

# BRAND & MARKETING PROCESS REFERENCE GUIDE



A user-centric custom-developed Salesforce application that makes it easy to start and track ADL creative projects:

- Incorporates ADL Project Brief that includes all critical information to begin a project
- Enables the Creative Studio to track and account for workflow by region and by CSC Team



## How Do I Use?

1. Login to Salesforce
2. Click on the 9 dots
3. Select Launchpad from App Launcher
4. Select project type and click on Request button below

## Accommodates two types of projects:

**1). Routine (simple requests):** In the service of communications/news cycle and business-as-usual (graphics for social media, email copy)

- Simple form completion
- Requires signoff from manager

**2). Strategic (complex projects):** Integrated campaigns that have long lead times and are highly integrated, involve multiple channels and multiple internal team members

- Requires additional detail/input
- A detailed project brief is submitted via Launchpad
- Project is presented/brief reviewed by the **Go Ahead Team**
- Requires signoff from manager

## MARKETING INPUT REVIEW AND GO AHEAD MEETING

The objective of this weekly meeting is to ensure a consistent approval process and aid in prioritization. Every week, we will assess new projects and review projects in process at critical decision-making and approval points. This process pertains to Strategic/complex projects only. **THIS MEETING IS ALSO WHERE ALL USES OF THE ADL LOGO WILL BE APPROVED.**

### Go Ahead Decision-Making Criteria

- ROI/ROE
- On Strategy/On Brand
- Clarity of Deliverables and Audience
- Budget

### Team Members from:

- Brand & Marketing
- Communications
- Development
- Executive Office
- Legal, as needed
- Policy
- Programs
- Regional Office Operations
- Technology

## How Does It Work?

1. Submit projects through Launchpad system **by 12pm Friday** for following week's meeting
2. B&M schedules project owner presentation time slot at weekly meeting
3. Team members receive submissions – project briefs, attachments in advance - to maximize meeting efficiency
4. Marketing Input Review/Go Ahead Meeting will take place every **Tuesday between 2 – 4pm**
5. New projects receive *Go, No Go or Needs More Information* designation
6. Recap/ Marketing summary to be sent by Creative Studio following Go Ahead Meeting