



2022 | V2

Design Workflow

INTERNAL USAGE

hfma[™]

healthcare financial management association

WHAT'S UNDER THE HOOD?

An important component of the HFMA marketing team is its interaction with the design team. This document outlines the framework of this interaction to ensure accuracy, streamline feedback, and provide consistency across deliverables.

HFMA's design process is a reflection of its commitment to providing the highest level industry standard deliverables, from ideation to deployment.

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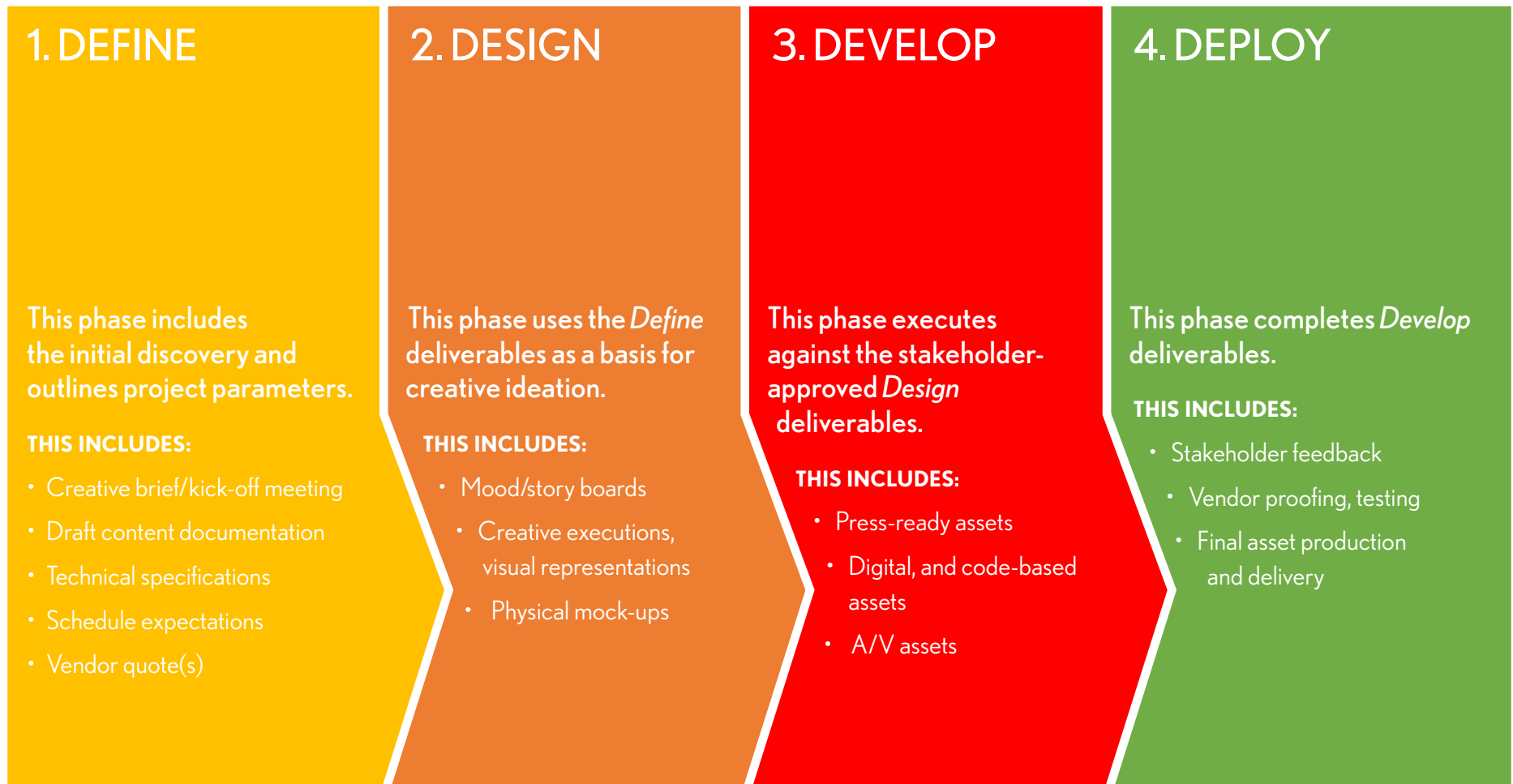
Design Process

DEFINE
DESIGN
DEVELOP
DEPLOY

HFMA utilizes a four-phase design process that provides a foundation for consistent deliverables across diverse media. This process begins with discovery, proceeds to creative ideation, which leads to technical development, and completes with final delivery of design assets.

Design Process

DEFINE, DESIGN, DEVELOP, DEPLOY



Design Process

TASKS & RESPONSIBILITIES

WHO DOES WHAT

The Design Process utilizes a number of supporting tasks and documentation to ensure its accuracy. Responsibilities can be shared. However, the following table should be used as a guide.

PROJECT ASSET	ASSIGNMENT	FILE LOCATION
Project code (see page 12.)	Design	/_PROJECTS
Vendor quote	Design/Marketing/Vendor	/1-DEFINE
Draft content document	Marketing	/1-DEFINE
Creative ideation files	Design	/2-DESIGN
Final stakeholder-approved .pdf	Design	/2-DESIGN
Final Audio/Video rendering	Design	/3-DEVELOP
Final production-ready art	Design	/3-DEVELOP
Annotated project feedback document	Design/Marketing	/4-DEPLOY
Mailing list	Marketing	/4-DEPLOY
Vendor proof	Vendor	/4-DEPLOY

Production Process

Everyday is Monday.

HFMA implements a production process that streamlines team feedback, simplifies stakeholder touches, and efficiently utilizes a common workflow tool, Monday.com.

Production Process

JOB REQUEST

HFMA projects vary in scope from multi-faceted campaigns that span multiple media, to singular one-off requests, such as a logo file. The following forms of request are acceptable, however, it is important to match the type of request to the appropriate form of communication.

1. Kick-off meeting

Large scale projects or unfamiliar requests benefit from focused attention in a dedicated meeting.

2. Phone call

Projects that are familiar but may benefit from background, and contextual explanation are best communicated via a conversation.

3. Microsoft Word Document

Projects that require numerous details, scope definition, legacy or external examples. This documentation should then be linked in Monday.com.

4. E-mail

Requests that can be quickly explained in a short, concise message may use an email. However, courtesy should be paid to thread length, and CCed recipients.

5. Teams IM

Suitable for singular requests, such as logo files, minor revisions to deliverable.

After a request is made, it should be added to Monday.com, see following page.

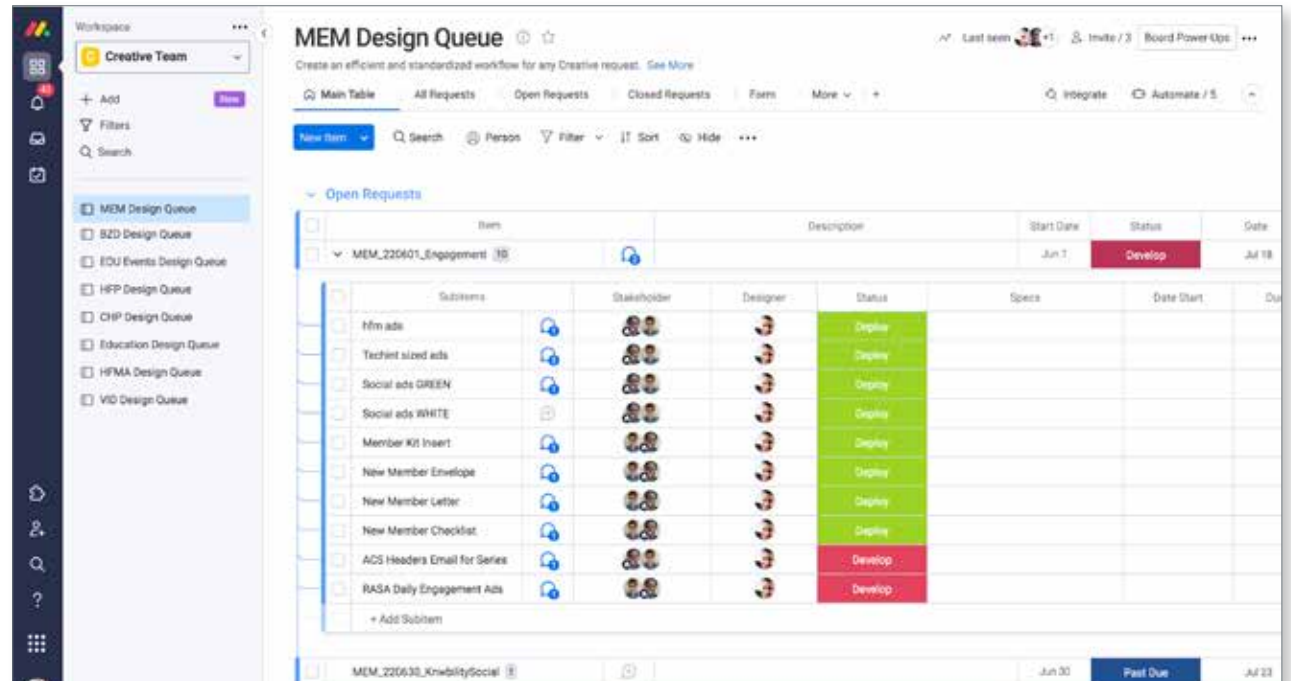
Production Process

MONDAY.COM

HFMA uses [Monday.com](#) to document the production process. They offer [online tutorials](#) that provide usage guidance

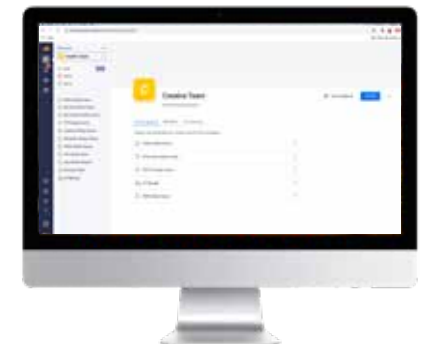
The following items should be assigned to each project request:

1. **Item, subitems;**
Project name, description, code (see pg 11.)
2. **Stakeholder(s), Designer(s);**
Assigned marketing manager, designer.
3. **Schedule expectations;**
Start date, 1st proof, due date
4. **Status;**
Indicates the current design process phase
5. **Sharepoint link;**
Sharepoint references
6. **Chat/feedback thread;**
Team feedback



The following boards may be used for their respective purposes:

- MEM Membership requests
- BZD Business Development requests
- EDU Education Events requests
- HFP Healthcare Finance Policy requests
- EDUCATION Educational Foundation requests
- HFMA Corporate requests
- VID Audio/Visual requests



Production Process

PRODUCTION MEETINGS

Dedicated time for team collaboration is scheduled on a weekly occurrence. These meetings are organized with the intent to focus team members' attention to individual project details. There is currently one meeting with attendees aligned to HFMA offerings.

Production Process

PROJECT FEEDBACK

Capturing project feedback in a consistent manner is critical to a project's efficiency and ultimately its success. The following tools are acceptable for aggregating and sharing project feedback. However, it is important to match the type of feedback to the appropriate tool.

1. Monday.com

This workflow application offers a scalable, automated tool that captures key project expectations and deliverables.

2. Adobe Acrobat

PDF documents are a preferred method to capture feedback as it directly relates to the design deliverable. Sticky notes should be used to capture feedback as well as exact copy revisions. These documents are collected by the design team and retained as part of the entire project archive.

3. Microsoft Excel

Spreadsheets provide an ability to collect multiple types of feedback data in a dynamic environment.

4. Microsoft Word

Initial project content is best delivered with a content document.

5. Email

Singular feedback and project details, such as printing specs, or mailing lists should be delivered through email. However, courtesy should be paid to reduce thread length, avoid thread re-reads, and minimize in-boxing.

6. Teams

Immediate singular feedback.

After feedback is collected it should be linked in Monday.com. Preferred documentation includes:

- Annotated .pdfs
- Microsoft Word docs with or without tracked changes



Project is documented with assigned stakeholders.



Collected feedback on design deliverable.



Multiple project assets: content docs, legacy art, scheduling, etc.



Draft content for the Annual Conference tri-fold brochure.



Quantity for the brochure is 10k. Here's the mailing list.



"Hey there. Did you see the collected feedback on Monday?"

Digital Organization



HFMA uses Sharepoint to host all design assets. This provides a singular location that may be accessed from multiple locations.

Within the Design directory, projects are divided into two categories:

_Projects – All design projects, not including A/V (audio-visual)

_Video – All A/V (audio-visual) design projects

Digital Organization

PROJECT CODES

HFMA design projects utilize a strict organizational convention. This ensures:

- A foundation that is scalable to multiple project components such as: digital assets, vendor documentation, email threads
- Consistent naming conventions to facilitate asset identification, as well as unique string assembly for search and retrieval
- Predictability

HFMA project coding starts with a three-letter category abbreviation. This allows for an initial vertical organization. The following are examples:

- ANC = Annual Conference
- HFM = HFMA agnostic projects
- MEM = Membership
- ENT = Enterprise Solutions

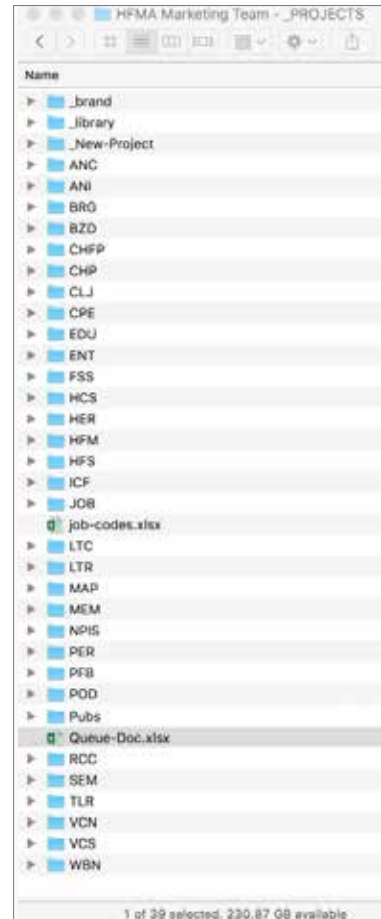
The design team will assign individual projects a unique project code. This ensures that no two projects have the same name. The following format is strictly followed:

ABC_000000_Short-Description

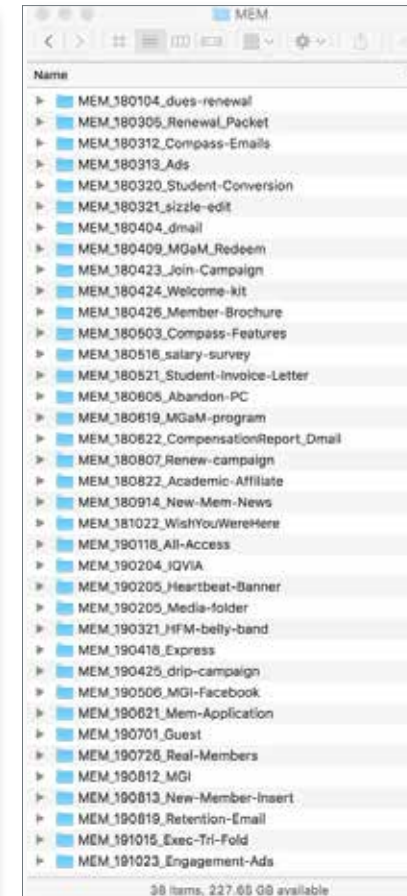
3-DIGIT CATEGORY CODE

6-DIGIT INITIATION DATE (YEAR MONTH DAY*)

READER-FRIENDLY DESCRIPTION



ROOT LEVEL PROJECT STRUCTURE



PROJECT STRUCTURE*

* Year-month-day order is imperative to maintain annual organizational structure. Project codes are used to identify prints assets. They should be included in final artwork as 5pt. type, in a non-distracting location.

Digital Organization

DIRECTORY STRUCTURE

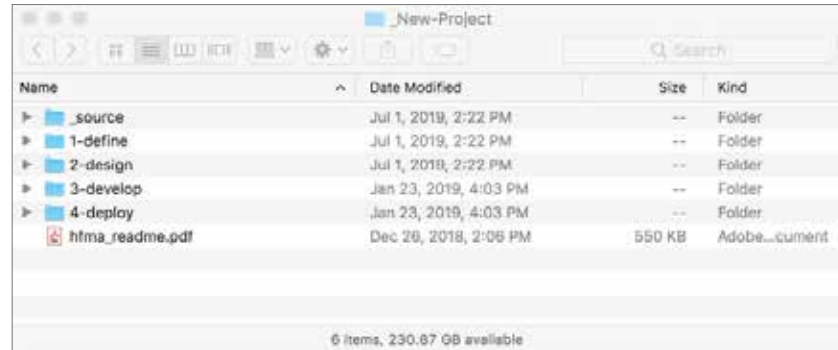
HFMA utilizes a strict directory organization that parallels the design process. This ensures:

- Consistent organizational approach
- Easily scannable directory structure
- Predictability

Individual directory contents will vary from project to project. However, the structure provides a level of consistency and expectation. The following are examples of document type and its suggested corresponding location:

- **_source**
Unedited source documentation: E.g., head-shots, manuscripts, third-party logos.
- **1-define**
Scope documentation: vendor quotes, draft content docs, art die lines.
- **2-design**
Creative ideation docs: .aep, .ai, .indd, .pdf, .psd.
- **3-develop**
Production-ready docs: .aep, .ai, .indd, .prproj, .pdf, .psd.
- **4-deploy**
Project feedback, vendor proofs, mailing lists.

The _New-Project directory resides at the root level of _Projects and _Video Sharepoint directories. It should be copied into the parent directory as new projects are initiated.



NEW PROJECT DIRECTORY STRUCTURE

Directory organization is the responsibility of the design team. However, marketing team members can self-serve, if they follow the guidelines. The intent is to set an expectation that removes confusion.



Where is the draft content doc?

A: 1-define



Where are the working creative docs?

A: 2-design



Where is the final stakeholder approved .pdf?

A: 3-develop



Where is the final mailing list?

A: 4-deploy

Assets



Consistent asset delivery is a key step in the design process. It provides our vendors a uniform and dependable method to receive final project deliverables.

Assets

PROJECT DEPLOYMENT

WHAT HAPPENS NEXT?

Upon stakeholder approval, files are prepared for final delivery.

Depending on the project scope, this may include:

- Document pagination, production die-line application
- Digital specification integrity check
- Final post-production rendering

Additional documents may be required, and may include:

- Final vendor quote
- Final mailing list
- Final delivery instructions

Assets

PROJECT DEPLOYMENT (CONT.)

README

Project documentation for print-production art is collected in a ReadMe .pdf file.

This form includes:

- Delivery date, HFMA job number
- HFMA staff and contact information
- File names
- Method of production
- Software used
- Project specifications

Additional supporting documentation is also included in this .pdf file.

This includes:

- Screen snap of final directory structure prior to its deployment
- Digital representation of final artwork



hfma_readme.pdf

hfma PRINTING DISCLAIMER

DATE

JOB NUMBER

DISCLAIMER
THIS DISK WAS PREPARED BY HEALTHCARE FINANCIAL MANAGEMENT ASSOCIATION (HFMA) AS ELECTRONIC ARTWORK.

WE ASK YOU TO OPEN THIS FILE AND TO REVIEW IT BEFORE DOING ANY WORK OR OUTPUTS. IF, DURING YOUR REVIEW, YOU HAVE ANY QUESTIONS OR PROBLEMS, PLEASE CALL: _____ AND ASK FOR: _____

HFMA WILL NOT PAY OR BE RESPONSIBLE FOR ANY CHANGES YOU MAKE ON THIS FILE UNLESS HFMA HAS APPROVED THE CHANGES AND THEIR ESTIMATED COST IN WRITING (VIA FAX). IF ANY CHANGES ARE MADE (OTHER THAN TRAPPING OR IMPOSITION) TO ALTER OUR FILE PLEASE CONTACT HFMA SO THAT WE MAY UPDATE OUR FILES AND/OR SEND US A REVISED FILE FOR OUR RECORDS.

GENERAL INFORMATION

<input type="checkbox"/> MULTIPLE FILES _____ QUANTITY	<input type="checkbox"/> FONTS SUPPLIED
FILE NAME(S)	Use of fonts other than HFMA's supplied fonts may result in reflow or loss of text. Contact MSI with any font problems.
	This file was built with the intention that it would print
	<input type="checkbox"/> OFFSET <input type="checkbox"/> DIGITAL
	<input type="checkbox"/> OTHER _____
	This file was created with
	<input type="checkbox"/> ADOBE ILLUSTRATOR CC <input type="checkbox"/> ADOBE ILLUSTRATOR CC

Noise and Instructions

This file was prepared as

PROCESS (CMYK) PLUS _____ SPOT COLORS

SPOT COLOR(S)

The color printout accompanying this file was done on a digital CMYK color printer, although the job may contain spot colors. This printout is an indication of color/printer behavior only, it is not accurate for color.

All jobs require you to provide MSI or MSI's client a Color Key, Chromalin, Waterproof or other contract proof along with a Dylux or laser folding dummy (in addition to the laser dummy we have provided).

HFMA will not accept responsibility for any problems, fines and additional monies connected with any problems which you may fix or alter unless we have been made aware of the problems and given an estimate of the corrections for written approval. We will not accept any fiscal responsibility for alterations handled by you. We furthermore do not accept responsibility for the final printed product unless we have been allowed the opportunity to sign off on a color proof and a folding dummy (created by you) prior to the final printing of the piece.

For Healthcare Financial Management Association

HFMA has not trapped this file. It will be the responsibility of firm house and/or printer for all traps.

HEALTHCARE FINANCIAL MANAGEMENT ASSOCIATION
Three Westbrook Corporate Center, Suite 600, Westchester, Illinois 60154 Toll-Free (800) 252-4362 Direct: (708) 531-9600 Fax: (708) 531-0032

Assets

PROJECT DEPLOYMENT (CONT.)

FILE DELIVERY

Notification of final assets should be delivered to the vendor via email. This email contains the final assets as an attachment, or directions to download locally.

This email also includes:

- Vendor quote for reference
- Mailing lists
- Final proof recipients
- Final delivery instructions

PROOFING

The proofing process is the last step between file delivery and final production. Depending on the project scope, the following may be included:

- Electronic proof, .pdf
- Physical folding sample
- Test email deployment

Asset Delivery

DIGITAL FILE TRANSFER

FINAL ASSET DELIVERY

E-based delivery of assets can utilize e-mail, FTP, or third-party file transfer services.

E-mail is acceptable for small files sizes, singular deliverables.

Larger file sizes, and multiple assets deliveries should use FTP or a third-party service.

HIGH TAIL:

<https://www.hightail.com>

ZIP IT

Zip is a third-party application that is commonly used across MAC and PC platforms. Its features include:

- Encapsulates multiple files into a singular asset
- Prevents file corruption
- Reduces overall file size



Project Journey



A project's journey involves numerous tasks that span design, marketing, managerial, and coordinator roles. Setting expectations and assigning responsibilities eliminates redundancies, avoids confusion, and provides a foundation that team members can leverage in their day-to-day activities.

Assets

SUBSCRIPTIONS

HFMA maintains subscriptions to supplement its creative asset delivery. This includes stock photography, audio, video, illustration, as well as creative assets templates and font sets.



ISTOCK:

<http://www.istockphoto.com/>



ENVATO:

<https://elements.envato.com/>



FONT AWESOME:

<https://fontawesome.com/>



DREAMSTIME:

<https://www.dreamstime.com/>

Project Journey

WORKFLOW

I HAVE A NEW REQUEST!

Is it a task or a project?

A *task* is a singular request, eg: a logo file, or a resized graphic.
A *project* involves multiple disciplines, eg: content drafting, design, production, etc.

TASKS

Is it creative or executional?

A creative task involves subjective application of visual elements, eg: resize an ad, apply an existing ad to a social post.
An executional task is transactional, eg: provide an asset(s), change a text element, such as a date. **Requests can be made via email, Teams, or face-to-face.**

A: Creative

Follow the *Design Process*, starting with *Design*.

A: Executional

Follow the *Design Process*, skip to *Develop*.

Simple, singular, transactional requests are temporary in nature and should not be added to Monday.com.

PROJECTS

Is it a new project?

New projects start from scratch. Legacy projects pick-up existing assets, using project codes, and Monday.com for asset recovery.

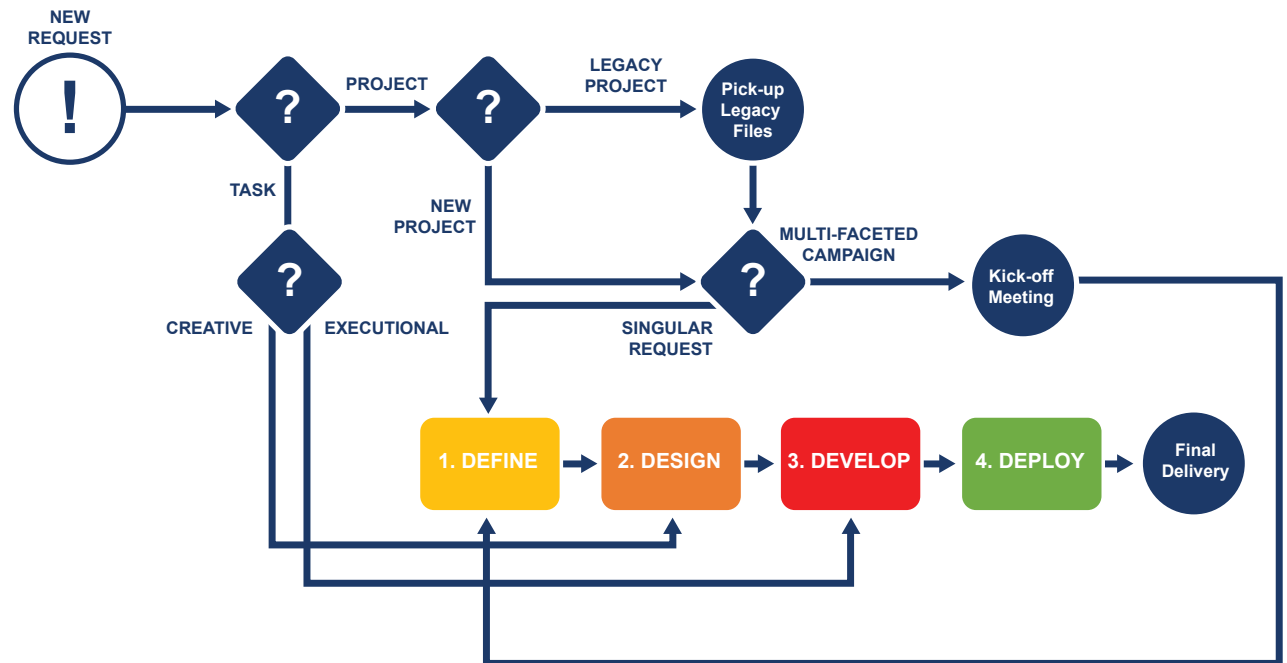
Does this project have multiple elements?

A: No

A singular project request requires a *Define Phase*. However, its scope can be defined via email, eg: Save the Date house ad, Enterprise Solutions brochure update.

A: Yes

Schedule a kick-off meeting to initiate the *Define Phase* where scope, roles, and expectations are assigned.



Does a request get added to the Monday.com?

YES. Monday.com documents a majority of the traffic between Design and Marketing.

NO. The documentation process should not slow down the response to the request. Simple tasks that can be answered with single email should not be entered into Monday.com.

Project Journey

WHO DOES WHAT

FAQs

After a request has been made, tasks and responsibilities can be shared. However, the following Q&A sets expectations.

Project documentation is critical to ensuring accuracy, timeliness, and preserve its legacy. However, it should not hinder efficiencies.

A general rule of thumb for documentation should be applied. The method of documentation should not exceed the time required for the action item.

Does my request enter Monday.com?

A: Yes! After a request has been made it is entered into Monday.com. Most often, the *Design Team* will add it to the appropriate location. However, the *Marketing Team* can add it and provide a notification to Design.

Eg: I added a Peer Review application update to Monday.com, EDU Board. Please check it out, and respond with questions.

Exceptions: If the request does not require more than one phase of the *Design Process*, it may be excluded from Monday.com.

Who assigns project parameters?

A: Roles. *Design* and *Marketing* assign their respective roles.

A: Dates. *Design* and *Marketing* assign schedule expectations according to awareness.

A: Codes. *Design* assigns project codes and creates directory file structures on Sharepoint.

Who requests a vendor quote?

A: Both. *Design* and *Marketing* can request quotes from vendors. The documents are a shared asset, and should be treated as such.

Where is feedback collected?

A: Monday.com. Compound feedback should be collected in Adobe .pdfs, Microsoft Word and Excel docs and should be uploaded to Sharepoint and linked in monday.com.

A: Email. Singular feedback can be sent via email. Courtesy should be paid to recipients, and message length.

Does my feedback fit Monday.com?

A: Yes. Feedback can be provided in different methods, however, Monday.com should be used to collect Sharepoint links and feedback notes. Monday.com is a living document. Its shape can evolve as team members continue to interact with it. If a method of documentation is preferred, team members are encouraged to share.

How is project status communicated among team members?

A: Feedback. Collected feedback notifications can be shared via email or Skype. Keep in mind, both methods can get lost. Team members should be proactive in their communications.

A: Progress. Monday.com provides project parameters, assignments, schedules, as well as legacy documentation.

Where did my project go?

A: Monday.com. Upon completion, project parameters are moved to their respective Closed Requests group on Monday.com. That sheet can be filtered, searched, sorted for individual projects.

QUESTIONS?

What about this?

Questions regarding the HFMA design workflow should be directed to the following:

Michael Chorvat
Creative Team Lead
mchorvat@hfma.org