

7/11/2014

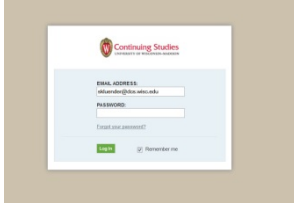
Integrated Marketing Communications Processes

IT ALL STARTS WITH A REQUEST FOR A MARKETING CONSULT

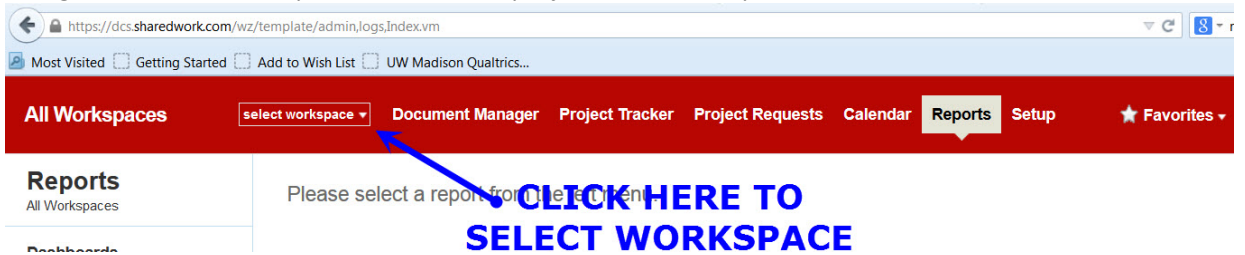
Complete a request for a marketing consultation through WorkZone as soon as you schedule a program. For the best service, it is helpful to make your request at least 5 months prior to your program start date.

How to request a consult from the IMC team:

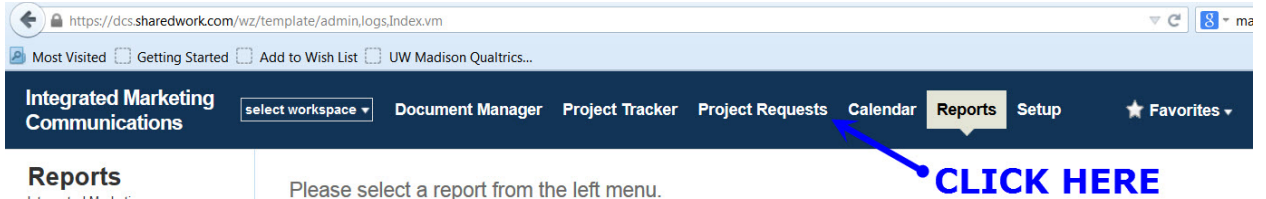
1. Log into WorkZone (dcs.sharedwork.com).



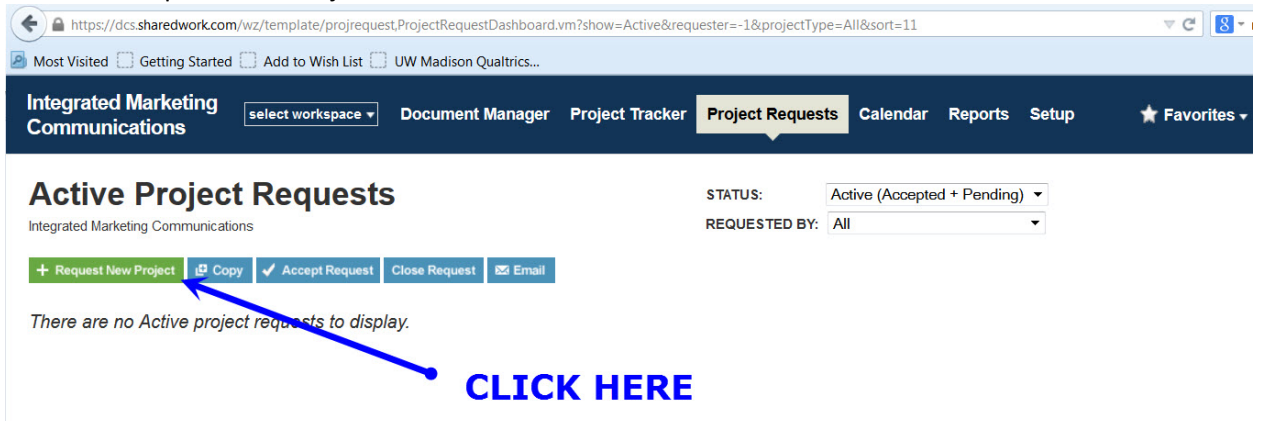
2. Navigate into the work space in which the project should be opened.



3. Click on Project Requests in the top navigation bar.



4. Click on + Request New Project.



7/11/2014

5. Complete the request form using these guidelines:
 - a. Project Title
 - i. Please use the following naming convention for the Project Title
 1. Program name (for a single program, this should match the IF in CSIS) and program start date
 2. Acceptable examples:
 - a. Substance Abuse Certificate Program Fall 14-Spring 15
 - b. SOA-R Summer 2014
 - c. Digital Storytelling 7-22-2014
 - d. French Classes Marketing Research Fall 2014
 - e. Community Health fall social work 2014 programs
 - f. New idea for art program in fall 2015
 - b. When do you need this?
 - i. Your consult will take place within 3 weeks of receiving your request.
 - c. Describe your need (the more detail the better)
 - i. At a minimum, please include
 1. A brief description of your program or idea for a program (this can be one sentence)
 2. Marketing budget (if open to suggestions, then indicate that here)
 3. Dates for the program, if known
 - ii. You may also want to include
 1. Known audience(s)
 2. Known competition
 3. Repeat programs: What marketing was done in previous years
 4. Your ideas for marketing the program
 - d. Other comments/things we should know
 - i. This might be a list of sponsors/partners who need to approve
 - ii. Dates you will be on vacation or out of the office in the next 3 weeks
 - e. Check if you have files to upload (you will be prompted to upload after you submit your request)
 - i. Partner logos
 - ii. Other program details or planning forms
 - iii. Other things that would help with a marketing consult
 - f. Submit

https://dcs.sharedwork.com/req/template/projectRequestNewProject.vm

Most Visited Getting Started Add to Wish List UW Madison Qualtrics...

Integrated Marketing Communications select workspace Document Manager Project Tracker **Project Requests** Calendar Reports Setup

New Project Request

Requested by: Sara Kluender Request date: May 30, 2014

Project title (for referencing project) *
Conference on Child Sexual Abuse Fall 2014

When do you need this? *
08/28/2014

Describe your need (the more detail the better) *
Our event is celebrating 30 years in 2014. We have ranged from 500 to over 1000 participants. We would like to get closer to the upper range for 2014. We have \$25,000 for marketing. October 26-29, 2014

Other comments/things we should know
We are partnered with FSAT. Jim is going to take July off this year.

I have files to upload with this project request (done in next step) (graphics, creative briefs, detailed specs, etc.)

Submit project request **COMPLETE AND SUBMIT**

7/11/2014

6. Someone from the marketing strategies and services team will contact you to schedule your consult.
7. Consults may range from a brief conversation to multiple meetings with several participants, depending on the scale and scope of your program.
8. Be prepared to send your IMC team member the following prior to your consult:
 - a. Program description/idea
 - b. Known competition
 - c. Known audience(s)
 - d. Budget
 - e. Repeat programs only: Details from marketing of past programs
 - f. Any ideas you have for marketing
 - g. Number of attendees to break-even
9. Your assigned IMC team member will assess the scale and scope of your program, create a timeline for the delivery of a marketing plan, and determine the format for delivering the initial copy.
10. After reviewing the plan with you, your assigned IMC team member will work with the project coordinator to open the appropriate marketing jobs in WorkZone.

HOW TO HELP KEEP A PROJECT ON SCHEDULE

1. Check your To-Do List in WorkZone daily to ensure your projects remain on schedule. The templates are built on tight timelines. If a deadline is missed, it will throw off the entire schedule for the IMC Team – not just your project. Projects are assigned to writers and designers based on the number of hours they are available when the project should land on their desk. If your project is behind, it could mean they become double or triple booked.
2. You can change the view on your To-Do List to see up to 30 days out to plan around your vacation and out of office schedule. If you will be out when you have a task due, please arrange for backup coverage and add that person to the specific task line in WorkZone. To add backup coverage in WorkZone:
 - a. Navigate to the task requiring backup. (from To-Do List or Project Tracker)

The screenshot displays the 'To-Do List: Sara Kluender' interface. At the top, it shows the user's name and a 'CLICK HERE TO VIEW PROJECT WITH TASKS' link. Below this is a table of tasks for 'TODAY, MAY 30, 2014'. The table has columns for ITEM, WORKSPACE, PROJECT, WORK, START DATE, END DATE, STATUS, and % COMPLETE. The first task is 'Project Details Given to Sheila (may be first draft, may be bullet points depending on the project)' with a workspace of 'Summer Term' and a project of 'Summer Term 2015 VISP Messaging (10074)'. A blue arrow points to this task. The table lists several other tasks, all with a status of 'complete' and 0% completion. At the bottom, it shows 'MON, JUN 2, 2014'.

ITEM	WORKSPACE	PROJECT	WORK	START DATE	END DATE	STATUS	% COMPLETE	NOTES
Project Details Given to Sheila (may be first draft, may be bullet points depending on the project)	Summer Term	Summer Term 2015 VISP Messaging (10074)	2 hours	May 20, 2014	Jun 3, 2014	complete	0%	
Confirm budget with program	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
Confirm project has been approved	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
Review what has happened in the past to inform the plan	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
What is the inspiration for the program?	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
Who are the stakeholders and decision makers	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
Who is the audience	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	4 min	May 20, 2014	Jun 4, 2014	complete	0%	
Who is the competition	Arts - Visual Arts	WRAP 2015-75th Anniversary (10027)	6 min	May 20, 2014	Jun 4, 2014	complete	0%	

7/11/2014

b. Click on your name on the task line where backup is needed.

Summer Term | select workspace | Document Manager | **Project Tracker** | Project Requests | Calendar | Reports | Setup | Favorites | SEARCH | Help

Task List | Gantt Chart | Project List | Project Templates | Recent Activity | FILTERS | EDIT

EDIT Multiple | COPY | MOVE | EMAIL | ADD TIME | ADD EXPENSE | ADD TASK | ADD PROJECT | DELETE

PROJECT / TASK	CATEGORY	RESPONSIBLE	DURATION	WORK	START	END	STATUS	% COMPLETE	REM WORK	NOTES
Summer Term 2015 VISP Messaging (10074) (Target date: Jun 20, 2014)	IBC - Job - Writing	Sara Kluender, Sarah Barber	14.50 days	17.85 hours	May 28, 2014	Jun 17, 2014		0%	16.97 hours	UConn is designing pieces for Anna to take to Prague to promote the VISP program. Summer term is able to have an insert designed by UConn if we have it all written by our staff. We are requesting a writer to assist with the language for this project.
Create Project Schedule	IBC - Project Management	Sheila Clig	4 hours	1 hour	May 28, 2014	May 28, 2014	✓	100%	0 min	
Project Details Given to Sheila (may be first draft, may be bullet points depending on the project)	IBC - Program Information	Sara Kluender	4.50 days	2 hours	May 28, 2014	Jun 3, 2014		0%	2 hours	
Save the project details to the server and send to the writer/editor	IBC - Project Management	Sheila Clig	2 hours	15 min	Jun 4, 2014	Jun 4, 2014		0%	15 min	
Review marketing plan and creative brief	IBC - Writing/Content Development	Mary Abrecht	2 hours	15 min	Jun 4, 2014	Jun 4, 2014		0%	15 min	

c. Select add another resource (please do not delete your name)

Summer Term | select workspace | Document Manager | **Project Tracker** | Project Requests | Calendar | Reports | Setup | Favorites | SEARCH | Help

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d. Choose your backup from the drop down menu and click Save

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e. You and your backup will now be assigned to complete the task (only 1 person needs to mark as complete)

Summer Term | select workspace | Document Manager | **Project Tracker** | Project Requests | Calendar | Reports | Setup | Favorites | SEARCH | Help

Task List | Gantt Chart | Project List | Project Templates | Recent Activity | FILTERS | EDIT

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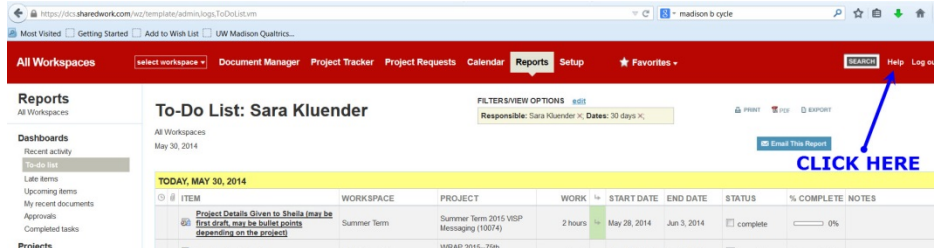
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3. For all requests, please make sure that registration is scheduled to open prior to the first send/mail/website go-live date.

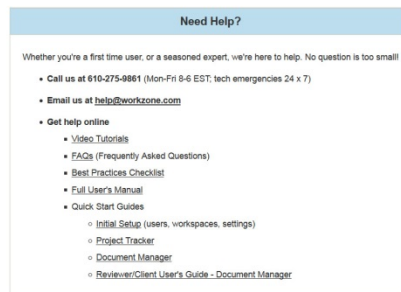
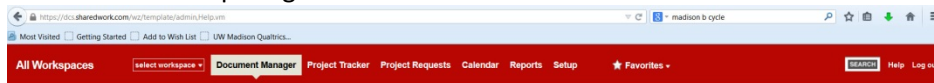
7/11/2014

I FORGOT HOW TO USE WORKZONE! HELP ME!

1. In MOST cases, log in dcs.sharedwork.com
 - a. Log in: dcs email address
 - b. All passwords were first assigned as dcs followed by your first initial then your last initial. Example: BuckyBadger@dcs.wisc.edu Password: dcsbb
2. Click on Help



3. WorkZone offers full service help. As a user, you can call or email them, view the videos, full user manual and quick guides.



4. Resident WorkZone experts:

Julie Klein
Sara Kluender
Alan Ng
Alissa Oleck
Sheila Olig

WORKZONE DOS AND DON'Ts

1. **Do** still talk to the people working on your project. WorkZone is not a replacement for human interaction, but a way to manage our projects and keep the team aware of the process.
2. **Do** log in each day to view your To-Do list.
3. **Do** use WorkZone to manage your work projects.
4. **Do** use WorkZone to monitor progress on your marketing projects.
5. **Do** assign backups to your tasks when you are out of the office.
6. **Do not** change the dates associated with any task on any IMC project or any project you do not manage directly.
7. **Do not** delete any projects; mark them as complete instead.
8. **Do not** lock projects.