



HASSLE-FREE PUBLICATIONS

Managing Publications So They Don't Manage You! Guidelines for Successful Publication Management

Publication management is a perfect task for process-driven, detailed people. Since some of us are broad brush folks here are some thoughts and steps to help you produce successful, hassle-free publications without losing your mind (or your hair) in the process!

Begin initial planning process 6 to 8 weeks prior to when you actually need the publication.

Steps for Success:

Step 1: Set internal planning meeting. Invite staff that will either be involved in the actual production process or will determine the direction (purpose/need) of the printed piece. During this meeting you will: determine the marketing goal of the piece (why you need it); the primary audience; the budget; quantity; the approval process; staff responsibilities; and desired delivery date (or in-mail date for publications being mailed.)

Step 2: Produce written project specifications and schedule. Based on above data produce a print specifications sheet; a production schedule and a mail house specifications sheet, if applicable. Sometimes when you are writing your print specs you may not have a definite quantity yet. In this case you can ask vendor(s) to quote on more than one quantity. You need to finalize your quantity at least one week before the job gets to the printer since he or she will need to order the appropriate paper stock.

Distribute spec sheets to the appropriate vendors to get pricing. Get at least two quotes per type of service, i.e. printing, mailing, etc. When you get the quotes back you'll know if you can move ahead with the jobs as "spec'd" or if you need to scale back like going from full color to two-color or changing your paper stock or mailing bulk (standard mail) instead of first class.

It is best to get written quotes so you are not depending on memory – yours or your vendors! Make sure you know things like how many rounds of revisions are included in the price for design process and what kind of proof you will receive before going to print, etc. Comparing a vendor that offers only one round of revisions with one that offers two is like comparing apples to oranges.

You'll also want to clarify whether there will be delivery or shipping charges tacked on to any vendor fees. That can certainly make one vendor more desirable than another.

Sample production schedule

Start with delivery date or in-mail date and work backwards

Allow at least:

Two weeks for copywriting and design. Work in enough time for revising copy twice. If you have a complex approval process (staff and board) or folks who like to make multiple changes add in more time.

Two weeks for printing. This allows for unforeseen circumstances as well as equipment issues, lags in ordering paper stock, etc.

Five working days for mail house services.

This schedule can be tweaked and confirmed with selected vendors.

Something to Ponder: Knowing when you need help: Outsourcing work to vendors and consultants

Unless you have in-house professional graphic design, printing and mail house capabilities there are times you'll want to outsource some or all of these services. Copywriting may be another area you may want to farm out.

Although it is often tempting to save money by doing everything yourself; think strategically. What are you sacrificing? Your time? Possibly quality? Is it worth it in the long run? If you are not professionally trained in a particular area, chances are it is going to take you more time to accomplish a service like designing a brochure or labeling and sorting your mail than someone who has the education and in-house software and equipment designed to do that.

Ask yourself how much your time is worth and what could you be doing instead? If you did everything in-house would the publication look professional so that it represents your business appropriately to your target market?



Step 3: Pre-production, in-house work. Develop content and gather artwork while you are waiting for your quotes to come back. Although it rarely happens, copy should be written for a specific graphic design. In this best-case scenario you would develop an outline for your copy and would write copy once design had been established. However, most organizations write copy first and then turn it over to the graphic designer who will tell them when copy needs to be cut.

In this pre-production (pre-vendor) stage it is very important that you evaluate the quality of your photographs and artwork. If your photos are out of focus or are not “strong”, well-composed photos now is the time to tackle that issue. Arrange for new photography or purchase stock photography, if needed. There are a number of good stock photography sources with reasonable pricing such as www.istock.com, www.shutterstock.com, www.GettyImages.com, www.photos.com.

Note about vendor selection: Pick the vendor who you feel can do the best job for the best price. Don't pick exclusively by cost. Trust, reliability and quality are crucial factors for the selection process. If you must have an Annual Report in the mail two weeks prior to your annual meeting that stipulation is going to be an important deciding factor when you are evaluating quotes. Another factor is “the pain in the butt factor.” If the process of getting your job completed is going to be highly stressful and completely chaotic because of the demeanor of a particular vendor or consultant you probably don't want to go that way even if the price is good!

Get vendor recommendations from trusted colleagues so you have a better chance to pick a winner, not a clunker!

Step 4: Production - Create and follow your paper trails. Now that you have everything gathered it is time to start the production cycle. Keep in mind that even if you are using outside vendors, you are responsible for monitoring the process and keeping everything on track. Like with any relationship it is important to communicate frequently and clearly. If there are issues you are worried about like the print quality of a photo, hitting the desired delivery date or having too much copy, please express that to the appropriate vendor. Keeping a running list of concerns puts everyone on the same page and establishes a comprehensive troubleshooting checklist.

Establishing file/software compatibility, processing postage costs (if using mail house services) and proofreading are important components of the production cycle.

Files and software issues: Whether you are emailing a text file to a graphic designer or emailing mailing data to a mail house, make sure you know what type of file that vendor needs to ensure that there will not be compatibility issues or lost time during production.

Postage issues: If a job requires mail house services estimate postage costs and make sure you have the appropriate money in the permit account in time for the mailing. If you are using a permit number/indicia, make sure the renewal payment has been made. It is best to resolve any postal issues at least two weeks prior to when the job will be delivered to the post office. There is nothing worse than a job sitting merely because someone forgot to cut a check and get it to the post office in time.

Proofreading: Allowing time to carefully proofread will save you the embarrassment (and credibility issues attached) and cost of reprinting a job. As you know when any piece, even a simple letter, leaves your office with a typo or content error it reflects negatively on the professionalism of your business. If you know that proofreading will be an issue for you, build in extra time in your pre-production and production stages of your schedule.

Also, each vendor has quality responsibilities based on their area of expertise. Although vendors will do some cursory proofreading, it is your responsibility to proofread and sign off on the job! (See proofreading handout for additional advice.)

Step 5: Clarify billing and delivery information. Billing and delivery information should be put in writing prior to the conclusion of the job. If you are using mail house services and you want part of the job sent to your location and the remainder to go to the mail house for processing, make sure the printer has that information. In addition, you'll also want to specify what to do with the extras at the mail house. Should they be delivered to you or can they be shipped or mailed? Again provide specific written instructions to ensure that everyone is on the same page and has the same expectations. Specific contacts and contact information for each delivery location should also be specified.

Publication management can be a rewarding experience. Seeing a job go from concept to final delivery is satisfying – and can even be fun. Enjoy!