**Copy writing whiteboard – explanation of whiteboard tasks**

**No amends should be briefed in via email/phone or verbal**

**All work to be briefed in via whiteboards and ‘to do’ documents backed up by a conversation if required**

1. **Creative review**

Select the above when a client asks us to review their creative output, whether it’s their own work or emails that we have produced.

1. **New client (everything new)**

Select the above for a new client where no existing copy, brand guidelines, examples are in existence on file (has not been worked on before).   
Brand guidelines and any additional guidelines the client provides should be provided at the time also.

A completed [client mailing brief](file:///C:\Users\danderson\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\FR9049HJ\Client_mailing_brief.docx) will need to be provided along with a meeting held (including the design/HTML teams) to discuss the criteria for the email.

1. **New Project (existing client)**

If guidelines are held on file and we have pre-existing copy / email examples on file the above would be selected. A completed [client mailing brief](file:///C:\Users\danderson\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\FR9049HJ\Client_mailing_brief.docx) will need to be provided along with a meeting held (including the design/HTML teams) to discuss the criteria for the email.

If the copy is to be inserted into a template which does not already exist you would include design and HTML on this conversion also.

1. **Proof reading**

If any copy supplied requires just proofing (not re-writing or amending) please select the above option

1. **Amends**

Once you/the client have checked the copy you may wish to suggest some copy changes (the copy doesn’t contain the correct information or isn’t in the correct tone of voice for the audience), the above would be selected in this instance and a meeting would be held with Dan to discuss.

A ‘copy to do’ document will need to be provided for this task.

1. **R&D**

To be used by copywriting team only for development type projects/tasks

1. **Meetings**

To book Dan for internal and client meetings that he is required to attend.

1. **Other**

To be selected if there is no option above that fits into your request