CREATIVE WORKFLOW MANUAL

Wrike | U

WELCOME TO THE TEAM.

If you're reading this document, you've just joined the creative squad at The U.

Congratulations! If you're new to Miami, ¡bienvenido! This is an amazing place to live and work. If this isn't your first rodeo with the Canes, welcome to the creative team.

Whether you're a designer, a producer, an animator, a strategist, or a project manager, you know that we pride ourselves on producing engaging creative that stays authentic to the Miami Hurricanes brand – and you're here because you feel that same sense of pride about the Orange and Green.

In order to keep the machine humming and make the most efficient use of our team's time, we always follow a specific process for both video and design work.

A creative process is simply a roadmap; a tried and true method for creative professionals to work together to get the job done.

Our process is a set of rules and procedures, an operating system that includes tools, approvals, and communication. It can (and should) evolve over time. The process is intended to keep everyone on track and allow for the most amount of time to be spent on creative work with the least amount of our creatives' time spent on administrative tasks.

Our workflow software tool is called **Wrike**. It's a complex but intuitive tool for collaboration, and this document outlines everything you'll need to know about how to use it. It will also answer some big picture questions about why we do things the way we do. Our process might not work for every organization, but it has been tested over time and it works here.

We're glad you're here, and we hope you're ready to do some kickass work.

Go Canes!

TABLE OF CONTENTS

THE WRIKE INTERFACE

Whether you are a creative contributor like a graphic designer or video producer, or you're in an administrative role like a project manager, Wrike has some basic tools and functions you'll need to understand.

When you first start at The U, the Project Manager will send you an invitation to join Wrike. You'll get this via your email, so make sure to be on the lookout. Click the link in your email invitation and log into Wrike using your miami.edu email address.

Once you're logged in, you'll see a bunch of different parts of the interface – a list of folders on the left sidebar navigation, plus a number of views that are accessible along the top menu bar.

This section of the guide will walk you through the functions of each of the tools with the aim of making your Wrike user experience easy and intuitive.
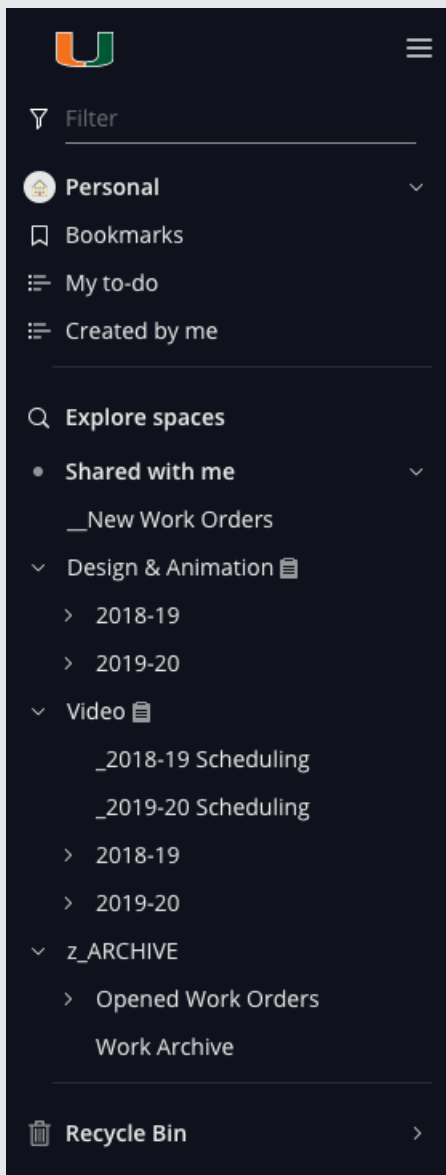
Left Navigation

Think of the left sidebar navigation as our file hierarchy, similar to the structure of a Shared Drive. Depending on your level of access and user type, you may see only your department's folders; for example, you may just see the Design & Animation master folder if you are a graphic designer.

The next sublayer of those folders is broken down by academic year so we can easily search by year. When you open the current academic year, you'll see a folder for each of our clients. Our client list includes each scholarship sport at UM as well as individual business units that request work from us on a consistent basis like Marketing, Events Services, Digital, etc.

From there, we subdivide the years into client folders to make searching for current and past projects simpler as well. Inside each client subfolder, there is a list of work orders in chronological order of when they were opened. These tasks are where we house creative work and the conversations that lead to getting it done.

If you ever have trouble finding a recent project, make sure you select "All tasks" from the filter inside the gray menubar. Sometimes the system resets and defaults to "All active tasks" which doesn't let you see tasks that have been marked Completed.

If you're a Project Manager or Admin, you will also see a master folder called __New Work Orders. This is where – surprise! – new work orders come in to be assigned to the creative team. More details are available about that process in the section called **How To Turn A Work Order Into A Job**.

Finally, everyone will see a folder at the bottom of the left sidebar navigation marked z_ARCHIVE. This is where work orders go when they're archived. In the off chance you ever need to reference something as it was originally written in a work order, you'll find it in the subfolder titled *Opened Work Orders*.

Mentioning this folder is a good time to also state that we <u>do not ever delete files, tasks, or work orders from Wrike</u>. For practical purposes, our Wrike storage may as well be limitless and we keep everything so that we have record of our work and the conversations around it. Never send anything to the Recycle Bin – please, and thanks.
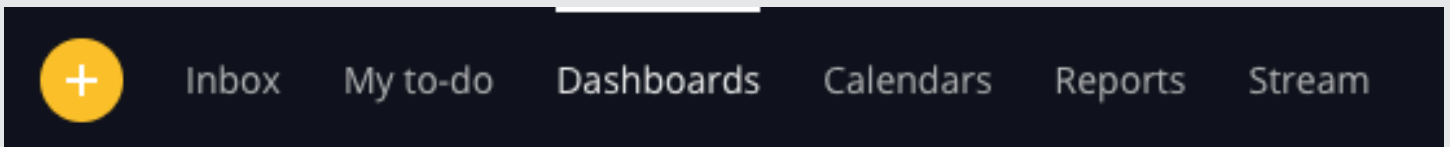
Inbox
Pretty self-explanatory; this is where you'll get notifications any time someone assigns you a task or @mentions you in a project. In Wrike, @mentioning someone is tagging them just like on social media. The inbox can be a good resource to look back chronologically for recent work.

My to-do
My to-do is a simple view that aggregates all work assigned to you across the entire Wrike platform. The most useful way to sort is by viewing Only Active Tasks; otherwise you'll view everything you've ever worked on all at once.

Dashboards
Dashboards are a resource that allows you to organize and view your work using tools called Widgets. Every creative will have access to either Personal Dashboard (Design) or Personal Dashboard (Video); the dashboards are functionally the same, they just pull in projects from different master folders.

The Widgets allow you to display and filter projects by criteria like status, assignee, due date, etc. For instance, the Widgets in both Personal Dashboards all have Current User as the assignee; that means whichever user is logged in will see projects assigned to them. The other criteria are sorted by status: Assigned to Me, Edits Required, etc.

Personal Dashboard (Design) ▾

+ New Widget   ⚯ Created by William P   Share   ⋯

Assigned to Me

No tasks

No tasks match current widget settings or folder is empty

My Edits Required

No tasks

No tasks match current widget settings or folder is empty

My Projects Awaiting Approval (9)

OVERDUE (7)

FB: Cushy Gigs Mural   Jul 10, 2019
Awaiting Approval: CLIENT   2018-19 Branding

VB 20001 - Printable Recruiting Signage T...   Sep 10, 2019
Awaiting Approval: CLIENT   2019-20 Volleyball

TIX 20009 - Pride Night Video Recap for Sales C...   Jan 23
Awaiting Approval: CLIENT   2019-20 Tickets

BIZ 20017 - 2020 First Pitch Banquet Print Colla...   Jan 31
Awaiting Approval: CLIENT   2019-20 Business Ops

BIZ 20018 - 2020 CWA Print Collateral   Jan 31
Awaiting Approval: CLIENT   2019-20 Business Ops

My Projects to Finalize (5)

OVERDUE (4)

WELL 20001 - Lennar x Dr. Kaplan Video   Jan 27
Ready to Post/Prep to Deliver   2019-20 Health & Wellness

FB 20045 - Welcome New WR Coach   Feb 3
Ready to Post/Prep to Deliver   2019-20 Football

MBB: 2/2 @ Pittsburgh - 12:00   Feb 3
Ready to Post/Prep to Deliver   _2019-20 Scheduling

MTEN: 2020 Intro Video   Feb 4
Ready to Post/Prep to Deliver   _2019-20 Scheduling

THIS MONTH (1)

WBB: 2019/20 Intro Video   Feb 26

Dashboards

Calendars   ⇤

Today   ‹ ›   Feb 2020 ▾   Month ▾   Public links   ⋯

+ New Calendar

› ☐ Leo
› ☐ Kyle ⚯
› ☐ Kevin
› ☐ James
› ☐ Design Interns
› ☐ Key Dates ⚯
› ☐ Digital Marketing ⚯
› ☐ Design Team
› ☐ Video Team ⚯
› ☑ Bradley ⚯
› ☐ Tamara ⚯
› ☐ Blair ⚯
› ☐ David ⚯
› ☐ Jimmie ⚯
› ☐ Video Intern ⚯

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27 WELL 20001 - Lennar x ... / HC 20002 - Football Co...	28	29	30	31 TIX 20010 - Football Se... / FB 20015 - "The Breakd... / FB 20017 - Football Fac...	1
2	3	4	5	6	7	8
9 HC: 2/9 Celebration of ... / HC: 2020 Celebration o...	10 TIX 20012 - Positive Pre...	11	12	13 FB 20016 - Get To Know: Early Enrollees	14	15
16	17	18	19	20	21	22
23 FB: 2/23 NFL Combine ...	24	25	26	27	28	29 FB: 2/29 Spring Practic... / FB: 2/29 Women's Clinic

Calendars

You are free to create your own dashboards if you'd like to sort your work a different way. Just make sure not to make edits to the Personal Dashboards.

Admin level users will also have access to certain additional dashboards which highlight workloads for the full department or groups like Video, In-Game, or Design.

Calendars
Some people like to view their workload in the context of a work week. The calendar view lets you view everything assigned to you by date. For the Video Team, this is a particularly useful view because it includes both scheduled events and client-requested work.

Admin level users will have access to additional calendars for each creative employee that reports to them so they have a quick reference to see how much bandwidth their staff has at any given time.

Reports
As a Creative, you will likely never need Reports; this is a tool that lets you dig in at a granular level with filters similar to the Widgets in Dashboards. Reports are useful to show how busy your team was at a particular time during the year, or how many projects from a certain team are currently waiting to be reviewed by the client. You can also download the information as a CSV file in case you need to share it as a spreadsheet.

Search Bar
Wrike's search functionality is excellent and comprehensive. If you search a key term in the project you're looking for, you're likely to find it fairly easily.

Stream
The stream is exactly that; it displays everything that has happened in every project you're part of in chronological order, regardless of if someone tagged you or not. This is a more useful tool for managers because you can refer back to recently updated projects.
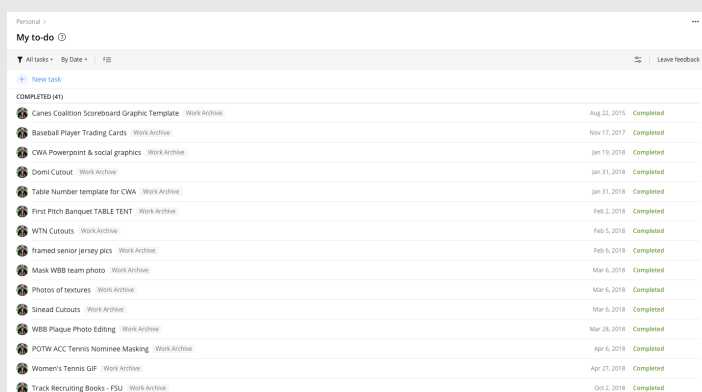
My to-do
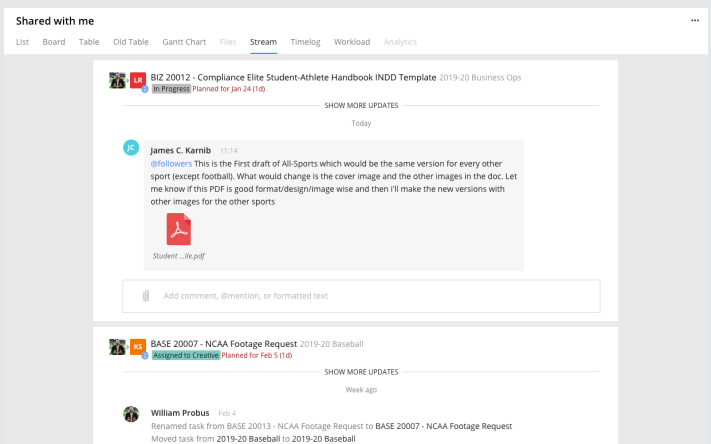
Stream

WORKFLOW: HOW IDEAS TURN INTO CREATIVE ASSETS

Every project begins as an idea in somebody's brain. This is how the journey from idea to creative asset works at UM Athletics:

Concept
Ideas keep the content engine humming and the revenue rolling in, and a concept can come from anyone in the organization. However, it is the responsibility of the person that needs a creative asset to put in a Creative Request – *and not send an email.*

Creative Request
To place a work request, the Client will complete a Creative Request Form and select whether he or she needs Video or Design services. The Client will fill out the form to the best of his or her ability – providing all pertinent information and required assets – and click submit. Work will not begin on the project until a Creative Request has been submitted.

Creative Brief
After a Creative Request is submitted, the project manager will vet the request to ensure all the required info has been received. If incomplete, there will be a follow up conversation with the Client. If work is ready to begin, the request will be used to write a creative brief that the Creative will follow when fulfilling the request. The project manager then assigns the task to a Creative or to a department head to assign to their team.

Work
The Creative works on assigned tasks based on priority and deadlines. When the Creative finishes a draft of a creative asset and it's ready for review, he or she will post it in Wrike and tag his or her supervisor.

Feedback and Revisions
Once the draft is posted in Wrike, the creative asset will go through the feedback and revision process. It begins with the Creative changing the status to *Awaiting Approval*.

Reviewers will deliver all feedback within Wrike using the markup tools and dialog boxes. The first reviewer is always the department head who is to ensure the creative asset meets brand standards. At the time of this writing, that could be the **Assistant AD of Video/Game Production**, the **Director of Brand Marketing**, or the **Assistant AD of Creative Services**, but things can change and best practice is for the Creative to always tag their supervisor or @followers for approval. Once the creative has been approved from the design or video supervisor, the Creative will @mention the Client and change the project status to *Awaiting Approval: Client* so they can review the creative asset. Please note that the entire project and discussion area will be visible to the Client at this point.

During review, talking through edits in person with Clients is fine – even encouraged in some cases – but their feedback must be posted to Wrike before changes can be made. Because of how closely Creatives work with Clients at UM Athletics, it is up to the Creative to make sure Clients adhere to this process. Making all changes in Wrike ensures that we maintain clarity and transparency throughout the process.
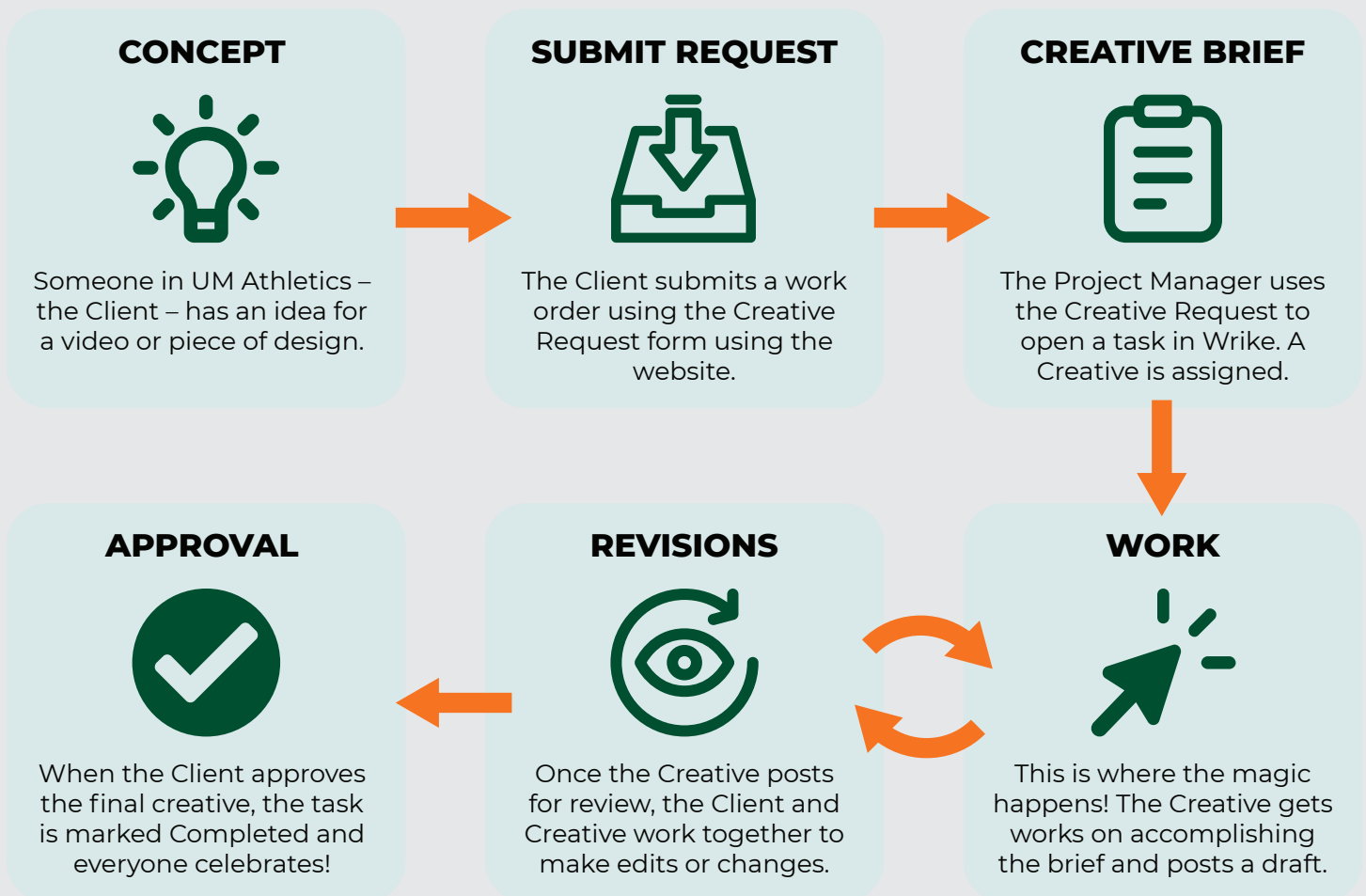
Approvals

Once approval is received, the creative asset will be finalized. For instance, if it's a design file that will be printed, it'll be prepped with crop marks and bleeds. Likewise, if it's a video that needs to be rendered at multiple aspect ratios, it will be exported as such.

Once finalized, the task will be marked *Complete* in Wrike by the designer, the department head, or the project manager, and the job will be archived.

Please note that video producers do not mark their own projects complete because there are additional layers/rounds of approval for video projects. The final files are packaged and shipped off to the Client – via WeTransfer or downloaded via Wrike after you @mention them – whatever makes the most sense for the specific use case.

Creative Workflow Diagram: How Ideas Turn Into Creative Assets

CONCEPT

Someone in UM Athletics – the Client – has an idea for a video or piece of design.

SUBMIT REQUEST

The Client submits a work order using the Creative Request form using the website.

CREATIVE BRIEF

The Project Manager uses the Creative Request to open a task in Wrike. A Creative is assigned.

APPROVAL

When the Client approves the final creative, the task is marked Completed and everyone celebrates!

REVISIONS

Once the Creative posts for review, the Client and Creative work together to make edits or changes.

WORK

This is where the magic happens! The Creative gets works on accomplishing the brief and posts a draft.

ORGANIZATION & FILE STRUCTURE

Keeping Organized

You'll notice there's a distinct file structure in the left navigation, but you might be wondering why we chose this particular organizational hierarchy. The processes and conventions in our workflow have been designed with two priorities in mind:

First, we want to keep the system navigable and intuitive for Wrike pros and Wrike newbies alike. We want our people to spend less time fumbling with a software interface and more time making cool stuff. The rules we've put in place allow us to focus our time where it counts.

Second, we want to make sure that our system is scalable year-over-year. We never want to have to restructure our folders and projects because that introduces uncertainty and change, and this system allows us to effectively turn the calendar page when it's time without skipping a beat.

Most of the habits we develop working in Wrike eventually become muscle memory because the individual tasks – post work for approval, change status, make edits, etc – are somewhat repetitive. This system ensures we're always functioning on the same page and no one has to spend time relearning the process.
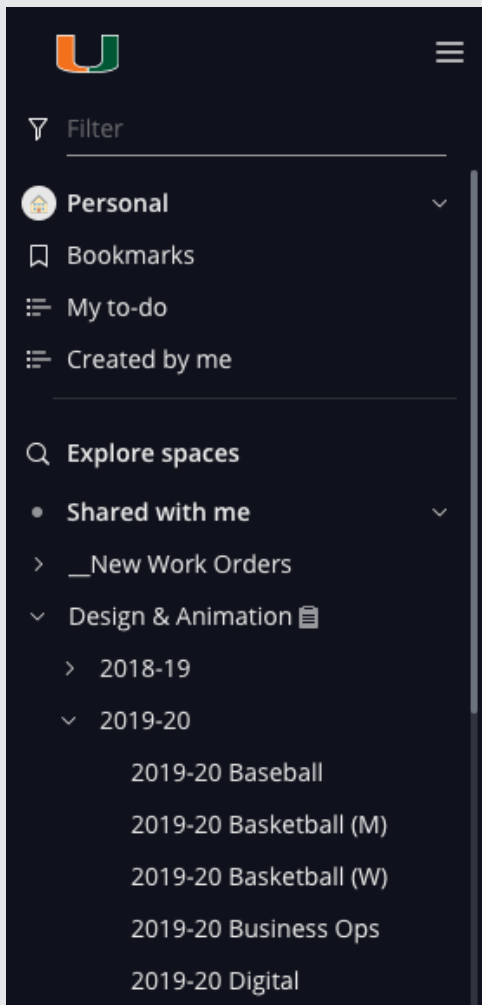
Folder Hierarchy

The hierarchy of folders is designed to flow down from creative discipline to year to client to work order; big to small, highest-level to lowest.

The master folder is divided by discipline – Design or Video. The next sublayer of those folders is broken down by academic year so we can easily search. When you open the current academic year, you'll see a folder for each of our clients.

From there, we have subdivided the academic years into client folders to make searching for current and past projects simpler as well. Inside each client subfolder, you'll find a list of work orders listed by open date.

This is intended to make referencing and finding past projects simpler. For instance, if you worked on a soccer video in 2019-20 that you need to update for this year, you'd simply go to **Video > 2019-20 > 2019-20 Soccer**, and locate the task in the list.

If you're on the Video team, you'll notice you have extra folders at the same level as your academic year folders. These are titled with an underscore (which allows the folders to live at the top of the list), then the academic year, and the word Scheduling. This is where we place video tasks that are event-specific: games, travel, banquets, events, etc.

Design isn't assigned to "cover" events the way that videographers do, so that makes Scheduling a group of video-only folders.

Naming Conventions
You will only have to worry about naming conventions if you're opening new tasks, which is a responsibility that will fall on the project manager 99% of the time. The conventions are established so that projects show up in chronological order. If you do not follow them, the system becomes very difficult to navigate for the creatives.

If you are a project manager or you find yourself opening projects from work orders or adding events to the calendar, please *for the love of Sebastian* follow the naming conventions. Please don't make things harder on your co-workers.

The naming conventions for Tasks created from work orders have 4 key parts:

1. Always start with the client abbreviation, in this case WBB for women's basketball. This allows for easier sorting later.

2. The number is always five digits, made up of two key parts. The first corresponds to the academic year, so if we are in 2019-20, the abbreviation will begin with 20; always use the second year in the academic year. The second part is the job number, so this was job #10. The number always needs to have five digits; make sure to include zeroes until you've gotten to project #100 for the year.

WBB 20010 - Beatrice Mompremier Preseason ACC POTY

3. Space, hyphen, space. This might seem trivial, but if you don't include all three characters, the sorting by number gets out of whack.

4. The last part is always the title of the project. Make sure this is as descriptive as necessary so it's easier to find later.

The only exception to this rule is when Marketing opens something for in-game. We simply add the sport and the year after the space-hyphen-space and at the beginning of the project title. For example:

MKT 20006 - Football 2019 Big Cheese Videoboard and Ribbon

This was a marketing request for an in-game videoboard and LED ribbon animation, so we include "Football 2019" in the title so it's, again, easily searchable.

If you're opening a task from a Creative Work Order, the naming conventions will use that exact same formula. You will simply add either "DSGN Request" or "VID Request" in front of the name depending on what kind of project it is before sending it to the Opened Work Orders folder. The process is laid out in much more detail in **Steps to Turn a Work Order into a Task**. In the case of the football in-game videoboard task, the creative request would be renamed:

DSGN Request: MKT 20006 - Football 2019 Big Cheese Videoboard and Ribbon

Finally, let's look at naming conventions for events that go in the **Video > Scheduling** folders. As a reminder, these are video-only tasks that are manually input according to the schedule for each sport/client. Here's an example:

MTEN: 1/17 vs College of Charleston - 12:00

This task is a home men's tennis match on January 17 against the College of Charleston. The match starts at 12:00. All of this information is included – in this order – in the title of the task so that a Video Producer can quickly glance at it within his or her calendar. We don't currently include the year in the naming convention because of character scarcity, but this could change if we determine it's needed one day.

Usually the project description/body of the work order is left blank because all the info is in the title. The exception is when a Video Producer is traveling to an event, and then we usually put the destination in the project description.

These tasks usually become the central hub for content approvals via clients during and after the event; that could include recaps, highlights, or any other individual pieces of video content around the event.

COMMON TASKS

Here is an easy access guide to completing some common tasks in Wrike. Refer back to this page when you are still learning the interface or if you ever have questions.

Locating a completed project
You'll often have to locate work after it's already been marked completed. Maybe you're updating a project from a previous year, or maybe you need to use an older project as a benchmark. To find past projects, you can either search via the folder structure or the search bar.

To search via the folder structure in the left navigation bar, you'll need to know the client and the year the project was created. Simply open the master folder for your discipline – Design & Animation or Video – locate the proper year, then open the client folder, and the work orders should be listed in chronological order. *Pro Tip: Make sure you are viewing All Tasks, not All Active Tasks, so you can see everything rather than just projects that are currently open.*

To locate past tasks using the search bar, simply begin typing in the top right section of the interface. The Wrike search engine is actually very robust. You can search by title or number, but the search feature also allows you to find things based on text in the project description and even within the conversations.

Creating a New Dashboard
It may help your workflow to build a custom Dashboard just for you. This process can be a bit complex because there's so much freedom in terms of what you can do, but basically it all comes down to Widgets.

To make a new Dashboard, go to the Dashboards tab on the top menu bar. Click the dropdown menu and select *+ New Dashboard*. Next, add a Widget. Widgets are tools; filters that allow you to see only certain projects. You can either pick one of the templated Widgets or go Custom. Building your Widget really depends on what exactly you're trying to visualize, so make sure to reach out to the project manager if you have questions.

Scheduling an "event task" – games, banquets, media shoots, etc
Video producers may need to open a project for a scheduled event like a game or match, a banquet, a festival, or other such event. These events rarely have a Creative Work Request submitted for them, so you'll need to open the task manually.

To do this, locate the current year's _Scheduling folder within the Video master folder. Add a task by clicking the + New task button at the top of the list. Make sure to pay special attention to the naming convention; you'll need to include the client abbreviation, the date and the name of the event, plus the time if you have it. So for instance, a home men's tennis match on January 17 against the College of Charleston starting at 12:00 would look like this:

MTEN: 1/17 vs College of Charleston - 12:00

Make sure to check the Naming Conventions section under Organization & Structure to read about the how's and why's.

FOR
PROJECT
MANAGERS

TURNING WORK ORDERS INTO TASKS

These instructions on how to turn a work order into a project in Wrike are meant to create efficiencies for Designers and Producers so their workflow is smooth and uninterrupted by uncertainty or tracking down additional information.

As the Project Manager, following these step-by-step instructions to the letter is important so that our naming conventions remain consistent, our past work is easily searchable, and our file hierarchy is scalable in the future. Please make sure to be as diligent as possible about following these guidelines.

Video: Open a Work Order for Video Producers
As you are monitoring the __*New Work Orders* folder in the left navigation in Wrike, you'll see work orders come in. They'll have a series of numbers followed by "Creative Request Form." Click one. At a glance, you should be able to tell if the job is for Video or Design.

If the job is for the Video Content Team, please follow these instructions:

1. Read the work order in its entirety for context. Take note of which Client folder it belongs in and what you think the title of the project should be. Sometimes that's clear because the Client defined the project well, sometimes you have to put in a little more brainpower to understand exactly what they need.

2. Copy the entire work order. You won't use it all, but you'll need all the information.

3. In the left navigation, find the client folder under *Video > Current Year* that the new project belongs in. Click that folder to open it.

Here's how we'll change the work order into a format that your Producer is used to seeing and can use:

4. We're now going to create a task from the work order. Scroll to the bottom of the work order list in the folder you just clicked. We need to name the project in sequential order with the other tasks in that folder, so figure out what the next number in the sequence should be. For instance, if the most recent project was FB 20006, you'll begin the name of the new project with FB 20007. (It's just as important to include the Client abbreviation at the beginning of the project name.)

5. Once you're in the Client folder, click the (+) symbol at the top of the list of projects to create a new project. Begin the new project name with the client abbreviation, add the number you determined was next, add a hyphen, then insert what you think the project should be named based on reading the work order. Once you have finished the name, press Enter or Return. Then, click the project you just created.

6. The Project Description field should be a big blank white space. Paste the work order you copied in Step 2 into this space.

A Video work order contains several specific and important parts to make sure the Video Producer has all the information they need – and nothing that they don't. Those parts are:

Client
Client Contact (Email/Phone)
Creative Brief
Does the project require a shoot? If yes:
– Shoot Date
– Shoot Contact
– Shoot Location
Aspect Ratio
Length
Due Date

7. We're going to create this brief from the work order text that the Client provided. Note that to maintain consistency, all headers should be **bold** and all body copy should be regular/un-bold.

— Erase the first text you see in the work order that begins, "When placing your creative…" This is instruction for the client that gets copied into each work order, but we don't need it. Change "What's your name?" to "Client." Consolidate Client name, email, and phone number (whatever was provided) under that header.

— Add a header for "Creative Brief." Press Enter or Return a few times. We'll come back to the Brief in one of the last steps.

— Erase everything below this up until "Do you need us to cover a live event…". This answer will inform whether this project involves a shoot or just an edit using existing footage. If it does involve a shoot, use the data the Client entered to insert answers to the following questions:
Shoot? Yes…
Shoot Date: XX/XX/XX…
Shoot Contact: Insert Contact…
Shoot Location: Insert Location if provided…
Refer to the formatting in the Sample Project Outline to see how this is laid out in the brief.

— Next, decipher the Aspect Ratio, Length, and Due Date from what the Client has written. Sometimes it'll be clear, sometimes you just get "for YouTube," so you'd need to know in that case it should be 16x9 (1920x1080). Make sure to include any specific file specs the Client may require (like MOV or MP4).

— Finally, delete everything else that's unnecessary except for Project Description and any other field where the Client may have included pertinent details. Copy all of that information and insert it back under the Creative Brief header. Read through it, rearrange it, and tweak anything that would be unclear to a Producer or any grammar/spelling issues. The Creative Brief section is the most important part of the project because it tells the Producer what he/she is doing.

— A good measuring stick is to make sure that if you were reading it cold, you'd know exactly what the Client was looking for. If you need to rewrite it, that's fine. If you need to ask the Client for more details, that's also fine (if annoying).

— Review to make sure the project is formatted correctly and is easy to follow. Remember that the clearer you are in presenting the brief, the less questions the Producer should have and the less time they'll waste.

Congrats! The work order has now been turned into a project for your Producer. There are a few additional important steps to make sure this gets slotted into their work queue and prioritized appropriately by due date.

8. Click "Set Date" right above your Project Description dialog box and set the Due Date. If it's a project with a long duration, drag out the timeline to encompass all relevant dates.

9. Click the Status Bar that should currently say *New Project* and change it to *Assigned to Creative*.

10. Right next to that is a button that says *+ Add Assignee*. Click that and begin typing the name of the Producer(s) to assign. Make sure to add yourself as well so that you'll get tagged on all @followers responses.

The work order is now in queue and your Producer can begin working on the task. The last step is to make sure we keep record of the original work order in case there are any discrepancies between what gets delivered and what was requested.

11. Back in the project you just opened, copy the full name of the task. It should include a client abbreviation, a job number, a hyphen, and a job name.

12. In the left navigation, scroll back up to __*New Work Orders* and find the work order you just turned into a project. The work order name should be a series of numbers plus Creative Request Form. Change that name by inserting "VID Request:" and then pasting the project name you created.

13. Finally, we're going to archive the opened work order. You can do this one of two ways. First, you can drag the work order in the left navigation into the *z_Archive > Opened Work Orders* folder. This can be tedious since there are so many open work orders. A second way to accomplish this is to simply change the work order's location by clicking the (X) where you see __*New Work Orders* underneath the work order name, clicking the (+), and typing "Opened" until that folder comes up. This method is less time-consuming and moves the work order into the archive by typing rather than manually dragging it. Either way works.

Sample Project Outline (Video)

If you're working from the digital PDF of this document, when you open a new work order you can paste this into the Project Description field and fill in the brief from there.

Client
Name
Email (if provided)
Phone (if provided)

Creative Brief
Insert all the information your Producer will need here.

Shoot? If no shoot is required, delete everything below this up to Aspect Ratio. If a shoot is required, write "Yes" here and move to the steps below.
Shoot Date: XXX
Shoot Contact: XXX
Shoot Location: XXX

Aspect Ratio: XX x XX
Length: X:XX
Due Date: XX-XX-XXXX

Note that you can also open a project without a work order by following Steps 4-10. You'll just need to be able to articulately write up the project for the Creative Brief section.

Creative Request (Video) turned into a Creative Brief

Creative Request (Video) as submitted

Design: Open a Work Order for Designers

As you are monitoring the __*New Work Orders* folder in the left navigation in Wrike, you'll see work orders come in. They'll have a series of numbers followed by "Creative Request Form." Click one. At a glance, you should be able to tell if the job is for Video or Design.

If the job is for a member of the Design Team, please follow these instructions:

1. First, read the work order in its entirety for context. Take note of which Client folder it belongs in and what you think the title of the project should be. Sometimes that's clear because the Client defined the project well, sometimes you have to put in a little more brainpower to understand exactly what they need.

2. Copy the entire work order. You won't use it all, but you'll need all the information.

3. In the left navigation, find the client folder under *Design > Current Year* that the new project belongs in. Click that folder to open it.

Here's how we'll change the work order into a format that the Designer is used to seeing and can use:

4. We're now going to create a task from the work order. Scroll to the bottom of the work order list in the folder you just clicked. We need to name the project in sequential order with the other tasks in that folder, so figure out what the next number in the sequence should be. For instance, if the most recent project was FB 20006, you'll begin the name of the new project with FB 20007. (It's just as important to include the Client abbreviation at the beginning of the project name.)

5. Once you're in the Client folder, click the (+) symbol at the top of the list of projects to create a new project. Begin the new project name with the client abbreviation, add the number you determined was next, add a hyphen, then insert what you think the project should be named based on reading the work order. Once you have finished the name, press Enter or Return. Then, click the project you just created.

6. The Project Description field should be a big blank white space. Paste the work order you copied in Step 2 into this space.

A Design work order contains several specific and important parts to make sure the Designer has all the information they need – and nothing that they don't. Those parts are:

Client
Client Contact (Email/Phone)
Creative Brief
Specs
Due Date

7. We're going to create this brief from the work order text that the Client provided. Note that to maintain consistency, all headers should be **bold** and all body copy should be regular/un-bold.

— Erase the first text you see in the work order that begins, "When placing your creative…" This is instruction for the client that gets copied into each work order, but we don't need it. Change "What's your name?" to "Client." Consolidate Client name, email, and phone number (whatever was provided) under that header.

— Add a header for "Creative Brief." Press Enter or Return a few times. We'll come back to the Brief in one of the last steps.

— You'll need to decipher the Specs and Due Date from what the Client has written. Sometimes it'll be clear, sometimes you just get "Flyer," so you'd need to find out from the Client in that case it should be 8.5" x 11". Make sure to include any specific specs the Client may require (like "needs 1/4-inch bleed").

— Finally, delete everything else that's unnecessary except for Project Description and any other field where the Client may have included pertinent details. Copy all of that information and insert it back under the Creative Brief header. Read through it, rearrange it, and tweak anything that would be unclear to a Designer or any grammar/spelling issues. The Creative Brief section is the most important part of the project because it tells the Designer what he/she is doing. A good measuring stick is to make sure that if you were reading it cold, you'd know exactly what the Client was looking for. If you need to rewrite it, that's fine. If you need to ask the Client for more details, that's also fine (if annoying).

— Review to make sure the project is formatted correctly and is easy to follow. Remember that the clearer you are in presenting the brief, the less questions the Designer should have and the less time they'll waste.

Congrats! The work order has now been turned into a project for your Designer. There are a few additional important steps to make sure this gets slotted into their work queue and prioritized appropriately by due date.

8. Click "Set Date" right above your Project Description dialog box and set the Due Date.

9. Click the Status Bar that should currently say *New Project* and change it to *Assigned to Creative*.

10. Right next to that is a button that says *+ Add Assignee*. Click that and begin typing the name of the Designer to assign. Make sure to add yourself as well so that you'll get tagged on all @followers responses.

The work order is now in queue and your Designer can begin working on the task. The last step is to make sure we keep record of the original work order in case there are any discrepancies between what gets delivered and what was requested.

11. Back in the project you just opened, copy the full name of the task. It should include a client abbreviation, a job number, a hyphen, and a job name.

12. In the left navigation, scroll back up to *__New Work Orders* and find the work order you just turned into a project. The work order name should be a series of numbers plus Creative Request Form. Change that name by inserting "DSGN Request:" and then pasting the project name you created.

13. Finally, we're going to archive the opened work order. You can do this one of two ways. First, you can drag the work order in the left navigation into the *z_Archive > Opened Work Orders* folder. This can be tedious since there are so many open work orders. A second way to accomplish this is to simply change the work order's location by clicking the (X) where you see *__New Work Orders* underneath the work order name, clicking the (+), and typing "Opened" until that folder comes up. This method is less time-consuming and moves the work order into the archive by typing rather than manually dragging it. Either way works.

Sample Project Outline (Design)

If you're working from the digital PDF of this document, when you open a new work order you can paste this into the Project Description field and fill in the brief from there.

Client
Name
Email (if provided)
Phone (if provided)

Creative Brief
Insert all the information your Producer will need here.

Specs: XX x XX
Due Date: XX-XX-XXXX

Note that you can also open a project without a work order by following Steps 4-10. You'll just need to be able to articulately write up the project for the Creative Brief section.

Creative Request (Design) as submitted

Creative Request (Design) turned into a Creative Brief

ACCOUNT MAINTENANCE & DEVELOPMENT

Account maintenance matters.

Like your uncle's Harley or your shiny new MacBook, Wrike is a high-powered tool – and your responsibility as its steward is to make sure it continues to work efficiently and effectively for everyone.

Expensive, complex tools need constant maintenance and a little bit of elbow grease to keep them from breaking down, and as project manager, that will become an important aspect of your day-to-day job.

Part of that maintenance is diligently following the process as outlined earlier in this document, but part of it is also being proactive in clearing "clutter" – a process we'll call "pruning." There are a number of ways you'll keep the work lists clean, including archiving completed jobs and opening new ones.

New Work Orders
As the project manager, your role impacts everyone. Your most time-sensitive and visible duty will be keeping track of opening work orders in a timely manner. When a work order comes in from the creative request form, the system dumps it into the __*New Work Orders* folder and you will get a notification in your inbox.

Please see **Steps to Turn a Work Order into a Job** for a comprehensive guide on how you'll turn that form submission into a usable creative brief for the creative team.

You are responsible for ensuring that the department workflow *flows*. When in doubt, prioritize getting requests turned into jobs – tedious as it can be – because the creatives can't start working for our clients until you open the job for them. Just make sure that you don't let new work orders pile up. There's no worse feeling than dumping tight deadlines on your team because you may have procrastinated. Don't be that guy or girl!

"Pruning"
Keeping the workload on track with new projects is important, but so is archiving old projects as they are completed.

There are three main ways we ensure we keep our ledger clean, and you need to use them all to stay ahead of the game.

The first is using your **Inbox** to your advantage. As you get @mentioned on various tasks, keep an eye out for clients who say things like "Looks great!" or "Thank you!" or even "Approved!" This usually means the project has been completed to their satisfaction and you can mark the status as Completed – and if you're unsure, you can always ask. The Creative won't always know to mark the project Completed, and the client never should, so stay diligent about reading your messages and you'll clear a lot of clutter early.

The next "pruning" method is using **Dashboards**. The Creative Dept Workflow Dashboard has been designed to show the whole workflow of the department – design, video, and animation – all on one screen that is divided so you can see unopened work orders, what is waiting on assignment or feedback, and what each Creative has on their plate. As a note, only admin level users can see this Dashboard.

To ensure completed tasks are actually marked Complete, go through each Creative's Widget and check out their jobs listed as OVERDUE, TODAY, TOMORROW, and THIS WEEK. Since you'll have a handle on what has been requested, postponed, and finished, you'll be able to make a quick visual sweep here and see if anything is already finished but hasn't been marked. It'll also help you make sure that anything marked OVERDUE is either in Approvals or whether you need to follow up.

The last "pruning" method is using the **Calendar**. Make it a habit of checking up a week or so after events like games, video shoots, or banquets. As long as a recap video or graphic has been posted and approved (if one was required), you can mark those past events as completed. A calendar full of three-week-old events looks messy, and clearing those tasks will alleviate some sticker shock when your creative team looks at their workload.

Strategies to help stay on top of "pruning"

Clear your inbox every day, being sure to answer or follow up with everything that requires an answer

Set a daily reminder for each afternoon to view the Dashboard to ensure that no deadlines are being missed and that any project that has been completed has been marked as such

Set a weekly reminder to check the Calendar and clean up any completed projects including past events where there are no outstanding projects (like a video recap).

ONBOARDING A NEW USER

As the project manager, you'll be asked to add new Wrike users from time to time. Most of them will be clients, but occasionally we'll add a creative person as well. Each of them gets a different license type.

Wrike License Types

External User: We don't assign these. They are intended for users outside our organization.

Collaborator: Somewhat limited functionality; these licenses are assigned to our clients and creative interns. They're able to view tasks, upload files, and approve tasks, but they don't have access to Dashboards or Calendars. We can assign an infinite number of Collaborator licenses.

Regular User: All of the Creatives have this license type. They have full functionality including access to Dashboards and Calendars.

Admin: Department heads and project managers have this license type. They have all the functionality but are able to make structural changes to the system and have visibility into all of their team's work.

Owner: This license type has all the same admin rights, but can see every single thing in the interface. This is the point person that Wrike reaches out to when there are issues. There can only be one Owner.

Adding a Client

Sometimes when someone is hired, their supervisor will reach out and ask you to invite them to Wrike. However, people can submit work orders via the Creative Work Request website even if they are not already Wrike users. You'll just need to cross reference the requester in the creative request with the account management page to see if they're already in the system. You can shortcut this by beginning to @mention their username and seeing if they come up as an option.

If you determine the person is a new user, you'll click the *+Add users* tab at the very bottom right corner of the Wrike interface. You'll get a pop-up window that looks like this one on the right:

You'll do three things from this screen:

1. Enter the new user's email address.

2. Change the dropdown from Regular User to Collaborator.

3. Click Include Personal Message and enter some variation of the text below; it's just nicer to start a relationship with a new hire with a personal message!

Sample Personal Message

Hi *THEIR FIRST NAME*,

Welcome to Wrike, our tool for creative work management and collaboration! As soon as you accept this invitation, I'll copy you into your work order so you'll be able to see drafts as they're posted.

If you have any questions, don't hesitate to call or shoot me an email. Thanks!

YOUR FIRST NAME

Click the *Invite Users* button and you're all done! You'll get an email notification when they accept your invitation and then you can copy them into their work order when appropriate.

Adding a Creative
To add a designer or video producer, you'll follow those same steps as for a Client – though you'll probably want to change the personal message to something more appropriate for a creative. After that there are a couple more steps to make sure the Creative has everything he or she needs to hit the ground running.

After you complete the invitation process, click on the master folder for *Video*. Find the center list that shows all the subfolders – this should be *Scheduling* and *Academic Year* folders – and then go to the top right corner where you'll see a symbol and the word *Shared* like this. Click that link and share the entire Video folder with the Creative.

Repeat this process with both the *Design* master folder and the *z_Archive* folder so the creative can access all existing projects including completed ones. Designers and Producers will need to be able to access each other's master folders because there is often collaboration across disciplines.

Next, you'll need to grant the Creative access to a Dashboard. To do this, click *Dashboards* in the main menu bar. From the drop down menu, you'll see all the available Dashboards. If the new person is a Producer, grant them access to *Personal Dashboard (Video)*. Likewise, if the new person is a Designer, grant them access to *Personal Dashboard (Design)*. Do this by clicking *Share* in the top right corner of the Dashboard module.

Finally, we need to add a Calendar and layer for the new Creative so we can track their work. To do this, click *Calendars* in the main menu bar. Click *+ New Calendar* in this list and name it the new hire's first name. Go into that folder and add a layer, also named the person's first name. Assign that person a color no one else has, and then Share the Calendar with the person's supervisor, the person, and any other people that will need to know their schedule.

Adding an Admin / Project Manager
To add an admin level person, first follow the same steps as above. Next, share the *_New Work Orders* master folder similar to the process of adding Creatives to *Video, Design & Animation*, and *z_Archive*. Finally, share the *Creative Dept Workflow Dashboard* and either the *Video Dept Workload*, *Design Dept Workload,* or both depending on which discipline(s) the new user falls under. At the admin level, you shouldn't need to create a Calendar and layer for this user because the work should be assigned to their direct reports, not to them.

If this person is a project manager, you'll need to complete one more step. Go into the *Account Management* folder in the top right corner of the Wrike interface (you'll see your account info there). In the left nav, locate *Request Forms* and click *Creative Request Form*. On the right side, make sure in the steps that once the new project is submitted, the task becomes assigned to the new PM. This will allow the PM to receive a notification when a new work order has been submitted.

WRIKE SCHEDULING MILESTONES (VIDEO ONLY)

As a project manager, you'll find that there are very rarely work orders placed for scheduled events like games, matches, banquets, shows, etc. Each year, there are a couple of calendar milestones that require you to input schedule data for all the upcoming events so that the Video team can stay on top of the coming semester's workload.

You'll want to set aside an afternoon or two to manually input these tasks. Keep in mind, no one is going to ask you to do this housekeeping. You *could* input scheduled events every two weeks or every month – but that doesn't mean you should. Opening the tasks for the next semester all at once will allow the Video Producers to know some of their workload so they can plan vacations, doctor's appointments, comp days, and other general "life stuff."

Scheduling a semester all at once will also allow you to identify schedule conflicts early. For example, here's a real scenario that happened: The men's basketball producer who also covers track and field has tournaments for both sports at the same time in two different cities. You would need to figure out which one he or she would cover and who gets assigned to the other event. Aside from booking travel, this is much easier to figure out at the beginning of the semester so you can set the coach's expectations than having that conversation a week out.

How To
So how do you find out the schedule for the next semester? Unfortunately, there's no shortcut method; that's why it'll take you an afternoon or two.

You'll need to visit the calendar page for each sport on the Hurricane Sports website and add a new event for every single home game, match, and meet. To do this, locate the current year's *_Scheduling* folder within the *Video* master folder. Add a task by clicking the *+ New task* button at the top of the list. Make sure to pay special attention to the naming convention; you'll need to include the client abbreviation, the date and the name of the event, plus the time if you have it. For instance, a home men's tennis match on January 17 against the College of Charleston starting at 12:00 would look like this:

MTEN: 1/17 vs College of Charleston - 12:00

Make sure to check the Naming Conventions section under **Organization & File Structure** to read about the how's and why's.

Before you begin scheduling any away events – and perhaps before you sit down to do any of this scheduling – make sure to connect with the sports information director for each sport to see when a Producer will be traveling to away events. Make sure to input those events into Wrike as well, adding a buffer travel day on either side of the competition.

One last word of advice: Let the Video team know that you're going to input all these events before you begin. It can be overwhelming to step away from the computer for a couple hours and come back to 39 new notifications and tasks. A little heads up can go a long way.

To Be Input by December 15
Baseball
Football (Spring Practice)
Men's Basketball (ACC / Postseason)
Women's Basketball (ACC / Postseason)
Track & Field
Men's Tennis
Women's Tennis
Rowing

To Be Input by July 15
Soccer
Volleyball
Football
Men's Basketball (Out of Conference)
Women's Basketball (Out of Conference)
Cross Country
Swim & Dive
Golf

You will need to take one additional step during the July 15 milestone: setting Wrike up for the next academic year. You will tackle this in a couple of steps.

First, you'll need to create new folders for the next academic year in both *Video* and *Design & Animation* master folders. You will then need to create Client folders for all the Clients in the new academic year folders. You can shortcut this process by duplicating the current year folder, but then you'll also need to go in and delete all the work orders you copied over, plus change the folder names to the next year.

Likewise, the naming conventions for all new work orders placed in these new folders will need to change. For example, if the previous year's naming convention for tasks started with the numeric sequence 20XXX, it would shift to 21XXX.