Integrated Marketing Communications Processes

IT ALL STARTS WITH A REQUEST FOR A MARKETING CONSULT
Complete a request for a marketing consultation through WorkZone as soon as you schedule a program. For the best service, it is helpful to make your request at least 5 months prior to your program start date.

How to request a consult from the IMC team:

1. Log into WorkZone (dcs.sharedwork.com).

2. Navigate into the work space in which the project should be opened.

3. Click on Project Requests in the top navigation bar.

4. Click on + Request New Project.
5. Complete the request form using these guidelines:
   a. Project Title
      i. Please use the following naming convention for the Project Title
         1. Program name (for a single program, this should match the IF in CSIS) and program start date
         2. Acceptable examples:
            a. Substance Abuse Certificate Program Fall 14-Spring 15
            b. SOA-R Summer 2014
            c. Digital Storytelling 7-22-2014
            d. French Classes Marketing Research Fall 2014
            e. Community Health fall social work 2014 programs
            f. New idea for art program in fall 2015
   b. When do you need this?
      i. Your consult will take place within 3 weeks of receiving your request.
   c. Describe your need (the more detail the better)
      i. At a minimum, please include
         1. A brief description of your program or idea for a program (this can be one sentence)
         2. Marketing budget (if open to suggestions, then indicate that here)
         3. Dates for the program, if known
      ii. You may also want to include
         1. Known audience(s)
         2. Known competition
         3. Repeat programs: What marketing was done in previous years
         4. Your ideas for marketing the program
   d. Other comments/things we should know
      i. This might be a list of sponsors/partners who need to approve
      ii. Dates you will be on vacation or out of the office in the next 3 weeks
   e. Check if you have files to upload (you will be prompted to upload after you submit your request)
      i. Partner logos
      ii. Other program details or planning forms
      iii. Other things that would help with a marketing consult
   f. Submit

![New Project Request Form](image-url)
6. Someone from the marketing strategies and services team will contact you to schedule your consult.

7. Consults may range from a brief conversation to multiple meetings with several participants, depending on the scale and scope of your program.

8. Be prepared to send your IMC team member the following prior to your consult:
   a. Program description/idea
   b. Known competition
   c. Known audience(s)
   d. Budget
   e. Repeat programs only: Details from marketing of past programs
   f. Any ideas you have for marketing
   g. Number of attendees to break-even

9. Your assigned IMC team member will assess the scale and scope of your program, create a timeline for the delivery of a marketing plan, and determine the format for delivering the initial copy.

10. After reviewing the plan with you, your assigned IMC team member will work with the project coordinator to open the appropriate marketing jobs in WorkZone.

HOW TO HELP KEEP A PROJECT ON SCHEDULE

1. Check your To-Do List in WorkZone daily to ensure your projects remain on schedule. The templates are built on tight timelines. If a deadline is missed, it will throw off the entire schedule for the IMC Team – not just your project. Projects are assigned to writers and designers based on the number of hours they are available when the project should land on their desk. If your project is behind, it could mean they become double or triple booked.

2. You can change the view on your To-Do List to see up to 30 days out to plan around your vacation and out of office schedule. If you will be out when you have a task due, please arrange for backup coverage and add that person to the specific task line in WorkZone. To add backup coverage in WorkZone:
   a. Navigate to the task requiring backup. (from To-Do List or Project Tracker)
b. Click on your name on the task line where backup is needed.

c. Select add another resource (please do not delete your name)

d. Choose your backup from the drop down menu and click Save

e. You and your backup will now be assigned to complete the task (only 1 person needs to mark as complete)

3. For all requests, please make sure that registration is scheduled to open prior to the first send/mail/website go-live date.
I FORGOT HOW TO USE WORKZONE! HELP ME!

1. In MOST cases, log in dcs.sharedwork.com
   a. Log in: dcs email address
   b. All passwords were first assigned as dcs followed by your first initial then your last initial. Example: BuckyBadger@dcs.wisc.edu Password: dcsbb

2. Click on Help

3. WorkZone offers full service help. As a user, you can call or email them, view the videos, full user manual and quick guides.

4. Resident WorkZone experts:
   Julie Klein
   Sara Kluender
   Alan Ng
   Alissa Oleck
   Sheila Olig

WORKZONE DOs AND DON’Ts

1. Do still talk to the people working on your project. WorkZone is not a replacement for human interaction, but a way to manage our projects and keep the team aware of the process.
2. Do log in each day to view your To-Do list.
3. Do use WorkZone to manage your work projects.
4. Do use WorkZone to monitor progress on your marketing projects.
5. Do assign backups to your tasks when you are out of the office.
6. Do not change the dates associated with any task on any IMC project or any project you do not manage directly.
7. Do not delete any projects; mark them as complete instead.
8. Do not lock projects.