FROM CHAOS TO CLARITY WITH POINT-AND-CALL PROJECT PLANNING

Plan and execute print and mailing projects with less brain power using a consistent checklist, intentional habits, and insights from expert project planners.

This guide summarizes the steps to consider while planning print and mailing projects, punctuated by insights from the pros. It's paired with a PDF calendar template to help you build accurate timelines that account for each phase of your project, plus possible delays.

Ready to simplify your planning routine?

START THE SAME WAY, EVERY TIME

Every print project begins with an idea that targets a need, such as a sales promotion for your business, organizing an event for the community, or running a fundraising campaign. While each project is unique and requires different things, having a consistent planning process helps to ensure thoroughness and reduce mistakes.

Save time and brainpower, while ensuring nothing falls through the cracks by using a consistent workflow checklist to plan each project.

It may seem rudimentary to use a checklist each time you start the planning process (after all you've done this dozens of times, right?) but there is strong evidence that doing so can help reduce errors and create efficiency – even when we're highly experienced at what we're doing.

Consider this example. The railway system in Japan is famously efficient with impressively high safety ratings and low rates of error. One of the cited reasons for this is their point-and-call system of ensuring each step is followed precisely, every time. This method is credited for *reducing workplace errors by up to 85%.* In practice, personnel physically point and say aloud when doors open and close, as they read meters, release brakes, and more.

This simple but effective habit helps make sure that railway workers are paying attention to each step every time and reduces their chances of missing something important. You can use the same principle to reduce errors in project planning.

When we do the same thing over and over again, we start to develop habits that help us do repeated things faster and with less effort. When it comes to planning projects, this can sometimes mean accidentally glossing over details we should be paying closer attention to.

To avoid this type of repetition blindness, use a consistent checklist that includes everything you need to start planning each project. Having each step already listed out in a thoughtful way means that you don't need to rethink the process.

You just need to fill in the blanks.

> **APG Project Planning Workflow**
>
> **Go through each section and fill in the blanks with your specific project details.**
> Any sections that don't apply to the project you're planning can be disregarded or crossed out. Use in conjunction with our Timeline Calendar Template to create a summary and overview of your project.
>
> Project Title:
>
> Project Summary:
> *Summarize the general idea of your project and what it will look like.*
>
> Project Goal:
> *What is the purpose of this project?*
>
> Project Budget:
>
> Project Deadline:
> *(Is this firm?)*
>
> Key team members and roles:
> 1.
> 2.
> 3.
> 4.
>
> APG Project Manager:
>
> Project research: *What questions do you have that should be answered upfront?*
> 1.
> 2.
> 3.
> 4.
> 5.

Download the APG Project Planning Workflow Sheet here.

Using a point-and-call checklist like this one can help you avoid missing steps of the planning process by helping you think through the whole project at the start.

ASK KEY QUESTIONS

Begin with asking a few key questions about your project:

- Will this project require **writing**?

- Will this project require **graphic design**?

- Will this project require **mailing services**?

Projects that involve these elements may require more steps and planning than simple print jobs. They also mean more people may be collaborating on the project, which can add to your timeline.

Once you've thought about these questions and are ready to discuss options for what your materials will look like, it's time to consult with your APG Project Manager.
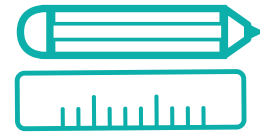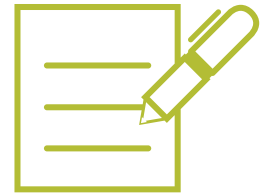
CONSULT WITH YOUR PROJECT MANAGER

Consult with your APG Project Manager to:

- Establish project goals & parameters

- Outline the material details to get estimates

- Discuss timeline and next steps

Quantity informs a lot of project planning decisions. By taking care of your mailing list upfront to determine an exact number, you can plan more accurate budgets and timelines.

Pro Tip: *"Pull your mailing list early to determine quantity."*

– Stephanie B., Manager of Development & Communications, Hillsboro Medical Center Foundation

MAKE A PLAN

After receiving estimates from your Project Manager and determining what the best options are for your project, it's time to solidify a plan.

1. Confirm the chosen estimate option with your Project Manager to start the process of ordering supplies and materials, scheduling any design work needed, and to reserve time on the production calendar.

2. Create a working timeline calendar with your Project Manager and share it with the rest of your team. This will help keep everyone aligned and on schedule with their parts of the project.

Pro Tip: "When creating your "work back" schedule, leave two workdays between each task. Even if you're confident it won't take you two days to complete each task, this allows for the inevitable hiccups that occur during any project: a member of the team catches a cold, an email gets lost. This buffer time will allow you to stay on track and will decrease your stress when hurdles appear (and they always do)."

– Breesa Culver, Planning & Strategy Partner Extraordinaire

3. Schedule ample time for writing before the graphic design phase. While it's normal to make edits and adjustments during the design, it helps to streamline the process when the copy is nearly finalized before jumping into the creative work.

4. If your project requires graphic design or layout, be sure to schedule enough time in your timeline to **allow for at least 3 rounds of proofs and revisions, with 2-3 days between each proof.**

Pro Tip: "Try to reduce your copy by 25% after your first draft (pre-submission to the designer). Mailed pieces have limited real estate and audiences will be more likely to engage with less copy."

– Stephanie B., Manager of Development & Communications, Hillsboro Medical Center Foundation

TIPS FOR A SUCCESSFUL DESIGN PHASE

The creative process can be nebulous, but there are a few good design project habits you can implement to get the results you want and help things go smoothly.

1. Export your copywriting and instructions to a common format for sharing. There are a lot of apps to use for writing, including Word, Google Docs, and Pages. But these file types don't work for everyone. By exporting your copywriting and design instructions into a widely used format (we suggest either Microsoft Word or a PDF) you can avoid errors that may occur when files are converted by the receiver.

2. Package source files with an optimized PDF preview. When sending files created with Adobe software (such as InDesign, Illustrator, or Photoshop) be sure to include a PDF optimized for viewing with Adobe Reader or other viewing software. Not everyone has access to the type of software needed to open these source files. With a PDF preview included anyone can easily visually confirm that everything looks correct on your materials. (And that they have the right file!)

3. Review your proofs thoroughly. When you rush through reviewing a proof, things can be missed that will need to be corrected later. This can add unexpected days to your timeline. Schedule time to review your proofs. We recommend doing it twice, with a few tasks in between for a brain re-set between reviews.

4. Send feedback together, once. When a project has more than one person reviewing proofs, it's important to consolidate feedback and send it together. When you're compiling your own edits, wait to send them until you're sure you've received feedback from the entire team. When you send edits in multiple emails it makes organizing them more difficult, which can increase the chances of one being missed, or misunderstood.

Pro Tip: "Gather all your content into one document, have your team review and edit before submitting to design in order to keep your graphic design budget focused on design rather than copy editing."

– Stephanie B., Manager of Development & Communications, Hillsboro Medical Center Foundation

HABITS FOR EASIER PROJECT PLANNING

Habits that streamline project planning tasks can help you feel less stress, as well as help you save mental energy for higher-level tasks.

For help with this, we look to the 4 Laws of Behavior Change as outlined in James Clears' best-selling book *Atomic Habits – Make it obvious; make it attractive; make it easy; and make it satisfying.*

Here are some examples of how you can use these Laws of Behavior Change to streamline your project planning workflow and make it more enjoyable.
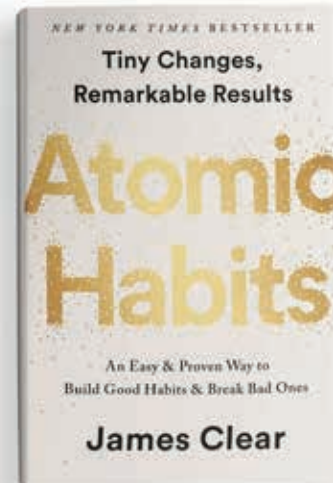
Make it obvious; Keep your project planning materials in an easily accessible place so they become a default thing you look at in your workspace. By keeping them close at hand and organizing a spot for them in your space, you reduce the friction involved in using them.

Make it attractive; By making the tools you use to plan your projects attractive, they become more appealing and gratifying to use. So go ahead, buy the nice leather pocket folders and foil-embossed notebooks. You'll be more likely to use them consistently, which will help your projects in the long run!

Make it easy; The process of using the workflow checklist should feel easy, and therefore not a pain-point in your day. Feel free to add your own steps and other customizations to make it as easy as possible to use for your needs. *Consulting with your APG Project Manager is also easy* – choose whether you want to email your questions, do a quick phone call, schedule a video call, or come in person!

Make it satisfying: Aside from the satisfaction of a job well done, you can increase the impact of this law of behavior change by deciding on small rewards for yourself. For example, maybe whenever you fill out a Planning Workflow Checklist, you make yourself a fresh cup of coffee or tea first. This makes sitting down to plan a project a more satisfying part of your day.

Here are a few other habits that you can incorporate to increase your productivity, reduce fatigue and distraction-related errors, and help streamline your project planning process:

- **Prioritize your tasks every day.** Pick the #1 thing you can do that day to move yourself forward, and get it done first. With the tasks that remain, focus on the most important ones first and delegate or eliminate less critical ones.

- **Avoid multitasking.** Concentrate on one task at a time to maintain better focus and productivity. Trying to split your attention between multiple tasks will reduce the quality of your work and increase the potential for errors.

- **Take regular breaks.** Allow yourself time to recharge every hour or so to reduce the risk of fatigue or burnout. Take a walk, stretch, do a doodle, contemplate a word cross puzzle – do something for 10 minutes or so every hour to maximize your productivity and keep yourself feeling good throughout the day.

- **Set deadlines for yourself.** Establish personal deadlines to keep yourself accountable and motivated. Decide what happens if you miss one, or what reward you get when you meet one.

- **Re-set your workspace at the end of every day.** An organized and clutter-free environment helps improve focus and efficiency. Make a habit of spending the last 5-10 minutes of your workday cleaning up and re-setting the space. Coming back to it in the morning will be much more enjoyable and you'll thank yourself for it!

SUMMARY

- Using a consistent workflow checklist helps you avoid missed steps in the planning process and makes sure you think about the whole project upfront.

- Once you have a general idea of what your project will look like, consult with your APG Project Manager to build a rough timeline, and start estimates for your materials.

- When you approve your estimate, we'll start ordering supplies and scheduling time on our Production Calendar.

- Schedule ample time for writing, feedback, and editing copy before your project reaches the design phase.

- Follow our tips for successful design projects like exporting written content to Word documents and saving a PDF preview with your artwork files.

- Develop good project planning habits using the 4 Laws of Behavior Change to stay productive and stress-free through all your projects.

With a consistent routine that includes a point-and-call checklist of steps, and developing helpful habits that work for you, every project you plan will feel like less effort. Which means you'll have more energy and brainpower to put towards other priorities.

Start today by downloading the APG Project Planning Checklist and Calendar Template!