



# **"How It Gets Done"**

## **SDI Marketing Department Traffic Manual**

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The pages that follow detail how we, the SDI Marketing Department should perform our jobs as a team committed to meeting SDI's marketing needs, while containing overhead and maximizing profit goals. It is expected that this discussion will assist all SDI staff members in recognizing and understanding how important each of us is to the successful realization of our company's goals. It should also provide greater insight into other staff members' responsibilities and how the links between areas need to be maintained and improved.

While all aspects of a job are being performed, they are not currently being employed in a systematic fashion. This will serve to standardize the process by which jobs are performed, and moved through our department.

The SDI Marketing Department is more than an inhouse agency. This department is the living, breathing machine that leads to the generation of all ultimate revenue by this company. The major areas of the department have diverse objectives, yet must work together on successive projects as a team. As a team, we must think in terms of common objectives. Individual initiative is vital at all phases, but "mavericks" and temperamental attitudes do not serve the interests of common goals. Each of us will be called on from time to time to serve in capacities other than what our job title describes, however, the better we do our jobs, the less often this will occur.

Don't be swamped by the attention to detail in this Traffic Manual! The flow of a job involves the passing of the pieces of the job (via the job jacket) through the hands of many people. Each adds to the job before passing it on. All of the following items are currently being done. The major differences occur in how they are being done, who is doing each step, and the personal sign-off of each participant in the process.

The detail in which this has been written is a direct result of breaking down the "how" a job gets done into its many components. While this uses only the example of a direct mail job, progressively each specific job type shall be broken into its finite components, and restructured into a written traffic process.

Identifying the "who" involves, in some cases, redefining and standardizing job classifications and understandings. Up until now, many job descriptions have varied by the individual's personality in the position, leading to confusion regarding the extent of authority and ownership of the job at different stages of the process. Some of the job descriptions here will be, of necessity, shared duties for the time being (some do not currently exist as separate positions within the department). Nevertheless, having the structure in place allows understanding of the process, and understanding of the individual job being performed at any particular point. This will help us as we grow, to do so in a smoother manner than before.

The only additional part of the overall process is the personal sign-off at each stage, a feature which will add only a few minutes into the job. The sign-off is self-explanatory. It simply ends one phase of a job's development, and begins the next.

The sole example given at this time is a complete direct mail print campaign. There are other types of projects which have not been detailed at this time, checklists and guidelines to assist each area in their duties and responsibilities, style guides and standards which have yet to be written down. This Traffic Manual is a work in progress. What follows are the basics. These basics are the beginning, not the end. The process of "how it gets done" involves each member of this department, and the rest of the company, as well as our vendor "partners" outside SDI.

-- W. Emerson Brantley III

# I. Functional Areas Defined

Currently the SDI Marketing Department has eight functional areas. These are: Administrative, Creative Services, Direct Marketing Project Coordination, Media Services, Online Marketing, Joint Ventures/Club Marketing, Business Services and Traffic. Each staff member functions in at least one of these areas, some of us function in more than one, due to our size and the demands of being an inhouse agency.

Because of the complex nature of our marketing mix, and the differing job goals for each area (meeting deadline, compelling copy, complementary layout, lowest pricing, weight, etc.), Administrative Services, or the Management Team, is vital to the continued forward direction of the marketing activities towards the greater company goals.

*Creative Services* includes creative direction, art direction/art production, copywriting, and production supervision. All aspects of the actual written, visual, and aural campaigns are developed in this area. Any other creative efforts on the job must be done in concert with the efforts of the Creative Team.

*Direct Marketing Project Coordination* (general ongoing campaigns, new campaigns for products and events, lead generation, direct/database marketing, advertising and public relations) includes strategy development, campaign planning including followup strategies, program development, account supervision, and day-to-day coordination of campaign details with all relevant parties. Once a project is approved by the administrative team, the PCs are the managers for that individual campaign, properly communicating with all involved and affected parties, and seeing it through to its conclusion within the guidelines of this traffic system. Coordinators also responsible for accurate budgeting of campaign costs and reporting of results, and the constant communication of other affected areas and departments throughout active campaigns.

*Media Services* includes media (radio, television, print) planning, evaluating, buying, and reconciling, as well as the coordination of all production activities for radio and television spots and infomercials.

*Online Marketing* coordinates all design and maintenance of online pages, all orders and registrations, including the design, contractual agreements, joint venture online links, reporting, and overall development of online marketing resources.

*Joint Ventures/Club Marketing* is responsible for coordinating all pertinent campaigns, especially events, with the leadership of the REIA groups and other joint venture partners as they become available.

*Business Services* oversees all areas of the small business association (NAPE), the magazine (Business Solutions) and all peripheral marketing and organizational details related to our business division. This includes all planning, contractual agreements, reporting, and overall development of this area.

*Traffic* includes coordination of all vendor relations, estimating, maintaining project calendars with coordinators and Creative Team, entering and accounting for all POs, and central file for all Job Folders.

## II. Responsibility By Functional Areas

**Administrative** includes Creative and Direct Marketing management, as well as the overall management and direction of the department. Responsibilities include guiding overall conceptualizing in the development of new and revised campaigns, ensuring the adequate mid- and long-range planning for campaigns, including as liaison with other departments to keep outside scheduling of events and telesales campaigns as far in advance as possible. When conflicts of scheduling, offers, different campaigns arise, administrative must determine the most important elements pursuant to the overall direction of the marketing program and mix. Other areas include interpreting reporting and adjusting campaigns accordingly, and establishing ongoing budgetary guidelines for the department, creating a stimulating creative environment for increased initiative and teamwork. The vision and stimulation for the department, and the continuity of the marketing approach, ultimately is the responsibility of the Management Team. By properly performing in these functions, the Administrative area allows all other areas to function as a team.

**Creative Services** has ultimate responsibility for every aspect of the creative product that is produced by SDI, based on the briefs and creative meetings with the PC. This includes making sure that the creative product fits the strategies and parameters identified for the product, and that the creative product is designed with the overall intent of improved sales. Members of the Creative Services team must work with all other department members to ensure that the creative product meets quality standards, budget, size, weight and time frame considerations. Unlike an outside agency with many clients, we have for the most part only one... SDI Creative Services is the voice and image of SDI. Creative Services personnel may purchase outside services on behalf the company (e.g. separations), and should work with Traffic to maintain the necessary vendor relations to do so. Details of these purchases must be acquired and approved in advance, and written purchase orders generated through Traffic.

**Direct Marketing Project Coordination** has ultimate responsibility for the overall planning, budgeting, and accurate and timely delivery of all information pertinent to each job, including internal strategic/job planning documents and program development. Each Project Coordinator must take responsibility for ensuring that all new and updated information, as it is received, gets to Traffic, Creative, Media, Online, Joint Ventures and any Other Parties (as appropriate) in a written and complete communication. Verbal information must be followed up as soon as possible (same day) with written conformation on the Job's internal forms. Project Coordinators must be familiar with the policy on scheduling and should always defer to Traffic before committing to requested deadlines. PCs must convey all information and updates pertaining to a Job to Traffic. This does not mean restrict communications directly from PCs to other areas, e.g. Creative, but Traffic must be kept informed, so that schedules accurately reflect job expectations and revisions. No substantive changes to a project will be made without the signoff of the appropriate PC. At this point, substantive means changes to an offer, date, phone, time, intent of piece, components of a campaign, schedules, and revisions to a job which do not follow the internal revision process described in this document. Normal proofing, copy and layout adjustments (e.g. typo corrections) are not included. Once the initial job concept and plan is approved, it is the PCs responsibility to see it through.

**Media Services** has responsibility for the planning and producing of audio and video and the placing of media placement (electronic and print) commitments for Direct Marketing campaigns. Media Services staff must work closely with both PCs and Traffic to ensure that deadlines and details are communicated. There are often production considerations and costs that Creative Services and Media Services need to discuss before finalizing creative/media recommendations and solutions. Media must coordinate all schedule and production changes with Creative and the PC, and is responsible for the timely completion of all media projects and schedules. As the area that increasingly effects most outside spending, Media Services must ensure that management is kept aware of media commitments. It is Media Services responsibility to stay constantly ahead of the Production calendar for events, and to always seek the best possible pricing and bonus considerations.

**Online Marketing** coordinates all design, coding and maintenance of online pages, including design, coordinating

copy.