FT
FINANCIAL TIMES

Special Projects Toolkit

A set of resources and material that will help the newsroom better plan, execute, and review projects

WHY?

1. **Projects have proven value:**
   - a. Demonstrate our journalistic quality
   - b. Prestige from winning awards
   - c. Creates room for experimentation
   - d. As a focal point for customer acquisition and ad sales
2. **Guides and resources can make it easier for editors to run more, and better, projects**

GOALS

By June 30, 2017:

- **Any desk editor put in charge of a project could, using the kit, carry it out without feeling lost**
  We will have more, and better run, projects
- **Reporters will know the requirements for pitching a project and the criteria on which their ideas will be judged, and know that their pitches will be considered**
  We will have more, and better project pitches
- **All projects will have a workflow review and an analytics review**
  We will learn from past success and failures

MODULES

The Ikea Kit is modular. Each module addresses a specific problem that reporters and editors have when it comes to projects

MODULE 1: What projects are already in progress?

Find out via the online **Projects Calendar** (Online only)

MODULE 2: How do I get started?

Answer these **Project Pitch** questions

MODULE 3: Who do I talk to about...?

Use the **Contact List**

MODULE 4: What do I do if I'm put in charge of a project?

Follow the **Production Checklist**

MODULE 5: How did my project do?

Use the **Analytics Template**

MODULE 6: Review meetings

A **simple guide** for how and why to do it

APPENDICIES

1. **Sample review meeting summary document**

Module 1

Projects Calendar

This calendar tracks our plans for big events and projects over the next year.
You can find it online at: **editorial.ft.com/projects/calendar**

FT FINANCIAL TIMES

Module 2

Project Pitch

Use these questions to help you get started on a project and clarify your thinking before you discuss it with an editor

STEP 1	WHAT IS YOUR TOPIC?
e.g. Isis economy, Italian banks, driverless cars	

STEP 2	WHAT IS COMPELLING ABOUT THIS TOPIC?
We don't want 'book report' series where we just tell readers everything we know about the topic du jour. How would this add to normal FT news reporting?	

STEP 3	HOW ARE YOU PLANNING TO TELL THE STORY?
If you already have a format in mind, please explain why your story needs to be told in this way	

STEP 4 WHY SHOULD READERS CARE?

People tend to read and share things that are original and personally relevant to their lives. Why should they spend time with your story

STEP 5 WHAT EVIDENCE DO YOU NEED?

Even the most compelling narrative needs facts and evidence to support it. What do you need to prove your thesis? Data that shows some cross-over point or superlative? Key quotes from particular people? Documents and other physical evidence?

STEP 6 WHAT ARE YOUR GOALS?

These are some of the goals we might have for projects

- We want readers to be particularly engaged with these pieces
- We want this to be worthy of winning a journalism award
- We want to experiment with a new way of reporting or telling stories
- We want to raise awareness of an obscure issue

FT
FINANCIAL TIMES

STEP 7 OTHER PRACTICAL CONSIDERATIONS

Is there a news peg? *What is it and roughly when will it happen?*

YES ☐ NO ☐

Reporting time needed? *Will you or any other contributors need time off diary? If yes, please indicate how long.*

YES ☐ NO ☐

Reporting trips? *Will you or any contributors need to travel to do reporting?*

YES ☐ NO ☐

Budget needed? *Besides travelling, any additional costs*

YES ☐ NO ☐

Need help from other reporters? *e.g. Graphics and data journalists, or other domain specialists*

YES ☐ NO ☐

FT FINANCIAL TIMES

Module 3

Contact List

CONTACT LIST

Email addresses are ______.______@__.___
How the extensions work:+____ ____ (4-digit extension)
The full FT directory can be found on ____.ft.com

Special Projects

Robin Kwong (x____)

Sue Matthias (x___)

Interactive News Team

Whole team: ________@ft.com
Head of the team: Martin Stabe (x___)

London
John Burn-Murdoch, Aleks Wisniewska, David Blood, Tom Pearson, Callum Locke, Ændrew Rininsland

New York
Claire Manibog, Joanna Kao, Lauren Leatherby

Video

Head of the team: Veronica Kan-Dapaah (x____)

Podcasts

London
Fiona Symon (x____)

New York
Aimee Keane (+ ____)

Statistics

Whole team: ____@ft.com

Head of Team: Keith Fray (x____)

Graphics

Whole team: ____@ft.com*
Head of team: Alan Smith (x___)

* Will change in the future to just ________@ft.com

Design

Kevin Wilson (x___)

Investigations

Christine Spolar (x____)

Audience Engagement

Head of team: Renee Kaplan (x___)

Engagement: Alana Coates (x___)

Social Media: Sarah Laitner (x___)

SEO: Anna Lisinski (x____)

Data Analytics: McKinley Hyden (x____)

Community / Comments: Lilah Raptopoulos (x___)

New York
Alyssa Zeisler (____)
Jake Grovum (____)

Asana, CardKit, Nightingale

____.____@ft.com

Lantern

____.____@ft.com

Tag missing

____@ft.com

FT FINANCIAL TIMES

Module 4

Production Checklist

STAGE 1	EARLY EXPLORATION

In this stage you will:

- Define your series: Find the story, not just the topic
- Assemble core group of key personnel
- Secure approval to go ahead

1 **Fill out the project pitch form with the main reporter**

2 **Check project schedule for rough timing and potential clashes with other projects**

3 **Schedule a meeting with the news editor and a special projects editor to discuss your project. This meeting helps secure approval by discussing:**
   - a Do you have a story or just a topic?
   - b What's the (ideally front-page worthy) news story?
   - c What key personnel you will need, for what period of time. Does anyone need to be taken off-diary?
   - d What are the best formats to tell your story?

4 **Start a planning document on Google Docs so that other people can easily find out what your project is about.**

5 **Fill in the rest of the planning document. This will likely involve:**
   - a Checking the availability and eagerness of key personnel to be involved
   - b Figuring out what data/evidence you will need to secure, and a timeframe for when you will know from the key reporter if that is possible
   - c Discussions with Alan Smith (graphics), Martin Stabe (interactive), Veronica Kan-Dapaah (video), Helen Healy (Photos) and Fiona Symon (audio) about how your stories could be told via their formats

6 **Schedule another meeting with the news editor. Assuming all steps were taken, you should be able to secure approval at this meeting, which will also discuss:**
   - a Rough publication date
   - b Deadlines
   - c Audience engagement strategy

How you'll know you've finished this stage:

- [ ] **Email/written confirmation from the news editor to go ahead**
- [ ] **Your project goes onto the upcoming projects calendar**

STAGE 2	HAVE OVERVIEW, AWAITING COPY

In this stage you will:

- Rope in everyone else you need support from
- Finish tasks that can be done in advance to avoid a crunch when copy starts coming in

1 **Formally commission the stories. Negotiate deadlines (Rule of thumb: leave at least one week, ideally two, between copy deadlines and the launch date)**

2 **Visuals: Discuss and liaise with the following people if needed:**
   - **a** Picture desk: You'll need at least one master per methode story (Who: Helen Healy)
   - **b** Video: Do you want to make an FT Feature? Shorter explainer videos? (Who: Veronica Kan-Dapaah)
   - **c** Graphics/Data visualisation (Who: Alan Smith)
   - **d** Interactive stories / Quizzes (Who: Martin Stabe)
   - **e** Audio: Podcast discussions, audio storytelling (Who: Fiona Symon)
   - **f** Branding and identity: What will identify your series? A logo? A colour scheme? An illustration? (Who: Kevin Wilson)

3 **Web revise: Secure a dedicated web revise person (Who: Tom Stokes)**

4 **Agree a schedule of when you will be able to get edited copy to web production staff**

5 **Audience engagement: Alana Coates might be able to co-ordinate / talk to all the people listed below.**
   - **a** SEO for search keywords and series titles (Who: Anna Lisinski)
   - **b** Social Media desk: Devise a social promotional plan (Who: Sarah Laitner)
   - **c** Marketing: Help promote your story with paid digital advertising (Who: Aislinn McGurk)
   - **d** Data analytics: How best to tag your stories and how to measure success (Who: McKinley Hyden)

6 **Decide on a series title (Who: Anna / crowdsource from newsroom)**

7 **Other website production:**
   - **a** How should you be tagging stories in this series? (Who: Mustafa Songancilar)
   - **b** Will you need a vanity URL? (Who: **vanity@ft.com**)

8 **Print production:**
   - **a** Do you need to request extra print space? (Who: Hugh Carnegy)
   - **b** Can you lay out / design print pages in advance? (Who: Kari Ruth-Pedersen or Kevin Wilson)

How you'll know you've finished this stage:

- [ ] **You've spoken all those people**
- [ ] **You've run out of time: Copy is starting to come in**

FT
FINANCIAL TIMES

STAGE 3 COPY EDITING, RAMPING UP TO LAUNCH DAY

In this stage you will:

- This stage should begin at least two weeks before publication
- Edit copy and keep track of web production
- Make final decisions on how we'll launch and promote the story

1. **Get final ok from Peter: The story and the top lines for the front-page news piece should now be clear**
2. **Chase up copy if deadlines are missed**
3. **Likewise, check progress of any graphical / video / interactive stories you've commissioned**
4. **To keep organised: Consider using Asana to keep track of the stories (Who: Tom Stokes)**
5. **Discuss a publishing schedule with audience engagement / main news desk**
   a. 5.30am publishing generally works best. That means having copy edited, subbed and web-produced at least one day before
   b. Ensure your stories are included in the daily broadcast schedule (Who: Tony Tassell / Peter Spiegel)
   c. Finalise social media/digital distribution strategy with the audience engagement team. Check what visuals, or words, they need from you.
6. **Discuss homepage placement with main news desk**
7. **Edit and revise the copy**
8. **Check progress, if you are working with Video, Graphics, Audio, or Interactive**
9. **Ask the dedicated web revise person to make web and paper promo boxes**
10. **Assemble visual assets for social media into a folder on google drive**

How you'll know you've finished this stage:

- [ ] **Stories are copy edited and web-produced**
- [ ] **Launch and promotional strategy decided**

STAGE 4 LAUNCH DAY, 'LIVE' STAGE

In this stage you will:

- Follow through on publication and distribution plans
- Make adjustments if needed based on Lantern data or Conference feedback

1. **Attend morning conference even if you don't normally go**
2. **Adjust headlines or distribution strategy if needed (Who: Audience Engagement)**
3. **Check that stories scheduled for 5:30am publication the next day will actually be published and placed on homepages**

How you'll know you've finished this stage:

- [ ] **If all has gone well there is actually very little you need to do at this point**
- [ ] **If it hasn't, then you're likely putting out fires and reacting to events**

STAGE 5 AFTERWARDS

In this stage you will:

- Show appreciation to people who helped you, and help them get recognition for their work
- Review what was done and learn from it

1. **Ensure the project gets a mention in Lionel's weekly note**
2. **Hold a review meeting with everyone who worked closely on the project within two weeks of the series finishing. The Review Meeting Guide details how to do this**
3. **Email the notes from the meeting to all involved**
4. **Talk about what we learnt from doing the project / series at Wednesday's News Editors' meeting. Ask to attend it if you don't usually**
5. **Commission an audience engagement report using the analytics template (Who: McKinley Hyden). Send it out to those involved**
6. **Talk to Audience engagement about medium-long term opportunities to re-promote the series**

How you'll know you've finished this stage:

- [ ] **The review meeting is crucial. Even if you do nothing else in this stage, make sure you hold the review meeting**

FT FINANCIAL TIMES

Module 5

Analytics template for series

What do we mean when we ask "So, how did it do?"

HOW TO USE

- Analytics are meaningless when they are not tied to goals
- Every project is different, but there are some goals that are common across FT projects
- Use this template as a starting point to determine your goals

COMMON GOALS FOR SERIES

- We want them to be well-read
- We want to attract new audiences
- We want readers to become loyal

How we break this down into specific metrics:

1. **We want readers to be especially engaged with the stories**

   How to measure:
   Stories in the series performed better than average on our standard editorial metrics like time-on-page and pageviews

2. **We want the stories to appeal to FT readers who are already interested in the topic**

   How to measure:
   A high proportion of people who previously read about the topic in the FT read the series

3. **We want to raise awareness about the topic among people who don't normally read about it in the FT**

   How to measure:
   A high proportion of the series' readers are people who haven't been reading about the topic in the FT

4. **We want people who read the stories to come back to the FT for more**

   How to measure:
   A high proportion of people who read the series return for more FT content within seven days. (i.e. they turn into 'quality visits')

Do you have additional goals? Write them here and our data analysts can help you translate them into metrics

COMMISSIONING THE ANALYTICS REPORT

At the beginning of your project, schedule an appointment with McKinley Hyden, our lead data analyst on the audience engagement team. Depending on her workload (and whether you have additional goals/questions you want answered), it may take up to three weeks after your project's publication to generate a report. You can reach McKinley at **mckinley.hyden@ft.com** or on extension 6803

FT FINANCIAL TIMES

Module 6

How to hold a review meeting

WHY DO IT

- You'll feel good: it brings people together
- You'll learn: it's how we figure out what went well and what didn't
- People will like you: if you make time to listen to what they have to say

WHAT ARE YOU TRYING TO ACCOMPLISH

- Show appreciation for the effort people put in
- Give people an opportunity to be heard
- Review how the project was produced and come up with lessons for next time

WHAT THIS MEETING IS NOT FOR

- Going over the audience analytics data
- Assigning credit or blame

HOW TO DO IT

Arrange the meeting

Try to do this no later than 2 weeks after the project ends, while people still remember

1. **Ask everyone who worked closely on the project to attend. When you do so, tell them what the meeting will be about ("We'll go over what went well and what went poorly, so we can figure out what we should be doing differently next time")**

2. **Book a room that will fit everyone and has a large whiteboard**
   The whiteboard is critical: it ensures that notes taken during the meeting is in full view and legible

Before the meeting

3. **Make sure you the meeting room is stocked with:**
   a. Stacks of post-it notes
   b. Pens

4. **Before anyone else arrives, draw a line down the middle splitting the whiteboard into two halves. Title one half: 'What went well' and the other half 'What went poorly'**

FT
FINANCIAL TIMES

THE MEETING

(Bonus points if you can keep it to less than 30 minutes)

Important: You are in charge of running this meeting. It is your responsibility to moderate it and keep it as short as possible while accomplishing the goals

5 **Start by thanking everyone involved for the effort they put into the project**

6 **Explain the format and the goal of the meeting. If you have any top-line audience numbers, tell them now, but explain that you will send a detailed audience analytics report separately/later**

Goal of the meeting: For everyone to have a chance to say what went well and what went poorly in terms of the process, so that we can learn how to improve it and what we should be doing differently next time

7 **Hand out the post-it notes and the pens. Ask everyone to write down one thing that went well or one thing that went poorly per post-it note. They can write as many or as few post-it notes as they like. Tell them they'll have 10 minutes to think and write**

Use a timer (your phone has one) to keep track of when the ten minutes are up
You should also be writing out post-it notes in that time

8 **When the ten minutes are up, demonstrate how this next part works by placing your post-it notes on on corresponding side of the whiteboard, and read out what you wrote as you do so. Proceed through the group until everyone has placed their post-it notes**

- a Set the tone by only reading out what you wrote. Don't give a speech. If any note is unclear, someone in the group is bound to ask for clarification
- b Despite your demonstration, some people will want to explain their note, or suggest what needs to be done differently. That's ok. You are trying to strike a balance between giving people a chance to be heard and keeping the meeting moving; your goal is not to enforce a meaningless rule to only read out what was written
- c As people put up post-it notes, think about how to group or categorise them into the main areas. This will be important for the next step

9 **Once the last person has put up their post-it notes, take charge of the room again by communicating:**

- a You have been listening ("From what everyone has been saying, I…")
- b A brief summary of the main points raised (these are the groupings you have been thinking about)
- C Ideas for what to do differently next time. Ask the room if there are other lessons you've missed

10 **Finish the meeting by telling the room you will produce and share a written summary of what was discussed**

AFTER THE MEETING

11 **Gather up the post-it notes. In Google Docs, Write up a document with three sections:**

- a What went well
- b What went poorly
- c Suggestions for next time

A sample is attached **in appendix 1**

12 **Share the document with everyone who attended, and others who need to know (for example, senior editors)**

Appendix 1

Sample review meeting summary document

This shows some of the workflow feedback gathered from a review meeting

Good:

- Having a dedicated editor: It was important not just for copy editing but also coordination with video, production etc
- We achieved our goal of owning the subject and making a splash when the topic is newsworthy
- Production was eased by clear scheduling of what we wanted to run each day
- Produced a variety of content formats (in particular: many explainers)
- Culture change: we were a lot more relaxed about cannibalising and

Bad:

- Some felt there was still over-commissioning. Others disagreed and said it was the right amount and they did not feel overwhelmed by too much stuff to read.
- Scheduling was clear but was still subject to late revision and changes
- We were late on data on one story, which meant graphics were being made at the last minute.

Suggestions for next time:

- Start earlier? Both in terms of time needed for production and timing of when the stories would have impact. Questions to also consider: Is there a way for us to have a bigger web / search ranking presence earlier? Would some pieces have been more useful before the summit?
- Ensure that, like this time, we have the resources to: 1. React and create new (non news article) content as situation changes (i.e. the '10 most-searched-for questions, answered' article) 2. create custom components and assets as needs arise (i.e. we didn't know we needed the