Standard Operating Procedure (SOP) for Creating Marketing Creatives

This SOP outlines the steps and best practices for designing clear, effective, and on-brand creatives used for social media, websites, marketing, and more.

➤ [Skip to Checklist](#)

Define Objective and Audience

- Identify the main message and target audience before starting the design.
  - Highlighting a service?
  - New sale?
  - Targeting a certain demographic (gamers, work-from-home, veterans, etc.)?
- Keep the topic focused and relevant to your intended viewers.
  - Avoid multiple 'points' in a single design.

Plan and Outline Content

- Draft a clear outline with a logical flow from introduction to conclusion.
  - Know what your objective is and the language you want to include.
- Use bullet points to separate and highlight key information instead of vertical lines or excessive separators.
  - Information should be quick and easy to read.
  - Important key points should be easily absorbed by the reader.
  - Using bullet points or icons to highlight key points in new rows is easier to visually absorb than using verticals with content close together.

- Avoid filler words (e.g., really, many, very) to keep content concise and impactful.
  - Use clear and direct language.

Visual Hierarchy and Emphasis

- Use headings and bullet points to structure information and indicate hierarchy.
- Emphasize key terms or data with bold lettering or contrasting colors to draw attention.
- Make sure that the most important elements are visually dominant through size, color, or position.
  - Call attention to the key point(s) readers should know.

Design Consistency and Clarity

- Stick to 1–3 fonts and a simple, cohesive color palette that aligns with your brand.
  - In Canva, there is a 'Brand' section where things like company logos and brand colors can be set up.
- Maintain alignment, centering, and visual cleanliness throughout the design.
- Use white space strategically to separate elements and avoid clutter.
  - Designs should be clear and clean.

Branding and Contact Information

- Place your logo on all infographics, videos, and other branded materials.
  - All materials should have the brand visible somewhere.
- Include contact information for all locations and your website URL in a clear, consistent footer.

Visual Elements and Data Visualization

- Use images, icons, and charts to reinforce your message, not overwhelm it.

- ○ When possible, use high-quality images organically sourced (not stock images).
- Whenever possible, use visual data (charts, graphs) rather than relying on text alone.
- Keep visuals high-quality and use only to support the narrative.

Accessibility and Readability

- Make sure all text is legible and within the intended display size.
- Design for mobile-friendliness so that the infographic can be viewed on various devices without unwanted cropping or loss of intent.
- Font coloring should differentiate enough that the font 'pops' from the background, preventing users from being unable to read text.

Proofreading and Fact-Checking

- Double-check all facts, figures, and data visualizations for accuracy.
- Proofread for grammar, spelling, and design consistency.
  - ○ Copy/paste too/from a document to check grammar and spelling if you don't have a program like Grammarly that checks all content written.

Source Attribution

- Cite all data sources clearly and accurately, typically in the footer.
Review and Feedback
- Get feedback from colleagues or stakeholders before finalizing the design.
  - ○ We all could use a couple of extra eyes on creatives. Have 2-3 people review your creative(s) before publishing, printing, etc.
- Make necessary adjustments based on input to ensure clarity and impact.
  - ○ We all have different experiences that give us different perspectives. Feedback is a good thing!

Quick Reference Checklist

- ☐ Clear objective and audience defined
- ☐ Bullet points for key information
- ☐ Key terms emphasized (bold/contrast)
- ☐ Consistent fonts, letter casing, and colors
- ☐ Aligned, centered, and visually clean layout
- ☐ Logo and contact info included
- ☐ Concise, filler-free content
- ☐ Data visualized where possible
- ☐ Adequate white space
- ☐ Proofread and fact-checked
- ☐ Sources cited