BRIGHT BLUE

Process Manual

Spring 2017

TABLE OF CONTENTS

Part One: Introduction

Part Two: Client Processes

Part Three: Technology Processes

Part Four: Internal Processes

Part Five: Transition Process

PART ONE: INTRODUCTION

PURPOSE OF DOCUMENT

The purpose of this process manual is to keep Bright Blue's standard operating procedures consistent from semester to semester as new interns take over. This guide will help make the onboarding and transitioning process simpler and more efficient. The more time Bright Blue spends on training and onboarding, the less time the team can work with clients. This document is constantly evolving and changing as the team sees fit.

JOB DESCRIPTIONS AND RESPONSIBILITIES

Description: Bright Blue is the Butler University student-run marketing and communications agency. Students engage in strategically-focused, creative projects for organizations and businesses in the greater Indianapolis area. The agency is made up of highly motivated and passionate students mentored by an advisory board of faculty and industry professionals. Bright Blue provides fresh perspectives and innovative approaches while achieving clients' objectives at a lower cost than traditional agencies.

The agency will have six paid interns serving in different roles who will work together to achieve agency objectives. The agency is guided by a program director and program manager.

CEO Job Description:

The CEO is responsible for establishing and continuing the vision and culture of Bright Blue. Some of these core cultural values are innovation, ambition, versatility and accessibility. The CEO also oversees all client projects to ensure high-quality work and that all projects adhere to the established project budget. The CEO also acts as a liaison between the agency and the university. This includes being the liaison between Bright Blue and the project director, the project manager, the advisory committee and the general committee.

The information below can be used semester to semester for recruiting and the applications that will be posted on Handshake. The term section will need to be updated each semester.

Job Title: CEO
Status: Internship (paid)
Term: Summer 2017, Monday thru Thursday, 30 hours per week
Contact: Joe Ellsworth, Project Director
Email: jellsworth@fireandrain.com

CEO Responsibilities:

- Establish and continue the vision and culture of Bright Blue
- Core cultural values: innovation, ambition, versatility, accessibility
- Manage and coordinate agency staff
- Oversee and ensure all projects adhere to the agency budget
- Oversee and ensure all projects adhere to client project budgets
- Ultimate responsibility for agency profitability
- Project/product quality control
- Act as a liaison between agency, project director, and advisory committee

Qualifications:

Junior or senior classification
Highly motivated, capable of working independently
Understand principles of management, finance, marketing and communications strategy
Ability to mobilize and lead a student group with diverse skill sets and personalities
Strong interpersonal communications skills
Entrepreneurial spirit

Account Executive(s) Job Description:

The Account Executives are responsible for identifying potential clients and initiating the correct processes to engage potential clients. They also will develop and lead professional business proposals to potential clients. Once a project is awarded, the account executives will serve as the first point of contact between the client and the agency. They are responsible for ensuring projects are completed on time and that they meet the high Bright Blue standards.

Job Title: Account Executive (two internships at this position will be awarded)
Status: Internship (paid)
Term: Summer 2017, Monday thru Thursday, 30 hours per week
Contact: Joe Ellsworth, Project Director
Email: jellsworth@fireandrain.com

Account Executive Responsibilities:

Identify client targets and lead the presentation of agency capabilities to potential clients
Initiate the correct processes to engage potential clients
Develop and lead professional service proposals to potential clients
Serve as first point of contact between the client and the agency, once a project is awarded
Coordinate schedules and timelines to ensure projects and services are completed by deadlines and meet Bright Blue standards
Present final project outcomes to clients
Understand project management system

Qualifications:

Junior or senior classification
Highly motivated, capable of working independently
Understanding of principles of management, finance, marketing and communications strategy
Outstanding skills in interpersonal communication, public speaking and project management
Salesmanship
Strong organizational skills
Entrepreneurial spirit

Marketing Strategist Job Description:

The Marketing Strategist will be responsible for researching and strategizing a client's position in the marketplace. He/she must be able to understand the client's brand position and their business objectives. The strategist must also conduct benchmarking and qualitative research interviews when necessary. Being able to ask the right questions at the right time to determine what a client needs is crucial to the agency's success in a project. The strategist must also know the best methods and mediums to achieve a client's objectives once they are determined. Lastly, the strategist reviews the finished product to ensure it aligns with their research findings and desired outcomes.

Status: Internship (paid)
Term: Summer 2017, Monday thru Thursday, 30 hours per week
Contact: Joe Ellsworth, Project Director
Email: jellsworth@fireandrain.com

Marketing Researcher/Strategist Responsibilities:

Understand and articulate the client's brand position and business or organizational objectives
Present those objectives to agency team
Conduct benchmarking and qualitative research interviews (quantitative research not required)
Understand the target market associated with client objectives
Determine best methods and mediums for client to achieve objectives
Review final creative output to ensure its alignment research findings and desired outcomes

Qualifications:

Junior or senior classification
Highly motivated, capable of working independently
Understand principles of marketing and communications
Strong interpersonal communications skills
Ability to work in a team environment
Possess some familiarity with market research and market strategy; preferable have completed MK 385 and/or STR 327 prior to working with Bright Blue
Willingness to interview, question, respond to and challenge corporate professionals
Entrepreneurial spirit

Creative Director Job Description:

The Creative Director oversees the agency's output of deliverables, whether that be products or services. He/she must also be able to convert a client's objectives into tangible products or services. The Creative Director drives all creative project proposals and deliverables. He/she will also participate in client capabilities presentations and will design project proposals for clients. It's preferred the Creative Director develops and maintains a pool of resources for skills that fall outside Bright Blue's realm. The Creative Director must be proficient in either graphic design or writing.

Job Title: Creative Director
Status: Internship (paid)
Term: Summer 2017, Monday thru Thursday, 30 hours per week
Contact: Joe Ellsworth, Project Director
Email: jellsworth@fireandrain.com

Creative Director Responsibilities:

Drive the creative and tactical response to strategic direction provided by the agency to the client
Develop concepts for the delivery of messages to the client's target audiences
Participate in client capabilities presentations
Participate in the design of project proposals to clients
Copy writing or graphic design used in agency projects
Oversee agency output of deliverable products and services
Assess current team's in-house abilities. Then develop and maintain a pool of resources for tactical skills outside the realm of the agency (video producers, web designers, event planners, additional designers, etc.
Brand Guideline officer

Qualifications:

Highly motivated, capable of working independently
Understand principles of marketing, communications, advertising, graphic design and writing
Creative director should either have core competency in graphic design OR writing
Strong management and organizational skills
Ability to supervise agency creative team members and freelance resources
Ability to visualize and express concepts in a creative and engaging, yet businesslike manner
Entrepreneurial spirit

Writer/Graphic Artist Job Description:

A writer will be hired in the event that the Creative Director has an expertise in graphic design. He/she will be responsible for writing content for a variety of client needs, as well as writing content for internal use. Some tasks include ad copy, web content, press releases and more. Internal uses may include: official Bright Blue documents, statements, web content or any other release. The writer will aid in all communications Bright Blue has with clients. The writier will work closely with Market Strategist to ensure content/copy is best practice.

Job Title: Graphic Artist or Writer (If Creative Director has graphic design skills, we will engage a writer. If

a Creative Director is a writer, we will engage a graphic artist) Status: Internship (paid)
Term: Summer 2017, Monday thru Thursday, 30 hours per week
Contact: Joe Ellsworth, Project Director
Email: jellsworth@fireandrain.com

Graphic Artist or Writer Responsibilities:

Conceptualize and design graphic materials for a variety of client needs and uses. This could in clude logo development, brochures, posters, ads, web pages, displays or any of the ways in which graphic design is commercially utilized

OR, if Creative Director has a core competency in graphic design, then...

Conceptualize and write content and copy for a variety of client needs and uses. This could include slogan writing, ad copy, blog content, web content, video scripting, speechwriting, press releases or any of the ways in which creative copywriting is commercially utilized.

Qualifications:

Highly motivated, capable of working independently
Understanding of principles of business communications and how creative assets are used to deliver corporate or organizational messages
Creativity in the field of graphic design and written communication
Ability to develop graphic design output OR written output
Ability to adapt creative concepts to corporate or organizational uses
Ability to work in a team environment where both giving and taking direction will be required
Ability to function smoothly and professionally in a demanding environment where changing project parameters occur regularly
Ability to balance multiple projects simultaneously
Entrepreneurial spirit

RESOURCES FOR POSITIONS

For additional resources for each position, follow the respective path to find a folder with resources for your position. Feel free to continue to add documents to these folders.

CEO

Group/LSBCareers/BrightBlue/BB - Bright Blue /Positions/CEO

Account Executives

Group/LSBCareers/BrightBlue/BB - Bright Blue /Positions/Account Executives

Research Strategist

Group/LSBCareers/BrightBlue/BB - Bright Blue /Positions/Research Strategist

Creative Director

Group/LSBCareers/BrightBlue/BB - Bright Blue /Positions/Creative Director

Writer/Designer

Group/LSBCareers/BrightBlue/BB - Bright Blue /Positions/Writer

SERVICES OFFERED

Bright Blue Service Offerings:

Brand Development

Strategic Communication Plan Development

Brand/Product Launches

Creative Development

Advertising/Promotion/Awareness Campaigns

Tactical Design and Execution Across Multiple Mediums

Web/Social Media Development

Sales Collateral Development

Qualitative/Quantitative Market Research

Internal Communication/Culture Initiatives

Direct Marketing Campaigns (direct mail, e mail, drip marketing)

Millennial Recruitment

Event Marketing

EXPANSIVE LIST OF SERVICES - INTERNAL USE

Strategic Communication	Branding	Creative	Digital Media
Advertising	Advertising	Advertising	Advertising
Campaign Planning	Brand Development	Art Production Design	Competitive Research
Community Programs	Brand Strategy	Copywriting	Email marketing
Event Promotion		Photography	Social Media
Retail Audits		Print and Physical Advertising	Web Design
Web Strategy		Survey Creation	Search Engine Optimization
Reputation Management		Video and Motion Graphics	UX/UI Testing and Design
		Digital Advertising (Design)	WordPress & Craft Implementation
		Speechwriting	Conversion Rate Optimization
		Podcasts	Google Analytics

PART TWO: CLIENT PROCESSES

SALES PROCESSES

Potential Client Contact Process

Stage One: Create/Identify Leads

Step 1: Build relationships.

The mutual connection typically introduces an account executive to the potential client.

Step 2: Develop a vision of an ideal practice.

Visualizing how Bright Blue could help achieve the client's marketing objective.

Step 3: Identify and analyze current leads.

Develop a marketing strategy.

Step 4: Explore the opportunity without overdoing it.

It is important that Bright Blue remain a comfortable distance from potential clients.
Bright Blue should not attempt to sell anything at this stage.

Step 5: Set up an initial contact.
Engage by telling them about the benefits of a meeting, rather than the benefits of Bright Blue's services.

Note: Stage One ends when Bright Blue meets with the potential client. Once this meeting begins, Bright Blue can move to stage two.

Stage Two: Qualify/Track Leads

Step 1: Determine value Bright Blue would add to potential client.

If the potential is there for Bright Blue to add value, express interest in working with the prospect.

Step 2: Determine if the prospect is in a "qualified" or "positioning" lead.

Be sure to listen to the client, asking the right questions but not selling.

Step 3: Continue to build relationships before the point of sale.

Determine the decision maker and begin establishing a professional relationship with him/her.

Locate the users and influencers of the company (both within and outside)

Position Bright Blue for an opportunity and implement a project-based strategy to achieve the prospect's initial objectives.

Be sure to have a balance between substantive meetings with informal contacts.

Note: This stage is not the time for fee estimates or references. Stage Two ends when there is a need Bright Blue can fulfill recognized by the decision maker.

Stage Three: Shape the Service

Step 1: Clarify the central issue and value Bright Blue can bring to the company.

Do not talk about the services yet. Rather, determine what the potential client's objectives are.

Step 2: Meet more frequently with the potential client compared to the first two stages in order to better figure out their needs.

Step 3: Identify important factors to meet the potential client's needs and expectations.

I.e. features, benefits, ideal conditions for success, etc.
Establish a "Scorecard" with these factors for success.

Step 4: Implement a strategy to differentiate Bright Blue's services from other agencies.

A differentiated approach adds value to the services Bright Blue can provide.

Note: Stage Three ends when the client has a clear vision of the potential benefits, features, etc. of Bright Blue's services. The most important factors in the evaluation/decision making process are identified and monitored throughout the project.

Stage Four: Trial Close

Step 1: Introduce the contract and send them the first version.

Step 2: Ask the prospect for their business, and ensure the perceived benefits, features and conditions all align with both the vision of Bright Blue and the vision of the prospect.

Revise any of these if necessary.

Step 3: After any revisions, ensure the prospect agrees with perceived benefits of the project.

Step 4: Review drafts of the proposal and outlines of the presentation before completion.

Note: Stage Four ends when a shared vision is agreed upon between the client prospect and Bright Blue.

Stage Five: Final Close

Step 1: Continue to stay proactive and keep closing.

Step 2: Confirm the financial arrangement and payment plan. Know what is standing between the agency and its ability to start the work.

Overcome those obstacles to get to work in an efficient manner.

Step 3: Complete final revisions to contract and sign.

Step 4: Gain permission to begin the project.

Note: Stage Five ends when the engagement with client work begins.

Stage Six: Assure Client Enthusiasm/Determine Reason for Loss

Step 1: Get to the work and deliver the services with enthusiasm and pride.

Step 2: Receive client feedback on performance against the original shared vision and acceptance criteria.

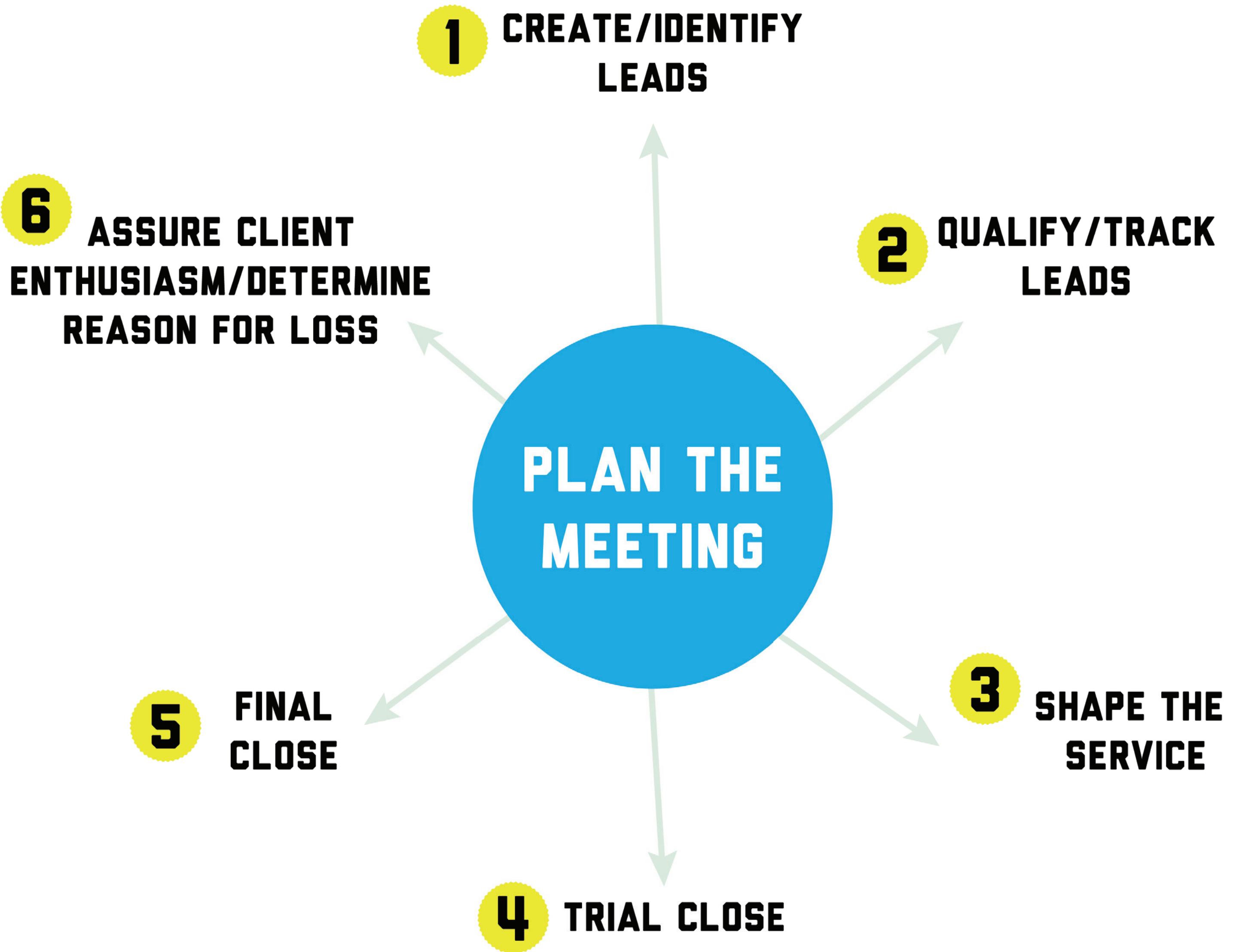
Step 3: Ask for additional opportunities to be of service.

I.e. repeat engagements, add-ons, introductions to others in the organization, etc.

Step 4: Request feedback on what could be improved in the proposal/bid process.

Note: Stage Six ends when Bright Blue has ensured the client is enthusiastic and identifies the organization as a prospect for future work. (Return to Stage Two.)

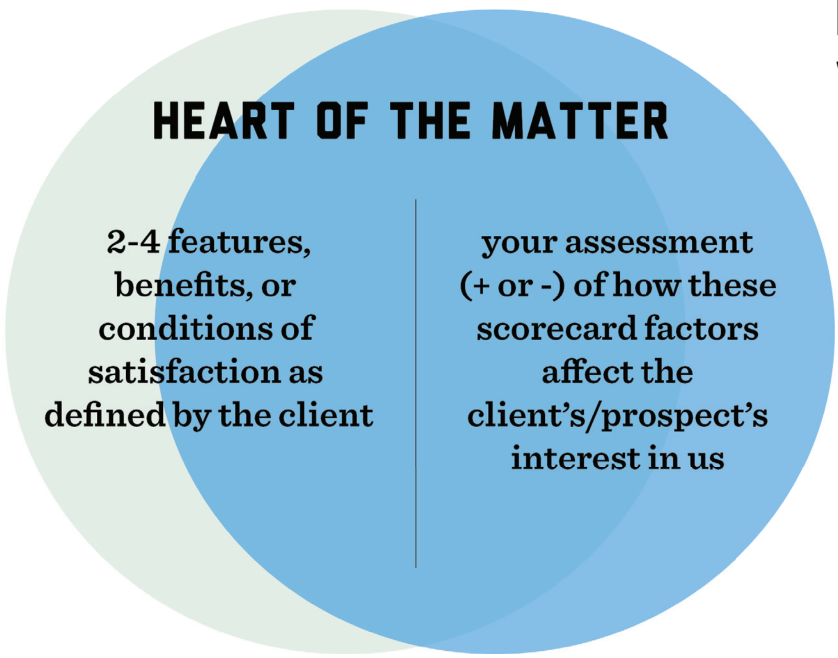
SALES PROCESSES ILLUSTRATED



SCORECARD

CLIENT VIEWPOINT

PROFESSIONAL VIEWPOINT

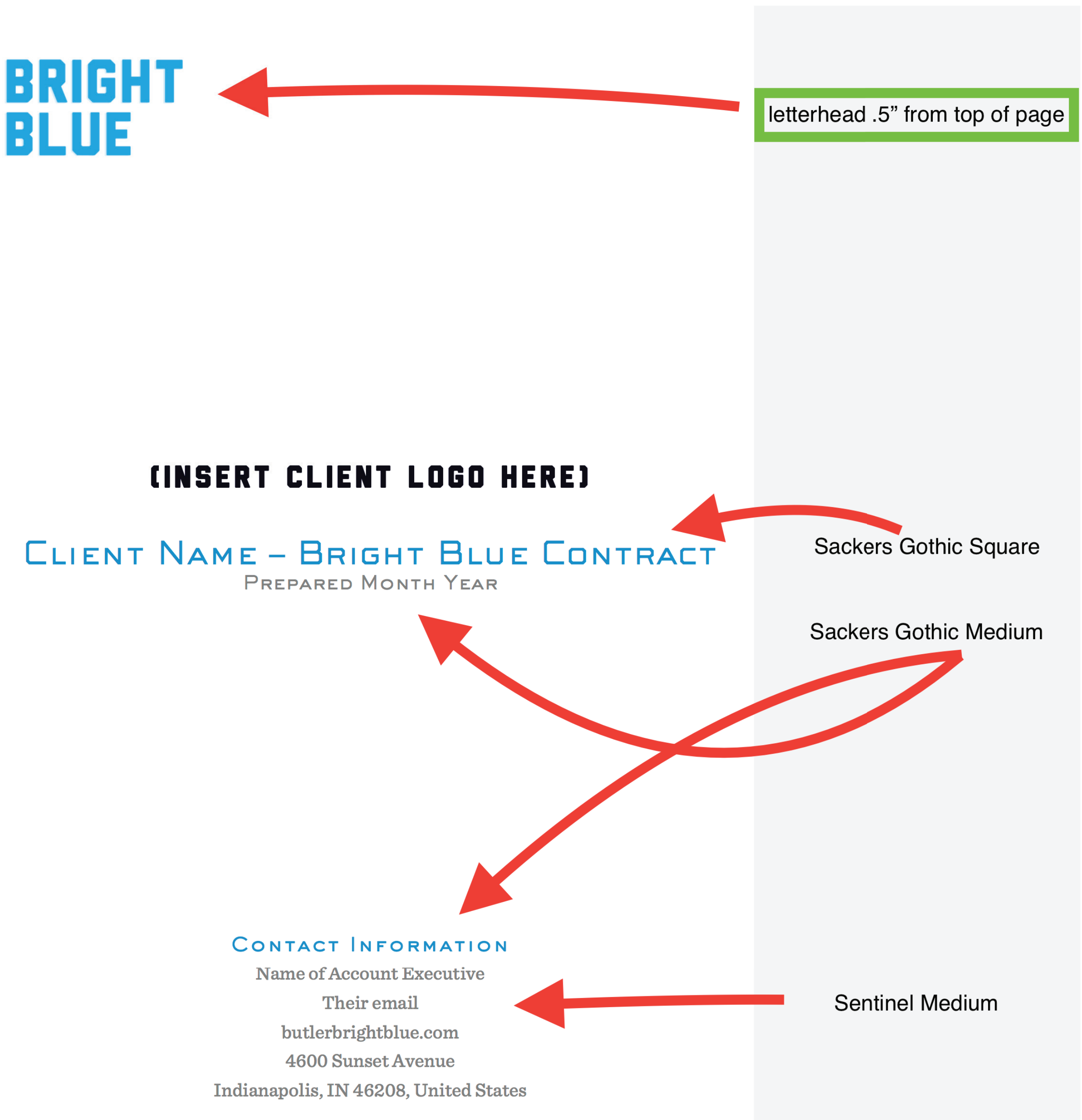


BILLING PROCESS

1. Build list of action items for team and deliverables to client based on Stage 4 and Stage 5 of the sales process.
2. Determine the estimated amount of time needed for each activity
3. Complete all services for client
    a. Obtain the signed contract with expected deliverables from the client.
4. Review all hours spent by each team member on the client
5. Review contract to correctly bill client based on agreed upon rate.
6. Send client an invoice for the services

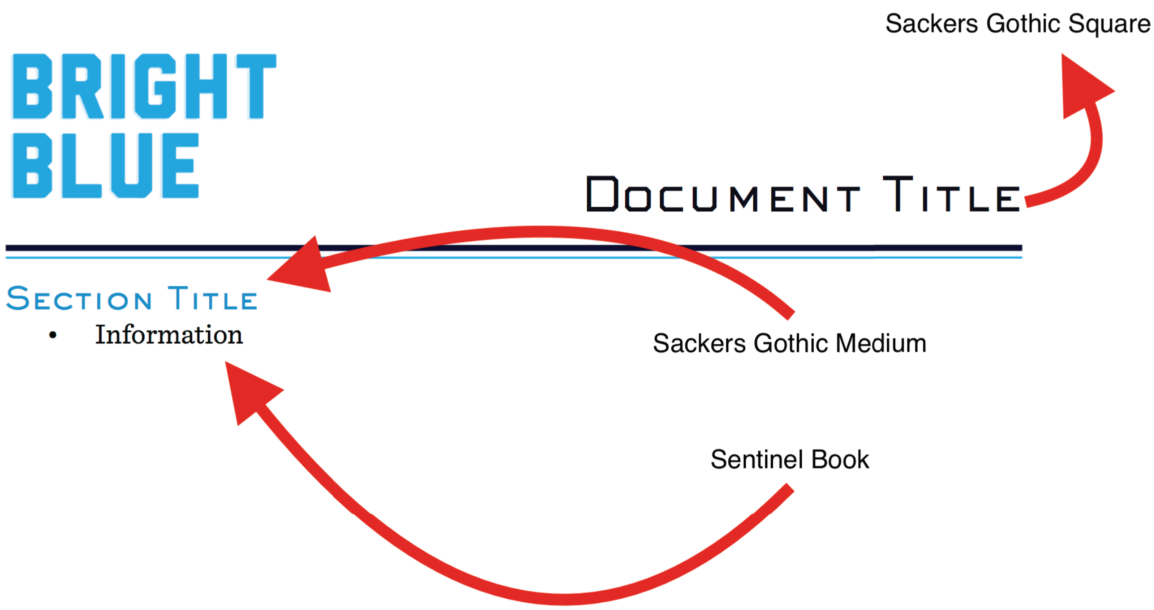
CLIENT CONTRACT TEMPLATE

The template for client contracts can be found on the Drive under Bright Blue>Deliverables>Templates. To use the template, you must download the document directly from the drive. DO NOT OPEN THE DOCUMENT USING GOOGLE DOCS. The only way to use the template successfully is to download it to your computer, edit it in Microsoft Word, then reupload the final document to the drive once it has been edited.



EXTERNAL DOCUMENTS TEMPLATE

The template for client contracts can be found on the Drive under Bright Blue>Deliverables>Templates. To use the template, you must download the document directly from the drive. DO NOT OPEN THE DOCUMENT USING GOOGLE DOCS. The only way to use the template successfully is to download it to your computer, edit it in Microsoft Word, then re-upload the final document to the drive once it has been edited. See previous page for details on fonts and spacing for cover page of external docs. See below for all other page details.



PART THREE: TECHNOLOGY PROCESSES

PAYMO AND SALESFORCE

Paymo

Paymo is an online project management software. Bright Blue uses this to manage projects, assign tasks and keep track of time.

Salesforce

The processes will not be written until Salesforce is actually implemented into Bright Blue. That date is undetermined at this time.

GOOGLE DRIVE

Though most files will be kept on BUFiles under a "Bright Blue" folder, Google Drive can also be used for collaborative projects and evolving documents that need to be accessible and updated in real time to everyone.

Google Drive is a file storage and synchronization service. A variety of tools are offered through Google Drive -- including, but not limited to:

Google Docs
Google Sheets
Google Slides
Google Forms

During the transitioning period at the end of each semester, the CEO will need to invite all new members to the Bright Blue folder on Google Drive.

Everyone who is invited to the folder will have access to anything and everything placed inside the folder.

To do this:

1. Go to Google Drive
2. Right click on the Bright Blue folder
3. Click the share button
4. Type in the names/emails of all new interns
5. New interns will then get an email notifying the folder has been shared with them

New interns then need to log into Google Drive and copy the folder to their drive. Logging into Google Drive/Copying Bright Blue Folder to Your Drive:

1. Go to www.google.com
2. In the top, right corner, there is Sign In button. Click this button.
3. Use your Butler email (including the @butler.edu) and password to log in.
4. Now, you should see a larger square made out of nine smaller squares in the top, right corner. Click this square and select Drive.
5. On the left side of the screen, there are several buttons. Click the one that says Shared with Me.
6. Find the Bright Blue folder, right click on the folder, and select Add to my Drive.
7. Now, whenever you log into Google and select Google Drive, the Bright Blue folder will always pop up at the top of the screen.

To add folders, sheets, documents, etc.

1. Click into the Bright Blue folder.
2. Find the blue New button on the top left corner of the screen.
3. Select whatever option you would like to create.

NAMING A PROJECT

Try and keep the naming convention as easy and obvious as possible

For projects that stay internally title the file BB_inserttypeofproject. So for example if you are creating a new logo you would name it BB_Logo.

If this is the second or third file named BB_Logo add the date at the end. We do this so we know what is the most recent and can distinguish which one is the current file in use. The new file would now be named BB_Logo_2.22.16

For projects that are for any of our clients, use the same naming convention. Instead of using the BB as the first two letters abbreviate the clients name to 2-3 letters. So if we are working with Eli Lilly name their file ELI_logo. If we are working for Clowes Memorial Hall, name the file CLW_logo. Try to make the abbreviation obvious. You wouldn't use LLY for Eli Lilly or EWS for Clowes Memorial Hall.

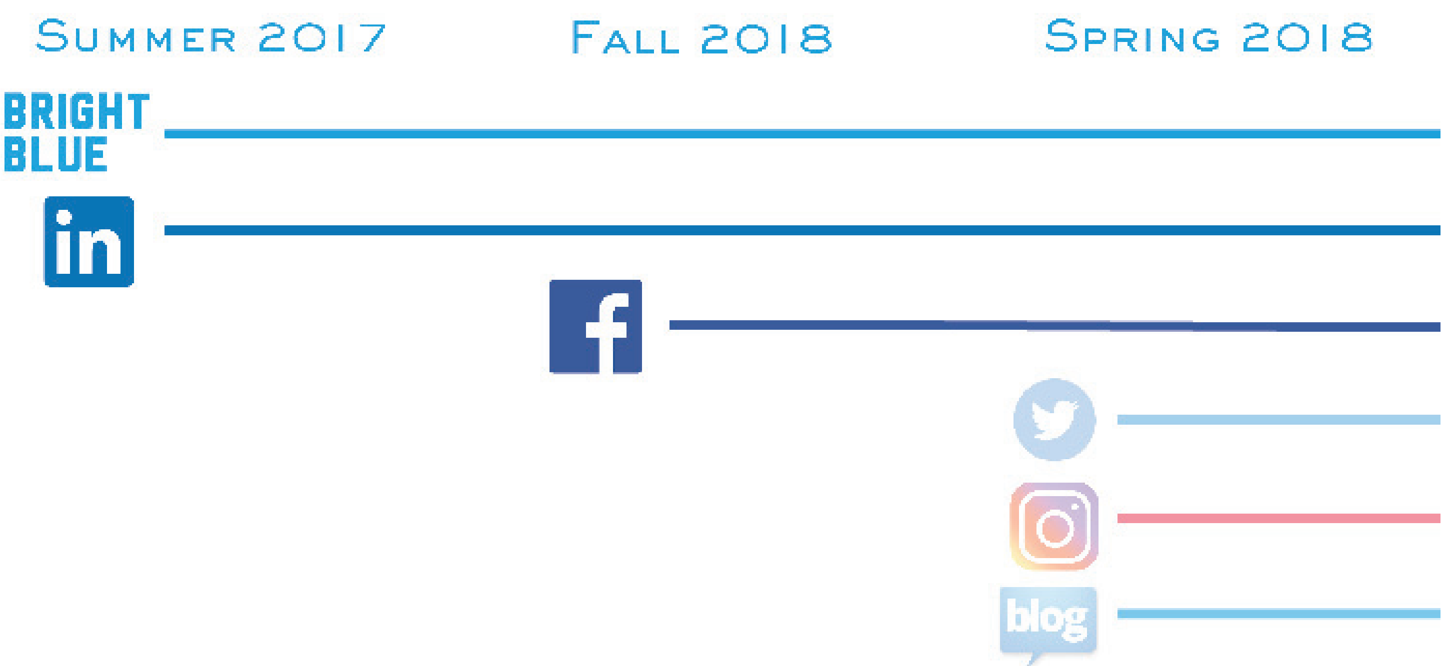
WEBSITE MANAGEMENT / SOCIAL MEDIA STRATEGY

Website Management

This process will be written upon the creation of a Bright Blue website. Once established, the necessary or interested parties will be trained by IT to use the web hosting software, Drupal.

Social Media Strategy

Ideally, our social media will be taken on in manageable portions. Based on our current needs, we have decided to prioritize LinkedIn and our website to begin name recognition and to establish our brand. Facebook is our next priority based on its reach to both our clients as well as perspective student interns. Depending on Bright Blue's needs in the Spring of 2018, Bright Blue could consider adding a blog, Twitter, or Instagram. Each new social media must be consistently managed and professional.



PART FOUR: INTERNAL PROCESSES

MEETING PROCESS

Meetings will occur weekly to report, brainstorm and collaborate.

Deliverables needed for meetings:

Agenda – created by the CEO with the help of the Project Director and Program Manager. This will be the roadmap for the meeting and will be divided into the following sections: high priority, medium priority, and low priority.

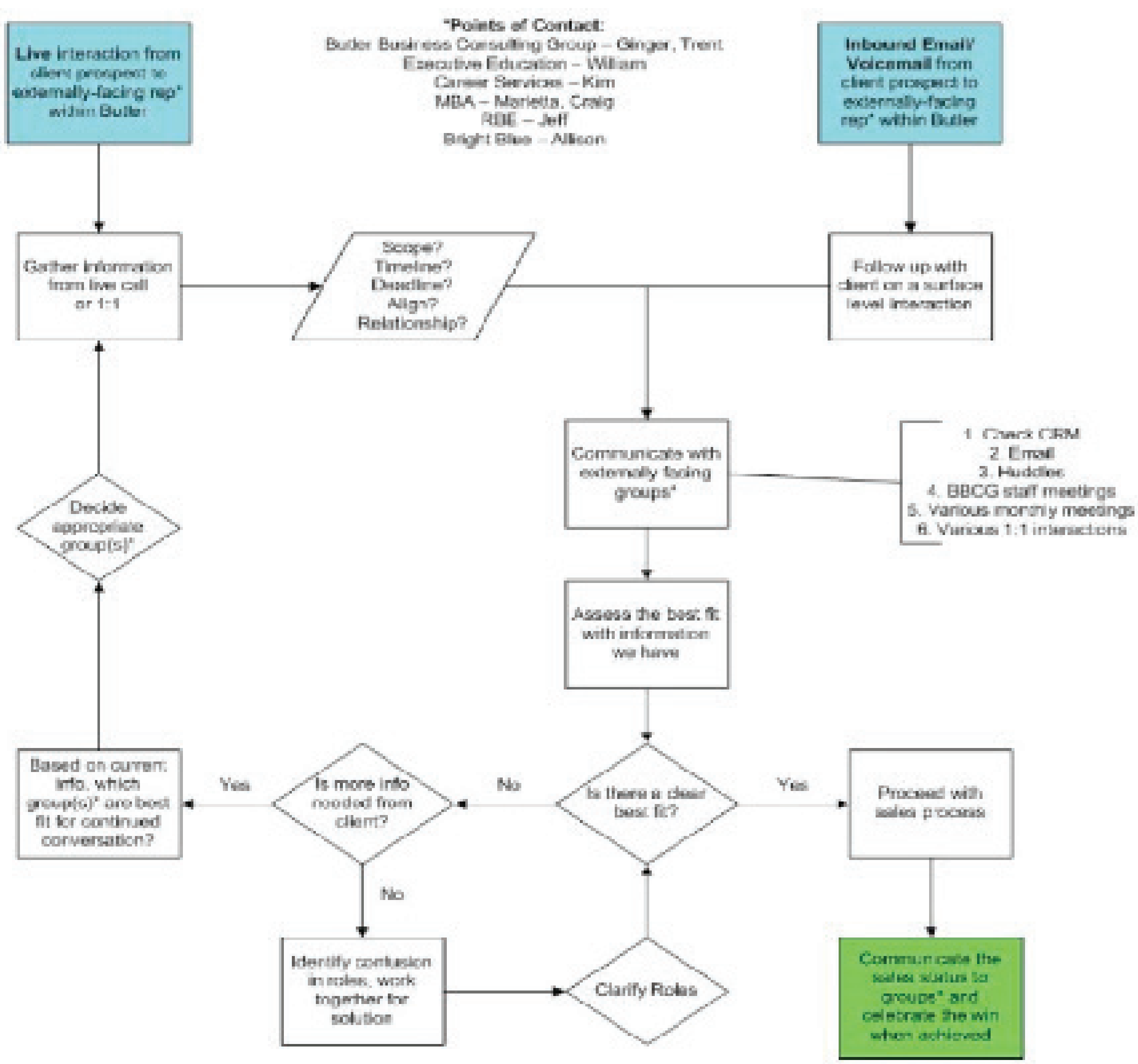
Support documents – this could range from the rough draft of the business plan, reporting of an interview with a potential client, or material that will support the agenda.

Reports – this should be a check in period with positions of the management team.
This will provide more of a holistic understanding of the business and better prepare members for a productive meeting.

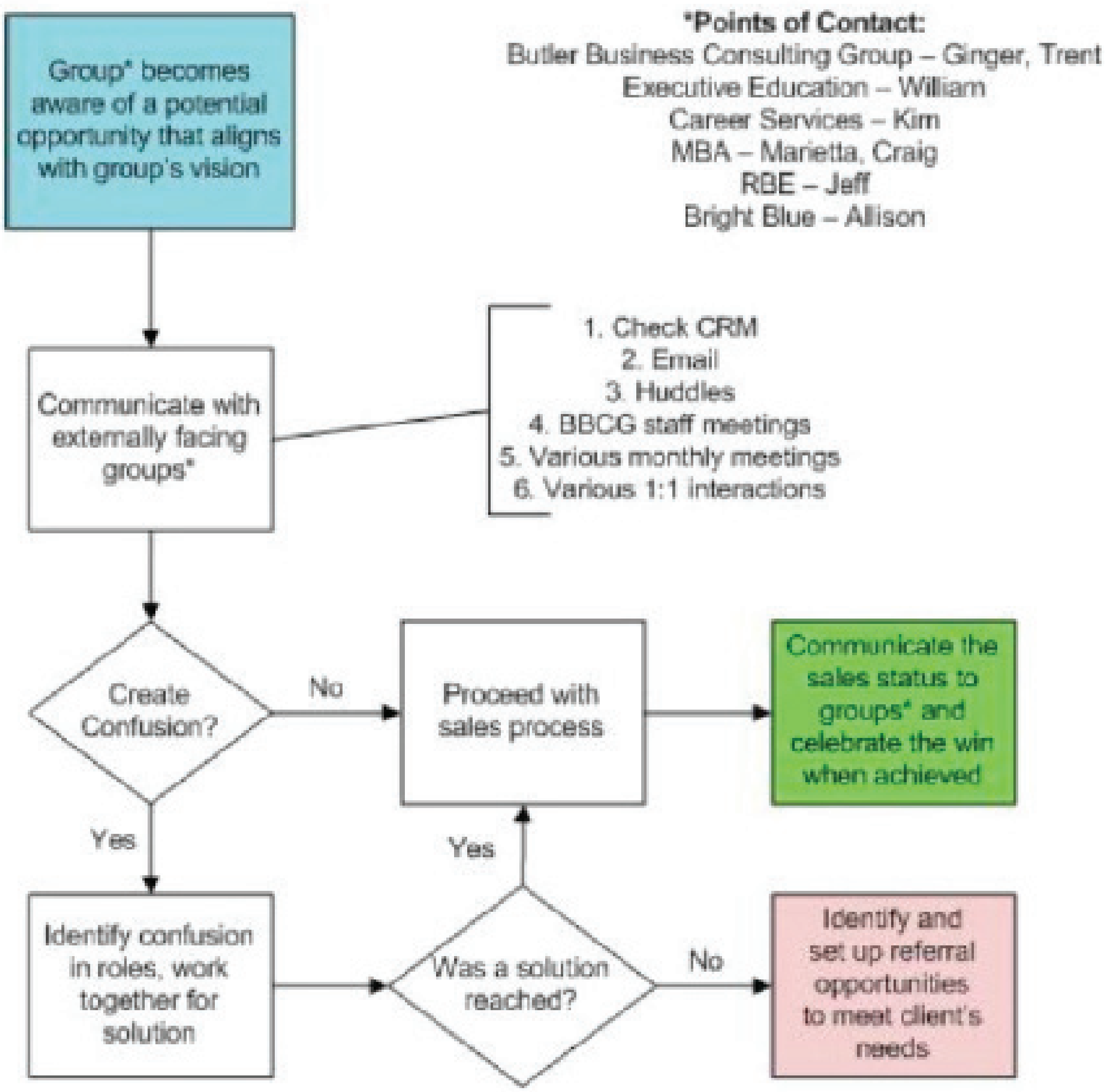
Goals – this is done at the end of the meeting to set a specific timetable and goals for the upcoming week. This will show what the team expected to accomplish and what they achieved in the previous week. In addition, it will have an area for action items for the week ahead and additional comments.

BUTLER INTERNAL APPROVAL PROCESS

The following are the inbound lead processes that must be followed before Bright Blue can move forward with an inbound lead. Although the points of contact may change in the future, it's important that this process continues to be followed. This internal process ensures that all externally facing groups remain aligned with respect to each other inside the university, as well as in the Indianapolis community.



The following are the processes that must be followed when Bright Blue identifies a potential lead that does not have a previous relationship with any other Butler University groups (i.e. the first interaction Bright Blue will have with the client is Bright Blue pursuing the potential relationship). Constant communication with all externally facing groups is essential to ensure the lead aligns with the vision of Bright Blue, while not stepping on toes of an externally facing organization.



THIRD-PARTY AFFILIATES

The following are potential third party affiliates of Bright Blue. The table should constantly be updated with new contacts and affiliates. To update this table, go to the “Third Party Affiliates” document in the Google Drive. Then, screenshot the table and paste the updated table in this process manual.

Skill	First name	Last name	Business	Location	Position	Email	Website	Notes
Video production	Christine	Taylor	Butler	On-Campus	CCOM	ctaylor@butler.edu	N/A	Phone No. 317-940-5967
	Moneytime	Video	Private	Indianapolis	N/A		videomvp.com	Phone no. 317-595-8811
Merchandise	Taylor	Bowen	Butler	On-Campus	Student rep	tbowen@butler.edu	southbysea.com	can get a 5% discount
Main Gate	N/A	N/A	Private	Indianapolis	N/A	info@main-gateinc.com	main-gateinc.com	Phone No. 317-243-2000
Web Design	Carrie	Rector	Butler	On-Campus	CCOM	crector@butler.edu	N/A	
Radio	Cutler	Armstrong	Butler On-Campus	CCOM	carmstr@butler.edu	N/A		
Mobile Apps	Outside	Source	Private	Indianapolis	N/A	Form on website	outside-source.com	Phone No. 317-842-4853
Printing	Campus	Impressions	Butler	On-Campus	HB023	N/A	butler.edu/printing	Phone No. 317-940-6495
	Elite	Printing, Inc.	Private	Indianapolis	N/A	Form on website	elite-printingindy.com	Phone No. 317-257-2744
Photography	Brent	Smith	Butler	On-campus	Photographer, Marketing & Com.	bsmith@butler.edu	butler.edu/marketing	Phone No. 317-940-9444
	Rob	Banayote	Private	Indianapolis	Owner, Banayote Photo	banayote@gmail.com	banayote.com	Phone No. 317-257-8800
Web Hosting	Deryl	Botta	Butler	On-Campus	Manager, App Ops (IT)	dbotta@butler.edu	butler.edu/it	Phone No. 317-940-6648

HOUR LOGGING PROCESS

Technology Used:

Paymo – A modern project management app for small & medium businesses. One platform for Team Collaboration, Timesheet Management and Project Accounting

My.butler.edu – Butler University's web portal that provides easy, direct access to university services and information, allowing students, staff and faculty to work more efficiently.

Processes:

1. Log Hours Into Both Systems
   - Paymo (can differentiate hours)
   - My.Butler

2. Both Can Be Entered
   - Web Clock / Timer
   - Retroactive / Bulk Entry

3. Action Steps
   - Time In
   - Time Out
   - Client
   - Task

Paymo

Paymo is an online project management software. Bright Blue uses this to manage projects, assign tasks and keep track of time.

Logging into Paymo

1. Go to this website: https://app.paymoapp.com/auth/login
2. Log in using the username and password assigned by the previous CEO
3. Now you're ready to use Paymo!

Understanding Paymo

Scroll through this website (https://www.paymoapp.com/project-management/)
Watch this video (https://www.youtube.com/watch?v=Y3u6l04muCo)

Opening a Project

Only account executives and the CEO have access to opening a project. Let's say you are working on designing a brochure for Eli Lilly and want to open the job on Paymo, here are the steps to doing this:

1. Email one of the account executives that you would like to open a project.
2. Include the filled in the information below:
    a. Client:
    b. Name of Project:
    c. Brief Description:
        i. I.e. Date initiated, sales stage, point of contact, etc.
    d. Billing method: (select one)
        i. Time & Materials Project (Hourly)
        ii. Flat Rate Project
        iii. Project Not Billable
    e. Hours Estimate: (select one the options below.)
        i. Adjusted automatically based on tasks budget hours
        ii. Budget hours (If you select this, provide number of hours estimated)
3. Also include any tasks, who the tasks need to be assigned to, and the timeline a. For example: Writing Content - Annie - Due by 2.16.17
4. The account executive will then open the job and send a confirmation email back whenever the job has been opened.

There are two ways to track time:

1. Timer
    a. In the bottom left of the screen, there is a little timer icon. Click on it
    b. Select the project
    c. Select the task
    d. Make any notes (this can be done before or after stopping the clock)
    e. Hit the play button when you have started working
    f. Hit the stop button whenever you have stopped working
    g. If you go to the timesheets button (the clock icon in the left panel), you should see that time recorded
2. Bulk add
    a. If you forget to start a timer, you can bulk add time
    b. Click on the timesheets button (the clock icon in the left panel)
    c. Either click and drag for the amount of time you spent working on something, or you can simply click on the day you want to add time
    d. A box will pop-up, giving you options to fill in the project, task, time spent and a notes box - fill this out

My.Butler

1. Go to my.butler.edu
2. Enter Student User ID and Password
3. On the far right side of the screen, there is a section called Time Reporting. Click Timesheet or Web Clock, depending on what you want to do (see info below for more information on the difference between the two options) under that section.
4. Select Either

    a. Timesheet – Report your time and task details for a day, week, or time period
    b. Web Clock – Report a single punch and associated time and task details
5. Timesheet
    a. Select Position Under Job Description
        i. Example: SA, CEO
    b. Enter Time In and Time Out
    c. Select Submit
        i. Status Will Change To "Needs Approval
        ii. Ensure Punch Total Matches Time In and Time Out
6. Web Clock
    a. Select Position Under Job Title i. Example: SA, CEO
    b. Select A Punch Type
        i. In
            1. Enters Time In
        ii. Meal (Don't Use)
            1. Enters Lunch Meal (Don't Use)

        iii. Out
            1. Enters Time Out

    c. Leave Comments Blank
    d. Select Enter Punch
        i. Make Sure To Time In and Time Out
    e. Select "OK" Button
    f. Check If Time Was Logged
        i. Select Time Reporting
        ii. Select Report Time
        iii. Select Timesheet
            1. Look At Date, Time In and Time Out

Conducting Research

Utilizing Butler Libguides:

1. Libguides.butler.edu
2. Business Libguide
    - Business Database Help- a good resource to learn how to navigate through certain databases as well as a breakdown of the top databases to use
        i. Business Databases – By Information Need: This is a table breaking down all of the business databases based on different types of information. The cross-section boxes that are highlighted yellow are the best two databases to use for that type of information per Teresa Williams' suggestion.
        ii. Business Research Tutorials: This section consists of "how to" tutorials for several of the business databases.

**Teresa Williams highly suggests reviewing the tutorials for Simmons OneView as this site provides valuable information regarding consumer information, but it is somewhat difficult to use at first.*

- Company Research- a list compiling the databases that are best for researching specific companies
    i. Databases tab:
        - o Business Source Complete (EBSCO Database):
            1. Click "Advanced Search"
            2. Fill in appropriate fields specific to your search
        - o Mergent Intellect: This database can be used to search for both public and private companies.
            1. Either type in search terms or select the type of search you wish to conduct
- Industry Research- a list compiling the databases that are best for researching specific industries
    i. Databases/Websites tab:
        - o First Research:
            1. Click "Continue"
            2. Click "Continue"
            3. Click "Submit"
            4. Type appropriate search terms in search bar
            5. Select appropriate profile
            6. Navigate through the profile using the navigation menu on the left side of the screen

** The "Websites" button on the left navigation menu once you open the appropriate profile is very helpful for finding current articles about the industry.*

- Indiana Business- a list of resources compiled for doing research specifically about business within the state of Indiana
    - i. Websites tab:
        - o Indianapolis Star (left side panel)
        - o Indiana Business Journal (left side panel)
        - o Inside Indiana Business (left side panel)
- Government Information Resources for Business- a list of resources useful for gathering census-type information about consumers in specific areas
    - i. State and Local tab:
        - o STATSAmerica
        - o STATSIndiana

Utilizing Google:

- Google Alerts: sends updates about new releases of information on topics predetermined by you
    1. Search "Google alerts" in preferred web browser
    2. Select page entitled "Google Alerts"
    3. Type the topic on which you would like to receive updates
    4. Select "Show Options" menu
    5. Select "How Often" you would like to receive alerts
    6. Enter your email address in the promoted box
    7. Click "Create Alert"
- Google Trends: allows you to see what Google searches are currently trending
    1. Search "Google trends" in preferred web browser
    2. Select page entitled "Google Trends"
    3. Type the topic on which you would like to see trends in "Explore topics" bar
    4. Click "Enter"
- Google Finance: allows you to gather information regarding public companies' financials
    1. Search "Google finance" in preferred web browser
    2. Select page entitled "Google Finance: Stock market quotas, new..."
    3. Type the company on which you would like financial information in the search bar
    4. Click "Get quotes"

Utilizing Indianapolis Public Library:

Indianapolis Public Library Card: Applying for an Indianapolis Public Library card is a useful resource because this provides you with access to additional free databases that Butler Libraries do not have agreements with.

1. Visit Butler librarian Teresa Williams (IL 126)
2. Request an application form for an Indianapolis Public Library card
3. Fill out application with your information
4. Return application to Teresa Williams

**She will take care of getting your application turned into the Indianapolis Public Library*

Additional Information:

Teresa Williams is an excellent resource when it comes to all library resources. She loves to talk with students and would be more than willing to sit down with you to explain the Butler databases or to answer any specific research questions you may have.

Teresa Williams hosts a workshop regarding how to use the Butler databases typically once a semester. This workshop is a 6-week course with sessions once a week, some in person and some online. This is a great resource to gain in- depth training on how to effectively navigate the database resource.

There is a possibility that a message will pop up prior to entering a database stating that the use of the database is for "educational purposes only." Butler is able to enter into agreements with owners of these databases at a discounted rate due to the fact that it is an academic institution. Therefore, we cannot provide this information for commercial use (i.e. selling information found on such databases to clients). This information can be used for educating the team on a specific client or industry in order to produce the agreed-upon deliverables established in the client's contract.

JOB COSTING

The costing of jobs will be performed utilizing a time and materials costing method. The Excel template can be found in the Bright Blue Google Drive.

1. Open the "Account Executives Documents" folder.
2. Open the file titled "Pricing Template."

Below is the Excel template that will be used in determine the price and cost of a client project:

1	Resource	Hours	Bill Rate	Cost Rate	Bill	Cost	Margin	Margin %
2					0	0	0	#DIV/0!
3								
4								
5								
6								
7								

To complete this template:

1. In the column titled "Resource," fill in the resources being used on the particular project.
**For the purpose of Bright Blue client projects, resources will be the Bright Blue team members needed for completing the project.*

2. For each resource listed, fill in the estimated hours necessary for completing the assigned task in the "Hours" column.
**This estimated amount should be collected individually from each resource listed.*

3. The "Bill Rate" column will be pre-populated with the rate of $55 per hour. If necessary, edit this information to match the appropriate rate to be charged (i.e. It might be necessary to increase the rate if the Program Manager or Project Director is listed as a resource).

4. In the "Cost Rate" column, fill in the amount of cost allocated to each resource.

5. The "Bill" column is formatted to populate itself using the following formula: =Bill Rate * Hours

6. The "Cost" column is formatted to populate itself using the following formula: =Cost Rate * Hours

7. The "Margin" column is formatted to populate itself using the following formula: =Bill Rate - Cost Rate

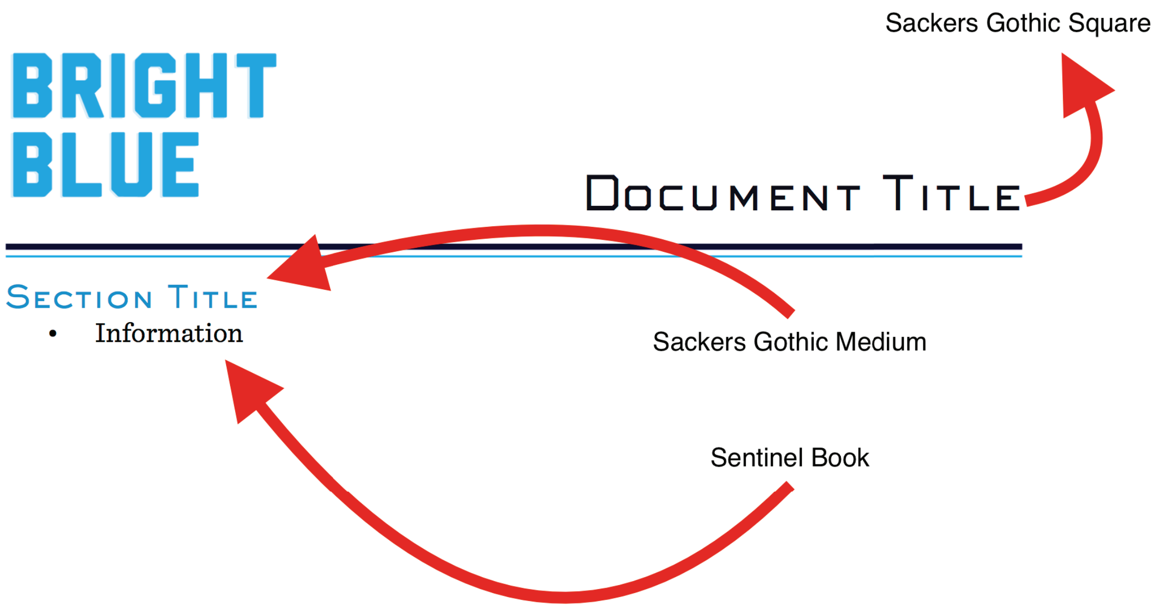
8. The “Margin %” column is formatted to populate itself using the following formula: = Margin / Bill Rate. This information can be used to analyze the gross margin as a percentage of revenue per each resource.

9. The “Total” row populates itself by taking the sum of each column. The last cell in the “Bill Rate” column is the price that should be quoted to the client for the project work. It may be necessary to add to this figure any necessary materials used in completion of the project (i.e. printing costs, the purchase of a domain, the outsourcing of work, etc.).

This process should be completed both at the beginning of a client project (the “Estimate” sheet) using estimate number of hours and at the end of a client project (the “Actual” sheet) using actual number of hours. Completing this process pre-project will allow the Account Executives to provide a quote for the project to clients prior to starting a project. Completing this process post-project will allow Bright Blue to analyze its efficiency in completing the project and make any necessary changes moving forward.

INTERNAL DOCUMENTS TEMPLATE

The template for client contracts can be found on the Drive under Bright Blue>Deliverables>Templates. To use the template, you must download the document directly from the drive. DO NOT OPEN THE DOCUMENT USING GOOGLE DOCS. The only way to use the template successfully is to download it to your computer, edit it in Microsoft Word, then reupload the final document to the drive once it has been edited. See Client Contract page for details on fonts and spacing for cover page of external docs. See below for all other page details.



PART FIVE: TRANSITION PROCESS

RECRUITMENT/TRANSITION PROCESS

Recruitment:

1. Set dates and times for call out sessions
    a. Send out Doodle to team regarding the best times to have call out session
    b. Email Beth Falkenbach to schedule rooms for the call out sessions
        i. Preferably at least 2 weeks before the sessions
    c. Work with creative director or writer to make a flier about call out session
    d. Draft email to Greek organizations, RBE classes and student organizations
    e. Send out the email with flier attached to Greek organizations, RBE classes and student organizations
    f. Post call out session information on Butler Connection
    g. Email Brenda Bantz about sending out call out session information on LSB listserv
    h. Email Scott Bridges about sending out call out session information on CCOM listserv
2. Post jobs to Handshake
    a. Meeting with Project Manager to discuss any changes to job descriptions from previous semesters
    b. Update any new information regarding job positions
    c. Create user profile with Project manager or director contact information d. Post jobs
3. Research career fairs or events to set up an information table
    a. Look at calendar of Butler events on Butler website
    b. Talk to LSB and CCOM contacts to determine any events Bright Blue could attend
4. Post call out session information to Bright Blue social media platforms
    a. Have team share the post on their social media in order to get more views
5. Schedule rooms for interviews
    a. Email Beth Falkenbach regarding room scheduling

Resources Bright Blue can utilize:

Butler Connection
The Collegian
Handshake

- Pros: I think the university is charged so no direct costs to Bright Blue. Specific to Butler and internships.
- Cons: A little clunky and harder to use than some others, but overall it's a great option.

LinkedIn

- Pros: Extensive, links well with our account, can view applicants profile instantly, overall lots of information for both us and prospective employees.
- Cons: 30-Day posting is roughly $200 (on top of our premium membership dues). Probably a little big for student recruiting.

Facebook -- need followers
Twitter -- need followers, and I don't think it will be the best way to reach people
LSB & CCOM Bulletin Boards

Note: It's important Bright Blue stays active on these social media accounts to remain relevant and in the minds of potential recruits. An inactive social media campaign is virtually useless in recruiting.

The Transition Process:

The CEO:

• Ensure the new CEO's vision lines up with current culture and the current vision of Bright Blue.
• Get new CEO up to speed on all current software and processes from time logging, to CRM, to social media accounts and anything else Bright Blue uses.
• Explain the relationships and roles of each position in the company and how they might change in the future.
• Give access to the Google Drive and explain any working documents. The Account Executives:
• Get the new executives up to speed with any current or near future projects.
• Familiarize them with any recurring clients, the relationships we have with them and specifically who we have dealt with.
• Go through the process of securing a client in detail and any modifications to the process that might be beneficial.
• Go through the proposal and pitch templates.
• Explain how working with another account executive works. What went well and what can be changed to help aid success.

The Creative Director:

• Show deliverables created throughout the semester and explain the processes used to create the deliverables.
• Explain resources used throughout the semester (including those outside of Bright Blue/Butler) and pass on those contacts for future projects.
• Explain any current projects that are going on, or any future projects that are in the pipeline.

The Writer:

• Show all the work done, especially the working documents.
• Explain the process of coming up with a position statement, mission statement, etc.
• Show work examples given to clients and go over the process of how the work was created.

The Market Researcher:

• Explain the role in the company and how it changed from the internal branding stage to when Bright Blue started working with clients
• Show helpful databases and tools used throughout the semester and how to navigate them.
• Explain role in the process of obtaining a client, helping with a proposal, and assisting in ensuring deliverables line up with research findings.

- Pass along contact information of resources used throughout the semester that assisted in research and strategy. (i.e. Theresa Williams, Brian Landis, etc.)

Program Manager/Director:

- Oversee the transition to ensure the new team feels comfortable by the time they start.
- Establish the timeline to get the transition period complete in a thorough but efficient manner.

INTERVIEW PROCESS

1. Compile all resumes and cover letters from applicants on Handshake
2. Read through cover letters, reviewing formatting and content in each to narrow down candidates
3. Look over resumes of those with unique cover letters, identifying previous experiences or skills that will make them a good fit for the job position
4. Contact applicants with appropriate qualifications
5. Meet with team to establish a list of questions for positions
6. Schedule who from the team will be present in each interview (preferably the team member who holds the position being interviewed for)
7. Book rooms for interview
8. Contact candidates with several times and rooms for interview
9. Conduct the interview
10. Meet with team members who were present in interview to determine the best fit for the position
11. Contact candidates who were the best fit for each position and the program director typically extends an offer

SAMPLE QUESTIONS

General

- Tell me about yourself.
- What do you know about Bright Blue?
- Why do you think you are qualified for this position?
- Describe to us what this position entails.
- What is your greatest strength and weakness?
- What questions do you have for me about this role?

Time Management

- Are you better at working on many things at a time, or are you better at working on and getting results on a few specific things? Explain.
- How do you decide what gets top priority when scheduling your time.
- Describe a situation when you had many projects due at the same time. What steps did you take to get them all done?

Analytical Thinking (Market Researcher)

- Tell me about a time you had to use data to understand a problem.
- Describe a task/project that best demonstrates your ability to analyze data from a variety of sources.

Problem Solving/Decision Making

- What steps do you follow to study a problem before making a decision?
- Give me an example of a time you had to make a difficult decision.
- Give me an example of a time when you had to solve a problem. Describe the problem, and then describe the steps you took to solve it.
- Think of a project/task you were given that was not well-defined. How did you proceed?

Communication (Account Executives)

- Describe a time when you and your co-workers encountered a problem, disagreement or issue that was difficult or uncomfortable to talk about.
- Have you ever had to "sell" an idea to your co-workers or group? How did you do it? Did they "buy" it?

Integrity

- Tell me about a time you made a mistake.

Leadership (CEO)

- What are 3 effective leadership qualities you think are important? How have you demonstrated these qualities in your past or current experiences?
- Have you ever been a member of a group where two of the members did not work well together?
- What did you do to get them to work well together?
- Tell me about a leader you have worked with that you greatly respect and admire. What are the characteristics of this person that make you admire them?
- Tell me about a time when you influenced the outcome of a project by taking a leadership role.

Motivation

- Describe one of your greatest accomplishments.

Teamwork

- Describe a situation where others you were working with on a project disagreed with your ideas. What did you do?
- Tell me about a time when you worked with a colleague who was not completing their share of work. Who, if anyone, did you tell or talk about it? Did you take action?
- Tell me how you worked through a disagreement or challenge within a team or with an individual.
- How do you ensure you or the team stays on track to deliver results?

Initiative

- Tell me about a time when you took it upon yourself to accomplish a task on the job, without being asked.

Interpersonal Skills

- Tell me about the most difficult challenge you faced in trying to work cooperatively with someone who did not share the same ideas. What was your role in achieving the work objective?
- Tell me about the most difficult or frustrating individual that you've ever had to work with and how you managed to work with them.

Adaptability to change

- What do you do when your priorities change quickly? Give me an example of when this happened.

INTERVIEW NOTE FORM

* Can be found on BUFiles

Bright Blue Interview

Interview Details			
Date:		Time:	
Interviewer Name:			
Candidate's Name:		Semester Applied for:	
Position Applied For:			
Major(s):			

Questions to Ask Candidate

Additional Notes