



**INNOVATIVE IDEAS & DESIGNS WITH
QUALITY, RELIABLE IMPLEMENTATION
YOU CAN RELY ON!!**

Project Planning Worksheet

In order to best meet your needs, please complete this questionnaire to the best of your ability. You can also attach any additional documentation and information to this information.

For convenience, all files can be sent to LEE@MERIUCREATIVESOLUTIONS.COM. If the files are too large for email, or you do not have them in electronic format, Lee will work with you to facilitate the information exchange.

Business Name: _____

Business Address: _____

City: _____ **State:** _____

Zip Code: _____

Business Phone: _____ **Fax:** _____

Business Website: _____

Contact Person Name: _____

Contact Phone: _____

Contact Email _____

The following questions will help us determine what the best options may be for you to move forward. Please note – this is not a commitment to move forward with any option. This provides a starting point for discussions, and may lead to long term project plans, one small project at a time.

Do you have a Company Style Guide?		Yes		No
If yes, will you provide the style guide to Meriu CreativeSolutions so we can make sure we are compatible with your current marketing style.		Yes		No
If no, do you want Meriu CreativeSolutions to work with you on designing and creating a Company Style Guide, along with templates (letterhead, business cards, billing invoices, etc), so you can be consistent in all your outgoing communications.		Yes		No
Do you already have a Website?		Yes		No

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If yes, are you looking for a website design change (new look, new feel)?		Yes		No
If yes, with a design change, are you looking at changing the content as well?		Yes		No
If yes, please tell me where your current website is being hosted.				
Are you willing to change to a different hosting site for convenience and customer service?		Yes		No
If no, do you want to develop a website?		Yes		No
Do you have a Logo?		Yes		No
If yes, do you have a high resolution version of the graphic you can provide?		Yes		No
If no, are you looking to have a logo designed?		Yes		No
Do you have business cards?		Yes		No
If yes, are you looking for a new design?		Yes		No
If no, is this something you are looking to have designed?		Yes		No
Do you have marketing collateral (brochures, etc)?		Yes		No
If yes, are you looking for a new design?		Yes		No
If no, is this something you are looking to have designed?		Yes		No
Do you use Social Media?		Yes		No
If yes, are you looking at creating a campaign or strategy to optimize your impact?		Yes		No
If no, are you looking at creating a campaign or strategy to work on outreach and social media?		Yes		No
Do you have other projects in mind that you would like to work on, that are not covered in detail already?		Yes		No
Please provide details on these projects:				
Do you have a specific deadline or timeline where you require work completed?		Yes		No
Please provide details as to what work, the deadline, and what goal you are trying to reach by that deadline:				



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Do you have any industry regulations that you need to comply with (FDA, Security, Medical Confidentiality, Legal Privilege, etc.)		Yes		No
Please provide details as to any restrictions or rules that you must abide by in your outreach and marketing material:				

The following are some basic concept and background questions that can help with approach:

<p>Are there specific colors that you associate with your business? Do you have specific color codes (Spot, CMYK, Pantone) for these? If you provide a style guide, and the colors are included in the guide, you can leave this question blank.</p>
<p>Are there specific fonts that you associate with your business? If these are not freely available fonts, can you provide the font to Meriu CreativeSolutions for use in your material? If you provide a style guide, and the fonts are included in the guide, you can leave this question blank.</p>
<p>Are there specific shapes or visuals that you associate with your business? Examples would be Nike has a swoosh, MacDonald’s has the golden arches. You may think that rainbows are the perfect visualization of what you represent or the feeling you want to invoke.</p>
<p>If you had to describe in one or two words what you are selling or representing, please tell me what that would be. You may have multiple one or two word phrases that you feel represent this. An example – perfume companies sell the concept of “Beauty” or “Hope”.</p>

Here are some of the projects that we may work on, depending on what we decide is the best course to meet your needs. Below each project is a list of some of the work that you will need to do for the projects to succeed. The more you have done before our early meetings, the faster we can make a plan. Eventually all of the items on a list for a specific project will need to be completed where it is relevant to your specific business. If you have a project not found here, we will work together to decide what needs to be done.

While Meriu Creative Solutions is committed to being your partner in Marketing Strategy and Deployment, you know your company, your vision, your industry, and your expertise. Ultimately, content decisions and often actual content must come from you. We are here to work with you and help you make the vision you have a reality.

Website Design (or Updating)

- ❑ Find one or two websites (more is better) that you really like the look and feel of and would like to consider in your website design
 - Describe what you like about each design
 - Describe what you do not like about each design
 - Describe what the site makes you feel
- ❑ If you have a website already:
 - Go through each page, and mark up all the content with what you:
 - Like
 - Dislike
 - Want to change
 - Want to add or remove
 - If you have new content (pages) – draft a quick idea of what the page would be about.
 - If you want to change the navigation, outline a menu structure you would like
 - Think about the message you want on your home page – you often only get the chance to get people to look further at the first glance of the home page. This should represent what you are Selling/Promoting – in a simple message. That key word(s) you determined on the previous page.
- ❑ If you do not have a site and you are looking to have one created:
 - Outline the menu structure for the pages you want to include
 - Think about the message you want on your home page – you often only get the chance to get people to look further at the first glance of the home page. This should represent what you are Selling/Promoting – in a simple message. That key word(s) you determined on the previous page.
 - Outline briefly what you want on each page:
 - Content
 - Pictures
 - Tables

- Links

Business Card Design (or Updating)

- Goal of the cards
- Include the logo?
- Single or Double Sided
- Full color or Black and White?
- Legal requirements to include?
- Size
- Do you want to also have adhesive backed (one-sided) or magnetic versions to give away?
- Concerns?

Social Media Strategy

- Do you have any regulatory issues or challenges governing your interactions with the public (FDA, Legal, Medical, Security, etc.)?
- Do you have someone willing to commit to regular updates to your social media campaign?
- What is your goal in social media?
- Do you have a PR campaign decided?
- Are you thinking of doing a blog?
 - Would this be implemented into any website created and implemented by Meriu Creative Solutions?
 - Do you have someone ready to create content for the blog?
 - Will you need Meriu Creative Solutions to maintain the blog, loading new content, etc?
 - Do you want the blog interactive (i.e. people can comment and you will respond)?
- What social media are you interested in:
 - Facebook
 - Instagram
 - Twitter
 - Linked In
 - Yelp
 - YouTube
 - MeetUp
 - Instagram
 - Pinterest
 - Professional organization outreach?
 - Other?

Style Guide Development

- What is the image your business needs to portray both internally and to the outside world?
- What are the business:
 - Goals
 - Vision
 - Mission
 - Ethics and foundational principles
- Are there colors that you like? Feel representative? Dislike?
- Is there a specific font you like?
- What images or graphics or pictures or shapes are important in portraying that vision?
- Logo design ideas
- What templates do you need developed as part of your corporate branding?
- How do you interact (paper, email, voice, etc.) with:
 - Employees
 - Your sales/service teams
 - Customers
 - Advertising groups
 - Others

Marketing Collateral Development

- Are you updating current collateral?
 - If so, it is often helpful to mark up a copy of that older material as a starting point for a new project
 - Also describe why or what you like, don't like, etc about the content, design, etc.
- Is this project based on an another project (design, content)? This could be from another company, competitor, etc. Anything you have seen that really catches your attention.
 - If so, please provide a copy of this other project and describe why or what you like, don't like, etc.
- What sort of material do you want to create (brochures, flyers, newsletters, post cards, video, etc.)?
- What is the goal of this material?
- What type of distribution are you looking at (electronic, paper, mail, handout, web, etc.)?
- What quantities are you looking at?
- What is your budget constraint for this material?
- Are there multiple collateral projects desired? Are they related?
- Other information or background.

Product Branding

- What is the product you want to brand?
- Features of the product you want to promote
- Problems with the product you want to overcome in marketing
- Competitors to the product
- Is this a new version of another product?
- Is this complementary to another product?
- Information and background on the product.
- Goal of branding
- Audience for the branding (note – sometimes products have to be branded very differently in each market or audience)
 - Background and research on that audience including:
 - Wants and Needs
 - Pain points
 - Demographics
 - Some key possible customers
- Other information that may be important...

Videos, Audio Recordings and Multimedia Material

Are you looking at creating videos, audio recordings or multimedia material for use in marketing, blogging, etc?

- Are you looking at Meriu Creative Solutions building these for you or do you have another party?
 - If another party, will Meriu Creative Solutions be working directly with this party to distribute these video, audio, or multimedia assets through the desired channels
- What sort of projects are you thinking about?
 - Are these projects one-off or on-going and continuous?

Training and Presentation Materials

- Will you want Meriu Creative Solutions to create training materials for you?
 - PowerPoint Presentations
 - Handouts
 - Manuals and Books
- Will you want Meriu Creative Solutions to create presentation materials for you?
 - PowerPoint Presentations
 - Handouts
 - Backdrops and displays