**Design Whiteboard – explanation of 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. **Pitch (concept work)**

To be used when creating designs/concepts for pitches/prospective new clients.   
A meeting will also need to be held with design AND Consultant on the client to discuss requirements

1. **New Client Design (everything new**)

This option should be selected when you are putting through a new design for a new client (where we do not have a pre-existing template.)   
Brand guidelines, all assets on ‘design brief checklist’ and a [full brief](file:///C:\Users\ejones\AppData\Local\Microsoft\Windows\Temporary%20Internet%20Files\Content.Outlook\26L62DAU\Client_mailing_brief.docx) must be completed.  
 A meeting will also need to be held with design AND Consultant on the client to discuss requirements

1. **New Template Design (new design, existing client)**

Design team have created templates/designs for this client before (so therefore have all general assets i.e brand guidelines, logos, brand fonts) and a new template/design is required, which is not based on something we have done previously.   
A full brief and meeting with the design team and consultant to discuss requirements will also need to be held

1. **New design (based on existing template)**

This option should be selected for an existing client when a new template exists. Design would simply need to populate this template and add images which can be either provided by the client or they can source from i-stock. A ‘design to do’ document should be completed for these jobs.

Possible meeting required depending on how complex the additions are just to clear up anything that might be misunderstood.

1. **Design Additional elements**

If we need to design additional elements on the email, such as a banner/or extra pod  
A ‘design to do’ document should be completed for these jobs.

Possible meeting required depending on how complex the additions are just to clear up anything that might be misunderstood.

1. **General Amends**

This option should be selected when images/text amends are required to an already designed email template. You may require images to be changed or slight alterations to text – if you require an amendment which alters the template again you would be required to discuss that with the design team.   
A ‘design to do’ document should be completed for these jobs.

1. **Text only amends**

Self explanatory - if the client has any copy changes to make the above option would be selected  
A ‘design to do’ document should be completed for these jobs.

1. **Finalise**

When the design has been signed off by the client to process to build with the HTML team the file will need to be ‘finalised’. All images from i-stock would be purchased at this time and the final PSD would be located into a folder marked ‘final’ which HTML would use to build from.

1. **R&D**

To be used by design only, when working on development type projects

1. **Other**

To be selected if there is no option above that fits into your request  
A ‘design to do’ document should be completed for these jobs.