

# Vertical Marketing

## Basecamp User Guide - Client Version



### Overview:

Basecamp is Vertical Marketing's online project management tool. It enables Vertical to manage client projects effectively and efficiently so that all staff members and clients are up to date with the current status of a given project at any time. Each client can have a personal log-in and can access basecamp from Vertical's website.

### Summary of tools and their application:

#### **Project briefing**

**Writeboards** - Before any project can begin the brief will be laid out by the account manager and approved by the client here. The client can approve the brief by adding a comment underneath stating clearly that the brief has been accepted or edit the brief accordingly. When any amends are to be made to the brief a new version must be created.

If any amends are made to the brief, or if the original brief changes at any time, the client will be contacted by the account manager and the project will be on hold until the client agrees to the amended brief. (The above procedure then applies before the project can continue).

#### **Client-to-Vertical project liaising**

##### **Messages**

Any questions about a project can be asked and logged here. Comments can then be left to respond to the message or to ask questions about that particular message.

##### **Uploading files and information**

There are two areas where the client or account manager can upload any information relating to a project such as files, logos, documents, data etc.

1. Within the 'Message' section, you can upload a file as an attachment to your message.
2. You can upload any files to the dedicated 'Files' section.

Any file you upload through either process will all be saved under the files section. Any artwork files, draft copies etc. that Vertical need to send to the client will also be saved here. The Files section can also be used as a file transfer utility for files up to 100mb.

#### **Project tasks that need to be completed**

**To-Do** - A list of tasks that a particular person (or the team in general) will need to complete for a project to progress will be outlined here. Clients can also post project snagging lists, where any problems, issues, snags etc. can be logged as well as keeping track of change requests in real-time.

#### **Important deadlines**

**Milestones** - Any deadlines that must be adhered to during a project will be outlined here to avoid being missed and to notify everyone involved of the projects status. For example; First draft to be sent to client; Approval by client; Date to be at printers by; Date of arrival at client address.

### Additional:

All of the above have the facility to notify the person/s involved by email. The recipient can then either log into Basecamp and respond or simply reply to the email (the response will be uploaded into Basecamp).

The Basecamp website has a series of tutorials and FAQs on a range of topics if additional help is needed on getting to grips with the functionality of Basecamp. Alternatively you can contact Vertical directly on 01202 842250 and ask to speak to a team member who will be happy to assist you with your query.

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