

WORKFLOWS

in an In-House Design & Marketing Department

Holly Kean
MARKETING MANAGER
Burkhart Dental Supply

Workflows in an In-House Design & Marketing Department

1. Introduction

- a. How our company structure affects our workflow
- b. Kinds of projects we work on *and how they affect our structured workflow*
- c. Our responsibilities/service offerings *as an in-house design department*

2. Our Workflow Process

- a. Graphics on Demand
 - i. intake/tracking
- b. Scheduled Projects
 - i. the "milestones" in our process
 - ii. timekeeping
- c. Marketing Collateral Intranet Site

INTRODUCTION

Burkhart Dental Supply

- Third largest dental dealer in the United States working with dentists across the Western United States
- Family owned since 1888
- Oldest company of record in the state of Washington
- Department supports 19 branches with sales staff of about 125 people, 2 subsidiaries and about one dozen departments
- Building great and long-lasting relationships is our greatest goal and plays a huge part in our culture and in our service to the company at large.

COMPANY STRUCTURE

We are a sales-person based organization

- We grow our sales with the efforts of our Account Managers, Equipment Specialists, Technology Specialists and Branch Managers through the relationships they cultivate and develop.
- We choose to invest in tools and training for our sales staff vs. investing in advertising to generate and sustain our sales.

Understanding these two principles gives us clear direction on how our department should approach our work.

COMPANY STRUCTURE

Evaluating Criteria

Projects need to be profitable and purposeful

- Need to generate income
- Need to educate clients and/or associates
- Need to build impressions for potential clients and partners
- Need to excite our associate groups and/or leadership teams
- Need to show our dedication to quality
- Need to express feeling of value

Projects need to be right for Burkhardt

- Does it show accountability, integrity, knowledge or client success?
- Does it show we understand our client and their needs, wants and desires?
- Does it fit into a defined “happy customer experience”?
- Is it right for our manufacturing partners?
- Is it fun?

COMPANY STRUCTURE

Types of Projects

We are ready with resources and a process for virtually every request that comes to our department.

- Packaging
- Publications
- Magazines
- Tradeshow & Environmental Graphics
- Brochures & Sell Sheets
- Direct Mail
- Campaigns
- Wearables
- Advertising
- Logos
- Stationery Suites
- Forms
- Swag

COMPANY STRUCTURE

Department Responsibilities & Services

- Design
- Vendor Management
- Marketing Consultation
- Project Management
- Concept Development/Facilitation
- Content Development
- Request for Quote
- Print Negotiation
- List Management
- Print Production
- Art Direction

OUR WORKFLOW PROCESS

Graphics on Demand

- Take in projects by email, voicemail, phone or in person.
- 0-2 hours of estimated time.
- Requested turnaround: 48 hours; Goal: 24 hours
- Ideal for PDF conversions, help with logos, setting up imprints.
- Logged in an Excel spreadsheet.
- Keeps track of repeat requests that could go on Marketing Collateral Intranet Site.
- Track date, date completed, requestor & time spent on the project.

OUR WORKFLOW PROCESS

Scheduled Projects Milestones

Using Basecamp, we set up each scheduled project and create the following Milestones for typical projects.

- Meeting
- Concepting/Design
- First Proof
- First Proof Changes (client)
- First Proof Changes/Second Proof
- Second Proof Changes/Final Approval (client)
- Prepress
- Prepress Review (outside department)
- Package & Deliver to Printer
- Ship By Date
- Available Date

OUR WORKFLOW PROCESS

Scheduled Projects Timekeeping

- **Meeting** *Formal meetings*
- **Research** *Concept Research, Search for photos/type/illustrations/vendors*
- **Art Direction** *Leadership in design, concept development or design development*
- **Concepting** *Idea development*
- **Design & Layout** *Production, execution of concept, time spent in revisions*
- **Proofing** *Review of work for inaccuracies or inconsistencies, Prepress Review*
- **Prepress** *Prepare files for print, time spent on uploads/downloads, burning CD or DVD and press checks*
- **Production** *Any time spent preparing deliverables – mostly used when not using outside source to replicate and deliver final product*
- **Project Management** *Coordination of project details and communication (informal meetings) with involved parties (other than vendors) or materials suppliers*
- **Vendor Management** *Coordination of project details with vendors, Requests for Quote*
- **Content Development** *Copywriting, development of written material, captions, headlines, retrieving pricing or product numbers*

OUR WORKFLOW PROCESS

Marketing Collateral Intranet Site

- Allows us to set up marketing collateral pieces for customization by sales associates.
- Eliminates brand hacking
- Time-saver for non-skilled associates
- Enables branches to “create” pieces on their own.
- Gives marketing full control over design, logo use, imagery, colors, typefaces, tone and voice.
- Eliminates errors by limiting choices for users.
- Enables our department to focus on the projects that are more design-intense

Suggested Reading

In-House Design in Practice

Real World Solutions for Graphics Designers

by Cathy Fishel

Aha!

10 Ways to Free Your Creative Spirit and Find Your Great Ideas

By Jordan Ayan

Six Pixels of Separation

By Mitch Joel

Good to Great

By Jim Collins

Tales of Knock Your Socks Off Service

By Kristen Anderson & Ron Zemke

Five Star Mind

By Tom Wujec

Holly Kean
MARKETING MANAGER

253.212.4833
hkean@burkhartdental.com