee (copy, art, dev, etc.).
#AcctgHold	If a project is put on hold due to lack of payment or another accounting reason, the ***Account Manager*** will add this Status Modifier. When this happens, the assignee will be changed to the Account Manager's name.