

Preliminary Discovery Document

1. Diagram the current flow of primary brands product mar/com process:
2. Who is currently creating the mar/com materials and how are these materials being handed over? Vendor lists, removable media, film, final art?
3. Diagram/describe the approval process?
4. If you could change any part of the creative production process what would you change?

5. Product introductions and Updates:

a. What is your current product introduction/update time to market cycle?

c. Describe a standard set of mar/com materials associated with a product launch/update

d. How is traffic management currently handled?

6. What might you anticipate turning over to the CKS Onsite team?

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|--|--|
| <input type="checkbox"/> PR | <input type="checkbox"/> in-store displays |
| <input type="checkbox"/> Data-sheets | <input type="checkbox"/> brand specific identification systems |
| <input type="checkbox"/> web design—information architecture | <input type="checkbox"/> multi-media sales and marketing tools |
| <input type="checkbox"/> web design—content development | <input type="checkbox"/> corporate image/branding/training films |
| <input type="checkbox"/> packaging design | <input type="checkbox"/> on-line marketing and media planning |
| <input type="checkbox"/> promotional kits | <input type="checkbox"/> strategic consulting |
| <input type="checkbox"/> brochures | <input type="checkbox"/> other: _____ |
| <input type="checkbox"/> direct marketing materials | |
| <input type="checkbox"/> event marketing programs | |

7. What level of involvement do you expect to have with design/layout/creative direction, and how will that liaison interface with CKS Onsite?

8. Please supply a set of actual mar/com pieces associated with a product launch/update—are there standardized budget estimates for each item from the cost accounting group? What are those budgets?

Key Production Issues:

A. Work Flow Management

- *Establish a traffic management/schedule management procedure that addresses all of the stages of production from job initiation through all the interim steps to final hand-off.*
- Client will identify an individual to serve as a liaison to CKS for job initiation and final sign-off.
- The CKS onsite team access for project tracking will be limited to particular individuals within the creative services department of the client.
- CKS will need a final sign-off from the client at the final comp stage and the film proof stage (either color proof or black & white proof).

B. Production Services

- All key art & photos that need scanning, color correction and/or significant image manipulation will be considered a film cost—additional cost above monthly retainer, billed at the end of each month.
Note: CKS will look to establish a relationship with two or three service bureaus and shop the best price available locally, film cost will vary from the simple \$10-\$12 per piece all the way through—potentially—a few thousand per set for the oversized poster film.
- When CKS has produced the key art, then all related pieces (except the sales brochure) must also be produced by CKS.
- Key art provider or BMS creative services department must provide some form of mock-up for each piece the CKS production team will take through film and any specified fonts (screen font & outline font)—the more complete the mock-up, the better—this is an area for further review by CKS in dialogue with the creative services department of the client prior to agreement.

C. Retainer Boundaries

- The Client with the CKS onsite team will attempt to construct careful and clear production service boundaries to maximize the CKS and the client team effectiveness and productivity.
- Creative copy writing is not included in the retainer fee, (services would be available at an additional expense).
- Since the client presently acquires print services directly from selected vendors; CKS will not be responsible for press checks.
- The CKS onsite team will provide quality layout and production services for the client within the scope of the retainer, but will not be able to solve marketing problems or create complete marketing strategies—the full resources of CKS Group is readily available for such services on a contractual basis.

Additional Key Issues: (not in priority or chronological order)

- Track & quantify each unit of work
- Key to cost savings is manageable/scheduled workflow (limit down time—hardware & personnel)
- Goal is to keep the on-site concept straightforward and clearly defined, and for all appearances as an in-house production

- Review actual production pieces supplied by the client—are the hour estimates listed by the Client Cost Analysis reasonable & conservative - yes, w/n acceptable tolerances for error
- Estimates of quantities per month need to be accurate and assigned in a manageable workflow scenario
- Establish working relationship with service bureau
- Envision team personnel profile and workflow, create designer/production job descriptions and begin personnel search
- Film output trapping and proofing - yes, but press checks are the client's responsibility
- Estimate the number of product introductions/updates per month/quarter (accuracy here is essential to an efficient and manageable work-flow scenario)?
- Audit the client's production standard operating procedures