Client Processes Playbook

Graphic Design Services →

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About Us:

Outsource Access is a comprehensive "business process outsourcing" and virtual assistant firm with over 500 employees in the Philippines serving businesses in 70 industries. But what are we really? Our Clients tell us we are their "Growth Partner" helping them redefine how they scale. We are proud to have won 6 national and global awards for our commitment to quality and impacting the lives of our staff including recent ranking of #326 on the Inc 5000 for 2023.

We do a customized discovery session with each Client and offer support in every business function including operations, marketing, bookkeeping, sales, HR, admin and executive support. Our staff are all full time and managed employees who are committed to your success with our signature talent and matching, onboarding and detailed OA Playbook process to capture and document every task we execute. We will be your full turn-key, affordable answer to scale and growth.

Want to Take Next Steps? Scan the QR code and see a short video tour of our company and process with links to book a complimentary discovery call at:
OutsourceAccess.com/process

MARKETING

Task | Designing Product/Services Brochure via Adobe InDesign

Description of the Task: Creating visually compelling brochures that effectively showcase products or services using Adobe InDesign. A well-designed brochure can serve as a key marketing tool, providing potential clients with clear and engaging information. The design process must balance aesthetics with functionality, ensuring the layout is both attractive and easy to navigate.

1. Begin by reviewing the client's brief or requirements document to understand the brochure's objectives, target audience, and key messaging. Collect all necessary assets, including product images, brand logos, text content, and any specific design guidelines provided by the client.

2. Open Adobe InDesign and create a new document. Choose the appropriate brochure dimensions, including bleed settings for print. Set up the number of pages, ensuring that the layout aligns with the chosen brochure format (e.g., bi-fold, tri-fold). Define the grid and margin guides to maintain consistency throughout the design.

3. Create master pages that will serve as templates for consistent design elements across all pages, such as headers, footers, page numbers, and background designs. Apply the brand's color palette and typography guidelines to these elements to ensure brand consistency.

4. Start by designing the cover page, which should be visually appealing and immediately convey the product or service being promoted. Incorporate striking imagery, the brand logo, and a compelling headline to grab attention. Ensure that the design aligns with the brand's visual identity and stands out to the target audience.

5. For the inner pages, arrange the content in a way that is easy to follow and visually engaging. Utilize a balance of text, images, and white space to prevent overcrowding. Use paragraph and character styles in InDesign to maintain consistency in text formatting. Make sure the product details, benefits, and features are clearly highlighted.

6. Apply visual hierarchy principles to guide the reader's eye through the brochure. Use larger fonts for headings, bold text for key points, and high-quality images to draw attention. Ensure that each page has a clear focal point that communicates the main message effectively.

7. Add any necessary callouts, icons, or infographics that enhance the brochure's messaging. Review the design for alignment, consistency, and any errors. Proofread the text content to ensure there are no typos or inaccuracies.

8. If the brochure is for print, ensure that all images are in CMYK color mode and that the resolution is 300 dpi. Export the file as a print-ready PDF with bleed and crop marks. If the brochure is for digital use, export it as an interactive PDF or other appropriate format, ensuring it's optimized for online viewing.

9. Once the brochure is complete, submit the design to the client or the internal review team for feedback. Make any necessary revisions based on their input and finalize the design.

10. After the brochure is approved, organize and archive all project files, including the InDesign file, assets, and exported PDFs, in a designated folder for future reference or updates.

Task |Creating Social Media Ad Templates via Canva

Description of the Task: Developing eye-catching social media ad templates using Canva is essential for maintaining brand consistency across platforms. These templates allow for quick updates and customizations, ensuring that each campaign is visually aligned with the brand's identity while appealing to the target audience. Canva's user-friendly interface makes it accessible for designers to craft professional and impactful ads.

1. Begin by reviewing the social media ad campaign brief to understand the target audience, key messaging, and platforms where the ads will be displayed (e.g., Facebook, Instagram, LinkedIn). Take note of the ad dimensions and any specific design requirements mentioned in the brief.

2. Collect all necessary branding assets, including logos, color palettes, fonts, and any imagery that needs to be incorporated into the templates. Ensure that these assets align with the brand's visual identity to maintain consistency across all ad designs.

3. Log in to Canva and create a new design. Select the appropriate custom dimensions for the social media platform you are designing for. Ensure that you create separate designs for different platforms if they require different aspect ratios (e.g., square for Instagram, landscape for Facebook).

4. Start by choosing a layout that fits the campaign's messaging. You can use one of Canva's pre-made templates as a base or create a custom layout from scratch. Ensure that the layout is visually appealing and effectively highlights the ad's primary message.

5. Add high-quality images, graphics, and icons that align with the campaign theme and resonate with the target audience. Use Canva's drag-and-drop feature to arrange these elements on the canvas. Make sure to incorporate the brand's color palette and typography consistently throughout the design.

6. Insert the ad copy, ensuring that the text is clear, concise, and aligns with the campaign goals. Use bold fonts for headlines and CTAs to draw attention. Ensure that the text contrasts well with the background for readability. Position the CTA prominently, guiding users to take the desired action (e.g., "Shop Now," "Learn More").

7. Since most social media users access content via mobile devices, ensure that your design is mobile-friendly. Check that text is legible, images are clear, and important elements are easily visible on smaller screens. Canva's preview feature allows you to see how the design will look on different devices.

8. To maximize the effectiveness of the ad campaign, create multiple variations of the template with slight differences in design elements (e.g., color schemes, headlines, or CTAs). This allows the marketing team to perform A/B testing and determine which version resonates best with the target audience.

9. Share the templates with the marketing team or client for feedback using Canva's collaboration tools. Make any necessary revisions based on their input to ensure the design meets the campaign's objectives.

10. Once approved, download the templates in the appropriate format (e.g., PNG or JPG for image ads, MP4 for animated ads). Ensure that the resolution is optimized for social media platforms without compromising quality.

11. Save the final designs, along with any variations, in an organized folder for future use. Keep the Canva design files accessible in case any edits or updates are required for future campaigns.

12. Provide the final ad templates to the social media team, ensuring they have the necessary files and instructions for uploading the ads across the intended platforms.

Task |Designing eBook Covers via Adobe Illustrator

Description of the Task: Crafting eBook covers using Adobe Illustrator requires a blend of creativity and precision. The cover is often the first impression of the content, so it needs to be visually striking and aligned with the book's theme. This task ensures that the eBook stands out in a crowded market, attracting readers through its professional and appealing design.

1. Begin by reading the eBook brief to understand the book's genre, theme, and target audience. Identify key elements such as the title, subtitle, and author name, along with any specific design preferences or branding guidelines that need to be followed.

2. Collect all required assets, including stock images, illustrations, fonts, and any other visual elements that should be incorporated into the cover design. Research similar eBook covers in the genre for inspiration, and gather references to understand current design trends.

3. Open Adobe Illustrator and create a new document. Set the dimensions for the eBook cover, typically 1600 x 2560 pixels, or as specified by the client. Ensure that you set the correct color mode (RGB) and resolution (300 DPI) for optimal digital display.

4. Set up guides and margins to define the safe zones for text and important elements. This ensures that critical information, such as the title and author name, will not be cut off when the cover is displayed on different devices or platforms.

5. Start by designing the background of the cover. This may involve creating a custom illustration, using a gradient, or adding an image that aligns with the eBook's theme. Ensure that the background sets the tone for the book and does not distract from the main text.

6. Add the eBook title and author name using typography that complements the book's genre. For example, use bold, eye-catching fonts for thriller novels or elegant, serif fonts for literary fiction. Ensure that the text is legible, even at smaller sizes, and contrasts well with the background.

7. Add any additional design elements such as icons, illustrations, or textures that enhance the overall look of the cover. These elements should support the book's theme without overpowering the text. Use layers in Illustrator to keep these elements organized and easily editable.

8. Use color theory to create a visually appealing cover that draws the viewer's eye to the most important elements. Ensure that there is a clear visual hierarchy, with the title being the focal point. Adjust colors, shadows, and highlights to make the cover stand out while maintaining harmony within the design.

9. Check that the design is scalable and looks good at different sizes, as eBook covers are often displayed as thumbnails on online platforms. Make sure that the title and key elements remain legible and impactful even when reduced in size.

10. Review the design for alignment, balance, and overall aesthetics. Make any necessary adjustments to ensure that the cover is polished and professional. Consider seeking feedback from colleagues or the client before finalizing the design.

11. Once the design is approved, export the eBook cover in the required format, typically JPEG or PNG, at the highest quality settings. Ensure that the file size meets the platform's requirements while maintaining image quality.

12. Save the final Illustrator file (.ai) with all layers intact for future edits. Also, create a folder to store the exported files and any related assets. Proper organization ensures that the design can be easily accessed for future updates or revisions.

13. Send the completed eBook cover to the client or upload it to the designated platform.

Task |Customizing Icons for Apps and Websites via Figma

Description of the Task: Creating unique and cohesive visual elements that enhance user experience on apps and websites. Icons must be intuitive, visually consistent, and aligned with the overall design aesthetic. This task is critical for ensuring that the digital interface is both functional and visually engaging.

1. Begin by reviewing the design brief to understand the specific requirements for the icons, such as their style, size, and color scheme. Familiarize yourself with the brand's visual identity, ensuring that the icons align with the overall design language of the app or website.

2. Research existing icons within the same industry or app category to gather inspiration. Look for trends in icon design that are popular in the market and relevant to the project.

3. Open Figma and create a new project. Set up the workspace by defining the artboard sizes according to the required icon dimensions. This ensures consistency across all icons. For example, set artboards to 24x24 pixels or 48x48 pixels based on the app or website specifications.

4. Import any base icons provided by the client or start by designing simple geometric shapes that will serve as the foundation for your icons.

5. Modify the base icons to align with the brand's style. Adjust the stroke width, corner radius, and fill colors to ensure consistency with the app or website's visual identity. For example, use the brand's primary colors for fills or outlines and apply the appropriate level of detail for the icon's usage.

6. Utilize grids and guides in Figma to ensure that all icons are proportionate and aligned. This is crucial for creating a cohesive icon set that maintains uniformity across different platforms and devices.

7. Ensure that the icons follow a visual hierarchy, making the most important elements stand out. Also, consider accessibility by using high-contrast colors and ensuring that the icons are recognizable for users with visual impairments. This is particularly important for apps and websites that prioritize user experience.

8. Design variants of each icon to represent different user states, such as active, inactive, hover, and clicked. This enhances user interaction and provides visual feedback. Use Figma's component and variant features to manage these states efficiently.

9. Review each icon for clarity, simplicity, and alignment with the brand's visual identity. Make any necessary refinements to ensure that the icons are visually appealing and easy to understand. Seek feedback from colleagues or the client if needed.

10. Export the icons in the necessary file formats, such as SVG or PNG, ensuring that they are optimized for both web and mobile use. Figma allows for easy export of assets at different resolutions, so make sure to provide icons at various sizes as needed.

11. Organize the final icons into folders based on their usage (e.g., navigation icons, action icons) and save the Figma file with clear labeling. This ensures easy access for future updates or iterations.

12. Share the finalized icon set with the client or development team through Figma's sharing features, or export and send the files via email or project management tools. Ensure that all icons are ready for implementation into the app or website design.

Task | Developing Holiday Card Templates

Description of the Task: Designing holiday card templates requires creativity and a strong understanding of seasonal trends. These templates should be versatile and customizable, allowing clients to add their personal touch while maintaining a professional and festive appearance. Well-designed holiday cards can strengthen client relationships and boost brand loyalty.

1. Begin by reviewing the project brief to determine the specific requirements for the holiday card templates, including the holiday theme, target audience, and any messaging guidelines. Ensure that you are familiar with the brand's visual identity, such as colors, fonts, and overall design aesthetic, so the templates align with the company's branding.

2. Conduct research on current design trends related to holiday cards. Look for inspiration from various design platforms, focusing on typography, color schemes, and layouts that resonate with the intended holiday theme. Bookmark or save design elements that could inspire your work.

3. Depending on the complexity of the design, select the software that best fits the project. Adobe InDesign or Illustrator is ideal for more intricate designs with detailed typography, while Canva or Figma can be used for quicker, template-based designs.

4. Create a new document in the chosen design software. Define the dimensions for the holiday card, considering whether it will be printed, digital, or both. Common sizes include A5, 5x7 inches, or square formats. Ensure that you also set the correct resolution (300 DPI for print) and include bleed margins if the card is intended for printing.

5. Develop a mood board or style guide that outlines the color palette, typography choices, and visual elements that will be used across the holiday card templates. This helps maintain consistency throughout the design process and ensures alignment with the brand's identity.

6. Begin by designing the card's basic layout. Divide the card into sections for imagery, messaging, and branding elements. Consider the placement of the company logo, holiday greetings, and any personalized elements. Use grid systems to ensure proper alignment and balance within the design.

7. Add holiday-themed visuals, such as illustrations, icons, or patterns that are relevant to the specific holiday being celebrated. These elements should enhance the design without overwhelming the message. Ensure that the visuals complement the brand's aesthetic and feel cohesive with the overall design.

8. Create different variations of the holiday card template to offer options for different clients or purposes. For example, develop versions with different color schemes, layouts, or messaging. This allows for greater flexibility and customization based on the recipient or platform.

9. Design the card template with editable text fields where personalized messages, greetings, or recipient names can be easily inserted. Ensure that the fonts used are consistent with the brand's typography guidelines and that the text remains legible and aesthetically pleasing.

10. Carefully review the holiday card templates for consistency, alignment, and visual appeal. Make any necessary adjustments to ensure that the design meets both the client's and the brand's standards. Seek feedback from team members or clients if needed and implement any requested changes.

11. Once the design is finalized, prepare the templates for export. Save the files in the required formats, such as PDF for print or PNG/JPEG for digital use. Ensure that the files are optimized for their intended platform, whether for high-quality print or online distribution.

12. Organize the final holiday card templates into clearly labeled folders, separating print and digital versions if applicable. Save the working files (e.g., .INDD, .AI, .PSD) and exported versions in a designated location for easy access and future updates.

13. Share the completed holiday card templates with the client or relevant stakeholders. Provide instructions or guidelines on how to customize the templates if necessary. Ensure that all files are delivered in the correct formats and ready for immediate use.

Task |Setting Up Email Newsletter Email/ Template on MailChimp

Description of the Task: Designing layouts that are both visually appealing and easy to read. The design should align with the brand's identity while ensuring that key messages are communicated effectively. Properly designed templates help increase engagement rates and ensure that newsletters stand out in crowded inboxes.

1. Access your Mailchimp account by logging in with your credentials. Ensure that you have the necessary permissions to create and manage email campaigns and templates.

2. From the Mailchimp dashboard, go to the "Campaigns" tab. This is where you can manage all your email campaigns and templates.

3. Click on the "Create Campaign" button and select "Email" from the options. Choose "Regular Email" if you're setting up a standard newsletter or "Automated" if you're configuring a recurring campaign.

4. In the campaign setup wizard, choose the "Design Email" option to start creating your newsletter template. You'll have the choice to either use a pre-designed template or build one from scratch.

5. Select a template layout that suits your newsletter's content and design requirements. Mailchimp offers various layouts such as "1 Column," "2 Columns," or "Basic," which can be customized to fit your needs.

6. Use Mailchimp's drag-and-drop editor to customize the template. Add and arrange blocks such as text, images, buttons, and social media links. Ensure that the design aligns with the branding guidelines, including the color scheme, typography, and overall aesthetic.

7. Insert your company's logo and use brand colors and fonts to ensure consistency with your visual identity. This includes adding header images, background colors, and any other brand-specific design elements.

8. Populate the newsletter template with relevant content. This may include news updates, promotional offers, articles, or event information. Ensure that the text is engaging and formatted correctly for readability.

9. Add clear and compelling call-to-action (CTA) buttons that guide recipients to take specific actions, such as visiting your website or making a purchase. Customize the button text and links to direct users to the appropriate landing pages.

10. Set up personalization features, such as using merge tags to insert recipient names or other personalized information. If applicable, configure dynamic content blocks to display different content based on recipient segments.

11. Use the "Preview" and "Test" features to review how the template looks on different devices and email clients. Send test emails to yourself or team members to check for formatting issues, broken links, and overall appearance.

12. Enter an engaging email subject line and preheader text that encourages recipients to open the newsletter. Ensure that these elements align with the content of the email and are optimized for open rates.

13. Complete the setup by configuring email settings, including the "From" name and email address, reply-to address, and tracking options. Make sure these settings comply with email marketing best practices and regulations.

14. Save the completed newsletter template and review it one final time for accuracy and design consistency. Make any necessary adjustments based on feedback or your own observations.

15. Once the template is finalized, decide whether to schedule the email for a specific date and time or send it immediately. Set up the delivery options according to your campaign strategy and audience preferences.

SALES

Task |Mapping Referrals

Description of the Task: Tracking and organizing client referrals to understand the network and flow of potential business leads. This task is crucial for identifying key sources of new clients, optimizing referral programs, and leveraging existing client relationships to generate more business in the graphic design industry.

1. Go to Pipedrive.com and log in to your account using your username and password. If you don't have an account, create one and set it up according to your business needs.

2. Once logged in, navigate to the "Contacts" section located in the main menu on the left side of the screen. From the drop-down menu, select "Organizations" to access the list of all organizations in your database.

3. To filter organizations, click on the filter icon or "Add Filter" button. Create a new filter by selecting the criteria "Organization Referral Source is not Empty." This filter will narrow down the list to only those organizations that have a referral source specified. Save this filter by giving it an appropriate name, such as "Organizations with Referral Sources."

4. With the filter applied, review the refined list to ensure it includes only relevant organizations. Then, click on the "Export" button usually found at the top right corner of the screen. Choose to export the results in XLS (Excel) format. Save the exported file to your computer by following the download prompts.

5. Locate the downloaded XLS file in your computer's Downloads folder or the designated download location. Open the file using Excel or any compatible spreadsheet software.

6. In the opened file, carefully review the data to ensure it is complete and accurate. Edit the file by deleting any unnecessary columns and retaining only the columns labeled "Organization - Status" and "Organization - Referral Source." Ensure the data in these columns is accurate and neatly organized. Save the edited file with a new name to avoid confusion with the original export.

7. Open Google Sheets by navigating to sheets.google.com and logging in with your Google account. Create a new spreadsheet and set up two separate sheets within this spreadsheet. On the first sheet, label the columns and create a column graph to display the referrals from all sources. On the second sheet, label the columns and create a column graph to show referral sources spe-

edited Excel file to populate these graphs.

8. Review the created graphs to ensure they accurately represent the data. Adjust the graph settings and data ranges as necessary to improve readability and clarity. Save the Google spreadsheet and share it with relevant stakeholders if required.

Task | Hunting for Potential Client Companies

Description of the Task: Researching and identifying businesses that could benefit from graphic design services. This includes analyzing industry trends, scouting for companies that align with the service offerings, and initiating contact to introduce the design services. It's vital for expanding the client base and securing new projects.

LinkedIn Sales Navigator

1. Go to LinkedIn Sales Navigator and log in with your LinkedIn credentials. If you don't have an account, you may need to sign up for a Sales Navigator subscription to access advanced search features.

2. Once logged in, locate the search bar at the top of the screen and click on it. A drop-down menu will appear; select "Lead filters" to access the advanced search options.

3. Use the various filter options to narrow down your search. These filters can include Places (location), Titles (job titles), Keywords (industry-specific terms), and other criteria relevant to your target market. For example, if you're targeting graphic design firms in New York, you might filter by location (New York) and industry (Graphic Design).

4. After configuring your filters, you have the option to save this search for future use. This can save you time by allowing you to quickly access the same set of criteria without having to re-enter the filters. Click on the "Save search" button and give it a descriptive name.

5. Review the search results and begin collecting relevant information. For each potential client company, copy details such as the company name, contact information, and relevant personnel. Paste this information into a Google Spreadsheet document, organizing it into columns for easy reference. Be sure to include columns for the company name, contact person, job title, email address, phone number, and any notes or additional details.

Google Search

1. Open your web browser and go to Google.

2. In the search bar, enter keywords related to the types of companies you are targeting. This might include specific locations, industries, or other relevant criteria. For example, you could search for "graphic design firms in New York" or "top marketing agencies in San Francisco."

3. Browse through the search results to find potential client companies that meet your criteria. Look for business directories, industry lists, and company websites that provide the information you need.

4. For each relevant company, copy the necessary details, such as the company name, contact information, and key personnel. Paste this information into the same Google Spreadsheet document you used for LinkedIn Sales Navigator data. Ensure the data is well-organized and consistent with the format you established earlier.

Task |Assisting with Designing Visual Proposals

Description of the Task: Creating visually appealing presentations that effectively communicate design ideas and solutions to potential clients. This task is essential for making a strong impression, showcasing the design capabilities, and increasing the chances of winning new projects in a competitive market.

1. Begin by reviewing the brief or project requirements provided by the client or design team.

2. Gather all the necessary assets for the proposal. This includes logos, images, fonts, color palettes, and any other branding materials. Ensure you have high-resolution versions of all graphics to maintain quality in the final proposal.

3. Draft a detailed outline for the visual proposal. Include sections such as an introduction, project goals, design concepts, timelines, budget estimates, and any other relevant information. This outline will serve as a roadmap for the design process.

4. Choose the right design software for creating the visual proposal. Tools like Adobe InDesign, Illustrator, or Canva are commonly used in the graphic design industry. Ensure you have access to the necessary software and are familiar with its features.

5. Create the layout and structure of the proposal document. Use grids and guides to ensure a clean and professional design. Start with a cover page that includes the project title, client name, and your company's branding.

6. Integrate visual elements such as images, infographics, charts, and icons to make the proposal engaging and visually appealing. Use these elements to highlight key points and break up large blocks of text.

7. Choose appropriate fonts and a color scheme that aligns with the client's branding and the overall theme of the proposal. Ensure consistency in font usage for headings, subheadings, and body text to maintain a cohesive look.

8. Add the content and copy into the proposal document, following the outline. Pay attention to formatting and alignment to ensure readability. Highlight important information using bold or italic text as necessary.

9. Carefully proofread the entire proposal to check for any spelling, grammar, or formatting errors. Ensure that all information is accurate and that the proposal flows logically from one section to the next.

10. Share the draft proposal with the design team for feedback. Incorporate any suggestions or changes they may have to enhance the overall quality and effectiveness of the proposal.

11. Once all revisions are made, finalize the design and export the proposal in the desired format, typically PDF. Ensure the file is optimized for both print and digital viewing.

12. Send the final visual proposal to the client via email or through a project management platform. Include a brief message summarizing the proposal and offering to discuss any questions or further details.

FINANCE

Task |Preparing Graphic Design Invoices

Description of the Task: Efficiently create and send invoices to clients for completed graphic design projects, detailing services rendered, costs, and payment terms. This ensures timely and accurate billing, maintaining transparent financial transactions and fostering trust with clients in the graphic design industry.

1. Ensure all client details, project specifications, and billing preferences are accurately recorded and up-to-date in your client management system or database.

2. Create comprehensive invoices that outline graphic design services provided. Include itemized descriptions of tasks completed, hours worked per task, rates applied, and any additional costs incurred (e.g., materials, revisions).

3. Send invoices promptly upon project completion or according to the agreed billing schedule. Ensure each invoice specifies clear payment terms, such as payment due date, accepted payment methods, and any late fees.

4. Record and track all issued invoices in your invoice management system or spreadsheet. Note the issue date, due date, invoice number, client details, and payment status (e.g., pending, paid).

5. Establish automated reminders for upcoming and overdue invoices to prompt timely payments from clients. Personalize reminders as needed to maintain a professional and respectful client relationship.

6. Upon receiving payments, verify the transaction details and update the invoice status in your tracking system to reflect payment receipt. Include payment method, date received, and any transaction references for accurate financial records.

7. Regularly reconcile invoices with bank statements or payment processor reports to ensure all payments are accurately recorded and deposited. Investigate any discrepancies promptly and rectify them as needed.

8. Address and resolve any invoice discrepancies or disputes with clients promptly and professionally. Communicate openly to clarify misunderstandings and agree on fair resolutions to maintain positive client relationships.

9. Generate regular reports on invoicing and payment statuses to monitor cash flow, track outstanding balances, and assess overall financial health. Use these insights to make informed decisions and adjustments as necessary.

10. Maintain organized digital and/or physical records of all invoices, payment receipts, and related correspondence for auditing purposes and future reference. Ensure documents are securely stored and easily accessible when needed.

Task | Tracking Design Project Expenses

Description of the Task: Monitor and record all costs incurred during graphic design projects, including materials, software licenses, and subcontractor fees. This meticulous tracking helps manage project budgets effectively, ensures profitability, and provides clarity on project expenses for accurate financial reporting and client billing.

1. Start by gathering all receipts, invoices, and documentation related to expenses incurred during the graphic design project. Verify each document for accuracy and relevance to the project.

2. Create detailed categories to classify expenses based on their nature and purpose. Common categories include:
   a. Software and Tools: Costs for design software licenses, plugins, and digital tools used.
   b. Materials: Expenses for printing materials, paper, ink, and other physical supplies.
   c. Services: Fees paid to subcontractors, freelancers, or consultants for specialized design tasks.
   d. Travel and Accommodation: Costs associated with travel for client meetings or project-related trips.
   e. Miscellaneous: Any other relevant expenses not covered by the above categories.

3. Use accounting software like QuickBooks, FreshBooks, or a custom spreadsheet to input each expense item. Include the following details for each entry:
   a. Date of expenditure
   b. Vendor or supplier name
   c. Description of the expense (e.g., specific service, item purchased)
   d. Amount spent
   e. Project allocation (if applicable, specify which design project the expense relates to)

4. Assign each expense to the appropriate design project or client account. This ensures accurate tracking of project-specific costs and helps in calculating project profitability.

5. Regularly compare tracked expenses against the project budget to assess financial health and project profitability. Identify any deviations early to take corrective actions if necessary.

6. Record the payment status for each expense item, indicating whether payments have been made, are pending, or overdue. Maintain clear records to manage cash flow effectively.

7. Create comprehensive expense reports on a weekly or monthly basis, summarizing expenditures by category and project. Include visual representations like charts or graphs to visualize spending trends.

8. Share updated expense reports with project managers, clients, or stakeholders to maintain transparency and alignment on financial matters. Discuss any budget adjustments or financial implications.

9. Conduct periodic audits of expense records to ensure accuracy and compliance with accounting standards. Reconcile expense entries with bank statements or payment receipts for verification.

Task | Following Up On Client Payments

Description of the Task: Proactively communicate with clients to ensure timely payment for completed graphic design services. Following up on invoices fosters healthy cash flow, reduces payment delays, and maintains positive client relationships by addressing any payment issues promptly and professionally in the graphic design industry.

1. Begin by reviewing the agreed-upon payment terms for each client project. This includes understanding due dates, payment methods accepted, and any late fees or penalties specified in the contract.

2. Use an invoice management system or spreadsheet to track the status of all invoices sent to clients. Note down the issue date, due date, and current payment status (e.g., pending, paid, overdue).

3. Send a polite and professional email or message reminding the client of the upcoming or overdue payment. Include specific details such as invoice number, amount due, and payment due date.

4. Follow Up with Phone Call:

5. If the initial reminder doesn't elicit a response, follow up with a courteous phone call to discuss the outstanding payment. Be prepared to discuss the project's progress and reiterate the importance of timely payments for maintaining project momentum.

6. If appropriate and feasible, offer alternative payment methods or installment plans to facilitate prompt payment from the client. Ensure any revised payment agreements are documented and agreed upon in writing.

7. If the client remains unresponsive or delays payment beyond the agreed terms, escalate the communication. This may involve contacting a designated accounts payable contact within the client's organization or seeking guidance from a supervisor or project manager.

8. Keep detailed records of all communication related to payment follow-ups, including emails, phone calls, and notes from discussions. This documentation serves as a reference in case of disputes or future inquiries.

9. If the client fails to respond to reminders and follow-ups, send a final notice indicating the consequences of non-payment, such as discontinuation of services or legal action. Ensure compliance with contractual terms and local regulations.

10. Once payment is received, promptly update the invoice status in your tracking system. Confirm receipt of payment with the client and acknowledge their cooperation.

11. Regularly assess the effectiveness of your payment follow-up procedures. Identify any recurring issues or delays and propose improvements to streamline the invoicing and payment collection process.

HUMAN RESOURCES

Task |Checking and Reporting Work Hours

Description of the Task: Tracking and documenting the time spent by team members on various design tasks. This process ensures accurate billing for clients based on billable hours and provides insights into project progress and resource utilization. By maintaining detailed records and generating comprehensive reports, it supports effective decision-making, enhances transparency in client interactions, and helps optimize team productivity.

1. Utilize a dedicated spreadsheet, such as Google Sheets or Excel, for tracking work hours. Ensure the spreadsheet is structured with columns for names, dates, hours worked, project/task details, and any notes.

2. Duplicate the previous day's cell template and rename it according to the current date. This maintains consistency and facilitates easy tracking of daily work hours.

3. Review the team calendar to identify any team members who were out of office (OOO) or had scheduled leave.
Adjust the time tracker accordingly by marking these hours appropriately in the spreadsheet.

4. Clear the previous day's numbers in column C of the spreadsheet to prepare for the updated data entry.

5. Log in to Harvest and navigate to the Reports section. Customize the date range to retrieve the hours logged by each team member for the previous working day.

6. Customize the report in Harvest to reflect the previous working day. Note down the hours worked by each team member as per the detailed report generated.

7. Copy the recorded hours from Harvest and paste them into the corresponding cells in the spreadsheet under each team member's name and date. Ensure accuracy and consistency in data entry.

8. Compile the updated spreadsheet with all the day's tracked hours and send it via email to stakeholders. Include any necessary notes or highlights regarding exceptional hours or OOO adjustments.

Task |Updating Company Attendance Sheet

Description of the Task: Maintaining a systematic record of team members' work hours, leave schedules, and absences within a graphic design studio. This task is essential for managing resource allocation, project timelines, and team availability. By keeping the attendance sheet current and accurate, it enables efficient scheduling of design projects, ensures adequate staffing levels, and facilitates seamless collaboration among team members.

1. Log in to the company's shared drive or cloud-based platform where the attendance sheet is stored. Ensure access permissions are up-to-date.

2. Check the previous day's attendance records to identify any updates or changes needed. Verify entries for accuracy, including start times, end times, and any notes regarding absences or partial days.

3. Navigate to the current day's section in the attendance sheet. Input attendance details for all team members, including designers, project managers, and other staff as per the established format.

4. Refer to the team calendar or communication channels to note any Out of Office (OOO) notifications or planned leave for the day. Make necessary adjustments to reflect these statuses accurately in the attendance sheet.

5. Reach out to team members who haven't updated their attendance or need clarification on their recorded hours. Use Slack, email, or project management tools to gather missing information promptly.

6. Verify that all entries comply with company attendance policies and procedures. Double-check for any discrepancies or inconsistencies in time entries and resolve them promptly.

7. Once all entries are reviewed and updated, save the changes to the attendance sheet. If required, share a summary or report with relevant stakeholders, such as HR managers or project leads.

8. Ensure the attendance sheet is handled securely and confidentially, respecting privacy guidelines and data protection regulations. Use encrypted platforms if necessary to maintain data integrity.

9. Keep a record of any updates made to the attendance sheet and note down any feedback or issues encountered during the update process. This helps in improving future attendance tracking procedures.

10. Monitor responses from team members regarding attendance updates and follow up on any pending actions or inquiries. Keep communication channels open to address any further adjustments or queries.

Task |Sourcing Freelance Graphic Designers

Description of the Task: Identifying and recruiting talented individuals with specialized skills in graphic design to supplement in-house capabilities or meet project demands. This task involves conducting thorough searches across online platforms, reviewing portfolios, and assessing candidates based on their proficiency in design software, creativity, and industry experience.

1. Meet with stakeholders to understand specific project needs, including design styles, software proficiency (e.g., Adobe Creative Suite), and project timelines.

2. Explore freelance platforms such as Upwork, Fiverr, and Behance, as well as industry-specific communities like Dribbble or LinkedIn groups for graphic designers.

3. Draft compelling job postings that outline project details, required skills, and expectations. Highlight key aspects such as branding expertise, illustration skills, and experience in specific industries (e.g., tech, fashion).

4. Publish job ads on selected platforms with optimized keywords. Actively reach out to potential candidates through direct messages or invitations to apply, emphasizing the unique aspects of the project.

5. Evaluate portfolios and profiles of interested candidates to assess their creative capabilities, previous work, client testimonials, and adherence to project specifications.

6. Conduct initial screenings through video calls or messaging to gauge communication skills, responsiveness, and alignment with project goals. Discuss project scope, timelines, and rates.

7. Verify references and client feedback on past projects to ensure reliability, professionalism, and quality of work. Look for consistency in meeting deadlines and client satisfaction.

8. Negotiate contract terms, rates, and deliverables with selected candidates. Clarify payment schedules, revision policies, and intellectual property rights to align expectations.

9. Assist in the onboarding process by sharing project details, providing access to necessary tools or platforms, and introducing the freelancer to key team members or collaborators.

10. Foster ongoing communication throughout the project lifecycle. Address any concerns or modifications promptly and facilitate feedback between the designer and stakeholders.

11. Maintain organized records of agreements, invoices, and project milestones. Use project management tools like Asana or Trello to track progress and ensure timely deliverables.

12. Gather feedback from stakeholders on the designer's performance, creativity, and adherence to project goals. Document lessons learned for future sourcing activities.

Task |Assisting With Onboarding New Creative Team Members

Description of the Task: Preparing and facilitating the integration of talented professionals into the graphic design studio. This comprehensive process includes coordinating orientation sessions, providing necessary resources and tools, introducing team members to studio workflows and project methodologies, and offering ongoing support to foster a smooth transition.

1. Gather comprehensive onboarding materials including welcome kits, company culture guides, employee handbooks, and digital copies of relevant policies and procedures. Ensure access to necessary software tools like Adobe Creative Suite, Sketch, or Canva.

2. Schedule virtual orientation sessions and meetings with key stakeholders such as project managers, senior designers, and IT support. Coordinate the setup of virtual meetings and ensure all necessary technology, like video conferencing tools, is tested and operational.

3. Arrange virtual introductions with team members through video calls or team messaging platforms like Slack.

4. Curate and distribute training resources tailored to the new team member's role and proficiency level in graphic design.

5. Assist in setting up digital workspaces, including email accounts, access permissions to project management tools and shared file repositories. Ensure new team members have access to design assets, templates, and branding guidelines necessary for project execution.

6. Conduct detailed reviews of current project briefs, client expectations, and ongoing projects with the new team member. Clarify deliverables, timelines, design aesthetics, and quality standards expected within the graphic design services industry.

7. Guide new team members through the completion of essential paperwork such as employment contracts, non-disclosure agreements (NDAs), and confidentiality agreements.

8. Serve as a primary point of contact for new team members, addressing questions, concerns, and technical issues promptly during the onboarding process. Offer proactive support and troubleshooting assistance to ensure new team members feel supported and integrated into the creative team.

9. Encourage participation in team meetings, brainstorming sessions, and design reviews to foster collaboration, creativity, and knowledge sharing among team members. Facilitate introductions to team members who collaborate closely on projects to promote a seamless integration into project teams.

10. Document insights, challenges, and recommendations gathered throughout the onboarding process to improve future onboarding experiences. Share lessons learned with HR and team leaders to refine onboarding procedures, enhance team integration, and support long-term retention of creative team members.

ADMINISTRATIVE

Task |Downloading and Saving Zoom Recordings of Ongoing Projects

Description of the Task: Capturing and archiving Zoom recordings of design project meetings and reviews. It ensures that critical project discussions and feedback are securely stored for reference, facilitating transparency, accountability, and continuity throughout the project lifecycle. By preserving these recordings, teams can revisit discussions, and clarify requirements.

1. Begin by logging into your Zoom account and navigating to the recordings section at https://us02web.zoom.us/recording. Ensure you have the necessary permissions to access and download recordings for ongoing projects.

2. Identify and download all relevant Zoom recordings associated with ongoing design projects. These recordings typically include brainstorming sessions, client meetings, design reviews, and any other project-related discussions captured on Zoom. Download each recording in MP4 format to maintain compatibility and quality.

3. Once downloaded, open your Google Drive account where project materials and assets are centrally stored for team access and collaboration.

4. Within Google Drive's "Shared Files" or designated project folder structure, find the specific directory labeled "Active Projects" or a similar organizational category where current project materials are stored.

5. If not already established, create a dedicated folder named "Recordings" within the project directory. This folder serves as a repository specifically for storing all Zoom recordings associated with ongoing design projects.

6. Transfer the downloaded MP4 files from your computer to the newly created "Recordings" folder in Google Drive. Ensure each file is named descriptively to reflect the project name, date, and possibly the meeting or session topic for easy identification by team members.

7. Upon uploading, organize the recordings within the "Recordings" folder by categorizing them according to project name or date. Use clear labeling conventions to enhance searchability and ease of access for team members who may need to review or reference specific sessions.

8. Double-check that all recordings are successfully uploaded and accessible within Google Drive. Verify permissions to ensure that designated team members can view and download the recordings as needed for ongoing project collaboration.

9. Once confirmed that recordings are securely stored on Google Drive, delete the local MP4 files from your computer to free up storage space. Ensure this deletion does not impact the availability or accessibility of recordings for project continuity and future reference.

Task |Organizing Photos and Other Digital Assets

Description of the Task: Categorizing assets according to project, client, or thematic criteria, ensuring easy access, version control, and reuse. Organized assets streamline collaboration among creative teams, expedite project iterations, and uphold brand consistency across various design deliverables, enhancing overall project quality and client perception.

1. Begin by reviewing the existing inventory of photos, graphics, illustrations, and other digital assets stored across various platforms such as Google Drive, Dropbox, or internal servers.

2. Establish a standardized folder structure within the designated storage platform (e.g., Google Drive) to categorize digital assets. Create main folders based on asset types (e.g., Photos, Graphics, Icons) and subfolders for specific projects or clients.

3. Organize files by sorting them into appropriate folders based on their type, project, or relevance. Rename files using descriptive and consistent naming conventions that include project names, dates, and content types to facilitate easy retrieval and identification.

4. Implement metadata and tagging systems to enhance searchability. Add relevant keywords, project names, and descriptions to each file to enable quick retrieval through search functions within the storage platform.

5. Scan through the digital asset repository to identify and eliminate duplicate files. Retain the highest-quality version and delete redundant copies to streamline storage and avoid confusion.

6. Ensure all organized digital assets are securely backed up to prevent data loss. Set permissions and access controls to restrict or grant permissions based on team roles and project needs, ensuring data security and confidentiality.

7. Maintain version control for iterative design files and assets. Use naming conventions or folder structures (e.g., "Final," "Drafts," "Revisions") to distinguish between different versions and iterations of design assets.

8. Facilitate seamless collaboration by sharing organized folders with team members and clients as needed. Provide clear instructions on folder structures and access permissions to ensure everyone can locate and use assets effectively.

9. Schedule regular reviews and updates of the digital asset organization to accommodate new projects, updated assets, or evolving client needs. Keep the system current and organized to support ongoing design projects efficiently.

10. Document the organizational structure and guidelines for managing digital assets. Provide training or guidelines to new team members or clients on how to navigate and utilize the organized asset repository effectively.

Task |Managing Design Project Emails

Description of the Task: Organizing, prioritizing, and responding to client communications, internal discussions, and project-related inquiries. This task ensures timely follow-up on client feedback, clear communication of project milestones, and resolution of any issues that arise. Effective email management fosters strong client relationships, minimizes misunderstandings, and promotes a cohesive workflow among team members.

1. Begin by setting up email folders or labels within the designated email client (e.g., Gmail, Outlook) to categorize design project-related emails. Create folders such as "Client Correspondence," "Project Updates," "Feedback & Revisions," and "Completed Projects." Regularly check the inbox for new emails related to ongoing design projects. Prioritize emails based on urgency, client importance, or project deadlines.

2. Develop a standardized email response template or guidelines for common inquiries, such as project status updates, timeline queries, or feedback requests. Customize responses as needed to maintain a professional and client-centric communication approach.

3. Monitor and respond promptly to client emails regarding project progress, revisions, or queries. Ensure all client communications reflect a proactive and solution-oriented approach to maintain client satisfaction.

4. Collaborate with internal design team members or project managers via email to discuss project updates, task assignments, and deadlines. Keep team members informed of client feedback, design revisions, and any project-related issues that require attention.

5. Attach relevant project files, design drafts, or documents to email communications as needed. Ensure files are labeled clearly and appropriately to facilitate easy identification and retrieval.

6. Use email scheduling features or task management tools to schedule follow-up emails for pending client approvals, feedback responses, or milestone notifications. Set reminders to ensure timely follow-ups on outstanding tasks or client queries.

7. Archive completed project-related emails and attachments in designated folders or cloud storage solutions (e.g., Google Drive, Dropbox) for future reference and auditing purposes. Maintain organized records of email correspondence for each project to facilitate project reviews or client inquiries.

8. Adhere to data protection policies and client confidentiality agreements when handling sensitive project information via email. Ensure secure transmission of files and information to protect client assets and maintain trust.

9. Regularly review email management processes and procedures to identify areas for improvement. Seek feedback from team members and clients to optimize communication workflows and enhance overall project efficiency.

Task |Scheduling Creative Team Calendars

Description of the Task: Coordinating and maintaining the schedules of creative team members to optimize productivity and resource allocation. It includes scheduling meetings, design reviews, and project milestones, ensuring that team members are aligned with project timelines and client deliverables.

1. Begin by reviewing the creative team's existing calendars or scheduling tools (e.g., Google Calendar, Outlook) to assess current and upcoming project timelines, meetings, and deadlines.

2. Prioritize scheduling based on project deadlines, client meetings, design reviews, and team availability. Identify critical milestones or deliverables that require immediate attention.

3. Collaborate closely with project managers or team leads to gather updated project schedules, task assignments, and any changes in project timelines. Ensure alignment with overall project goals and client expectations.

4. Schedule client meetings, design presentations, and feedback sessions according to agreed-upon timelines and availability of key stakeholders. Coordinate meeting invitations and confirmations to ensure smooth communication flow.

5. Arrange internal team meetings, brainstorming sessions, and creative reviews to foster collaboration and idea sharing among team members. Allocate sufficient time for discussions, feedback, and decision-making processes.

6. Allocate resources such as design tools, software licenses, and equipment based on scheduled project timelines and team requirements. Ensure resources are available and accessible to support ongoing design tasks and project deliverables.

7. Reserve physical meeting rooms or virtual meeting platforms (e.g., Zoom, Microsoft Teams) for scheduled meetings and collaborative sessions. Verify availability and technical requirements to facilitate seamless virtual interactions.

8. Integrate project milestones, deadlines, and meeting schedules into the creative team's shared calendar or scheduling software. Ensure all team members have access to updated calendars and are notified of any changes or additions.

9. Set up reminders and notifications for upcoming meetings, deadlines, and project milestones. Configure notifications based on individual team members' preferences to ensure timely attendance and preparation.

10. Document scheduled meetings, action items, and decisions made during team meetings or client sessions. Follow up with meeting summaries, task assignments, and next steps to maintain project momentum and accountability.

Task | Communicating with Clients

Description of the Task: Regular client interactions via email, phone calls, or video meetings to discuss project progress, gather feedback, and ensure alignment with client expectations. By maintaining open communication channels, addressing client concerns promptly, and providing exceptional service, this task fosters trust, enhances client satisfaction, and promotes long-term partnerships with clients.

1. Initiate contact with clients via email or phone to introduce yourself and establish rapport. Use a professional tone and mention your role as a VA supporting their graphic design projects.

2. Schedule meetings or calls to gather project requirements, design preferences, and expectations from the client. Take detailed notes to ensure all client specifications are accurately documented.

3. Assist in preparing and presenting design proposals to clients, highlighting creative concepts, project scope, and timelines. Coordinate with the design team to ensure proposals align with client objectives and budget constraints.

4. Regularly update clients on project progress, milestones achieved, and any challenges encountered. Use project management tools like Asana or Trello to share updates and seek client feedback on design iterations.

5. Collect client feedback on design drafts and revisions. Consolidate feedback into actionable items for the design team, ensuring client preferences are incorporated while maintaining design integrity.

6. Coordinate with clients to set realistic project timelines and deadlines. Monitor project milestones and proactively communicate any delays or adjustments to ensure client expectations are managed effectively.

7. Facilitate design reviews and approvals between clients and the design team. Ensure all deliverables meet client specifications, branding guidelines, and quality standards before finalizing designs for production or publication.

8. Address client queries, concerns, or issues promptly and professionally. Serve as a liaison between clients and the design team to resolve any misunderstandings or discrepancies that may arise during the project lifecycle.

9. Coordinate final delivery of design assets or completed projects to clients. Conduct post-project reviews to gather client feedback and testimonials, ensuring client satisfaction and identifying areas for improvement.

10. Cultivate long-term client relationships by providing exceptional service, anticipating client needs, and offering proactive solutions. Maintain regular communication to nurture trust and loyalty, positioning the graphic design team as a trusted partner in the client's branding and marketing initiatives.