Resource Guidebook Questionnaire

This fun sheet is all about setting up your own Resource Guidebook for new marketers. It is not intended to be a comprehensive list of items to include and/or circumvent established employee onboarding and/or orientation programs already established by your firm. The intent is to serve as a starting place for your marketing department to discuss potential new hire needs. Use this questionnaire to prepare your specific Resource Guidebook.

Just work through this questionnaire by answering the questions. The answers will direct you of what items to include in your Resource Guidebook.

What does the new hire need to know about the firm? (Firm Introductions)

More specifically, what does he/she need to know about what services your firm provides, the corporate organization, contracting authority, marketing organization, etc. Suggestions for items to gather for this section include:

- General company overview presentation/brochure,
- Corporate organizational chart,
- Contracting authority matrix/information,
- Marketing organizational chart (if applicable), and
- Marketing roles and job descriptions (highlighting the new hire's role).

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What specific marketing guidelines should the new hire follow?

Most likely, your human resources department will provide a company conduct/policy handbook. Do you have any guidelines that marketers should follow? These can cover topics such as style, photos, creative approval processes, corporate communications, etc. Some elements that you may insert in this section include:

- Style Guidelines,
- Writing & Editing Guidelines,
- Filing Guidelines,
- Photography/Image Request & Usage Policies,
- Creative Requests/Approval Process, and
- Corporate Communications Process (i.e. press releases, announcements, conferences, etc.).

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Where does the new hire find marketing information?

This will most likely be the most important section of your Resource Guidebook. You want to make sure that you explain where marketing information is stored, how to retrieve it, and how to update it. Many firms use either or a combination of a shared drive, use their intranet, or have a robust CRM/database system. For your new marketer to feel confident and a contributing member of your team, he/she must know where to find the information to work on proposals and other marketing collateral. Some information you may want to explain how/where to find include:

- Marketing Database (Is yours a shared folder on a server? An intranet based system? A software system?)—Provide an overview and/or instructions on how to use it.
- Resumes — Where are masters kept? How are they updated? What is expected of marketing?
- Project Profiles — Where are masters kept? How are they updated? What is expected of marketing?
- Collateral — Do you have standard collateral (SOQs, brochures, etc.)?
- Photos — Where are they located? How do you know if you have proper usage rights?
- Boilerplate — Do you have standard language that you keep on file?
- Client/Prospect Contacts — Do have a central place/database to store these?

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How do you produce your proposals/collateral?

Although this section might lend itself to more of hands-on training, you can include some of your training materials, checklists, and/or presentations here. The new hire can add them as he/she completes the training. This section may also be somewhat irrelevant to more senior marketing directors. However, while each proposal process is somewhat similar each firm may have different procedures to get the end result.

Basically, you might want to include in this section information such as what does corporate marketing produce versus local/regional marketing, procedures for pursuit planning, proposal forms/checklists, etc. Some examples of my past Resource Guidebook include:

- Corporate Printed Materials (brochures, newsletters, etc.)
- SOQs
- Pursuit Planning Procedures (before RFPs)—Who is involved? What is the expectation of marketing?
- Proposal Management—Guidance on how to analyze an RFP, proposal production planning/scheduling, checklists, Go/No-Go forms, debriefing, etc.
- Templates—Does your firm use proposal templates? If so, where are they located? How can you alter them?
- SF330—Include instructions and a sample of a completed SF 330 form.
- Presentations—Similar guidance as proposal management.
- Trade Shows/Conferences—Ones that we have participated, at what level, corporate resources, etc.

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How do you assemble/package your proposals/collateral?

This section may seem too obvious to put into a resource directory, but I have even found it helpful to have all of our reprographics companies information and our internal printer settings in one place that I quickly refer to when I am in that hectic production mode. Items you might want to consider including in this section are:

- Printing
  - Explanation of different kinds of printing in general (i.e. printer's lingo)
  - Your color printers (how to use, settings for different pieces, etc.)
  - Outside reprographics companies in which your firm has accounts
  - General guidance on time frame to allow for printing
- Assembly/Binding
  - Who is available to assist (administration, interns, etc.)
  - Your firm's preference of binding
  - Instructions on how to use firm's binding equipment (if applicable)
  - General guidance on time frame to allow for assembly/binding
- Other—This can include laminating, special firm templates/pre-printed materials, etc.

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What do you do post production?

Again, this may seem obvious but maybe not to a new marketer or someone just out of college. In this section you will want to include information regarding proposal delivery, filing, and archiving. More specifically, I suggest the following:

- Delivery
  - Include your firm's delivery companies (FedEx, UPS, etc.) and account information. Also include instructions on how produce labels and last pick up time information.
  - Include directions and maps to the closest drop off locations and last pick up time.
- Filing
  - After the package has been sent to delivery, explain how to close out files. What do you do with electronic files (archive, etc.)? Who gets a hard copy?
- Post-Mortems
  - What are you firm's guidelines on proposal post-mortems?

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What services do you use to track upcoming work?

This will vary widely from one firm to the next. Some use subscription based services such as Onvia or BidNet others rely on local work and client manager updates. If you have any kind of tracking system the information should go here. Even though your new hire might not be involved in this part of the marketing spectrum just yet, you might want to go on vacation some day and he/she might need to access some of it while your gone!

Some suggestions for information include:

- Subscription services—The usernames and passwords for any and all subscription based lead services.
- Municipal/Agency portals—Many city, county, and state have their own procurement portals. If you are tracking any of these, include all of that information here.

Is there anything else your new marketer should know about you, your marketing department?

Does your firm and/or marketing department have responsibilities outside of general marketing such as office party planning, annual charities, bagel Fridays, etc.? If there is anything that is unique to you, your department, office or firm include that here. Feel free to make this fun!