TOOLS YOU CAN USE

START PROJECT

CHECKLIST

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Starting a new project is a lot like climbing Mount Everest. Fast-moving projects with a lot of pieces to juggle can sometimes seem daunting but having the proper tools and a sound strategy at your disposal will make you feel like a well-equipped mountaineer. A well-managed project lays the groundwork for future project management successes and maximizes efficiency. Use this checklist at the next project kick-off meeting, and you'll have all your bases covered.

TEAM

It sounds fundamental, but the very first step is to identify your internal team and identify the team leader or project manager who will serve as the primary contact with other departments and vendors. You should also be aware of stakeholders who can profoundly influence a project's direction. Assigning a single point of contact for day-to-day communications and getting C-Level buy-in early in a project timeline can save a lot of time and money downstream.

AUDIENCE

Most brands have a general idea of who is their target consumer, but not many have it written down as reference material. It's a good practice to identify all the key players along your sales channel, and then share that information with your team. Who are you targeting with this campaign? What is a conversion? Is it a final sale? Or are you just moving the curious shoppers to interested buyers?

GOALS

Can you identify the single most important message you want your target audience to take away from this campaign? What are your sales teams goals? You also need to understand how you will measure the effectiveness after the project has wrapped up.

BUDGET

This is a big one. Assigning a budget and sticking to it can be difficult. Be sure you have a clear picture of what funds are available for your campaign. Be honest with your creative partners and vendors, too. Knowing when there are insufficient funds allows some vendors to bow out and also keeps your creative team from wasting time on concepts that are too costly to execute.

SCHEDULE

When planning a project, it is best to look at the absolute final date and work backward from there. When do the finished pieces need to be in hand? Now allow for the average production cycle of your materials. A simple brochure needs just two weeks on press. But a large-scale website can take 3 months to build out. Back the production time out from the launch date to understand how much time there is for creative.

PROJECT-SPECIFIC TASKS

Some projects reject catch-all lists. It's critical to analyze your plans holistically and identify work that's required but might not make the standard to-do list such as photography or printing needs.

IMPLEMENTATION

Implementation is all about the nuts-and-bolts and is the part of a project that can be the most distracting at the outset. How your message gets to market impacts the materials and the method of production. Distribution, the shelf life of the content, and the shopping environment all need careful consideration before defining the final deliverable.

Project Management involves a lot of communication. Having a clear strategy with outlined benchmarks makes projects run smoothly.

START PROJECT : CHECKLIST

DISCOVERY

PRIMARY CONTACT _____

KEY STAKEHOLDERS _____

DESCRIPTION _____

PRIMARY AUDIENCE _____

PRIMARY GOAL _____

GOALS

- ☐ Primary message:
  What is the ONE THING the audience should
  take away from this piece?
- ☐ Supplemental message(s)
- ☐ Tone of communication
- ☐ Frame of mind of the target audience?
  Any objections to overcome?
- ☐ Secondary audience?
- ☐ Do not target _____
- ☐ How will we measure effectiveness?
- ☐ Visual Direction (brand guides provided, colors, fonts, logos,
  photo/illustration styles, opportunities to violate standards,
  campaign/communication trends to be aware of)

BUDGET

- ☐ What is the approximate budget for this project?
- ☐ Project estimate is due _____/_____

SCHEDULE

- ☐ First proof is due _____/_____
- ☐ Final pieces delivered to end user _____/_____

WRITING

- ☐ Who will provide copy?
- ☐ When?
- ☐ When is the team/kickoff meeting? May we attend?
- ☐ Are there team members we can interview?
- ☐ Other industry resources?

TRANSLATION

- ☐ Translation needed?
- ☐ What languages?
- ☐ Preferred vendor?
- ☐ Need to quote with multiple vendors?
- ☐ Who is buying the translation?

PHOTOGRAPHY

- ☐ Photography needed?
- ☐ Who is buying the photography?
  Who will provide:
  1. Product
  2. Props
  3. Models
  4. Locations
  5. Detailed shot list
- ☐ WSD to provide on-site art direction?
- ☐ WSD to provide location scouting?
- ☐ Preferred photographer?
  Who will process the photography?
  1. Clipping paths
  2. General editing (ex. background)
  3. Convert to usable form (CMYK)

PRINTING/DELIVERY

- ☐ Print quantity?
- ☐ When are the printed pieces due?
- ☐ Delivery location?
- ☐ Preferred printer?
- ☐ Need to quote with multiple vendors?
- ☐ Who is buying the printing?
- ☐ WSD to provide print management?

IMPLEMENTATION

- ☐ How does this get to the end user?
- ☐ Describe distribution method
- ☐ What is the environment/experience like?
- ☐ Peak period for distribution
- ☐ What is the "shelf life" of the message?
- ☐ How will you handle updates, if any?

FINAL PRODUCT

- ☐ What are the deliverables?

Water Street is uniquely positioned to serve the marketing needs of manufacturers. We specialize in creating product launch campaigns for B2B2C brands.

A strong identity and an effective tagline are great to have in the marketing toolbox, but we know it takes more than just good design to sell products. It takes clear, consistent messaging that confidently communicates your brand story, and its value proposition, all the way through the sales channel.

Consumer-facing content is not enough. Before a customer can stand in the store reaching for your product, you have to win that space on the shelf.

We understand the challenges facing a sales team that is more often than not selling your products to another seller. We help sales teams pitch their product, package, price, and program to retail merchants. We also develop sales programs for distributors who represent your brand and training tools for store associates who are on the front line of consumer interaction.

In the end, what we bring to the table are thoughtful solutions, inventive designs, and the tools you need to be successful.

We've done it before, and we can do it for you.

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Retail, Distribution & Sales Team Tools
Digital Marketing Campaigns
Package Design • Point-of-Sale
Catalogs • Events

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