Checklist

Task	Client	Project manager	Writer	Designer	Editor/proofreader	Mailing house
Selection of Suppliers For use in this example, we will assume that the project manager has been contracted and a decision has been made to commission a specific designer. The designer may be chosen after an interview, through indicative costings, or a presentation of a folio.						
Initial discussion Meeting to start project. May review previous report as a starting point and/or discuss stakeholders assessment of the project. May include brainstorming of new theme. The client should collect staff/directors thoughts before this meeting, ready to relay information to the project team. Budget and schedule should be discussed so designs can be developed within given constraints.	•	•	•	•		
Concept/Design Design process begins. Designer takes ideas generated at the initial discussions and translates them into cover/text designs for print and the electronic version of Annual Report. Writer may write titles, subheads and intro paras at this stage.			•	•		
Scheduling The schedule is prepared to meet proposed deadline (usually a launch or Annual General Meeting.)	•	•	•			
Presentation Initial designs are presented to key stakeholders. All decision makers should be included at this meeting so the theme and designs can be discussed and decisions made. There are many different modes of presentation. A mood board may be enough to convey the look and feel of the publication, especially if specific photography will be commissioned. Similarly, more than one cover and/or text concept may be presented. If the initial concept is not approved, design is revised until all stakeholders are satisfied. The writer would be involved if titles/headlines and intro paras are written to support the designs.	•	•	•	•		
Writing briefs Once the design is approved formal briefs should be prepared for suppliers. These are prepared in consultation with the client, but are the responsibility of the project manager. The document should include the writing/editing brief, illustration/photography brief (in consultation with designer) and pre-press/print specifications. It is not always mandatory, but advisable, to get 3 quotations.	•	•		•		
Budget The budget is prepared and submitted to the client. It should meet expectations from initial discussions, any variation should be discussed and approved before production commences. A purchase order including final costing should be raised.	•	•				
Production meeting Meeting of key people. Agenda includes • presentation of design/theme to all, • discussion of individual role/responsibilities, • agreement how text will be supplied, and • agreement of schedule.	•	•		•		
Writing The scope of the writing has been decided as part of the brief. It is the project manager's responsibility to coordinate writer and client. Writer could liaise directly with internal departments. Final copy is presented to client for approval. Project manager's role is to ensure that writing fits the brief. Designer's role is to supply copy counts if relevant.		•	•	•		

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	Client	Project manager	Writer	Designer	Editor/proofreader	Mailing house
Editing		•			•	
Photoshoot/illustrations		•		•		
Presentation of copy to client	•	•		•		
Hand-over meeting	•					
2nd production meeting	•			•	•	
Presentation of first pages	•	•	•	•		

Editing

If copy is written by the client, the manuscript could be provided to an editor for review. The project manager supplies the editor with a scope document (which may include a corporate style sheet) and would check editorial work conforms to the brief. Any content queries would be dealt with directly by the client and/or internal departments.

Photoshoot/illustrations

The photography shoot is usually the responsibility of the designer, with the help of the project manager to ensure relevant internal personnel (eg Directors) are available.

The project manager and/or designer may be at the shoot, depending on the relationship with, and skill of, the photographer. The client may be at the shoot to provide guidance, eg health and safety issues, ease of access etc.

Photos should be submitted to client for approval before use.

It is the responsibility of the project manager to prepare model release forms and ensure they're signed.

The procedure when using illustration is very similar.

Presentation of copy to client

The copy should be presented as final draft to the client for approval prior to any artwork. All copy should be included: eg: captions, contents, address etc at the one time.

Hand-over meeting

A meeting is held to hand-over all items needed to produce the report.
A further briefing may be useful at this stage, especially if details have arisen from research/writing of the report.

The client has already approved the contents, so does not necessarily need to be involved in the hand-over. It is the responsibility of the project manager to supply all material to the design studio before artwork commences. Handover should include: the copy (as softcopy and as marked-up hardcopy), any prompts needed for illustrations/ graphics/ tables and all original photographs/illustrations.

2nd production meeting

Agenda includes:
- discussion of schedule and review as necessary
- discussion of budget and review as necessary
- stock samples/dummies presented and discussed (the project manager's role includes liaison with the printer.

Presentation of first pages

First pages are usually black and white laser output, and should include all text, graphs, photographs and illustrations in place.

The designer and/or project manager would usually present these pages to the client and discuss placement decisions as needed. It is common for first pages to be left with client to review.

There should be no surprises because the design issues have already been resolved. However, layout issues such as type not fitting within pages; graphics/tables not fitting on same page as relevant text; or extra photography/graphics needed; may need discussion.

This meeting should identify actions that will resolve any issues, then the project manager ensures the actions are delivered. (Writer/Editor may be asked to review/edit some text if text fit is a problem)

	Client	Project manager	Writer	Designer	Editor/proofreader	Mailing house
Corrections to first pages	•	•		•		
Final pages	•	•		•		
Proofreading		•			•	
Approval of final pages.	•	•				
Production management		•		•		
Colour proofs (prepress proofs)	•	•		•		
Printing		•		•		
Distribution		•		•		•
Debrief	•	•		•		

Corrections to first pages

First pages are returned to designer (via project manager) with corrections marked on hardcopy. Any additional copy to be inserted should be supplied electronically so the designer is keying in as little as possible.

Final pages

Once the content and imagery are finalised, a set of same size lasers are printed for approval by the client. All text/graphics should be clear and easy to read, so often colour lasers are necessary. Although inhouse colour output is not completely accurate, any colour concerns can be discussed at this stage.

Proofreading

If no changes are expected at final pages (ie pages are supplied to stakeholders as courtesy), a set of lasers should be supplied to the proof reader.
If changes are expected, pages are not supplied to the proofreader. It is important that the proofreader is checking complete final copy. (Remember to include covers). The proofreader will mark-up any queries on a hardcopy for discussion with the project manager and the client. The designer will take in the approved changes (not all proofreader suggestions are always accepted) and then provide pages to be approved to print.

Approval of final pages.

Client should physically sign-off on a colour set of lasers to give approval to proceed.
The project methodology from this point may change, depending on the production process, but the steps remain the same.

Production management

The responsibility for quality control does lay with the project manager, however not all have print expertise, so they may rely heavily on the designer. (This may provide part of the selection criteria for the designer.)

Colour proofs (prepress proofs)

Colour proofs should be approved and physically signed off by the client prior to printing. It is not appropriate to proofread at this stage, but the proofs do need to be closely checked to ensure typefaces have not defaulted, lines moved or photographs incorrectly updated.

Printing

A press check is used to check colour accuracy and definition of print. The level of checking depends on the complexity of the project. For small projects, checking one section may be sufficient. Larger projects may need all sections approved at the press. Supply of a pre-bind sample can be useful to check before the total project is bound.

Distribution

A printer will usually deliver samples to the project manager for approval, before full delivery to the client. These samples, plus the final delivery to a mail house is within the base cost. Distribution to other centres and/or interstate should be negotiated as part of the schedule of costs.

Debrief

It is always beneficial to organise a debriefing after any major project. An Annual Report debriefing would visit each of the key tasks of the report to identify issues that could be handled better.
The meeting should be documented so issues can be communicated to the next Annual Report committee.