

A MARKETING PROJECT SURVIVAL GUIDE



Blind spots

**How to prepare
for what you
don't see coming**

MARKETING EDITION

BRADY DAHMER

PROMOTIONAL COPY

This is a promotional copy.

If you like what you see, please buy a copy
(or a few and give them away) it all goes to
support the project so we can keep finding
more of those pesky blindspots.

www.blindspotshandbook.com

Thanks,

A white, stylized handwritten signature on a red background. The signature is cursive and appears to be the initials 'JZ'.

SPECIAL THANKS:

My Awesome Family

Christopher, Ron, Mark

All my Clients + Contractors Good and Bad,

The "Loudest" Class of '95,

My Teammates at The Central Branch and Tropoly.

Many thanks to all those who inspired me
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Leslie, Lou, Meg, Michelle, Mike, Morrey, Nate,
Shelley, Steve, Terry.

Why did
I create
this?

I've*
painfully
learned...

*as many of us have.

“Assumption
is the
mother
of all
f#@k-ups.”**

**Steven Seagal - Under Siege 2: Dark Territory (1995)

Jumping to conclusions* and making assumptions* ultimately will:

*We all make them, where do you think all the content for this book came from?

- **Hinder useful insights**
- **Slow down innovation**
- **Increase risk and costs**
- **Disconnect clients and teams**
- **Prevent accountability**

In other words, assumptions create project blind spots.

I've written this book with the ideal project flow in mind. Each tip and insight is methodically organized so you're informed, ready, and always one step ahead of the project, confidently leading your team to success. Let's go...

Before We Start...

I packed as much as I could into the book

(I HATE wishy-washy content) so I created a set of icons to help you find helpful insights faster to get the absolute most out of this handbook.



Blindspots

Highlights hidden or overlooked risks for you so they can be actively considered and monitored.



Checklists

Summarizes and lists the potential blindspots covered in each chapter.



Universal Truths

Reminders of “universal laws” that we all know but sometimes “forget” - hoping they swing in our favor.

Inspiration

High-level thoughts and insights to spark your creativity and get your ideas into motion.



Tips + Hacks

Practical advice, expert tips, and project-tested shortcuts.



Tools

A collection of physical and digital tools we use daily to work smarter, not harder.



Don't Be That Person

We've all seen (and maybe even taken) those shortcuts that end up creating extra work for someone else. Be kind—take the time.



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With any project, your blindspot isn't what you don't know.

It's what everyone else thinks you already know.





**No matter
how good
the team
or how
efficient the
methodology,**

**if we're not
solving the
right
problem,
the project
fails.** - WOODY WILLIAMS



1. YOUR PROJECT PREP



RESEARCH
ORGANIZE
PLAN
SHARE



The success
of every
great project
comes down to
the blueprint
and
the foundation
it was built
upon.

This Is Where We Need To Start

It doesn't have to be complicated or intricate, just knowing:

1. **Who** your Market and Competition are,
2. **What** your Key Message is, and
3. **Why** you're doing what you're doing (AKA your goals!)

A clear understanding of these basics will give you the insight to articulate and accelerate your project outcomes—and improve future projects exponentially.

Lacking this foundation can lead to some of the biggest blind spots and failures in branding and marketing initiatives.

Let's go!



Know Your Customers?

Identifying the idea customer, is the foundation of understanding your market. It's difficult to sell effectively without that clarity.

At the very least you should understand:

- Who your target clients are
- Who your current clients are
- What do they want and need
- What motivates them to buy



Best Practices: Surveying current and past clients is a great way to identify where your company excels, where it stands out against competitors, and where the opportunities may exist.



Blindspots

If you don't understand your customer, you risk:

- Misjudging customer needs and wants
- Misaligning your offerings
- Ineffective marketing and communication
- Customer retention issues
- Wasting investment on missed business opportunities or brand damage

Do You Know Your Customers'...



Lifestyle Values Personality Interests Hobbies Cultural Background Life Goals Motivations Beliefs Stress Levels Buying Behavior Brand Loyalty Usage Rate Benefits Sought Customer Journey Stage Engagement Level Media Consumption Preferred Communication Channel Shopping Habits Frequency Of Purchase Seasonal Buying Patterns Response To Promotions Decision-Making Process Age Gender Income Level Education Level Marital Status Household Size Ethnicity Language Spoken Religion Urban/Rural Location Employment Status Region City Population Density Preferred Platforms Tech-Savviness Online Behavior Patterns Privacy Concerns Preferred Payment Methods Peer Influences Family Dynamics Health Consciousness Dietary Preferences Exercise Habits Financial Goals Savings Habits Environmental Consciousness Sustainability Practices Ethical Consumption Workplace Preferences Subscription Services Vacation Preferences Favorite Brands Luxury Spending Habits Career Ambitions Community Leadership Technology Dependence Local Event Participation Preferred Entertainment Mediums News Engagement Content Consumption Preferences Financial Risk Aversion Credit Card Usage Retirement Planning

Know Your Competition?

Failing to understand your competitors can lead to costly strategic missteps, missed opportunities, and a weakened market position.

At the very least, know:

- Who your top competitors are
- What advantages THEY have
- What advantages YOU have
- What sales and marketing channels they use
- What marketing tactics they employ



Best Practices: Start collecting examples of your competitors' marketing and messaging now.



Blindspots

Without a strong grasp of your competition, your business may suffer:

- Poor market differentiation
- Ineffective messaging and tactics
- Loss of market share
- Lagging product and service innovation

If you don't understand or attack the risks, the risks will attack you.

Do You Know Your Competitors'...



Market Focus Specific Market Segmentation Brand Tone And Voice
 Visual Branding Taglines Or Slogans Core Brand Message Overall
 Marketing Strategy Unique Selling Proposition (Usp) Target Audience
 Employee Training Customer Service Customer Satisfaction Levels
 Customer Pain Points Churn Rate Customer Acquisition Strategy
 Customer Retention Strategy Customer Reviews And Ratings Brand
 Loyalty Programs Customer Education Key Weaknesses Potential
 Threats Products/Services Product Pricing Strategy Quality
 Differences Product Variety Service Levels Customization Options
 Marketing Channels Used Marketing Goals Campaign Frequency Paid
 Search Campaigns Influencer Partnerships Social Media Ads Email
 Marketing Traditional Media Presence Affiliate Programs Discount
 Strategies Bundles And Upsells Sales Frequency & Promotions
 Loyalty Programs Landing Pages Subscription Or Membership
 Models Lead Capture Tools Blog Or Articles Video Content Social
 Media Posts Public Relations & Media Coverage Brand Reputation
 Community Engagement Industry Recognition Website Functionality
 E-Commerce Presence Use Of Apps Or Platforms Revenue Streams
 Funding Sources Sales Process And Funnel Pricing Shifts Partnerships
 Franchise Or Expansion Plans Innovation & R&D Efforts

Know Your What?

It's crucial to clearly define what you want to communicate to resonate with your target audience.

At a minimum, know:

- Your unique value proposition
- Your brand identity and personality
- Your core benefits and features
- Why the company exists



Positive results won't come from an average message with the wrong communication tools. Put in the work to find your unique value and promote like crazy!



Blindspots

If you aren't specific, consistent, and repetitive with your message, you risk:

- Mixed and confusing brand messages
- Inefficient campaigns
- A weak brand identity and lower customer retention
- Miscommunication, both internally and externally



BLANDING

/blænd-ing/ [noun]

(english-ish) The goal of developing a brand and messaging to appeal to the widest audience possible, while keeping up the latest design fads.

Results: Blending into the sea of sameness, a loss of unique identity and differentiation from competitors, making it harder for the brand to stand out and become memorable in its own market, ultimately blending into obscurity.

The Cure: The more you know, the better informed you are and the more effective decisions you can make, allowing your voice, message, and design to become more unique.

Know Your Why?

What are the primary and secondary goals and objectives of the project? What will make it a “successful project”?

Are the goals clearly defined and documented, so the whole team knows what they're working to achieve?

Are the goals measurable and easy to understand?



Best Practices: Keep revisiting and resetting goals as a team. Apply results to optimize for the next iteration, then repeat.

Consider using platforms that provide measurable, relevant, and usable data (e.g., Google Analytics). Use A/B testing to fine-tune your campaigns for even better results.



Blindspots

If goals and objectives aren't clearly defined, you risk:

- Lack of focus
- Misaligned team efforts
- Inconsistent design and messaging
- Wasted budget and resources

Are Your Project Goals Designed To...



Increase Brand Awareness Grow Website Traffic Boost Social Media Followers Generate More Leads Improve Conversion Rates Enhance Customer Engagement Build A Loyal Customer Base Launch A New Product/Service Improve Search Engine Ranking Increase Sales Revenue Expand Market Reach Improve Customer Satisfaction Enhance Online Reviews And Ratings Create Valuable Content Improve Customer Retention Enhance Brand Reputation Boost Product Visibility Increase Social Media Engagement Build A Community Around Your Brand Improve Ad Campaign Performance Increase Landing Page Conversions Improve Marketing ROI Reduce Customer Acquisition Costs Expand Geographic Reach Increase Product Awareness Improve Customer Feedback Increase Brand Loyalty Enhance Thought Leadership Improve Social Proof Enhance Omnichannel Marketing Increase Increase Content Shares Expand Product Line Awareness Build Strategic Partnerships Improve User Experience Increase Webinar Conversions Enhance Employee Advocacy Improve Lead Nurturing Boost E-Commerce Sales Improve Customer Insights Expand Market Segmentation Enhance Customer Journey Increase Cross-Selling and Upselling Boost Affiliate Marketing Increase Sponsorship Opportunities Improve Brand Consistency and Re-marketing Strategies



**Some things
that don't
count are
counted;**

**Many things
that count
aren't
counted.**

It's important to focus on what truly matters rather than just what's easily measurable. Vanity metrics may look good on paper, but rarely do they drive real business growth.

Collect All Your Assets

Do you have all your assets in one place?

Ensure that:

- Logos, illustrations, photos, videos, or any design materials are organized and easily accessible
- Files are in the correct format and size for the project
- Brand guidelines are handy



Best Practices: Platforms like Dropbox and Google Drive make it easy to share files with clients and team members.



Blindspots

If you don't have the files ready, reach out now. The longer it's been since they were created, the more time it may take to retrieve them.

Tip: Avoid sharing images over text or social platforms, as they've been known to reduce quality. Always use email or a file-sharing platform.

Know Your Passwords

Depending on your project, ensure you have all passwords, logins, or admin access for:

- Social Accounts
- Social Media Tools
- Email Marketing Platforms
- Online Ad Platforms
- Marketing Automation Tools
- Analytics + Data Tools
- CMS Platforms
- Project Management/Collaboration Tools
- Domain registrar account
- Web Hosting

If needed, consider setting up guest accounts.

Blindspots

It's inevitable: the IT person with access will be on vacation, or a former team member who had the details will have moved on. Plan ahead to avoid access issues.



2 MINUTE TUTORIAL



THE IMPORTANT DIFFERENCE BETWEEN FILE TYPES.

It's critical to make sure you're supplying the team with the right type of file for the project. When in doubt, ask your designer what they might need for your entire project.

Why is this Important?

- 1. Quality:** Each file type has its own quality limitations and strengths.
- 2. Editing Flexibility:** Some file types allow for easier and quicker modifications.
- 3. Compatibility:** Certain file types are more compatible with specific software or platforms.



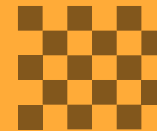
VECTOR

Vector images are mathematical calculations that form lines and shapes - so there are no size restrictions.

No matter how far you zoom into a vector graphic, it will always stay crisp and sharp.

Vector file extensions include

AI, EPS, SVG



RASTER

Raster graphics, such as digital photographs, are created using a grid of tiny pixels. A raster image has a specific number of pixels so it can only be scaled up to a specific size, based on its original proportions and PPI (Pixel Per Inch) before the image starts losing its sharpness and quality.

Raster file extensions include

PSD, JPG, PNG BMP, TIF, GIF

!@#*

NEVER SEND A LOGO, PHOTO OR GRAPHIC OF ANY KIND IN A WORD, POWERPOINT OR EXCEL DOCUMENT.

Know Your Future Needs

What design or creative assets will you need in the next 6, 9, or 12 months?

Have you checked with co-workers or other departments to see if they'll need anything in the near future?



Blindspots

Higher project costs: Without advance planning, you may miss out on bulk discounts.

Limited availability: Your creative team may not be available when you need them most.

In The Future Will You Need...



Business Cards Letterhead Envelopes Email Signatures Brochures
 Flyers Postcards Posters Banners Signage Billboards Website
 Landing Pages Blog Posts Social Media Profiles Social Media Posts
 Social Media Avatars Social Media Banners Email Newsletters
 Press Releases Media Kits Press Kits Product Catalogs Product
 Packaging Shopping Bags Labels Stickers Presentation
 Templates Proposals Reports Case Studies Whitepapers Ebooks
 Infographics Webinars Podcasts Videos Photography How-to
 Guides FAQs User Manuals Instructional Videos Product Samples
 Coupons Gift Certificates Membership and Loyalty Cards Event
 Invitations Event Programs Tickets Badges Branded Apparel
 Hats T-Shirts Uniforms Branded Merchandise Pens Notebooks
 Calendars Magnets Mobile Apps SMS Marketing Messages
 Chatbots Surveys Feedback Forms Customer Testimonials
 Reviews Referral Cards Affiliate Links Sponsorship Banners
 Event Materials Networking Materials Trade Show Booths
 Trade Show Banners Trade Show Giveaways Direct Mail Pieces
 Magazine Ads Newspaper Ads Google Adwords Facebook Ads
 Instagram Ads LinkedIn Ads YouTube Ads SEO Content

Know Your Resource Capacity

Understanding your resource capacity—both internal and external—is key to keeping the project manageable, focused, and more likely to succeed without waste or burnout.

Have you created a “who can do what, and when” plan along with your budget?



Best Practices: When in doubt, front-load tasks as much as possible. For instance, if you need 10 social posts, create them all now to avoid last-minute scrambles that drain time, budget, and resources.



Blindspots

Without a clear capacity plan, you risk:

- Limited availability of team and management
- Missed deadlines in the future
- Burnout among team members
- Issues with vendors or partners
- Budget overruns



Even if you
are on the
right track,
you will get
run over if
you just sit
there.

– Will Rogers

Launching is not the finish line, continuous execution, adaptation, and optimization is key. Take consistent action.

Sustain Your Momentum + Engagement

Just like planning for future needs, maintaining engagement is essential—but it requires a more strategic approach.

How will you keep your company top-of-mind with your audience?

Now is also the time to schedule a campaign/analytics debrief to plan your next wave of content.



Blindspots

Think like a marathon runner: don't exhaust your energy and budget at the start. Pace yourself and stay focused for the long haul. Be Brave, hold the course, and give it time to work.



“Let's see how this goes” is not a strategy.

Marketing is an investment—just like a car needs fuel, maintenance, and parts to keep going, so does your marketing. Avoid wasting your budget and resources on random, one-off efforts.

Keep Your Audience Engaged Through



Regular Content Updates: Continuously share fresh content (blogs, videos, articles). **Email Campaigns:** Send newsletters and updates to keep the audience informed.

Social Media Interaction: Engage with followers through comments, likes, and shares. **Exclusive Offers:** Provide special discounts or promotions for early adopters.

Loyalty Programs: Reward repeat customers with points, discounts, or perks. **Contests and Giveaways:** Run competitions to maintain excitement and involvement.

Referral Programs: Incentivize customers to refer others to your brand. **Collaborations:** Partner with influencers to reach new audiences. **Behind-the-Scenes Content:** Share insights into your process or team to build connection.

User-Generated Content: Encourage customers to create and share content about your brand. **Personalized Content:** Tailor messages and offers based on customer behavior.

Educational Content: Provide tutorials, how-tos, or guides related to your product.

2 MINUTE TUTORIAL



STRATEGY VS TACTICS

WHY IT MATTERS

There is a significant difference between strategy and tactics. Understanding this distinction enables you to make informed decisions about where—and when—to invest your time, budget, and resources. Think of strategy as your compounding interest bank account, and tactics as your monthly or weekly contributions to it.

Why is this Important? Strategy without tactics is the slowest route to victory. Tactics without strategy is the noise before defeat. - Sun Tzu, The Art of War

STRATEGY

Strategy defines your target market, long-term company goals, and the plan to achieve them. It's your path towards achieving your larger mission, vision, and goals.

Goal Focused
Plan Based
Big Picture
Proactive
Less Flexible
Future Oriented

Execution Focused
Tools Based
Current Need
Reactive
High Flexibility
Present Situation

TACTICS

Tactics determine how the strategy is to be executed (e.g., social media, email, ads, blogs). They are oriented toward smaller steps and shorter time frames to adapt to market shifts and conditions.

Make Sure You Have A Good Project Scope/ Creative Brief.

The success of a project is often determined from the outset, based on how thoroughly planned and detailed the project brief is. Think of the brief as the launchpad that inspires and drives creativity within your team.

A strong brief provides just enough insight to challenge everyone, encouraging deeper thinking and more inspired solutions—while also outlining essential project parameters, like budget and timelines, with clarity and precision.



Best Practices: Ask yourself, does this brief have the power to inspire a great solution? If not, revisit and strengthen key areas such as your mission, vision, target audience, and competition.



Weak research, planning, and strategy can let others dictate the creative direction and final results of your project.



A badly planned project will take five times longer than expected.

A well planned project only twice as long.

Even with a well-structured plan, things rarely go as planned. Think about contingencies and expect the unexpected—those hidden blind spots.

A Basic Brief Should Include:

If you've done everything in the book up to this point, this should be a breeze. Check out our website for additional tools, resources and courses.

Project Overview

- Project name
- Project background - context about the project
- The why- primary and secondary goals - what it needs to accomplish
- The customers - target audience demographics and psychographics
- The competition and market overview
- What are the timelines?
- What is the budget?

Your Brand

- Key and supporting message(s)
- Your USP
- Brand guidelines
- Brand positioning/personality
- Voice and tone
- What assets you will provide
writing, illustration, photography, video, etc.

Deliverables

- What needs to be produced?
- Specifications and technical details
- What additional services are required?
Writing, illustration, photography, video, etc.

Project Management

- What are the timelines?
- What is the budget?
- Who are the key stakeholders?
- What is the approval process?

Evaluation Metrics

- What is your criteria for success?
- How will it be measured/how often?

Best Practices: We're big fans of Google Docs—it's a great tool for collaborating with your team to gather their feedback and input before passing it along to creative contractors. Plus, there are plenty of free online templates available to help you get started.



Blindspots

The risks of an incomplete or poorly defined creative brief include:

- Unclear vision and expectations
- Inefficient use of time and budget overruns
- Frustration and strain on relationships
- Inconsistent strategy and execution



Be Inspirational

Look for inspiring design elements and content that speak to you. Let these spark your ideation and guide your project toward something original.

Some things to add to the brief:

- Processes / mind maps
- Prototypes
- Key historical business/employee moments

Create a shared folder for your inspirational assets, including copy, images, screenshots, and videos.



Online Resources: Pinterest, Behance, Designspiration, dribbble, Dieline, Communication Arts etc.



Blindspots

Observing competitors marketing is valuable for comparison and strategic insight, but adapt them to fit your own vision and avoid blending— or blanding—in with others.



Do NOT copy other companies' marketing, or let your designer do so.

Design is
more than
just what it
looks like,
but how
well it
works.

Go beyond surface-level trends to ensure your marketing and design effectively meets the needs and expectations of your audience and is authentic to your overall vision and brand.



PART 1

PROJECT PREP CHECKLIST

IS YOUR RESEARCH DONE? DO YOU KNOW:

- Your target clients?
- Your key competitors?
- What you want to communicate?
- The messaging/content that supports your brand mission, values, or goals?
- Why you're doing this?
- What your project goals are?
Are they clearly defined?
- Are your goals trackable and measurable?

ARE YOUR ASSETS READY?

- Logos and brand guidelines
- Images, photos + illustrations, videos
- Login details for all web services/platforms and social apps

HAVE A STRATEGY IN PLACE?

- Do you know how to support project success/momentum on a daily/weekly/monthly basis?
- Do you know what resources (time and budget) you might need to keep the project going?
- Do you know what collateral/creative assets that you'll want or need in the future?
- Do you have a back-up or contingency plan?

HAVE YOU DRAFTED A COMPREHENSIVE PROJECT SCOPE OR CREATIVE BRIEF?

- The project's objectives and goals — Your who, what, and why
- What needs to be produced (deliverables) — Subdivide into "must-haves," "should-haves," and "nice-to-haves"
- Project timelines and budgets
- Know what assets and resources are currently available
- What services will be provided and/or outsourced by the agency or consultant
- A future project plan/calendar (1-3-6-12 months, if possible)
- Inspirational design, color palettes, images, photographs, and videos



2. BUILD THE TEAM



**INTERVIEW
MANAGE
PAY
PROTECT**

! @ # *

**Time,
once
spent,**

**cannot
be
returned.**

Choose your team wisely. Sure, you can get your money back, but not your time.

Do your due diligence and ask as many questions as you need to feel comfortable.

Have You Seen Their Portfolio?

When selecting an agency, designer, or creative consultant, consider these key factors:

- Style and aesthetic—Does it align with your brand?
- Experience—Do they have expertise with similar projects?
- Versatility—Have they shown the ability to work across multiple media and platforms?
- Consistency—Is their work quality consistent over time?
- Innovation and creativity—How have they brought fresh ideas to the table?
- Measurable results—Can they demonstrate tangible outcomes?



Blindspots

If their past projects are all 'concepts,' be aware of the risks of working with a beginner—but everyone has to start somewhere, right?

If all their projects look the same, you can expect similar results for your project.

If they can't show their process or thinking, it may indicate a lack of research or originality—or that their work was copied.

Have You Contacted Their Referrals Or Past Clients?

Referrals can verify whether the agency delivers projects on time, stays within budget, and consistently meets or exceeds expectations.

Best Practices: A quick email often works well for a referral contact, but if their response is “Do you have time for a call?” there may be more to the story.



Blindspots

Their inability to share contacts may point to potential problems with past work.

Remember, a good-looking project doesn't necessarily mean a positive client outcome or experience.



What's Their Discovery Process?

How do they go about understanding your brand, audience, competition, and goals?

What is their onboarding process?

Are they asking the right questions and identifying the problems that need solving?

How do they find gaps, opportunities, and differentiators?



Best Practices: You're paying for their professional insight, it's a good sign if they ask a lot of questions.



Blindspots

Too few questions may indicate they're making assumptions about your needs, which could lead to an outcome that doesn't align with your goals or brand.

Do They Have Collaborative Partners And Resources?

Do they work with trusted writers, editors, photographers, printers, web developers, etc.?

How long have they collaborated with these partners?

Which projects did they work on together?

Best Practices: If you have existing partners, introduce them to the team as early as possible.



Blindspots

Who are the partners/resources contracted to?

Who's responsible for project managing them?

Who's responsible to pay them?

Who owns their work? See page 83





**The first
90% of
a project
will take
90% of
the time...**

**the last
10% will
take the
other
90%.**

Plan wisely, execute precisely, sprint for the finish.

Don't underestimate how long this will take.

Always ask ALL the suppliers what
their timelines are.

What's Their Project Management System?

How do they:

- Keep things organized, productive, and efficient?
- Assess deadlines, priorities, and workflow?
- Budget time for feedback and approvals?
- Account for project scope/time shifts?

Do you know the key point of contact for your project?

Have you identified everyone on your team who needs to sign off on each stage?



Best Practices: Choose project management platforms that fit your workflow. Popular choices include Asana (project and team management), Slack (team communication), and Google Sheets (for complex planning).



Many people tend to over commit and underestimate the time required to complete tasks—make sure expectations are as realistic as possible.

No plan = weak action + poor outcomes.



**By failing
to prepare,
you are
preparing
to fail.**

- Benjamin Franklin

What's Their Project Review and Feedback Process?

How are projects presented and reviewed?

What is the process for collaboration and feedback?

How are changes and updates tracked?

Which external stakeholders and team members might benefit from being in the presentation?*



Best Practices: For team presentations, consider using Google Slides or PDFs to track and share comments.



Blindspots

*Ensure all stakeholders understand the project's scope, requirements, and outcomes before the presentation.

"Design by committee" is the acceptance of mediocrity in your project - always test "ideas" against the project goals and scope - do the ideas make it better?

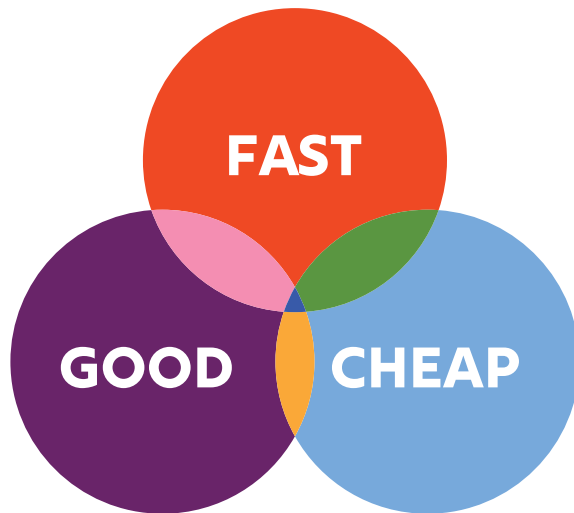


Anything
that can be
changed will
be changed
until there is
no time left
to change
anything.

Scope + Expectations

Before setting any expectations on a project's time and cost, ask questions first. You can always get a second opinion.

Be aware of the age-old, time-tested model of "Pick 2" that are the most important to you:



* We don't have the science to accomplish all 3 as of yet...

Project Quote

Do they charge by the hour, milestone, or total project?

Are hourly rates adjusted based on the type of task?

Do rates vary with project volume or specific work types?

Are there minimum charges for out-of-scope tasks?

Are the external/additional contractor costs included?

How are additional external costs (like stock images, illustrations, or couriers) handled?

Best Practices: We provide project quotes based on a very tight and clearly defined scope, using a "per-project" model. This approach allows clients to engage in ideation and edits without worrying about hourly charges, which leads to a better project outcome.

We handle all additional, external costs using a "client-approved before purchase" model to ensure transparency.

Blindspots

No firm quote = Poor understanding of the project scope = Budget creep = DO NOT MOVE FORWARD WITH PROJECT.



Exclusivity + Confidentiality

Do you need a Non-Disclosure Agreement (NDA) to protect your intellectual property (IP) or other sensitive project materials?

Will any external creatives or consultants have access to your IP or protected materials?

Do you require a non-solicitation or non-competition agreement to prevent the agency or contractor from working with competitors in your industry?



Blindspots

If a creative refuses to sign these legal agreements, consider it a red flag. Think of this relationship as a partnership built on trust and protection.

Ensuring Your Project's Originality

What is their research process and policy for verifying that their work is unique and hasn't been used in the same or a similar industry?

Is the design based on a template, and if so, has the template been purchased and who owns it? (See *Ownership of Assets*, page 81)

Best Practices: Use tools like TinEye and Google Images for reverse image searches to check the originality of the design.



Blindspots

Before signing off or making the final payment, confirm the following:

1. The design you're paying for is original.
2. You understand all "usage" rights for any photos, illustrations, audio, or videos.
3. You know the duration of usage rights (licensing) and the renewal terms and costs.



Retainer vs Per Project

Evaluating the pros and cons of a retainer can help to determine if it's the best fit for your project needs and business model.

Project Retainer Pros:

- Guaranteed availability
- Budget predictability
- Long-term relationship
- Increased flexibility
- Strategic partnership



Blindspots

Project retainer cons:

- Risk of unused hours
- Commitment lock-in
- Less focus on specific projects
- Difficulty in quantifying value
- Potential for complacency

Paying with Commission/Equity

Paying through commission or equity (stocks) can strengthen partnerships but introduces complexities that require careful consideration depending on your business stage and goals.

Commission or Equity Pros:

- Aligns incentives between parties
- Offers cash flow flexibility
- Attracts top talent
- Drives performance
- Shares both risk and reward

Blindspots

Commission or equity cons:

- Risk of over- or under-valuation of the company or creative work
- Potentially complex negotiations
- Dilution of ownership
- Delayed payment or gratification
- High risk for the provider



Be prepared to compensate if the work exceeds the project's expectations.



A **!** **@** **#** ***** **verbal** **contract**

Without written documentation, people will forget, misinterpret, and disagree on what was said, leading to misunderstandings and, of course, assumptions.

isn't
worth the
paper it's
written
on.

- Samuel Goldwyn

Payment Terms

What are the payment terms for this project?

Is there a milestone-based payment plan for longer projects?

Have you budgeted for the full project amount, including potential scope creep?



Best Practices: Industry standards typically use milestone payments based on project size and duration. A common structure is 30% upfront, 30% at the halfway point, and 40% upon completion. For longer projects (over three months), consider monthly payments to manage cash flow.



Blindspots

Ensure clear payment/refund terms in case of project cancellation, delays, or partial completion.

Be cautious if they request more than 50% upfront

Contract

Do they provide a contract?

Is it balanced and fair for all parties involved?

Key Details to Include:

- Scope of work
- Project revisions and additions policy
- Client responsibilities
- Timelines and deadlines
- Assets ownership and rights
- Deliverable formats
- Payment terms
- Termination clause
- Confidentiality agreement

Blindspot

NO CONTRACT = NO WORK



PART 2



BUILD THE TEAM CHECKLIST

BUILDING THE RIGHT TEAM

- Have you seen their portfolio/reel/published projects?
- Have you contacted their referrals or past clients?

ADDITIONAL TEAM RESOURCES

- Who in their network can help you with other aspects of the project or requirements?
- Know how long have they worked with that person or company?
- Who's responsible for project managing them?
- Who pays them and whom are they contracted to?

THE PROJECT PROCESS

- How do they set up the project and assess its priorities and workflow?
- What tools do they use to keep things on track?
- What's their discovery or orientation process?
- Do they create a work-back schedule with tasks and milestones?
- Have they budgeted time to incorporate team feedback?
- What's their availability to complete the project if things shift?
- What's their process and policy to confirm originality?

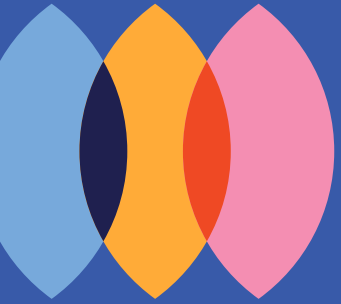
PROJECT LEGALITIES

- Do you need an NDA for your project?
- Do you need a non-solicitation and/or non-competition contract?

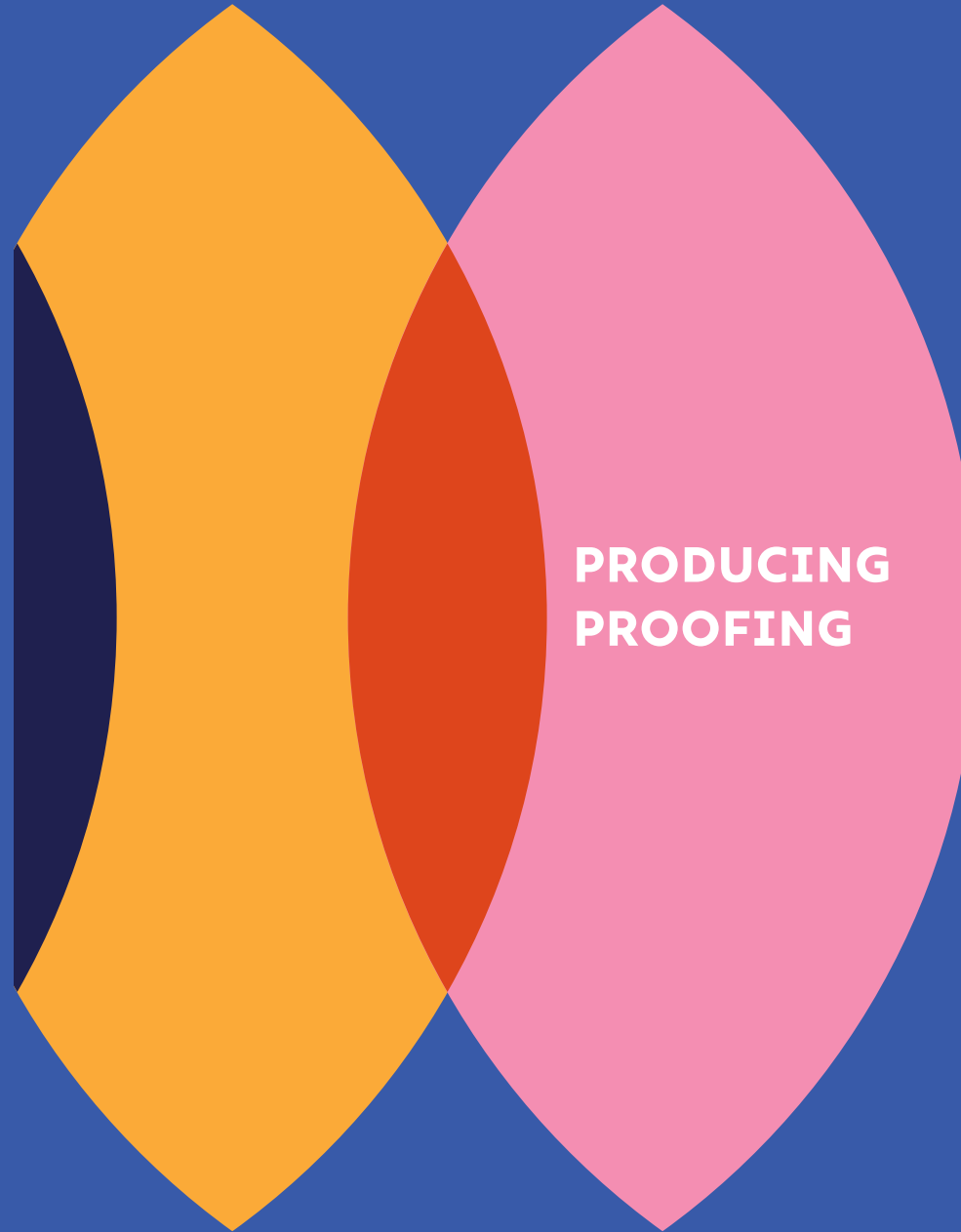
CONTRACT, PAYMENT, EXCLUSIVITY + CONFIDENTIALITY

- Do they provide a contract?
- Does it include pricing for project/scope creep?
- What are their payment terms?





3. RUNNING YOUR PROJECT



PRODUCING
PROOFING



If project content is allowed to change freely,

the rate of change will exceed the rate of progress.

Manage your changes carefully to ensure the project's progress and momentum isn't derailed by constant changes and shifts in direction.

Running Smoothly - Internally

Do you know who all the stakeholders and decision-makers are for your project?

What might they need from the project, and how do they measure the project's 'success'?



Best Practices: Clarify the roles and responsibilities of each team member before the project starts to ensure accountability and smooth collaboration.



Blindspots

Do any stakeholders, decision-makers, team members have any projects that might conflict, or have priority over yours? This could influence your project's timeline and resources.

Be aware of everyone's availability and unavailability - like vacations, maternity leave, conferences and tradeshows etc.

What's The Proofing And Sign-Off Process?

Who is accountable for the final sign off?

Do you know who will need to sign off after each stage of the project?

Best Practices: Have a proper editor - preferably someone outside the project so they can experience and read everything with a fresh set of eyes.



Blindspots

Make sure the cost for proofs is included in the budget as these can get VERY expensive.



If it's a printed piece ALWAYS get a printed proof, it will read and look different on paper, and it will always be exponentially cheaper than re-printing the project.



HOT POTATO

[hot puh-tey-toh, -tuh]/ [noun]

The game where everyone deflects important decisions and responsibility AKA the “Hot Potato”.

Make sure everyone is on board for any and all decisions, so you’re not the one holding the scalding vegetable.

If It's Not in Writing, It Doesn't Exist.

Be consistent in where you provide your feedback (email, PDF, Google Doc, Slack etc), and ALWAYS put it in writing so all changes can be tracked and accounted for by everyone on the team.



Best Practices: PDFs are excellent for feedback, as you can be precise about where and what changes need to be made.

Use email or group messaging platforms to track feedback, ensure delivery, and monitor accountability and progress.



Voicemail and/or voice memos do not count as revision or editing notes—put everything in writing.

Account For Proofing Time.

Have you allocated 15%–20% of your total project time for reviewing, editing, and revisions?

Have you considered the availability of other creative contractors during the proofing process?

Are you working with multiple languages? If so, have you accounted for not just translation and proofreading, but also the necessary design adjustments?

Blindspots

Factor in the creative team's availability to make changes that are reflective of the amount/type of changes needed.

Some languages, especially character-based ones, may require additional time and effort to integrate into the design.



2 MINUTE TUTORIAL



EDITING TIP AND TRICKS

When you are editing, use the following tips to make this process as smooth and effortless as possible.

DON'TS

Don't print out, mark edits by hand, and then send photos of the edits—handwriting can be hard to read, and image quality may be poor.

Don't use multiple platforms for sending changes—choose one and stick to it for consistency.

Don't allow multiple people to send edits to the designer/contractor—assign a point person to consolidate all changes.

Don't rely solely on spellcheck—it may miss important errors.

ALWAYS

Have someone else review all copy and details—this includes phone numbers, emails, links, and web addresses. Double-check everything.

Get a printed proof—seeing it on paper often reveals details that look different in print than on screen.

Do's

Provide the designer with copy/content that's as close to final as possible to minimize unnecessary edits and budget creep.

Use a platform with tracking capabilities for editing, such as PDF, Word, or Google Docs, so changes are easy to follow.

Track and highlight edits to clearly show what has been changed. Sending the full text without marking edits can result in the designer spending extra (billable) time reformatting rather than making simple text adjustments.

Number or date your edits to keep revisions organized.

Use email or Slack to send edits, as they are searchable and easy to track. Avoid SMS, Messenger, or WhatsApp, which lack effective search functions and can be deleted.

Read your copy aloud—this helps you catch errors in flow, identify missing or misspelled words, and spot inconsistencies.



TIPS FOR MORE PRECISE EDITING

1. Print your document in a smaller size—this makes you focus more intensely on each word.

2. Read it backwards—this breaks your familiarity with the text, preventing your brain from auto-correcting mistakes or filling in missing words.



**Theres
never
enough
time to
do it right**

**but
always
enough
time to do
it again.**

A deadline means nothing if the work isn't right.

PART 3



RUNNING THE PROJECT CHECKLIST

Running smoothly - Internally

- Who are all the stakeholders and decision-makers?
- What do they need out of the project?
- How do they measure project 'success'?
- Are there any timelines that might conflict with yours?

What's the Proofing and Sign Off Process?

- What's the their project review and feedback process?
- Know how the work/projects get presented?
- Know how the collaboration and feedback process work?
- Know how changes/updates are captured and tracked?
- Do you know who has final sign-off on the project from both your team and the creative team?

Coming
together is
a beginning,

staying
together
is progress,

and working
together is
success.

- Henry Ford



4. YOUR PROJECT WRAP





**A project
is complete
when
it starts
working
for you,**

**rather
than you
working
for it.**

- Scott Allen

Ownership of Assets

Who owns the creative assets produced (e.g., design, photography, illustrations, video, music)?

Are you free to reuse or resell them?

Does the scope or contract clearly specify who owns the project assets, such as concepts and design iterations?



Blindspots

Are any assets owned by outside contractors (e.g., illustrators, photographers, stock companies)?

What are the current and future licensing agreements for these assets, and what are the associated costs?

What is the length of the licensing period?

Confirm that all images and illustrations are properly licensed—not just downloaded from the Internet.

Unauthorized use can lead to copyright infringement lawsuits, hefty fines, and/or forced removal.

Failure to understand ownership and licensing could end up costing more than the entire project. (See page 83)

Assets + Resources Checklist

Do you have all approved graphic assets created for the project?

Are these assets provided in the proper file formats for future needs or edits?

Do you have contact information for key resources or team members that you may need in the future (e.g., writers, printers, developers)?

Blindspots

If the project didn't meet expectations, ensure you collect all the necessary files in their correct/editable formats immediately upon completion based on the contract.

Don't rely on contractors to store your creative assets. (See backup guidance on page 87.)



2 MINUTE TUTORIAL



WHAT IS CREATIVE OWNERSHIP?

Creative Ownership' refers to any original work—such as a logo, brochure, website, photograph, or video—created by an individual or entity. These works are considered the creator's intellectual property and are legally protected.

Ownership rights remain with the creator unless they explicitly sell or transfer those rights to you.

This includes:

- Rights to display the work
- Rights to reproduce the work
- Rights to make adaptations or derivative/future works

Creative ownership even extends to project ideas, concepts, discoveries, and innovations.

As you can see, this can become a major issue if it's not addressed and agreed upon upfront.

Why is this Important? Misunderstandings or misconceptions about creative ownership can lead to costly issues down the road. Here's a brief overview to help you ask the right questions and ensure that you fully understand:

1. What you are paying for
2. What you will receive upon project completion
3. What your usage rights are going forward

A SIMPLE ANALOGY...

Think about when you go out for dinner, you pay for that one meal on that one visit. You're paying for the ambiance and experience, the culinary creation, all the ingredients, and the time and expertise required to prepare it. The price doesn't include the chef's detailed recipe, all the utensils, the use of the china and glassware, directions to where you can buy the specific ingredients, along with a cooking tutorial. You, as the client, are paying for the delivery of the final product. That creation, that meal—nothing more, nothing less.

Key Points for Consideration

Ownership Rights: Ensure that ownership rights are clearly defined in contracts.

Licensing Agreements: Understand how assets can be used and any limitations on their use.

Asset Management: Confirm that all creative assets are properly licensed and stored securely (by you).

Future Use: Clarify whether you retain rights to concepts or project work for future use.



**Backing
up your
files isn't
expensive,**

**it's
priceless.**

Some 'What if' scenarios... Consider the potential risks that could impact your projects:

- Infection by a virus or ransomware
- Hacking
- Natural disasters
- Theft
- Accidental deletions
- Software crashes
- Hardware failures

What's your Back-up + Storage Plan?

Where will your graphic files and assets be stored and backed up?

Is there a protocol for version control?



Best Practices: Create your own cloud storage system to maintain access and control over your files, ensuring they're always ready when needed.



Blindspots

Create redundancy: back up all final files to an external hard drive or memory key and store them safely in another location. Computers and hard drives can fail—or encounter unexpected hazards like spilled liquids.

Protect against cyber risks: if your company gets hacked, files may be held hostage behind an expensive paywall.*



Ensure a backup and storage plan is in place—don't rely solely on others.

** Yes, this really happened to a client and lost 20 years of photos.*



Navy SEALs Golden Rule: One Is None, Two is One

Relying on a singular thing is risky.

Thinking ahead and planning for potential failures is key to minimizing risks.

Think of it as insurance for all your time, money and hard work.

PART 4



PROJECT WRAP CHECKLIST

Ownership of Assets

- Know who owns the creative assets that were just used in the project?
- Are you free to re-use or re-sell them?
- Do you want/need the concepts from the project?

Created Graphic Files + Resources

- Do you have all the graphic assets from your project?
- Are they all in preferred and/or editable formats?

Team Member Contact

- Do you have the contact information for the creative contractors involved in the project?

Back-up + Storage Plan

- Are your files and assets backed up?
- Do you have at least one extra copy of the back-ups offsite?



That's it but...
Have we missed anything?

If there's anything we missed—whether it's a Blindspot, Best Practice, Tip, Hack, Universal Truth, or a “Don't Be That Person”, we'd love to hear from you!

If we use your contribution in our newsletter or in the next edition, we'll send you an updated book for free.

Contact me at:
brady@blindspotshandbook.com

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 Brady@blindspotshandbook.com

 blindspotshandbook.com
thecentralbranch.com
tropoly.io

 [BradyDahmer](https://www.linkedin.com/in/BradyDahmer)

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2 Quick Favors That Would Mean the World to Me.

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Many Thanks!

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