

Sending an *Omen*

From a client's design request to a chosen concept, in six steps. Keep this open for your first few Omens.

Who does what

SALES

- Receive the design request from the client.
- Send the client a short heads-up (template below).
- Pass the request to design with the client contact's name and email.

DESIGN

- Create the Omen and send the invite from Znaak.
- Add concepts and notify the client.
- Promote the chosen concept to a project.

The six steps

- ☐ **1 Omens → New omen.** Title it after the product, e.g. "Granola box, 300g". The client sees this title in the email and on their page. Pick the client company and the **Packaging** template.
- ☐ **2 People: add the client contact and click "Add and send invite".** Role: Client. Add each person who should write or see the brief separately. Leave the 3-day reminder on.
- ☐ **3 Wait for the brief.** You get a notification and the answers appear under Brief. Clients can add reference links too.
- ☐ **4 Concepts → Add concept** for each direction, then click **"Notify client"**. Clients are not told about new concepts until you do.
- ☐ **5 Watch the reactions.** Likes, maybes and comments appear on each concept. "Chosen by client" marks their pick.
- ☐ **6 Promote to project.** Check the **Final approver email** is the client, not you. From here the project runs through review, approval and a Certificate of Approval.

SALES HEADS-UP · COPY AND PASTE

Hi [Name], thanks for the request! Our design team will send you a short brief link from Znaak today. It takes about two minutes and you don't need an account. Please check your spam folder if you don't see it.

DO

- ✓ Use "Add and send invite" so Znaak can track it and send reminders.
- ✓ Name every Omen after the product.
- ✓ Click "Notify client" after adding concepts.
- ✓ Check the Final approver before promoting.

AVOID

- ✗ Pasting the client link into Viber or email by hand. It's private to one person.
- ✗ Sharing one link between several people. Add each person instead.
- ✗ Leaving "New Omen" as the title.
- ✗ Promoting before the client has picked, unless agreed.

Quick fixes

The client didn't get the email.

Check the address, ask them to look in spam, then click "Send invite" again.

The client wants to change the brief.

They click "Edit brief" on their page. You'll see the update.

The link reached the wrong person.

Click "Regenerate link", then send the invite again. The old link stops working.

Two people at the client need to weigh in.

Add both under People with the role Client.