

Background:

KFC's process flow was over-simplified, not scalable for larger projects.



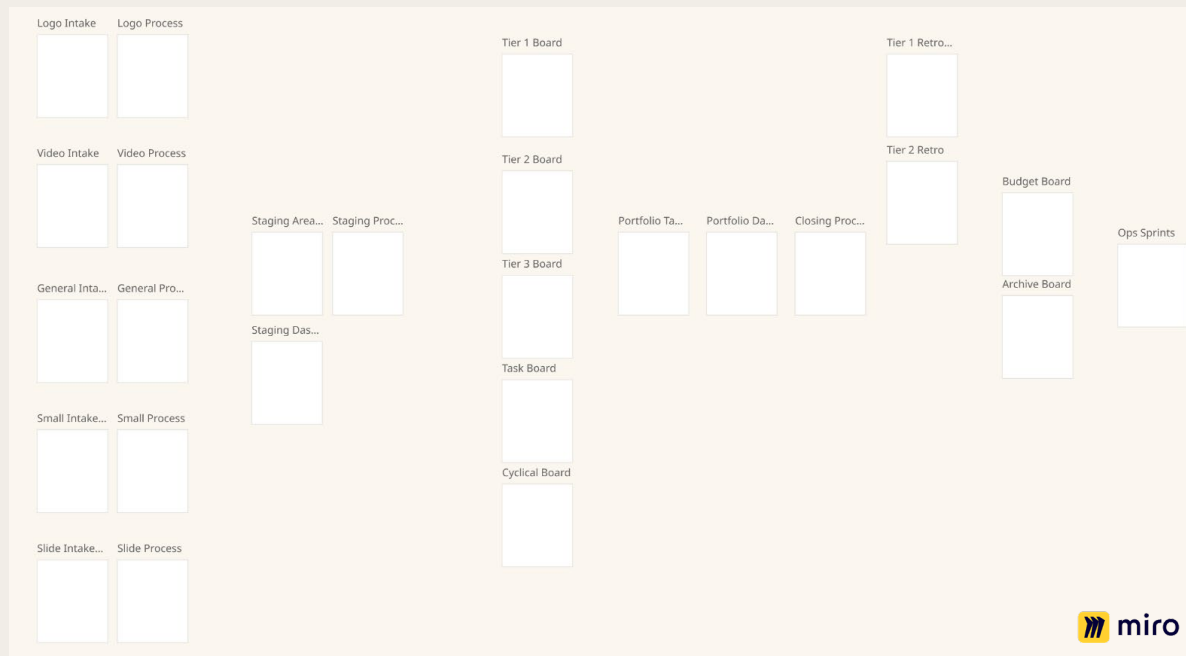
INTAKE	Request comes in via email to special email address, using templates provided
PRIORITIZATION	Project Manager reviews the request and determines if she can handle it or if Marketing Lead needs
INITIATION	Project Manager logs the request into something – Monday, status report, scheduling
PLANNING	PM and Marketing Lead decide when the item can be done and responds back to requestor about receipt and timing.
EXECUTION	Work gets done and goes back to PM to send to requestor.
PROJECT CLOSE	PM logs the project complete on whatever tool using to track items in progress.*

* Process documentation at start of contract

END-TO-END FLOW OF INFORMATION

Prior to developing individual board structure, we needed to understand the desired flow of information from start to finish. Working with stakeholders, we developed a flow from intake, through execution, to retrospectives and a process enhancement board.

We also identified key metrics desired and developed a dashboard plan to support quick decision making.



Project intake created more problems than it solved.
Planning boards were unusable and flows broken.

[illegible]

Slide Design									
	Task		What is your na...	Short text 1	Provide a short description of how KFC3 c...	Short text 2	How many slides...	What is your bud...	Short text
☐	Virtual Audit Program Materials	D	Andrew Schonborn	Pitch & Sell Deck	We need to develop a case for change to m...	case for change t...	5-10 per deck	TBD	
☐	+ Add task								
Emailed Items									
	Task		What is your na...	Short text 1	Provide a short description of how KFC3 c...	Short text 2	How many slides...	What is your bud...	Short text
☐	Chelsey	D							
☐	Meredith Kroenes	D							
☐	+ Add task								
General Request									
	Task		What is your na...	Short text 1	Provide a short description of how KFC3 c...	Short text 2	How many slides...	What is your bud...	Short text
☐	Clarissa Angel - LOGGED	D							
☐	Chelsey J-LOGGED	D							
☐	FW: Kentucky Fried News Teams Meeting Help! - LOGGED	D							
☐	+ Add task								

The Request center provided five paths to capture information.

- Small Request Form (4 Questions)
- General Request Form (10 Questions)
- Video Request Form (20 Questions)
- Logo Request Form (15 Questions)
- Slide Request Form (10 Questions)

Field names were full questions which did not effectively pass through to other boards within the system.

- Of 49 questions, only 8 (16%) captured discrete data. The most useful was a “delivery date”
- Only one question that requires programmed input.
- Cost and budget details were among the least often captured
- We often asked the same question in different ways.

DISCRETE AND AUTOMATIC DATA

We created intake forms that kept desired questions for different types of projects, while synthesizing common fields to create usability across request types.

We reorganized board structure to be more informative for project prioritization and planning, allowing focus on the most impactful projects.

We configured forms to capture known data (contact info, emails, departments, etc) to save input time.

Empowered with desired process and information types, we were able to create a master column set to enable seamless information capture and flow from board to board.

REFERENCE ATTACHMENT:
Master Column List_10102025.xlsx

KFC³

General Request

Need help creating printed materials, webpage layouts, or just need general creative strategy and ideation? Then you've come to the right place!

Project Name *

Please give this project a name. You can use the name of your program with a descriptor. If your program is "Test Kitchen Enhancement," then "Test Kitchen Enhancement Brochure" could be an appropriate name.

0/255

Owner *

Who is the owner of this project? If you're requesting it, there's a good chance it's you. Please include a full name.

Tom Gill

X

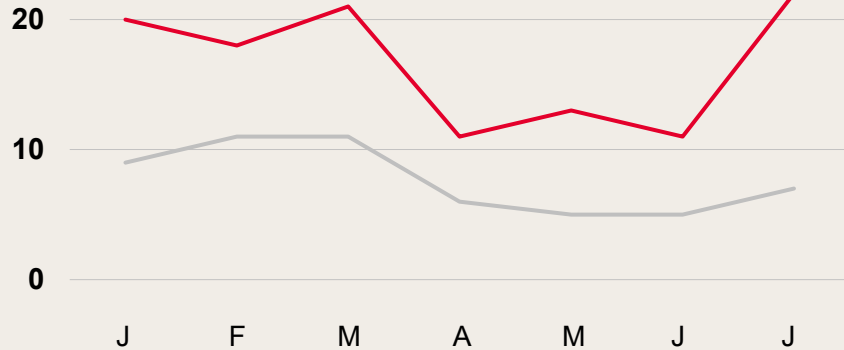
Staging Table	Portfolio Calendar	Welcome Page	Logo Request	Video Request	General Request	Small Request	Slide Request	Main table	All	+
New item	Search	Person	Filter	Sort / 1	Hide / 1	Group by				
In Planning										
Item	Owner	Schedule	Impact	Feasibility	Priority	Timeline	Dur...	Project Tier	Staging Stat...	
					0			Tier 2	In Planning	
					0	Oct 16 - 28	13 days	Tier 3	In Planning	
					0			In Staging		
					0	Dec 4 - 16	13 days	Tier 3	In Planning	
					0	Apr 26, 26 - May...	6 days	Tier 1	In Staging	
					0	Sep 23 - Dec 17	86 days	Tier 2	In Planning	
					0			Tier 2	In Staging	
+ Add Item										
		3 sum	11 sum	14 sum	28 sum	Apr 22, 25 - May...	366 days sum			
Deferred										
4 Items		Schedule 8 sum	Impact 10 sum	Feasibility 5 sum	Priority 23 sum	Timeline Jul 3 - Dec 31	Dur... 172 days sum	Project Tier	Staging Stat...	
Rejected										
1 Item		Schedule 0 sum	Impact 0 sum	Feasibility 0 sum	Priority 0 sum	Timeline Oct 14 - Nov 4	Dur... 22 days sum	Project Tier	Staging Stat...	
Approved										
Item	Owner	Schedule	Impact	Feasibility	Priority	Timeline	Dur...	Project Tier	Staging Stat...	
		10	10	10	30	Sep 16 - 18	3 days	Task	Approved	
		10	10	8	28	Aug 11 - 22	12 days	Tier 1	Approved	

Background:

Insights to portfolio & project magnitude were opaque due to limited breakdown of effort required.



Month-by-month project count averaged around 10, but capacity needs varied dramatically



Project count vs weighted project count; Q1-Q2, 2024

Of 208 projects captured in 2024:

- 10% were duplicate entries, entered for memory sake, without additional structure, including projects named “find,” or “locate”
- Only 25% of Tier 1 projects received Tier 1 level of planning effort
- 100% of cyclical, repeatable processes were captured as individual projects
- Once duplicates and cyclical processes were removed, insights across portfolio remained impossible – project load described the situation inaccurately, often contributing to overbooking of resources

STRUCTURE AND TEMPLATES

We created a structure for a tiered approach to project categorization to enable automations and shared understanding of project magnitude.

	TIER 1 (Strategic)	TIER 2 (Adaptive)	TIER 3 (Production)	TASK (Delivery)
Characteristics	Significant creative input, strategic planning, complex client and/or vendor collaboration	Adapting existing creative assets, creating variations, ensuring consistency	Changing headlines, swapping photos, using templates, retouching photos, versioning assets	Minor requests requiring minimal to no creative insight
Concepts	New brand identity, major events, new major process/change	Creating emails based on campaign/project theme, changing theme of existing assets	Creating multiple sizes/ratios from single creative	Locating & delivering files/assets, creating email banners from templates, sending emails from templates, locating/printing files
Examples	[REDACTED], [REDACTED], [REDACTED], [REDACTED]	[REDACTED], [REDACTED], [REDACTED], [REDACTED], [REDACTED]	[REDACTED], [REDACTED], [REDACTED]	[REDACTED], [REDACTED], [REDACTED], [REDACTED]

STRUCTURE AND TEMPLATES

Our new automated project creation includes pre-set project artifacts and deliverables to enhance planning process.

Project plans are tailored by tier to ensure appropriate level of effort.

We introduced planned-to-actual reporting for schedule, effort, costs to enhance capacity planning, reporting and ongoing process developments.

REFERENCE ATTACHMENTS:

_MvO_v01-TEMPLATE.xlsx

Project_TEMPLATE.xlsx

StakeholderAssessment_TEMPLATE.xlsx

CommunicationPlan_TEMPLATE.xlsx

> Project Timeline

1 Task

Status

Priority

Timeline

-

Duration

0 days
sum

Planned Effort

0 hours
sum

Effort Spent

0 hours
sum

▼ Planning

☐	Task	☐	☐	Status	Priority	Timeline	☐	Dependent On	☐	Duration	☐	Planned Effort	Effort Spent
☐	Problem Definition	☐	☐			-				0 days		0 hours	0 hours
☐	Solution Opportunity Assess...	☐	☐			-							
☐	Total Cost of Ownership	☐	☐			-							
☐	Stakeholder Assessment	☐	☐			-							
☐	Communication Plan	☐	☐			-							
☐	Strategic Brief	☐	☐			-							
☐	Creative Brief	☐	☐			-							
☐	Brief Approval	☐	☐			-							
☐	Contract Review	☐	☐			-							
☐	Build Project Schedule	☐	☐			-							
☐	Estimate Costs	☐	☐			-							
☐	Project Kickoff	☐	☐			-							
☐	Assign Resources	☐	☐			-							
☐	Develop Test Plan	☐	☐			-							
☐	Training Needs Assessment	☐	☐			-							
☐	+ Add task												

Help

[Help](#)

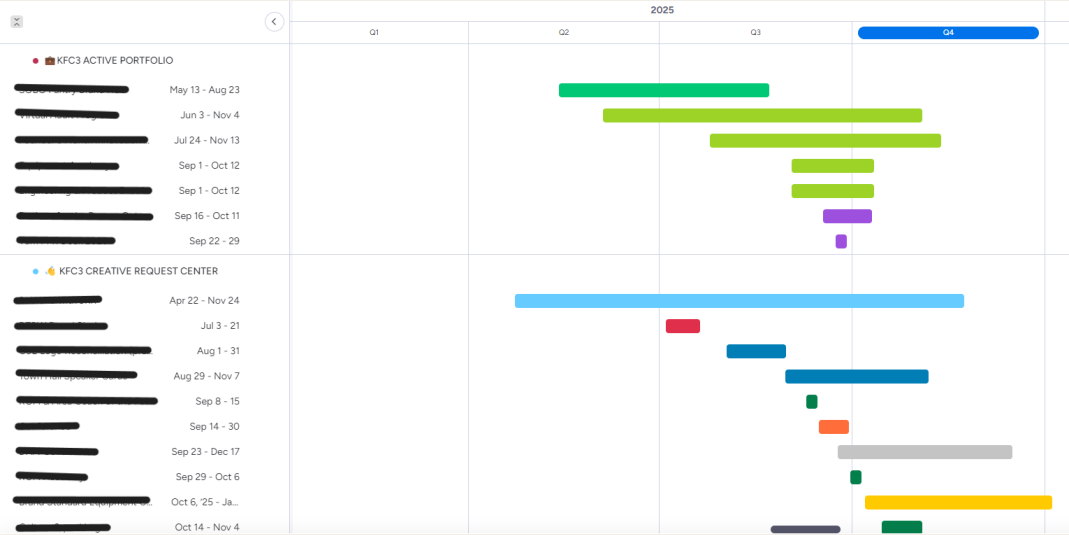
COMPREHENSIVE PORTFOLIO REPORTING

Our new structure enabled high-level portfolio views of work-in-progress with rapid access to key information such as project health, prioritization matrices, and schedule/cost variance.

Accompanying timeline views provided schedule analysis tools to enable more thoughtful portfolio balancing.

	Project	Owner	Schedule	Impact	Feasibility	Priority	Project Health	Project Progress	Planned Timeline	Actual Timeline	Planned Budget	Actual Budget	
☐				10	10	4	24	Project Health		Sep 22 - Oct 10	-	\$0	
☐				7	7	10	24	On track		Sep 22 - 29	Sep 22 - 29	\$0	\$5,500
☐				10	7	6	23	On track		Jul 14 - Oct 31	Jul 24 - Nov 13	\$10,000	\$2,400
☐				8	7	8	23	On track		Aug 20 - Sep 19	Sep 1 - Oct 12	\$1,000	\$1,200
☐				8	7	6	21	On track		Aug 20 - Sep 19	Sep 1 - Oct 12	\$1,000	\$700
☐				5	10	4	19	At risk		-	Jun 3 - Nov 4	\$23,000	\$47,500
☐				7	4	8	19	On track		Sep 16 - Oct 11	Sep 16 - Oct 11	\$499	\$0
☐				2	4	9	15	On track		May 20 - Aug 15	May 13 - Aug 23	\$10,000	\$4,377.56
☐							0	On track		-			

Help



Background:

Develop new website to support commodities investment team growth



The team was briefed to bring to support the growth of the new Hilltop Securities Commodities investment team with a website to describe services, connect with investors, and ultimately drive customer acquisition.

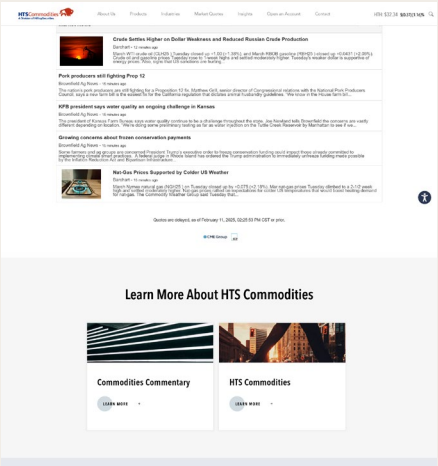
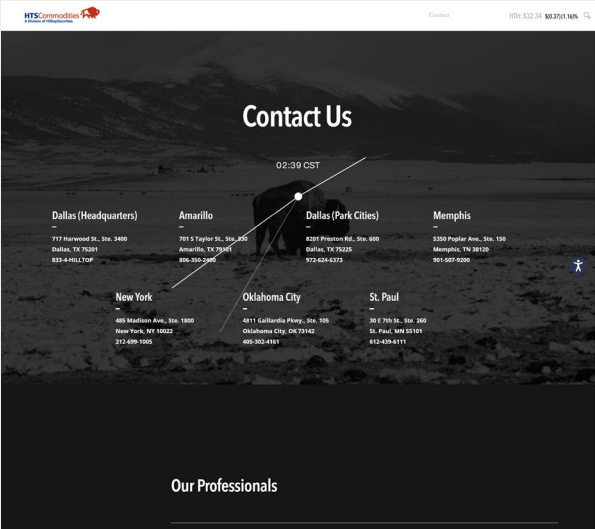
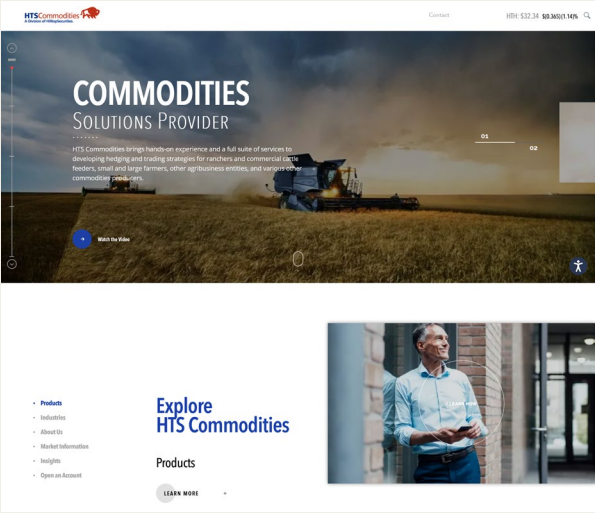
The work required deep understanding of the commodities products and capabilities along with an understanding of the prospective investors.

THE SOLUTION

We built a new dynamic page template to match other companies within the Hilltop portfolio.

Bios and contact information for investment managers to enabled personalized connection to investment experts.

Live market tools and news created ongoing engagment resources and increased return traffic.



Background:

Reposition brand from utility to lifestyle



The team was briefed to bring to life the new brand position for Brinks Home Security. More than just a utility like cable, water or electricity, elevated home security offers freedom to live life without worry of whether or not your home is safe.

The work included a full-scale rebrand of the company's assets, including core focuses on website look & feel, SEO best practices and functionality.

Strategic Framework

Security for Life

This is your home. And within its walls are the carefully selected, tastefully arranged artifacts of a lifetime of work. But where are you?

You - are not here.

You're somewhere else, blissfully not thinking about any of it.

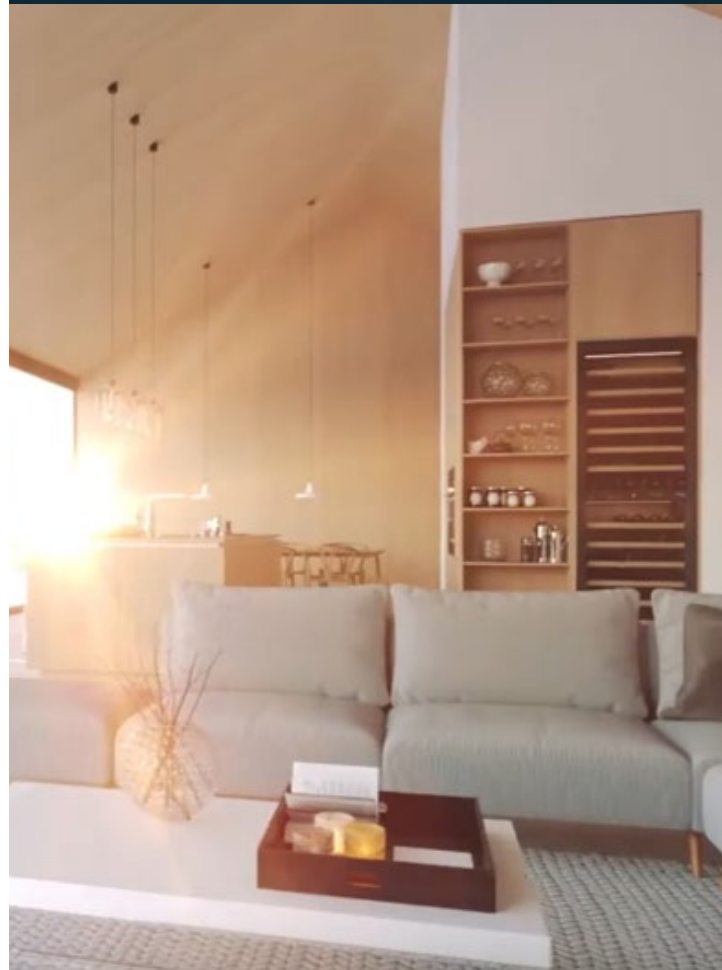
At Brinks Home, that's exactly our ambition. To turn an obsession with safety into a trust and confidence that lets you **live your life worry free and full of freedom.**

To engineer platinum-grade experiences that behave brilliantly, are ambitiously beautiful, and **elevate your home security** to the level of your taste.

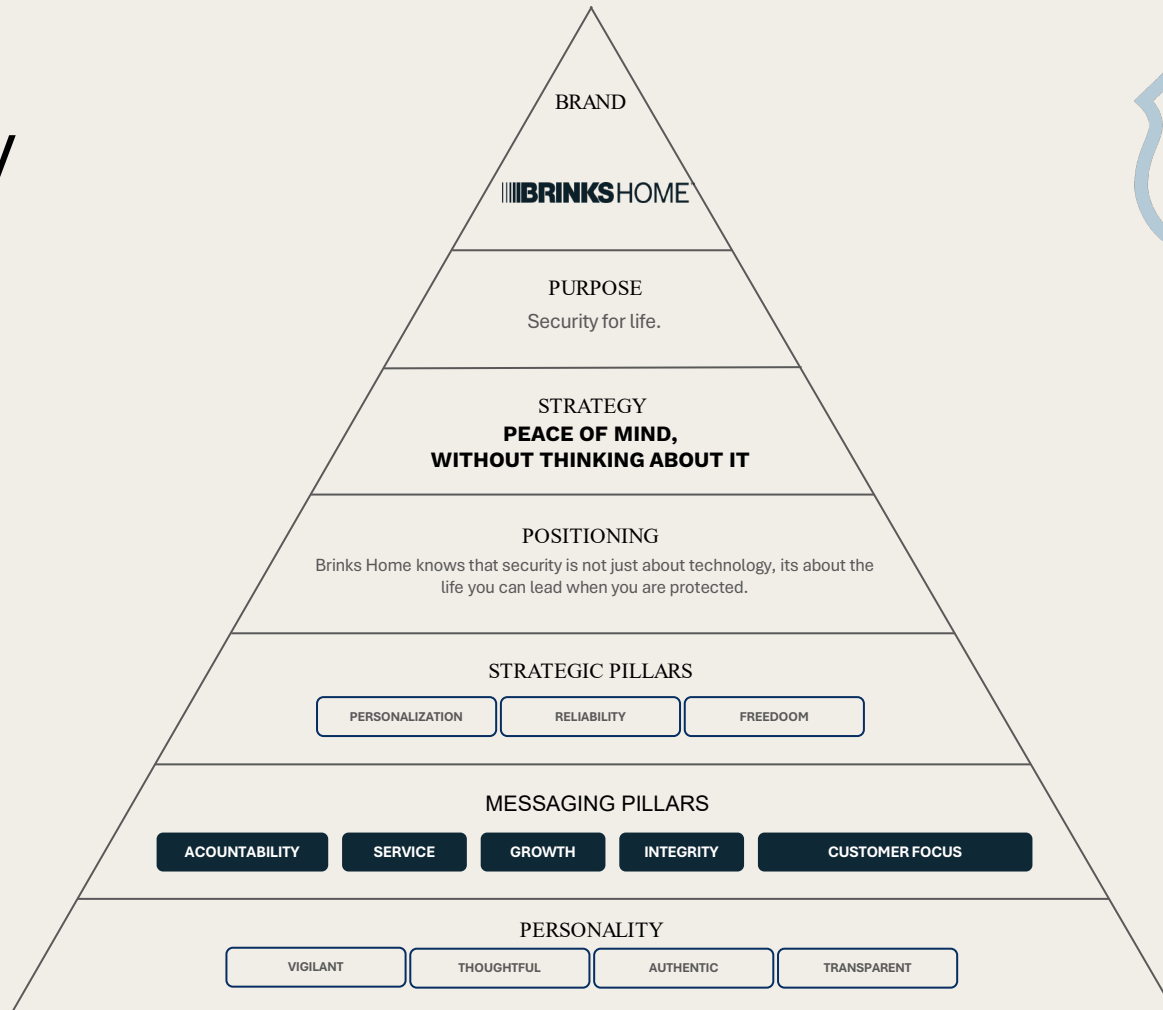
To seamlessly integrate with your space to keep bad out, and let good in.

All so you can live life, roam free, and know with full certainty that everything back home is as it should be.

Brinks Home. **Security – for life.**



Brand Strategy

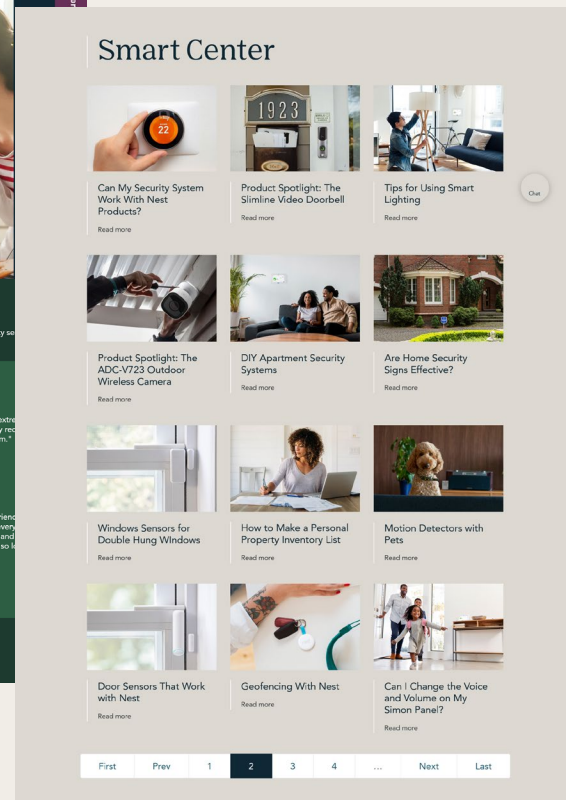
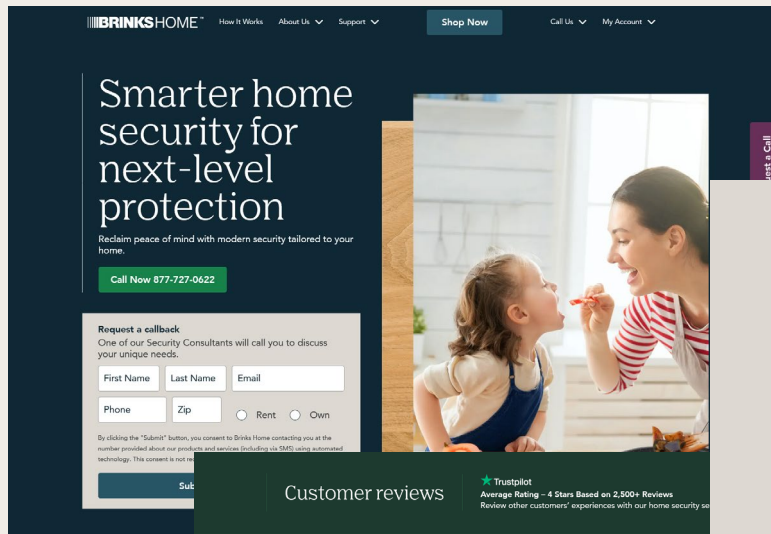


HOME PAGE

We leveraged CTA for deeper data collection and drive to connect with award winning customer service team while driving new brand identity forward.

We elevated customer reviews with curated live feedback tool to highlight positive experiences.

We overhauled content strategy and blog architecture to drive SEO growth.





[click image to view video](#)

Background:

Reposition brand from product to priceless service



The team was briefed to build the new brand vision for Jewelers Mutual, *Elevating the love of jewelry*, into a motivating and distinctive full-funnel marketing campaign.

We defined an ownable strategic territory, underpinned by rich insights, and then translated that idea into a remarkable and beautiful campaign that would fundamentally shift perceptions of the organization.

Strategic Framework

Knowing the Value of the Invaluable

Safeguarding your valuables is simple.

Lock the door, use the safe, keep the receipts, get the insurance.

Be smart, get covered.

But the most valuable things in the world are worth more than the money you spent, more than the cost of rocks and metal.

They are memory. They are hope. They are achievement. They are you.

Jewelers Mutual knows the true value of the items that mean the most.

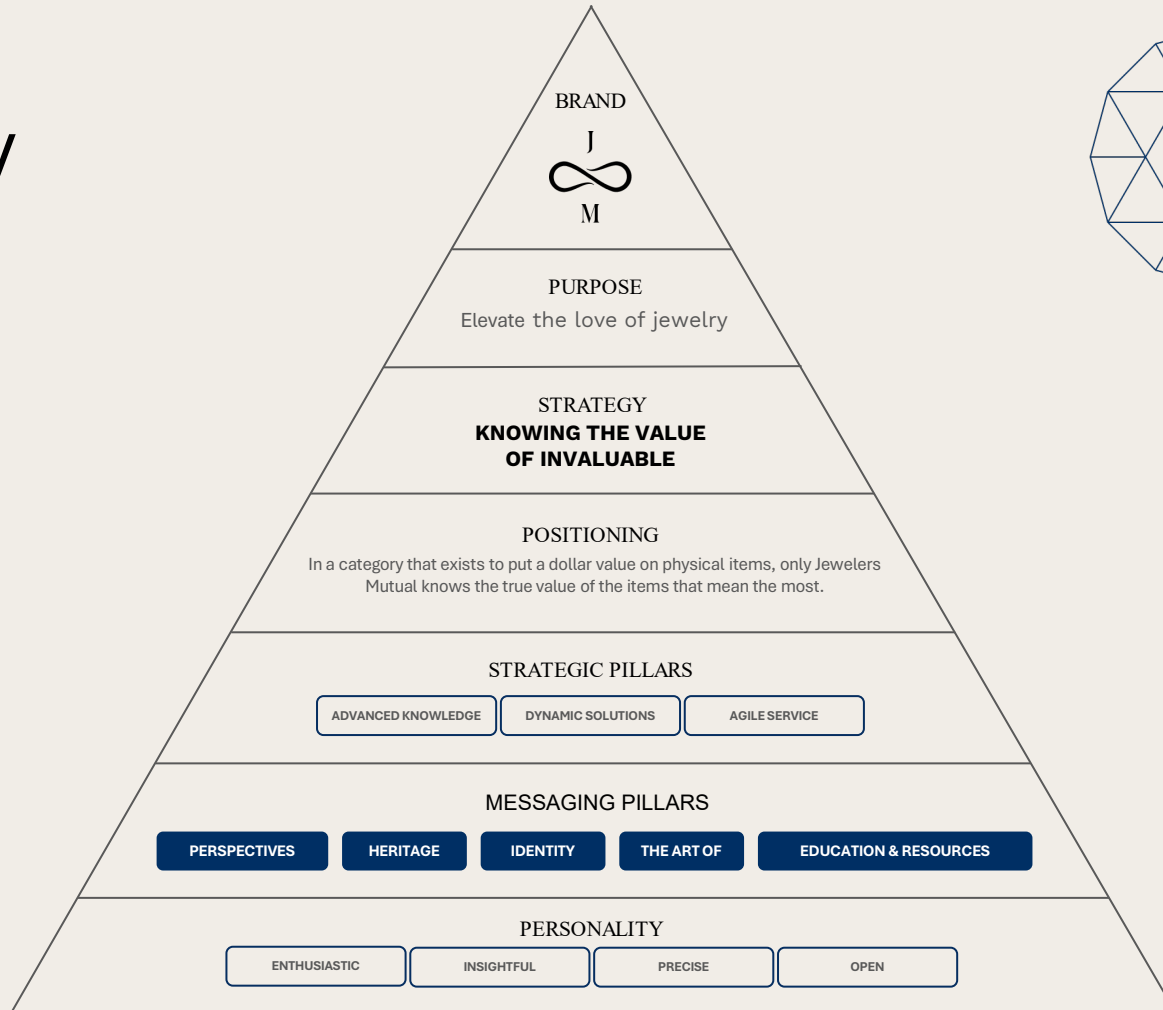
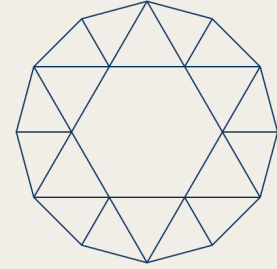
These are not valuables, they're invaluable.

For over 110 years, we've been the preferred partner to jewelers and jewelry owners alike, ensuring their most precious possessions have the protection they deserve.

Our unrivaled jewelry expertise, policy coverage, and customer service are a testament to our mission to **elevate the love of jewelry**.



Brand Strategy



More Than Metal & Stone

Our campaign was inspired by the true value of jewelry in people's lives.

Through dramatic, beautifully rendered imagery and storytelling, we celebrated the rich meaning behind each and every invaluable, individual piece.

We segmented and targeted considered audience groups (bridal, enthusiast, & affluent) at different stages of the consideration funnel.



DISPLAY ADS - BRIDAL
PROSPECTING (TOFU)




**More Than
Metal
& Stone**
it's our love

INSURE YOUR RING


**More Than
Metal
& Stone**
it's our love

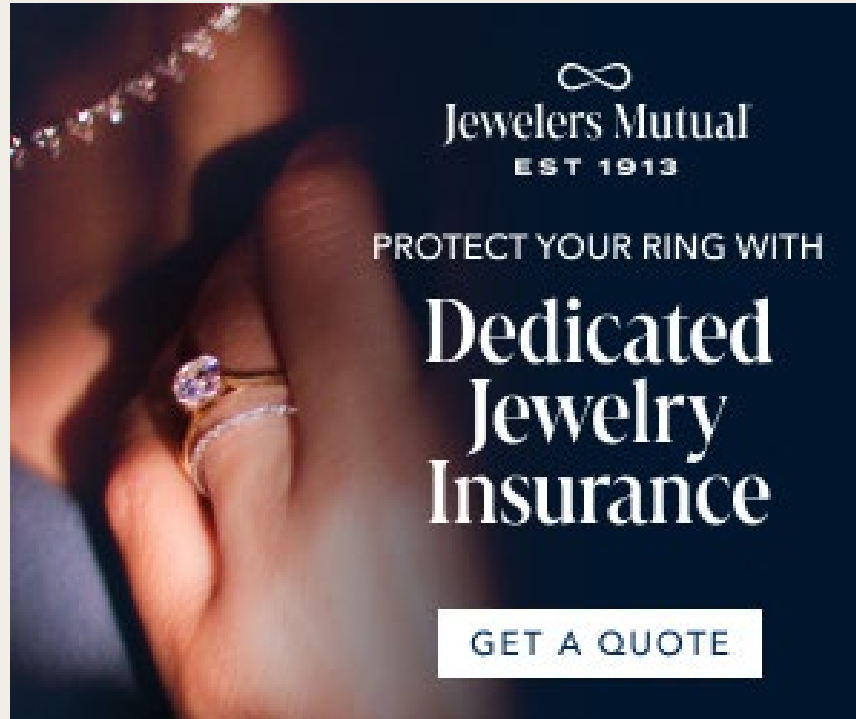
INSURE YOUR RING


More Than Metal & Stone
it's our love

More Than Metal & Stone
it's our love

**INSURE
YOUR
RING**

DISPLAY ADS - BRIDAL
RETARGETING (BOFU)

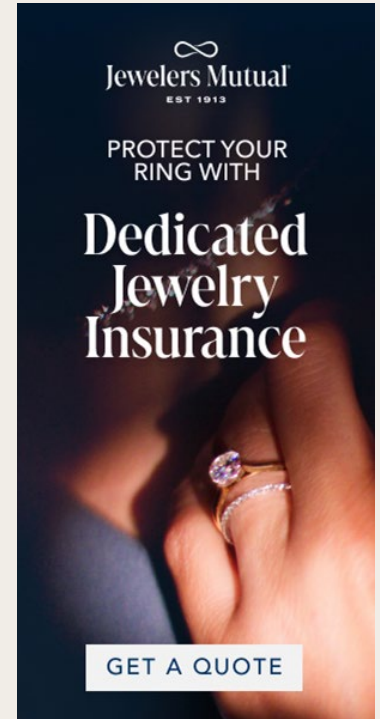



Jewelers Mutual
EST 1913

PROTECT YOUR RING WITH

**Dedicated
Jewelry
Insurance**

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