

# Stories of a Creative Project

*Journey of a New Marketing Manager*

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# New Manager in The Game

## *Monica's first day as a Project Manager*

***Monica** is a new Account Manager in **Q&D** creative agency. Her first challenge is to prepare, sell and drive a new PR campaign for **Slow'n'happy**, a global slow food restaurants network. As spring comes, they want to perform a new countrywide campaign.*

*Monica has just switched her job and wants to show herself as a professional in the new workplace.*

*You might be interested in Monica's story and what she has learnt during her first project.*



# Week 1: Selling The Proposal

*How to get Your Customer to Buy Into Your Idea*

*First Monica's challenge is to prepare, present and sell the project proposal to the customer.*

*The most daunting marketing challenge for the **Slow'n'happy** restaurants is that businesswomen and busy managers avoid slow food restaurants because they misbelieve that the meal will fit the lunch break time. White collars usually spend quite a bit of money on lunches, so the restaurants network want to attract more customers from this group.*



## The Challenge: Go Public Before Spring

Monica has just started negotiations with the customer. She prepared a great brief proposing how this marketing project should look like. She included the ideas how to make the campaign laser-focused and not to lose millions on prime time ads.

Monica proposed to focus on: LinkedIn, hard copy business magazines and on sending bunch of CEO-only discount coupons to selected CEOs who can forward them to their business partners. Also included ads in a few fashion and lifestyle magazines that are read by office assistants, who often have a great influence on the place where their bosses eat lunches. She was well prepared, she had optimistic approach and a lot of enthusiasm! She invited Olivier and his team for the presentation.

And the meeting became a disaster. She presented all the ideas listed in the brief. Bullet after bullet. Olivier put Monica through the hoops asking about subtle details of every single step in the campaign: dependencies, effort required and costs. She has not been prepared for such a detailed conversation and she had a feeling that the customer's hidden agenda is to depreciate the value of the campaign or herself personally.

Finally Olivier expressed his doubts whether the campaign will achieve the goals as expected. He underlined the tight timeframe, as people are motivated to eat healthy when first sunny days come. So it is important to go public before spring begins.

## The Problem: Sense of Security

The customer was reluctant to the campaign proposal, because Monica hadn't ensure his sense of security. The skepticism resulted from missing important piece: the schedule clearly shows the ownership of each step.

Olivier was afraid that his small marketing team will not manage to perform the campaign in such a short time, while in fact Sophie assumed (but not stated clearly enough!) that most of the work will be done on her side.

Not having all the data, Olivier thought that this campaign schedule might be too ambitious. He realized that the project can become a constant death march and can miss the goal to start promotion of his slow food restaurants on the spring solstice.

## The Lesson Learnt

Once you have your project plan ready, you need to communicate with the customer. Of course you can use a

spreadsheet or a to-do list, but the best way is to plan the project with an appropriate project\_management software.

Then you are supposed to set up an appointment or a teleconference. Share the schedule with your customer, by the way, in [FoxyTasks](#) you can do that with just one click. Explain the proposal in details. Even if you receive negative feedback it is very probable that you will arrive to some conclusions and get a second chance. **Don't you ever just throw your proposal through e-mail without interactive follow-up.**

## Hints For You

- DECOMPOSE YOUR PROJECT INTO ACHIEVABLE TASKS
- THINK HOW MUCH EFFORT AND TIME EACH TASK WILL COST
- PROVIDE YOUR CUSTOMER WITH THE PROJECT PLAN
- EXPLAIN THE PLAN TO ENSURE THAT CUSTOMER FEELS SECURE
- HELP YOURSELF BY USING DECENT PROJECT PLANNING SOFTWARE



# Week 2: The Magic Project Triangle

## *Ingredients of a Creative Project Proposal*

*Monica decided not to give up and work more on her proposal. She talked on the phone with Olivier and he suggested a talk on next week.*

*Of course Monica was afraid to jeopardize the second chance. Next day still without a clue, she has set up a meeting with her boss to ask for help.*

## The Challenge: Make The Quote Complete

After a few minutes of meeting and after reading the proposal, the boss frowned her eyebrows and asked if the document is complete, which Monica vigorously confirmed. The boss took white board marker and drew a triangle.

Every project has a few aspects you have to define and control, and project managers call that a 'project triangle'. In fact, the triangle sometimes has even more vertices, although there are the three basic ones:

- What: the **scope** of the project
- When: the **time** in which the project has to be done
- How much: the **budget** of the project.



These parts of the project triangle usually depend from each other. When a client states that the website should be dual language, you have to adjust the time and the budget. When a client wants you to finish the project earlier, you will have to spend more for overtime work, additional freelancers or a new tool.

In the middle of triangle there are some important details, which show your ability to deliver the project within *what*, *when*, *how much* constraints: how will you achieve the goal,

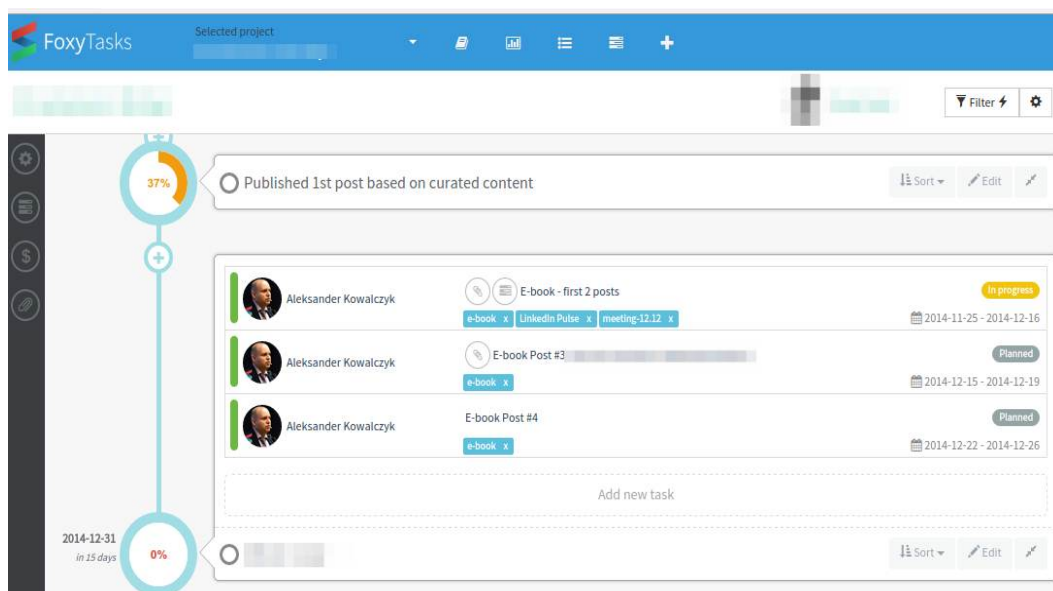
who will do necessary tasks for you, with whom you have to communicate...

These details were the missing pieces in Monica's proposal. The meeting with Olivier became a great success: he actually started to believe that the campaign plan is thoroughly thought and defined in each necessary detail. He even offered support of his team in terms of a few tasks that Monica marked as the most effort-consuming.

Olivier accepted the proposal and they signed the contract!

# The Problem: Missing Project Triangle Pieces

When



The more challenging the campaign idea is, the more insecure the client will feel if other ingredients are missing. “When” is the key piece of that puzzle.

Your client does not know much about PR campaigns: what is easy and effortless, what is hard and sweat squeezing. The client might be overwhelmed by the scale and by the apparent complexity of your brilliant plan.

You have to assure the customer that your plan is rock solid and well thought. Show deadlines on each step of your project. List all the phases or major tasks in a table. Set up deadlines and indicate major inter-dependencies. This will help both you and customer to believe that the project is feasible and realistic.

## How Much

Sometimes this is the most difficult part. The customer asks how much would that campaign cost. The agency responds with the question “how big is your budget?”. The customer is reluctant to reveal it, because this might impact the price stated by the agency.



Price is an important part of the offer. Many clients do not want to tell how thick wallet they have, so be prepared for presenting multiple variants.

How to deal with it? Prepare 3 variants or “packages” of the campaign: inexpensive, optimal and extended. Instead of going too deep into defining details, give the customer a choice in a form of simple comparison table. The customer will choose the one, or will ask for some combination of the packages, while you can be pretty sure he will select the most he can afford to. So you will not lose the opportunity to earn even more.

## Who

A customer might not appreciate your plan because he's afraid of being overloaded by tasks required to do.

For instance, Ethan might have been scared that he will not manage to prepare all the input materials required to perform the campaign.

What might help is to clearly indicate the tasks or phases when you will really need your customer activity. Suggest how much effort will be needed and who is the right person to do the task.

Also you need to firmly state that you are responsible for all the rest so you will do it on your own, without bothering the customer.

## With

Ensure that you have all the team members required to achieve the project goals. Yeah, one of the greatest risks is to start a project without assigned by name executors of every task. Remember you should start mitigating this risk just after you identified it.

In case you cannot find the right person, there are many ways to deal with that. You can hire a freelancer, contract a subsidiary. You can find the right person on networking meetings in your area, or in social networks. Sometimes your customer can help too, so do not hide the risk from him once you have run out of ideas. The later you start mitigating the risk, the less options will be available for you.

## How

The project itself have many subtle inter-dependencies between its tasks. Ensure you have not missed casual links between them.

One of methods is to identify major milestones in the project. Milestone is a key event or point in the project, which will not happen until some other activities are not done. Usually this



is a “no way back” point, when you decide to go or not to go into the next phase of the project. For instance, good moments for milestones are: before going public with the campaign, or before sending PDF materials into publishing house.

Note that milestone might depend from multiple tasks: be a kind of “crossroad” on which all the pieces glue together.

## The Lesson Learnt

Comprehensive project proposal will organize your creativity. Take small extra effort to prepare and write the complete proposal including all these project triangle ingredients. This will help both your customer to validate and buy into your idea and you to self-discipline around the proposal constraints.

## Hints for You

- REMEMBER THE PROJECT TRIANGLE VERTICES: WHAT, WHEN, HOW MUCH
- ESTIMATE EFFORT AND TIME REQUIRED TO COMPLETE EACH TASK
- IDENTIFY MILESTONES AND DEPENDENCIES
- DEFINE DEADLINES TO THE TASKS IN THE PROJECT PLAN

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