**Explanation of Who You Are:**

You are the Director of Marketing at Reyes Corporation. Although you have the authority to approve the proposed project, it is likely that you will also distribute the proposal to the VP of Marketing and Communications, one of the controllers in accounting, and a colleague in the marketing department as well. You requested this proposal. Most contractors are former permanent employees of Reyes and do all the marketing projects, tech manuals, graphic design, etc. This is done through the Creative Services department, which is part of marketing.

The part about me working for Reyes both permanently and as a contractor is true, and during my last assignment at Reyes, this standards manual was one of the projects in the queue. However, when a financial situation occurred, priorities shifted and everything was put on hold. I am writing this proposal under the make-believe assumption that things are back to normal (they are not) and that the projects that were in queue are once again being considered.

**M E M O R A N D U M**

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| **TO:** | Dr. David McMurrey, Director of Marketing |
| **FROM:** | Robert A. Freundlich, Contractor - Creative Services Department |
| **DATE:** | January 6, 1998 |
| **RE:** | Proposal to Develop a Corporate Standards Manual for Reyes Corporation |

Thank you for asking me to submit a proposal to develop a corporate standards manual. I have had this project in mind for some time now and have been eagerly waiting for the opportunity to work on it. As we discussed in our meeting on December 7, the changes that Reyes has experienced over the last two years have strongly impacted its identity. Employees, customers, and the market are all trying to define the new Reyes and set it apart from the old Reyes. Both the old and the new Reyes employees are confused about the usage of Reyes brand names, the Reyes logo, and other formatting and style issues. It is the perfect time to re-establish a strong identity for Reyes, starting with a new standards manual.

The attached proposal outlines the need for and the benefits of a standards manual. It also includes the method I will use to develop the manual, the contents of the manual, costs, schedules, and my qualifications for review by other colleagues if necessary.

Please call me at 770-995-1512 if you have any questions. I look forward to hearing from you.

Attachment: Proposal

**PROPOSAL
to
Develop a Corporate Standards Manual for Reyes Corporation**

The following is a proposal to develop a Corporate Standards Manual for Reyes Corporation. After reviewing the literature and the outdated standards manual that you gave me at our meeting on December 7, 1998, I developed this proposal to describe to you the process involved in creating your new standards manual. This proposal contains information on the need for a standards manual, the process of developing the standards manual, the contents of the standards manual, the schedule to complete this project, costs to complete this project, and my qualifications to produce a high-quality finished manual. Because I am a former full-time employee of Reyes and have now been working for Reyes on a contract basis for over a year, I am confident that I can create a standards manual that will accurately reflect the new Reyes image and will be a valuable resource for Reyes employees.

**Need for a Corporate Standards Manual**

Since Reyes has used a standards manual before, I know that you understand the importance of having a corporate identity that establishes a consistent impression across all media. Because Reyes has undergone so many changes in the last few years, it is more important then ever to present a consistent image to the media. There has been a large turnover in personnel since emerging from Chapter 11 bankruptcy in 1996 and the merger with Access Beyond in 1997. Over the past two years, I have seen numerous examples of inconsistent use of Reyes identity standards. Some of the incorrect usage is due to the lack of training provided to new employees, and some of it is because so many things have changed yet no new standards have been set. I recently saw a copy of a letter sent from a Reyes employee to a customer in which Reyes is referred to three times in three different ways: first as Reyes Microcomputer, then as Reyes Corporation and then the third time as Reyes Microcomputer Products, Inc. Not only can inconsistency confuse the customer; it can also leave an impression that Reyes doesn't quite have its act together.

Almost everything except the Reyes logo has changed. It is time to re-establish the Reyes look with new standard formats for logo usage, internal and external correspondence, business cards, forms, signage, press releases, and all media formats. There are new product lines, icons associated with those product lines, and Reyes trademarks that need to be used consistently and accurately. Some of the retail cartons, technical manuals, and product literature that I have seen recently do not refer to either the new or the old products consistently. Product names are sometimes written in all caps, sometimes in upper and lower case, and often they are separated from other elements that make up the entire brand name. I have seen usage of the Reyes name with an apostrophe, which has always been unacceptable in any situation. As you can see, it is more important than ever that Reyes presents a positive and organized impression, especially after its recent well-known financial and organizational problems.

**Benefits of a Corporate Standards Manual**

How you visually communicate your company to the world, the market, and your clients is an important part of your success. Consistent usage of style and and identity gives the world an impression that can be remembered. Once an impression is made to a potential customer through various media materials such as marketing collateral, signage, or the World Wide Web, it should be easily recognized a second time. If the identity elements are not used consistently, the impression may be lost. By creating and using identity standards, we can make Reyes more easily recognizable and memorable.

**Process of Developing a Corporate Standards Manual**

The standards manual that I am proposing to develop will include all identity system elements. I would like to meet with key Reyes personnel to establish clear communication objectives. I will then organize and format the manual and design the cover. No new graphics will need to be created, since all the necessary graphics already exist and are archived in the Creative Services Department. New designs will be developed, however, for stationery, presentations, forms and business cards using the current logo with the new Reyes name. I propose to also manage the production and distribution of the standards manual and to prepare a presentation for training employees. A permanent Reyes employee or myself may be considered to conduct the training session.

I identified three phases in the process of developing the manual: (1) analysis, (2) design, and (3) production. Below are the steps that will be taken in each phase to ensure accuracy and efficiency:

*Analysis Phase*

1. Research industry visual standards
2. Review competition's standards manuals
3. Attend meetings with key Reyes employees to:
4. Define requirements and establish clear communication objectives
5. Identify application items such as stationery, publications, signage, etc.

*Design Phase*

1. Develop the content and organization of the standards manual
2. Create the format and cover design
3. Finalize basic identity system such as typefaces, colors, etc.
4. Present draft of standards manual for review
5. Incorporate changes as necessary until final approval of standards manual
6. Create presentation material for training session

*Production Phase*

1. Choose vendor for print production, determine quantity
2. Prepare camera-ready artwork for printer
3. Review proofs and blue lines
4. Supervise prepress, printing and manufacturing of the standards manual
5. Distribute to all employees and set up training session

**Description of the Finished Product**

This standards manual is for all Reyes employees and Reyes contractors to use. I propose to use three-ring binders with printed covers and printed tab inserts to separate sections. This will be very useful later when only particular pages or sections need to be updated; rather then reprinting an entire book, only the pages that are changed will need to be reprinted and replaced in the binder. I have estimated that the book will contain between 60 - 75 pages. Most of the pages will be black and white text, except for those containing graphics such as logos or icons, examples of presentation layouts, or any other standard design element that includes color.

Following is an outline of the sections I plan to include in the standards manual. Some of this may change or sections may be added once I have met with Reyes personnel to determine the content.

1. Introduction: will contain brief history of Reyes and the proper usage of the Reyes name
2. Logo Usage: will contain information on proper usage of the Reyes logo and color schemes
3. Product Lines: will contain subsections with information on each product line and icons associated with those product lines
4. Formats: will contain subsections with information on memo formats, fax formats, business stationery, business cards, etc.
5. World Wide Web: will contain information on formatting issues for the World Wide Web
6. Marketing Literature: will contain information on formatting issues for promotional items, print and online documentation, signage, etc.
7. Presentations: will contain standard formats for internal and external presentations
8. Glossary of Trademark names: will contain a list of all trademark names
9. Glossary of Acronyms: will contain a list of Reyes and industry acronyms

**Project Schedule**

The proposed time schedule for this project will be as follows:

|  |  |
| --- | --- |
| **January 25** | Begin work on project |
| **February 12** | Analysis phase complete; begin design work |
| **February 26** | Present draft copy of the standards manual to Reyes for review |
| **March 8** | Incorporate all changes and present 2nd draft for review |
| **March 15** | Obtain approval of final copy; design phase complete |
| **March 16** | Begin production; deliver artwork to printer |
| **March 22** | Proofs from printer reviewed and approved |
| **March 31** | Standards manuals delivered to Reyes and distributed to all personnel |
| **April 5** | Presentations and training sessions begin |

**My Qualifications**

My qualifications for this project are as follows:

* I have been employed at Reyes in the Marketing and Communications department as a permanent employee and as a contractor for over five years combined.
* I have extensive experience and knowledge in all design and print production mediums as well as technical and marketing publications development.
* I have successfully completed numerous other contract jobs for Reyes.
* I offer competitive pricing.

**Costs**

I have estimated that it will take approximately 250 hours to complete this project, starting from the day I begin work until I receive the final print copies of the manual. As with the last contract I completed for Reyes, my hourly rate is $35 per hour, making the total cost for my services $8,750.

The cost of materials to produce the finished standards manuals can vary considerably depending on the vendor we choose and the quality of materials. I have a number of suggestions and price quotes for the production of the manual which we can discuss and decide upon during the initial stages of development.

**Closing**

Thank you for considering me for this project. I hope that you will approve my proposal and consider beginning this project as soon as possible. I am excited about creating this standards manual and as always, I enjoy working with Reyes.