Production Best Practices

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Pre-Production

→ Application setup
- ◆ Grid Systems
- ◆ Toolbars & Panels
- ◆ Units
- ◆ "Work smarter…"
- ◆ Workspaces

→ Asset management
- ◆ Asset Libraries
- ◆ Folders
- ◆ Naming Conventions
- ◆ Repositories
- ◆ Symbols
- ◆ Templates

→ Project Kickoff
- ◆ Briefs
- ◆ Scope

→ Specs

Production

Post-Production

➔ Archiving

➔ Project Post-Mortem

Pre-Production

Application Setup

Grid Systems

Acquire or create grid systems.

Establish a specific grid system
for development or layout.

➜ Columns (digital / print)

➜ Baseline measurements for coding

➜ Margins (digital / print)

➜ Safe title areas for video

Toolbars & Panels

Find the right tool for the job. Know what's available to accomplish tasks.

➔ Access and change information quickly via Panels. Take tutorials through the application or search to pinpoint the best way to utilize features.

➔ Change visual settings or remove to declutter your workspace.

➔ Customize toolbars for access to commonly used tools.
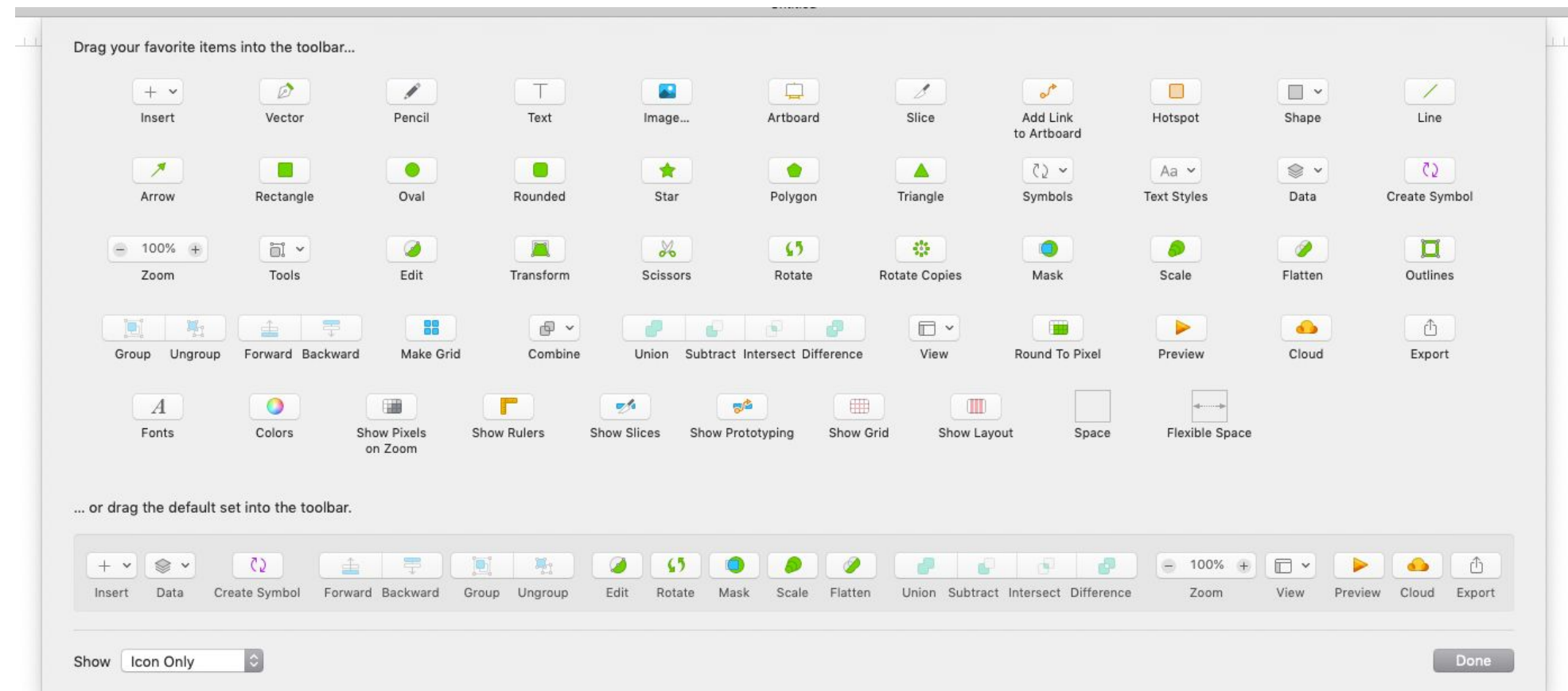
Units

Dots, frames, inches, millimeters, picas, points, pixels, seconds, etc.

Be aware of typical media dimensions. Be aware of how those dimensions have different aspect ratios and densities across differing types of media and platforms.
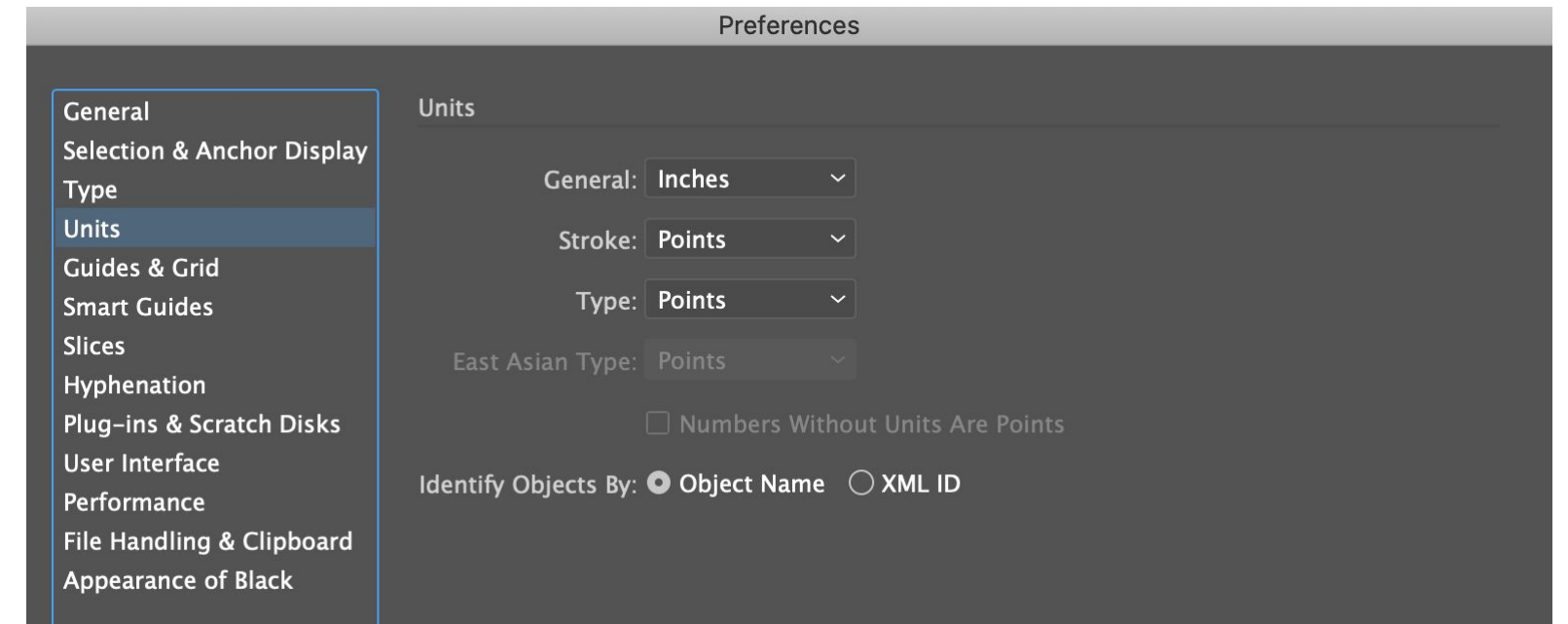
Work smarter, not harder 1

Use *keyboard shortcuts* to reduce time on peripherals and executing application functionality.

➜ Change shortcuts to suit your operating needs.

➜ Create custom application shortcuts within your application and/or operating system, if possible.

➜ Use different peripherals to enhance application usage, i.e. Wacom tablets, keyboards, multi-button mice and/or control panels.

➜ Utilize the default shortcuts in your application.

Work smarter, not harder 2

Set up application *preferences* according to you and your project's needs.

➔ Check modes, previews and export rendering.
➔ Configure the UI for better accessibility.
➔ Review tools and functions after software updates or breaks between usage.
➔ Set units, dimensions, formats according to specs.
➔ Test interactions between collaborative work and/or software.

See next slide for another suggestion.
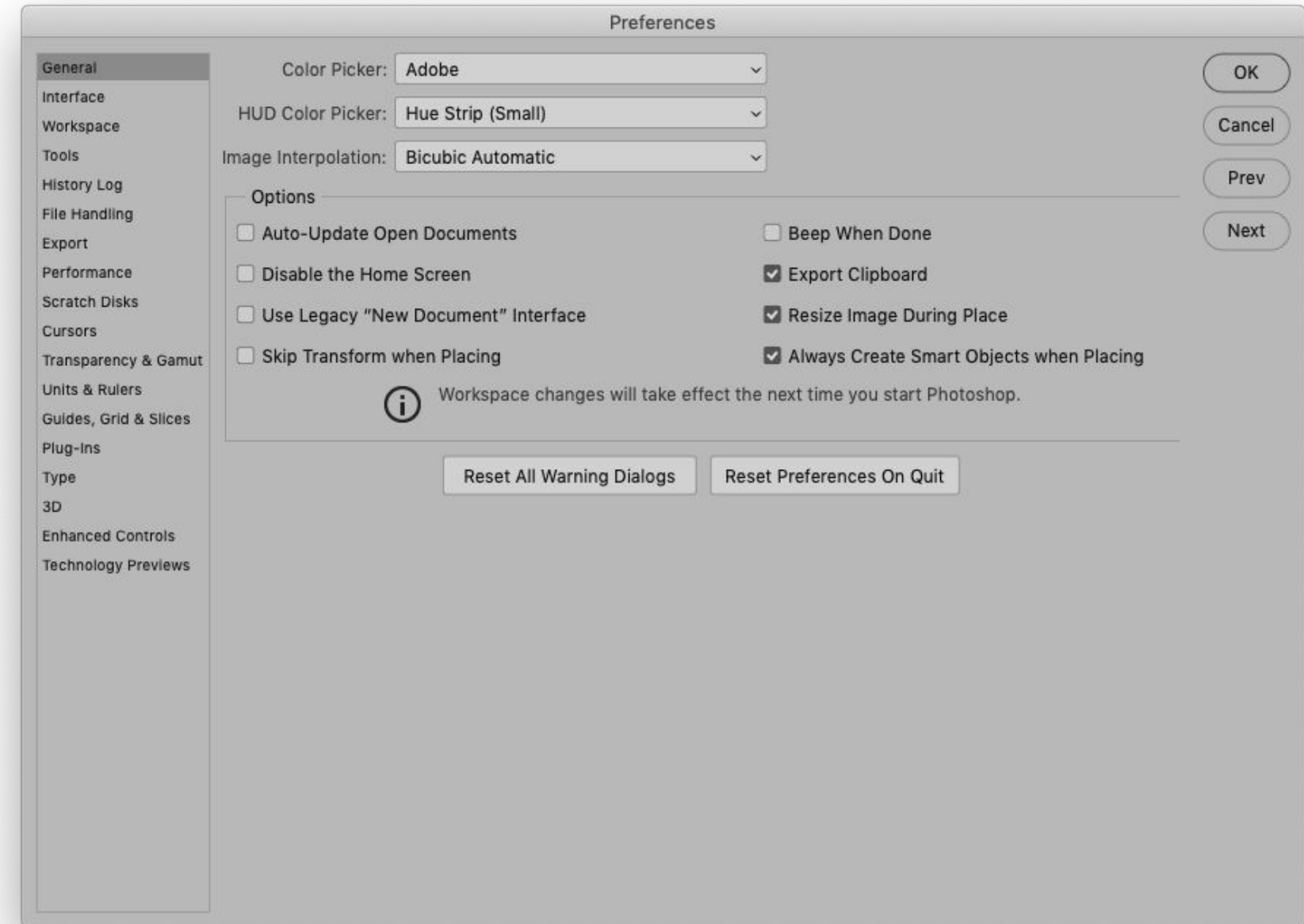
Work smarter, not harder 3

Enable or create *rulers* for alignment and guides.

When a ruler feature in a design application is unavailable, create a ruler using another shape or content box element.

Work smarter, not harder 4

Create reusable elements in applications that support them. Review assets or current source files for objects that are used across deliverables.

→ Buttons
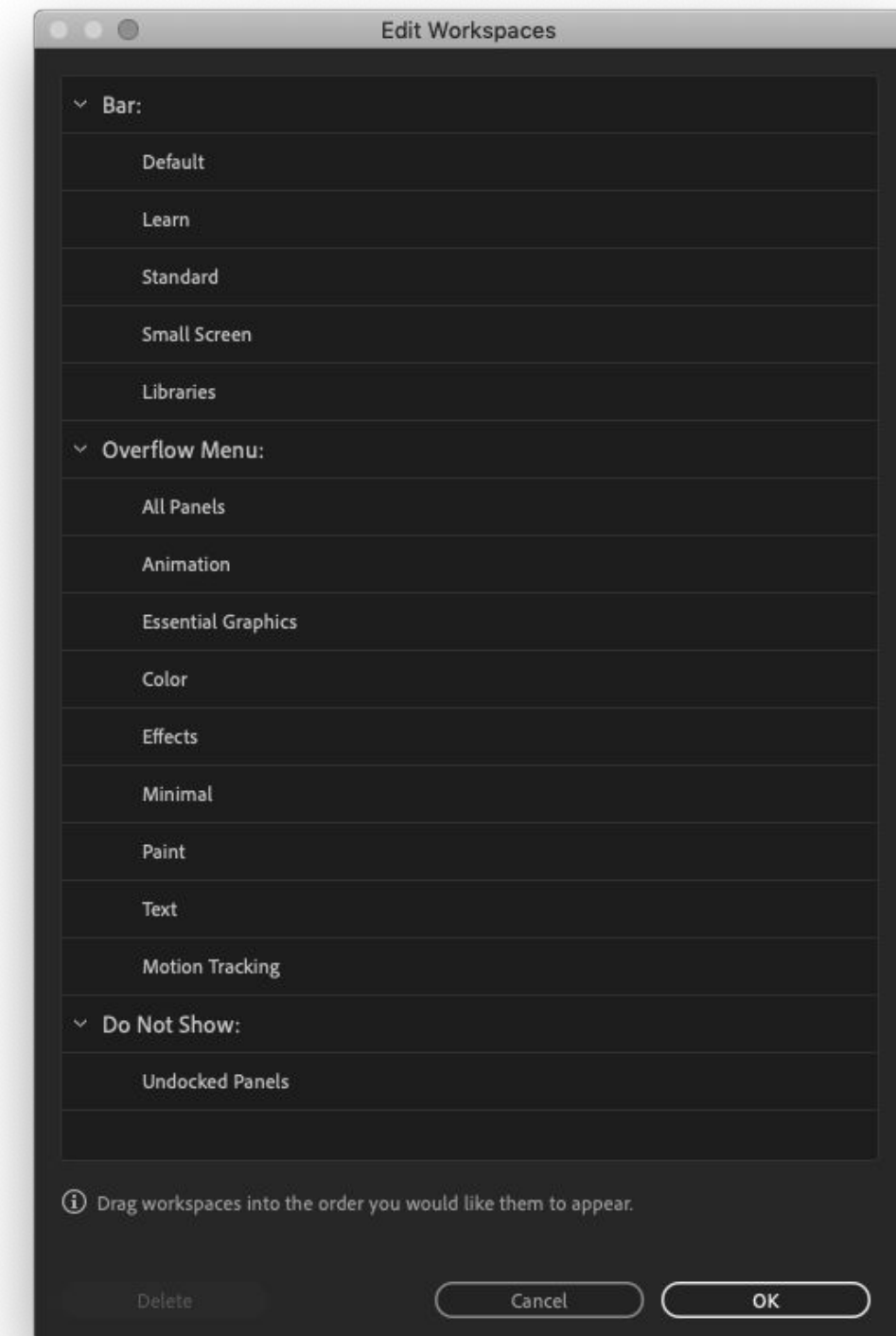→ Headers & footers
→ Icons
→ Illustrations
→ Lists
→ Logos
→ Paragraph styles
→ Photography
→ Type styles

Workspaces

Optimize workspaces to focus on specific tasks,

if an application has them.

Customize the application UI and functions for quick

information access and execution of commands via:

➔ Information panels
➔ Keyboard shortcuts
➔ Menus
➔ Rulers
➔ Toolbars
➔ Units

Asset Management

Asset Libraries

Gain efficiencies by creating or utilizing asset libraries for a specific brand, client or campaign. Store common assets for use across multiple projects and by team members.

➔ Consolidation of assets

➔ Design systems, used across an entire organization or brand

➔ Modularity

➔ Time-saving

Folders 1

Adhering to established *folder structures* helps everyone.

Folders help to separate assets, working files, documents and deliverables so team members can discern which files are archived, in progress, or approved and ready for use.

Folder structure naming conventions should not be personalized or customized to fit a certain project's needs. Please help to maintain a clean and understood-by-all file structure for everyone's benefit.

Folders 2

Consider maintaining *file hygiene* by separating the following into subfolders:

→ Archive
  ◆ Date created / modified
  ◆ Rounds / version

→ Assets
  ◆ Approved for use
  ◆ FPO swipe and working support files
  ◆ Reference

→ Output / exports
  ◆ By application / file type
  ◆ For developers
  ◆ Media

→ Source files
  ◆ By application / file type

Naming Conventions 1

Utilize or create a project's *naming conventions* to keep files, folders and objects within them organized and associated with each other.

Establish the hierarchy in the naming scheme and follow that throughout by renaming all of the files and sharing the schema with the team. Create a template for assisting with asset naming.

Consider the operating system and developer usage, then use underscores or hyphens instead of spaces as necessary.

Naming Conventions 2

Naming conventions should also apply to layers and objects within *applications*.

Always name layers, groups and folders.

➔ Include client name, job numbers, rounds/versions, dates, if relevant
➔ Try to limit character length to reduce typing errors
➔ Use lower case letters and avoid special characters

Unnamed layers and groups lead to confusion during file handoff.

Review naming consistency throughout a project.

Naming Conventions 3

Artboards

deliverabletype_name_version(_date_designer initials)

Filenames

project#_name_version(_date_designer initials)

Layers, Slices (in Sketch)

language abbrev_program_page name_DT or MB > Example: en_CA_YTA_report intro_DT

For Slices: Use Layer name; add # at end > Example: en_CA_YTA_report intro_DT1

Pages, Sections

project#_name_round#

Repositories

Create and maintain repositories to store completed projects, iterative assets, artwork / photography, etc.

➔   Store versions and deliverables for review (in asset management databases or documents).

➔   Use as a reference for future projects.

Templates

Create and utilize templates for reproduction of recurring deliverables.

Using established templates can ensure consistency of look and feel, and most importantly, bring brand integrity to a multitude of files.

As well, templates can save you time and help you avoid making mistakes by having to recreate commonly used elements within the project structure.

Project Kickoff

Briefs

Examine project briefs to understand purpose, creative direction, schedule, budget and scope.

Project briefs contain details of an upcoming project. They guide the workflow of the project inform design decisions. Briefs include the following information:

➜ Creative direction
➜ Deadlines
➜ Deliverables details
➜ Priorities
➜ Purpose of project
➜ Timeline

Changes to the brief and scope are best made as early as possible.

Scope 1

What is "scope"?

Scope is simply all the work that needs to be done in order to achieve a project's objectives. A project's scope should be clear and defined. Collaborate on review and finalization of the project brief prior to starting projects. *Remember: Good decisions start with good information.*

Consider how evolving impacts of schedule, execution timing and formats for assets and deliverables can (and often do!) change project expectations.

Strategize around how to most efficiently achieve the best possible results with the least amount of misdirected time.

Scope 2

Things to consider:

Be aware of the current scope of a project, and potential risk factors which may affect it.

➔ Budget / Estimated hours
➔ Deliverables
➔ Limitations (aspects not to be included in client-facing materials)
➔ Objectives / Goals
➔ Phases
➔ Resources
➔ Schedule
➔ Tasks

Scope 3

Managing project scope:

➔ Beware of and prepare for scope creep (when project requirements slowly increase); this indicates there are required tasks that were not budgeted for.

➔ Keep track of allocated hours and deadlines vs. deliverable requests; if these relationships become unbalanced, they must be addressed immediately.

➔ Keep track of documents related to projects, *i.e. status sheets, hot sheets, deliverable matrixes, schedules, copy decks, references, current working files*.

➔ Maintain contact with stakeholders, account managers and operations managers to discuss timing and budget issues, as well as for timely approvals on project changes.

➔ When change in scope happens: The budget, priorities and creative direction can also change. Coordinate with relevant teams to reassess scheduling allocations and budget, and to figure out which tasks have priority moving forward.

Scope 4

Time estimates are a VERY important part of a project's scope.

Estimate time needed and compare that to what has been allocated based on a project's scope, as well as with previous experience with similar jobs. Communicate with account and project managers if a project's scope and allocations don't align. Do this early do everybody saves time and keeps a project on point.

➜ Break down projects into milestones and tasks
➜ Gather / analyze stakeholder and personnel info for change insights
➜ Refer to timing from previous projects and/or experience as guidance for current work
➜ Understand deliverables
➜ Create a time estimation calculator

Specs

Specs

Gather specs and assets as early as possible. Review them for accuracy and quality in correlation to the deliverables.
Create a document or matrix to track specs and verify with client and teams.

➔ Accessibility
➔ Devices
➔ Dimensions
➔ Duration
➔ File formats
➔ Localization regions / languages
➔ Naming conventions
➔ Operating systems
➔ Resolutions

Production

Automation

Actions & Macros

Utilize actions and macros for common and/or repetitive tasks.

Create actions and macros for a series of tasks that can be applied to a batch of files.

➔ Applying filters and effects

➔ File format export

➔ Image transformation

➔ Document, layer, or object manipulation

Plug-ins / Add-ons / Extensions

Use plug-ins to enhance an application's functionality.

Consider using plug-ins that increase productivity, especially in:

➜ Converting formats
➜ Generating code
➜ Image / Text processing
➜ Modifying layouts, i.e. Smart Layout functions within Sketch
➜ Renaming files or document elements
➜ Swapping assets

Be aware that plug-ins aren't always installed, nor are they compatible with different application versions or platforms.

Scripting

Consider using scripts for simple, powerful, repetitive tasks.

Scripts execute more quickly, and can be customized with more variables than an application's actions or macros.

Scripts are useful for:

➔ Automating labor-intensive tasks
➔ Batch image processing
➔ Custom motion graphics
➔ Generating illustrations, outlines, paths, vectors

Document Setup

Artboards

Construct artboards according to the specs
of your deliverables.

Artboards in applications are like paper artboards that
represent printable areas, as well as allowing for objects
outside of the artboards to be easily accessible.

In digital production: guidelines, reference assets and
specs can live outside the artboard, providing information
to other project members.

Apple Devices

IPHONE

	iPhone 8	375×667
	iPhone 8 Plus	414×736
	iPhone SE	320×568
	iPhone XS	375×812
	iPhone XR	414×896
	iPhone XS Max	414×896

IPAD

	iPad	768×1024
	10.5" iPad Pro	834×1112
	11" iPad Pro	834×1194
	12.9" iPad Pro	1024×1366

APPLE WATCH

	Apple Watch 38mm	136×170
	Apple Watch 40mm	162×197
	Apple Watch 42mm	156×195
	Apple Watch 44mm	184×224

APPLE TV

	Apple TV	1920×1080

MAC

	Touch Bar	1085×30

Base Styles

Character, layout and paragraph styles increase productivity.

Create or utilize base styles to quickly format and edit elements across artboards and documents.
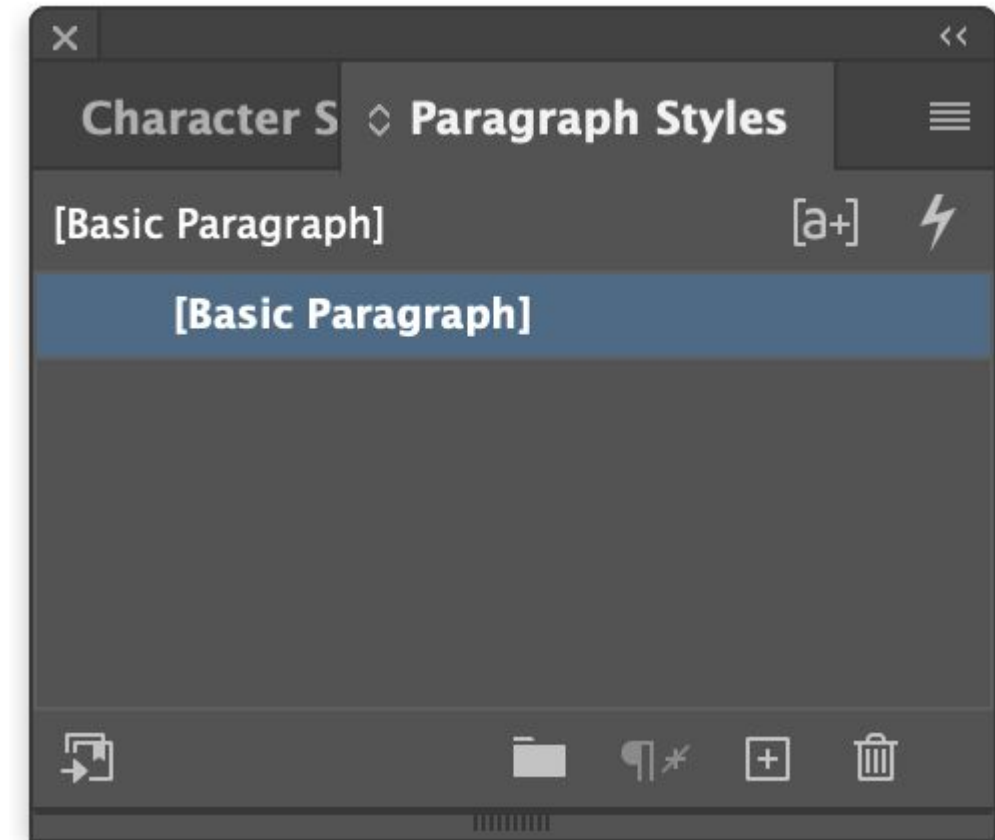
Color

Properly set up colors for all forms of relevant media.

When it comes to color, seek out and consult with established style guides and brand colors. Do not rely upon unconfirmed information from online and/or personnel sources. Due diligence in this area is particularly encouraged.

Acquire palettes, and swatches, or create a document track project color values:

➔   CMYK Coated and Uncoated

➔   Hexadecimal

➔   PMS Coated and Uncoated

➔   RGB

Dimensions

Set units, aspect ratio, frame rate, margins, columns, bleed.
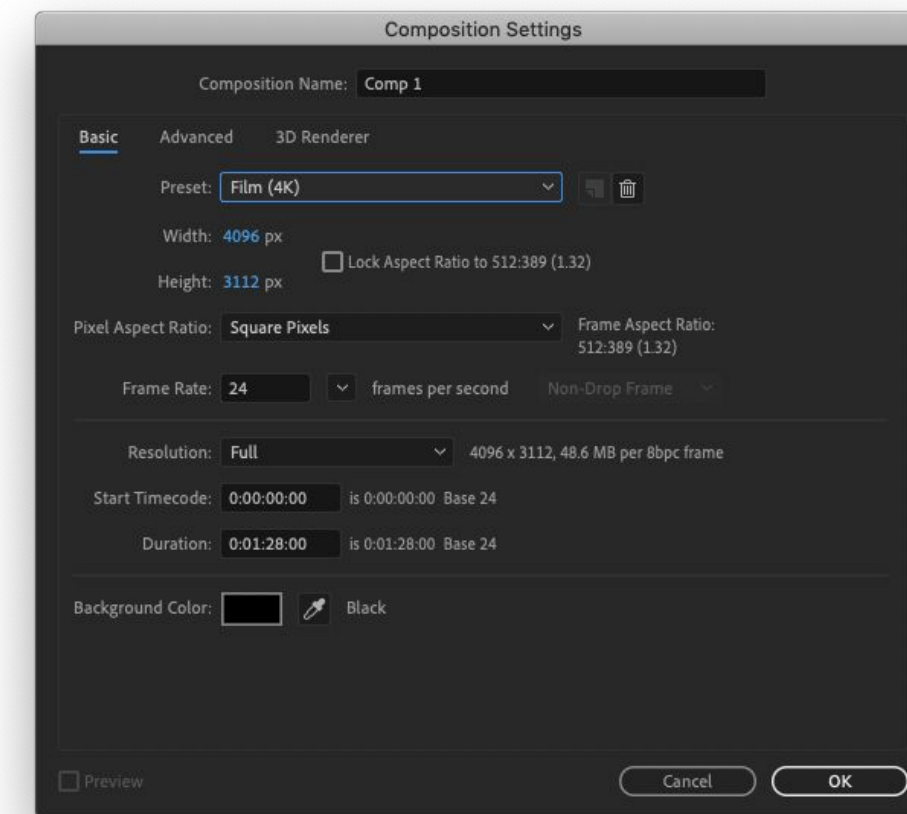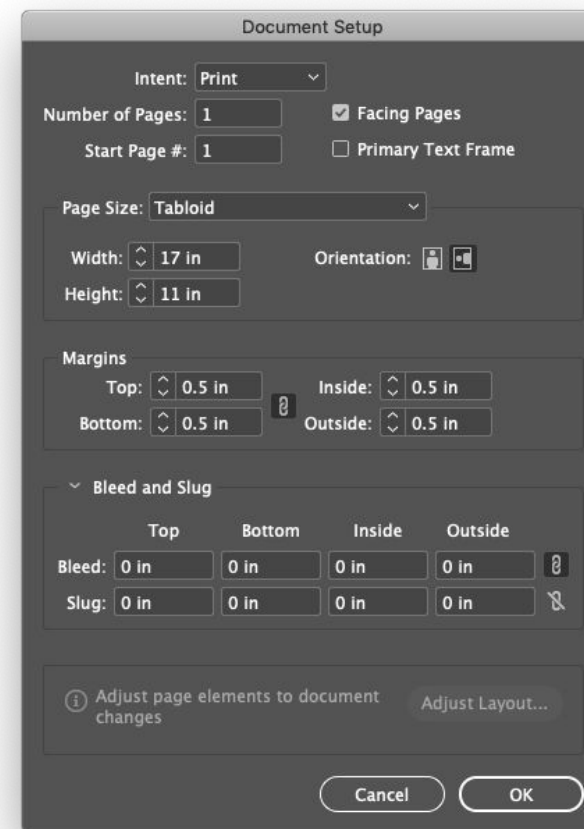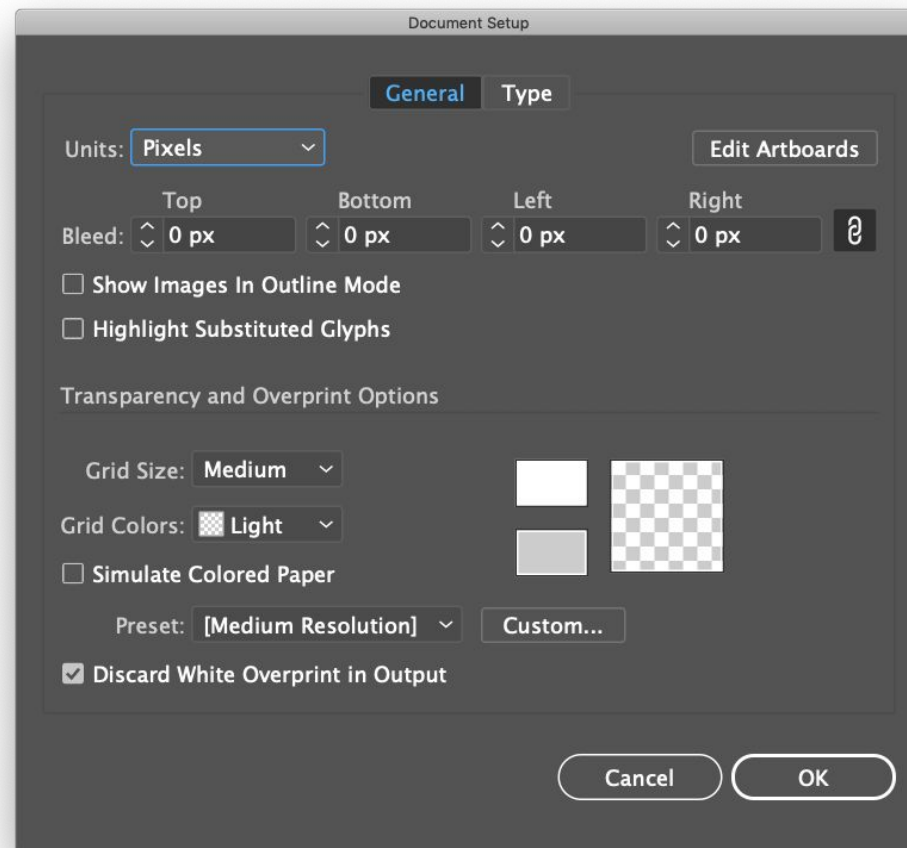
Fonts

Acquire the correct version of a font, and/or choose a suitable backup or version.

Collect, store and share fonts for projects as usage allows.

Font usage needs to be done legally, i.e. using a client's proprietary font family (created by them or licensed by the client for global use) or something purchased. Accessing clients' brand guidelines can lead you to approved fonts available for download. If a design employs a font that's not a verified part of a client's font library, reach out to properly license the font.

For accessibility and localization in digital projects, consider specifying backup fonts.

Layers

Organize layers from top to bottom.

Layer organization is critical for understanding visual arrangement and masks.

Layer hygiene also helps when files are handed off to developers and vendors.

Grouping layers can also help with overall file hygiene. You can group layers by:

➔ Module name
➔ Placement / location in a layout
➔ Type of / similarity in content, i.e. complex vector illustrations, related bitmap images

Ruler origin

Set ruler origins to absolute zero, or aligned with your current canvas/artboard.

Coordinates are easier to calculate, set and understand when the origin starts at (0,0). Negative offset coordinates sometimes pose problems for alignment and output.

Workflow

Checklists

They're more than just lists.
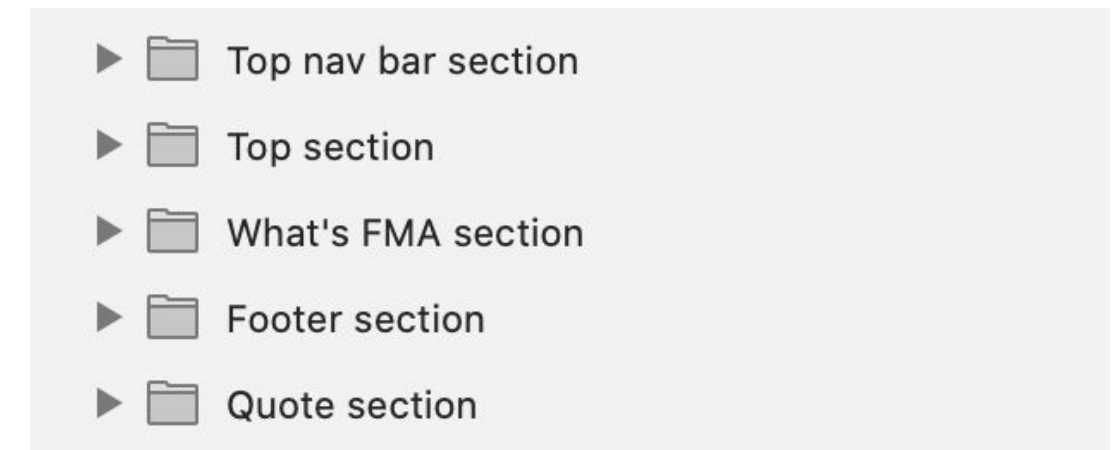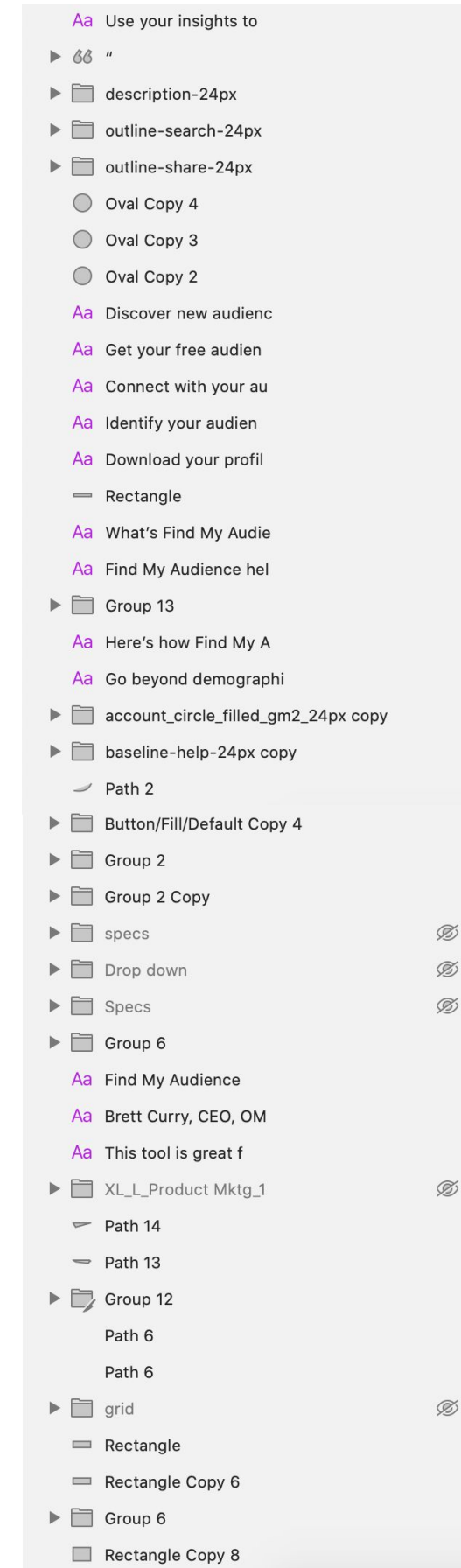
Create or refer to established checklists to:

➜ Audit requirements and deliverables

➜ Be efficient in completing a task

➜ Double check for consistency

➜ Manage a set of assets

➜ Properly release files to developers and vendors

File Hygiene

Prepare files for handoff to designers, developers and/or the client.

Go through checklists; align artboards; remove, rename and/or organize layers; utilize naming conventions.

Think about how you would like to receive a file and pay it forward. For instance, the first visual to the left shows an unprepped, unresolved file. The second visual shows a file that's been properly cleaned up.

Aa Use your insights to
▸ 66 "
▸ 📁 description-24px
▸ 📁 outline-search-24px
▸ 📁 outline-share-24px
○ Oval Copy 4
○ Oval Copy 3
○ Oval Copy 2
Aa Discover new audienc
Aa Get your free audien
Aa Connect with your au
Aa Identify your audien
Aa Download your profil
▭ Rectangle
Aa What's Find My Audie
Aa Find My Audience hel
▸ 📁 Group 13
Aa Here's how Find My A
Aa Go beyond demographi
▸ 📁 account_circle_filled_gm2_24px copy
▸ 📁 baseline-help-24px copy
⌐ Path 2
▸ 📁 Button/Fill/Default Copy 4
▸ 📁 Group 2
▸ 📁 Group 2 Copy
▸ 📁 specs   ⊘
▸ 📁 Drop down   ⊘
▸ 📁 Specs   ⊘
▸ 📁 Group 6
Aa Find My Audience
Aa Brett Curry, CEO, OM
Aa This tool is great f
▸ 📁 XL_L_Product Mktg_1   ⊘
⌐ Path 14
⌐ Path 13
▸ 📁 Group 12
Path 6
Path 6
▸ 📁 grid   ⊘
▭ Rectangle
▭ Rectangle Copy 6
▸ 📁 Group 6
▭ Rectangle Copy 8

▸ 📁 Top nav bar section
▸ 📁 Top section
▸ 📁 What's FMA section
▸ 📁 Footer section
▸ 📁 Quote section

File Review & Release

Cleanly releasing files to developers and outside vendors is more than just a good idea; it's crucial to a project's success.

To ensure your files meet with their intended implementation, consider adopting the below industry-standard procedures:

➔ Double check for adherence to project requirements and deliverable specs.

➔ Perform an appropriate output test at size; also, if applicable, making a mock-up can reveal hidden mistakes.

➔ Reduce file navigation issues by grouping elements wherever you can and/or makes sense.

➔ Refer to a checklist; it can remind you of things you may have inadvertently neglected to address.

➔ Remove unneeded elements such as: random points, shapes, text boxes / unassigned color swatches in color palette / unused or turned-off layers.

➔ Review folders / files / layers / elements for consistency re: naming conventions, set-up, treatment, etc.

➔ Send out only the supporting assets (fonts, images, etc.) that are pertinent to the file being released

File Sharing

Control access and permissions.

File sharing is the private or public sharing of data and resources in a network with separate levels of accessibility. Depending on the permissions set, file sharing allows a select number of people to read, view or edit the file based on the level of access that you, the file sharer, has provided.

Permissions

By setting *permissions*, files and folders can be made local or remote, shared, or restricted, and/or temporary.

So, why use permissions? Most file/folder systems have methods to assign permissions (access rights) to specific users and groups of users. These permissions control the ability of various users to view, change, navigate and execute on the contents inside.

Important note: Ask a file/folder's owner about changing permissions prior to doing so.

Prioritization

Learn which tasks are most important and/or urgent.
Create a priority system to aid in decision-making.

Consider the following:

➔ Deadline
➔ Hours resourced
➔ Total hours budgeted
➔ Number of reviewers
➔ Levels of priorities
➔ Other commitments

Project Management

Self-manage or assist with management of projects, if possible.

Basic project management awareness is extremely helpful. Consider the following areas of impact:

➔ Budgeting
➔ Communicating and negotiating with stakeholders
➔ Managing expectations
➔ Planning schedules and tasks
➔ Problem solving
➔ Tracking scope and deliverables
➔ Avoiding project scope creep

Time Management

Utilize time management methods that work for you and/or your project.

➔ Deep work priority setting (prioritizing tasks with resources)

➔ Focus / distraction-free techniques

➔ Flow

➔ "Getting Things Done"

➔ Manual timer and tracking

➔ Operational analysis

➔ Pomodoro Technique

Post-Production

Archiving

Prepare files for release, reference or
re-opening in the future.

➜ Always back up files

➜ Save time as previous versions can be used as base for
new, similar file / project

➜ Previous versions can provide inspiration re: a new project

➜ Provides source of truth should issues arise after project
goes live

➜ Tracks and maintains versions for reference

Project Post-Mortem

Conduct a post-mortem to determine which parts of a project were successful or unsuccessful, and how to improve them.

➜ Create a report

➜ Involve team members

➜ Note successes and pain points

➜ Record project details

Contact

Feel free to ask me any questions:

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