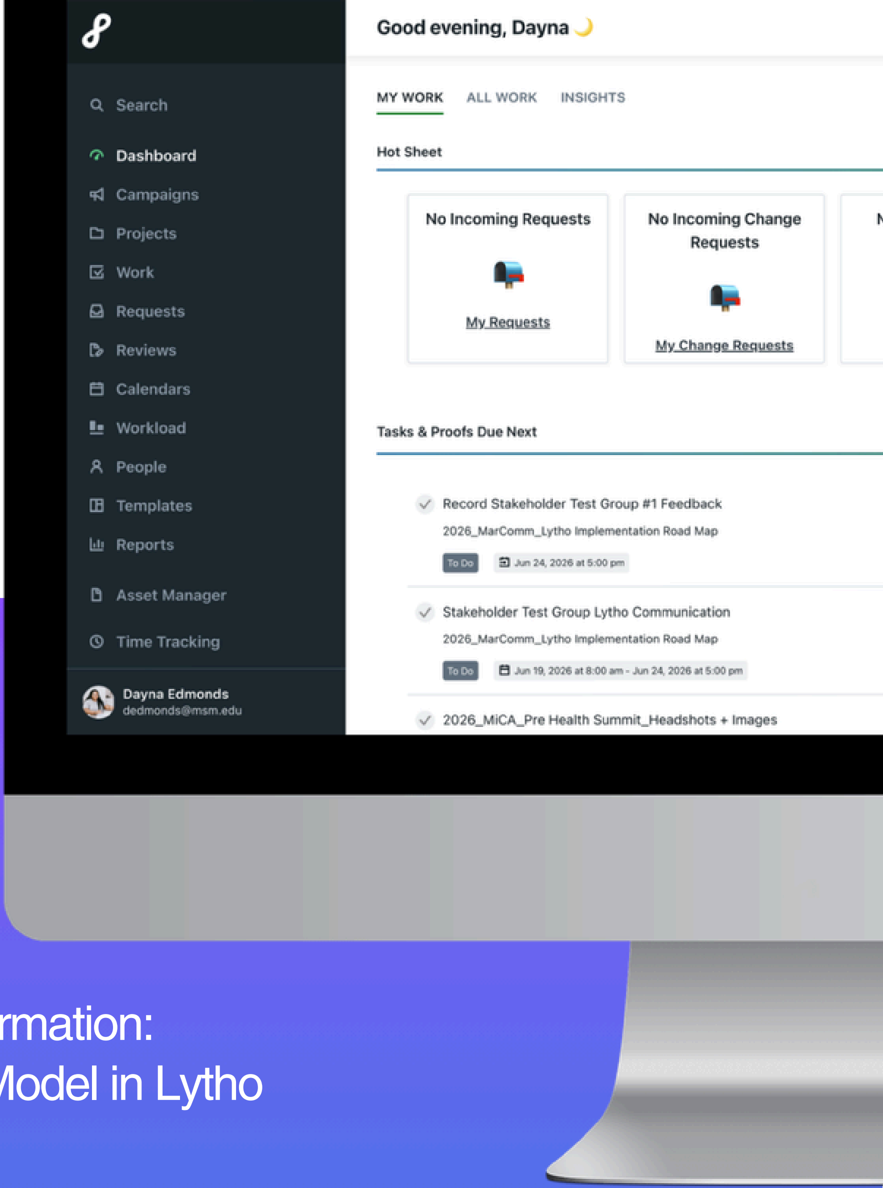

Lytho™

Marketing Operations Transformation: Building a Shared Operating Model in Lytho

Case Study

PREPARED BY:
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JUNE 2026

Marketing Operations Transformation:
Building a Shared Operating Model in Lytho

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Project Overview

Morehouse School of Medicine's **Marketing and Communications department supports a diverse range of stakeholders** across the academic experience, research initiatives, clinical operations, and community engagement efforts.

As the sole Project Manager supporting the department, I was tasked with **transforming how work was requested, planned, and managed.**

The Challenge

The existing project intake process created friction across stakeholder groups, limited visibility for internal teams, and reinforced siloed workflows that made collaboration difficult.

The existing process relied on **multiple intake forms, inconsistent workflows, and fragmented communication** across teams.

Stakeholders often **struggled to understand** where to submit requests, while internal teams **lacked visibility** into project **status, priorities, and capacity.**

Leadership needed a solution that **improved governance, reporting, and resource planning** without creating additional complexity for users.

My role was to **redesign the intake experience, establish governance standards, and create a scalable operating model** that balanced user needs, team workflows, and leadership decision-making.

Role: Project Manager
Timeline: July 2025 - Present
Stakeholders: Institutional Partners, Program Directors, Student Experience Advocates, Department Leadership, and Internal MarComm Teams
Tools: Lytho, Chat GPT, Scribe, Figma, Microsoft 365

Understanding the Users

To better understand stakeholder needs, I analyzed historical request data, audited existing workflows, and interviewed team members to **identify user needs, service gaps, and workflow challenges**.

This research helped **define three primary stakeholder groups**, **align service offerings to stakeholder goals, and uncover opportunities** to improve the intake experience.

Analysis of stakeholder needs and service demand revealed that many requests followed similar workflows, event-related work touched nearly every MarComm function, and successful delivery often required cross-functional collaboration.

See Appendix A for complete artifact.

Program Champions

Departments supporting **grant-funded initiatives, research studies, and community engagement.**

Examples: Centers, Institutes, Clinics, Signature Symposiums

Student Advocates

Departments supporting student **recruitment, engagement, and success.**

Examples: Admissions, Student Affairs, Registrar
Academic Programs, Student Success

Institutional Partners

Departments supporting **operational and institutional priorities.**

Examples: Finance, HR, Government Affairs, Facilities, Institutional Relations

Key Findings

✓ Work was highly cross-functional

Many projects required collaboration across multiple MarComm functions. Event-related work consistently involved multiple teams.

Opportunity: Build workflows that support collaboration from intake through delivery.

✓ Users thought in outcomes, not services

Requesters wanted to promote events, recruit students, share research, and advance initiatives. They rarely knew which MarComm team they needed.

Opportunity: Design an intake experience around user goals instead of organizational silos.

✓ Request patterns were predictable

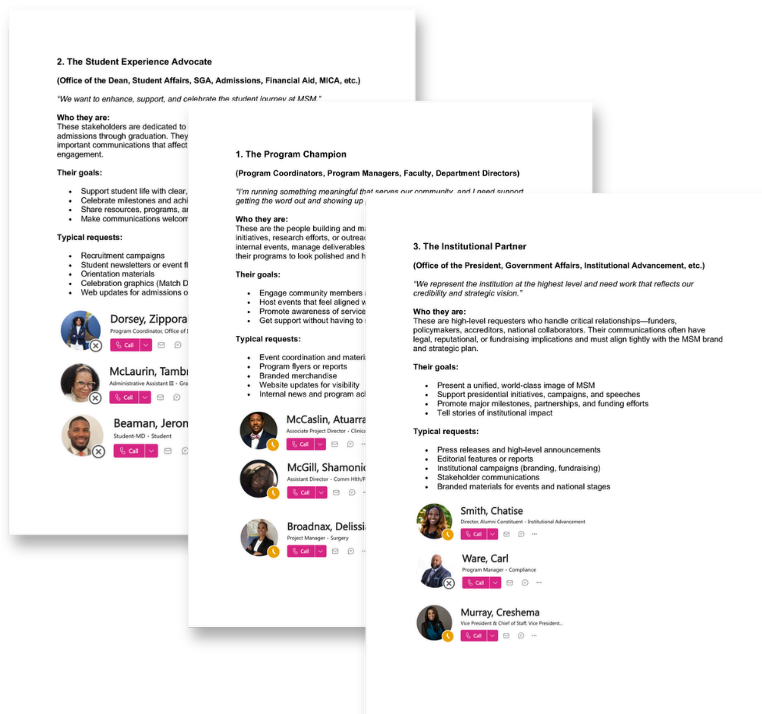
Analysis of 163 projects revealed recurring categories despite stakeholder differences.

Opportunity: Standardize intake pathways while maintaining flexibility.

✓ Leadership lacked visibility into demand and impact

Multiple intake channels made it difficult to understand capacity, prioritize work, measure outcomes, and allocate resources effectively.

Opportunity: Centralize intake and establish governance standards to improve reporting and decision-making.



By mapping stakeholder needs against historical project data and service offerings, I identified recurring request patterns, overlapping business needs, and opportunities to simplify the intake experience. These findings became the foundation for the project-type framework and user-centered workflow design.

See Appendix B for complete artifact.

AI as a Design Partner

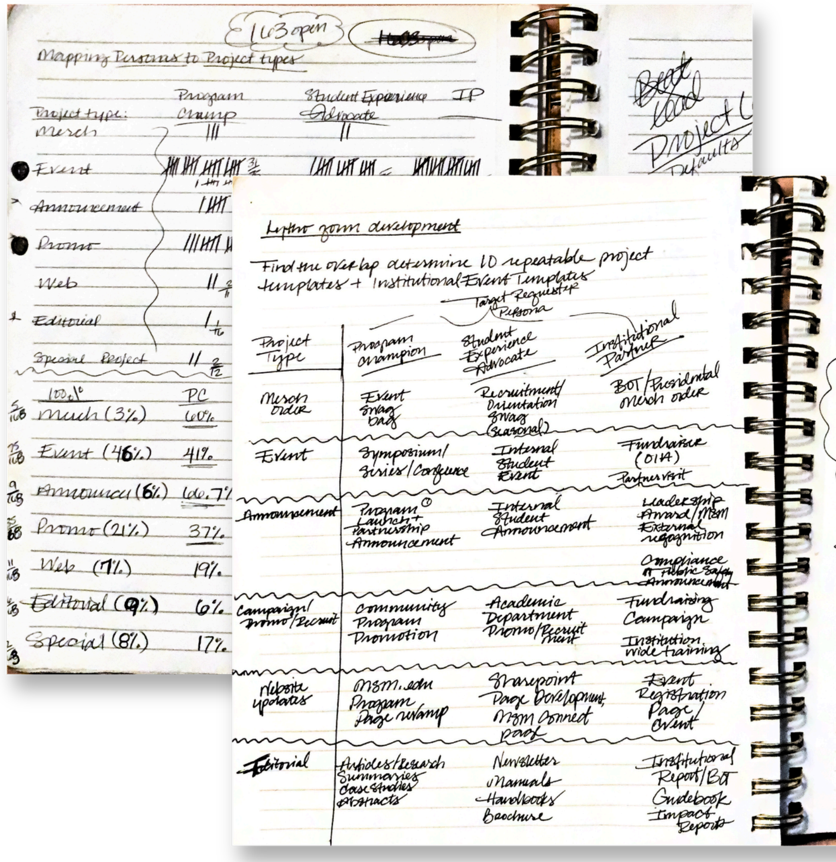
As the primary architect of MSM's Marketing & Communications operating model, I used **AI as a collaborative thought partner throughout the project.** AI accelerated research synthesis, documentation, visualization, and iteration, allowing me to focus on systems design, stakeholder facilitation, and organizational decision-making.

While AI increased my capacity, **I remained responsible for the strategy, governance, change management, and implementation** of the operating model.

From Sketches to Systems

Every solution began with **research, observation, and handwritten exploration.** My notebook served as the first draft of the operating model, **capturing project patterns, stakeholder relationships, routing logic, and emerging frameworks.**

AI entered the process only after those patterns emerged. It **helped organize information, test alternative structures, visualize systems, and accelerate documentation,** allowing ideas to move from notebook sketches into scalable workflows.



Early notebook sketches explored project taxonomy, stakeholder relationships, and workflow patterns before concepts were translated into Lytho. The table below shows how AI supported each phase while strategic decisions remained human-led.

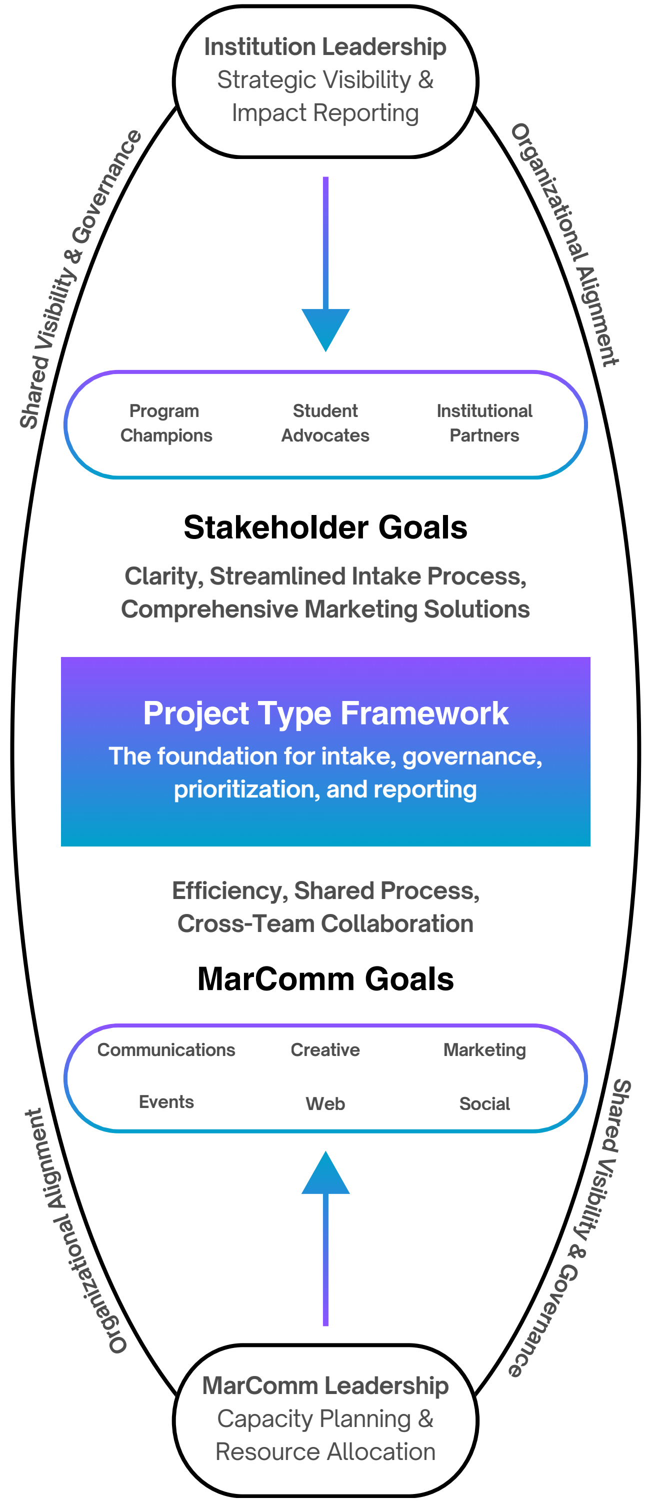
Stage	My Contribution	How AI Helped
Research	Reviewed 163 historical projects and interviewed stakeholders	Helped cluster recurring themes and test taxonomy options
Exploration	Sketched project types, personas, and workflows	Organized ideas, surfaced gaps, and generated alternate structures
Systems Design	Defined governance, routing, and decision logic	Helped visualize workflows and refine documentation
Documentation	Authored SOPs, guides, templates, and communications	Produced first drafts that I edited and validated
Change Management	Facilitated training, pilot testing, and adoption	Meeting notes, summaries, and communication materials

Creating a Shared Operating Model for Marketing Workflow

The goal was not to create another intake form. It was to **establish a shared operating model that aligned stakeholder needs, internal team workflows, and leadership expectations.**

While Lytho served as the implementation platform, the focus was **creating a framework that could exist beyond any single tool.** By defining project types, clarifying team roles, and establishing governance standards, the system created a common language for how work was requested, planned, and delivered.

This **framework became the foundation** for a more consistent stakeholder experience, stronger cross-functional collaboration, and improved visibility into organizational demand and impact.



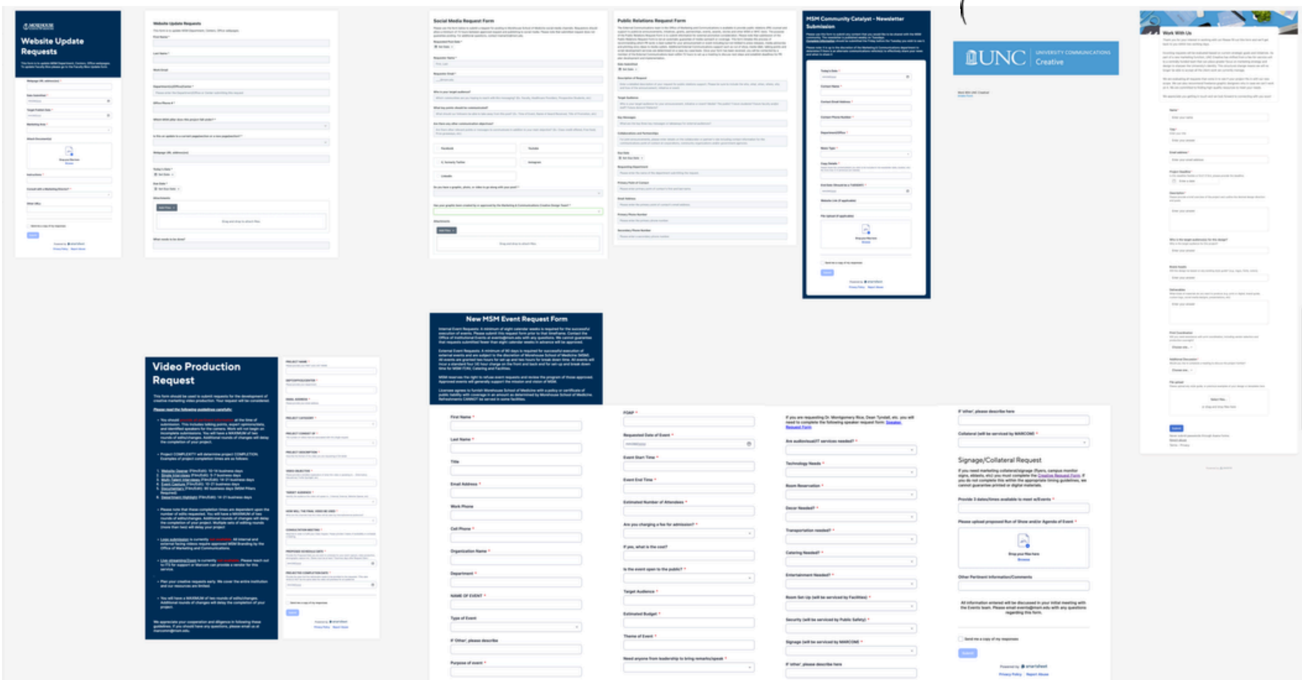
Project Type Framework

- Event Support
- Announcements/News
- Marketing Campaigns
- Editorial
- Website
- Template Approvals
- Special Projects

STRATEGY & SOLUTION

Bringing the Framework to Life

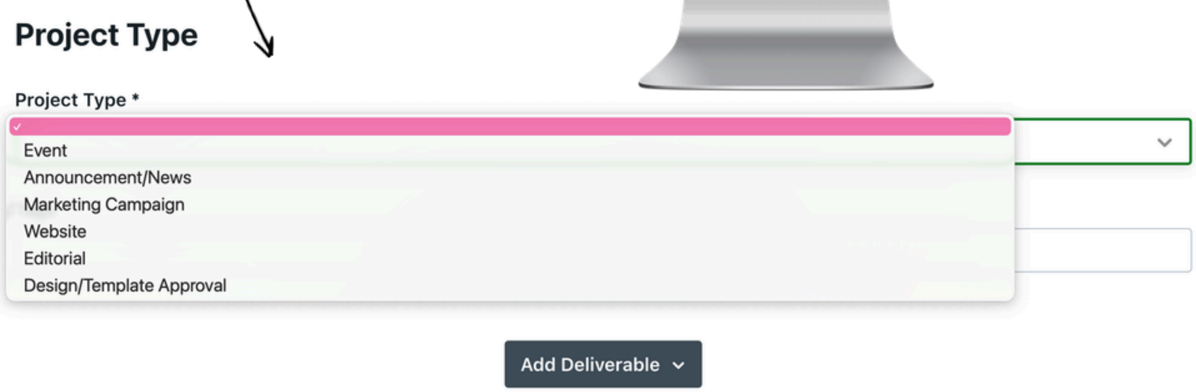
Before



Stakeholders navigated multiple intake processes depending on the type of request, resulting in **inconsistent information, duplicated effort, and limited visibility** across teams.

Build

Before implementation in Lytho, I used Figma to model the governance rules that would power the system. **By connecting project types, deliverables, team workflows, and stakeholder requirements through conditional logic, I designed a guided intake experience.** This work reduced unnecessary complexity and ensured the right information was collected before work entered production.



From Framework to Experience

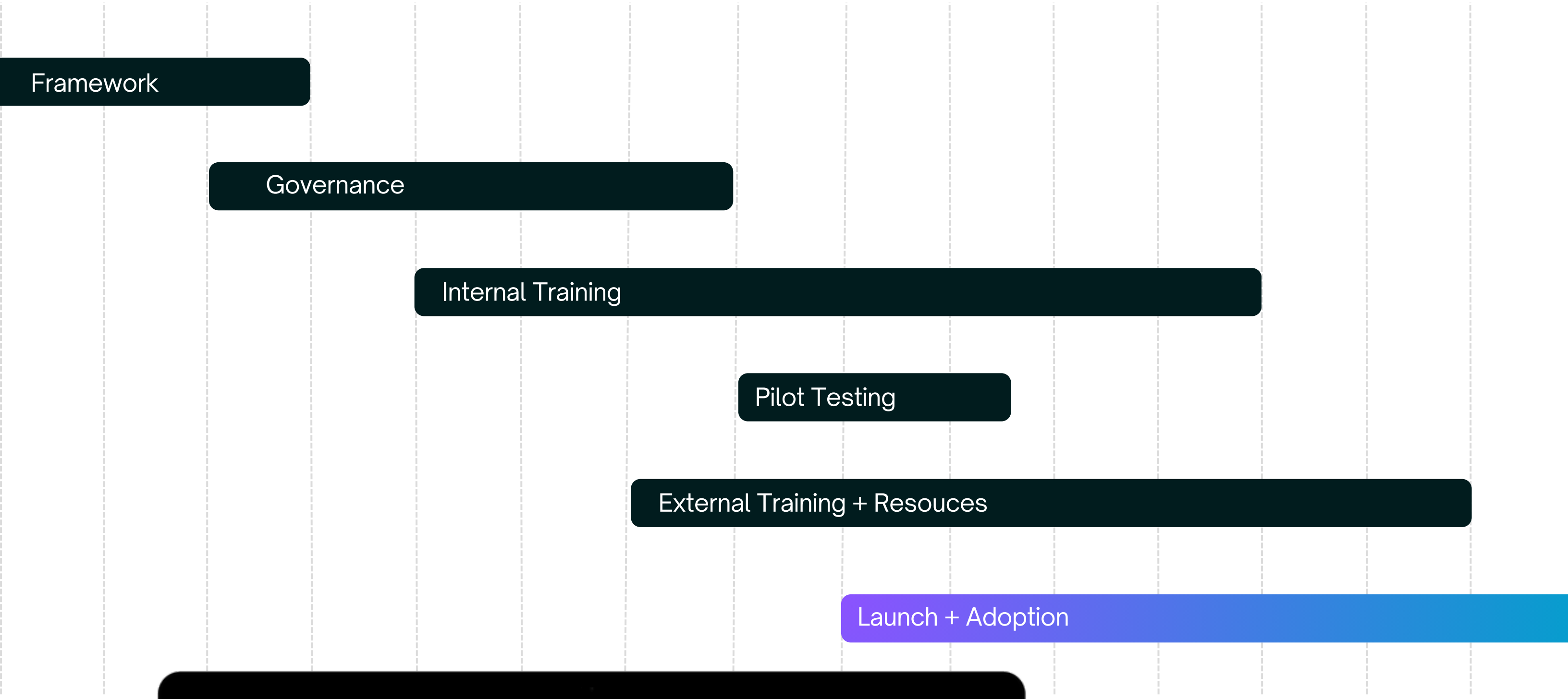
The project type framework was implemented in **Lytho,** a marketing operations platform, through a **single intake experience** designed to guide stakeholders through the request process.

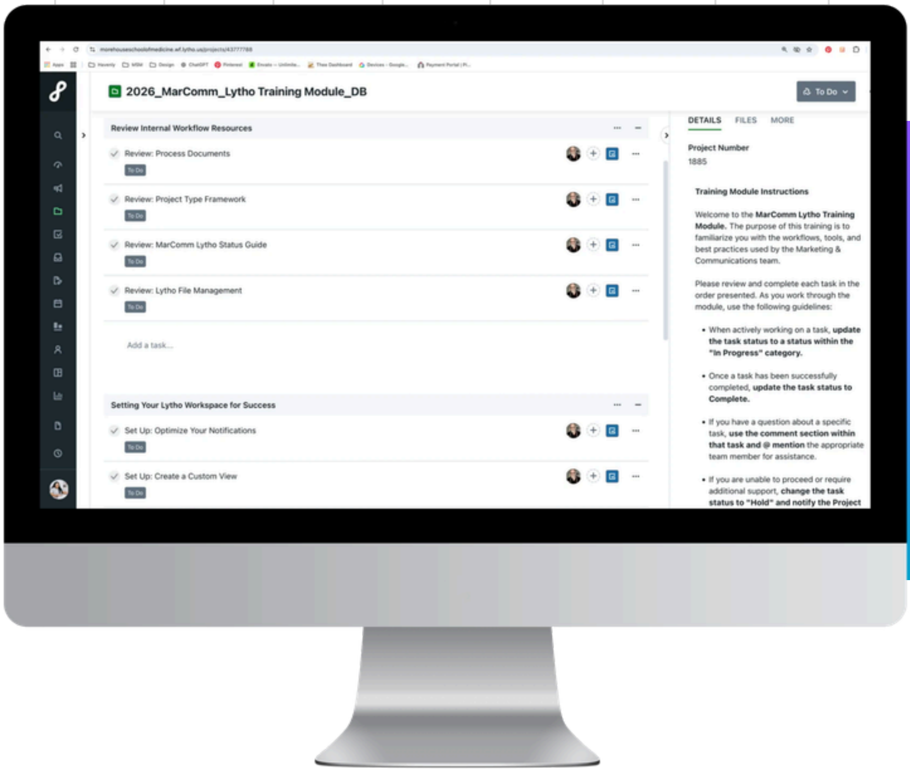
Rather than navigating multiple forms, **users selected a project type and were presented with relevant questions, deliverables, and requirements** based on the needs of their request.

This artifact documents the transition from multiple forms to a single dynamic intake experience. It outlines the framework, conditional logic, stakeholder requirements, and routing rules that governed how requests moved from intake to execution through designated project templates. *See Appendix B for complete artifact.*

Systems Over Software

Designing the framework was only part of the challenge. Long-term success depended on establishing governance standards, preparing internal teams, and creating the resources needed to support adoption at scale.





Training modules, playbooks, office hours, and stakeholder resources were developed to support adoption and reinforce the new operating model before launch. *See Appendix C for collection of training artifacts.*

What Changed & What's Next

163
Historical projects analyzed

3
Primary stakeholder groups aligned

8 → 1
Intake experiences consolidated

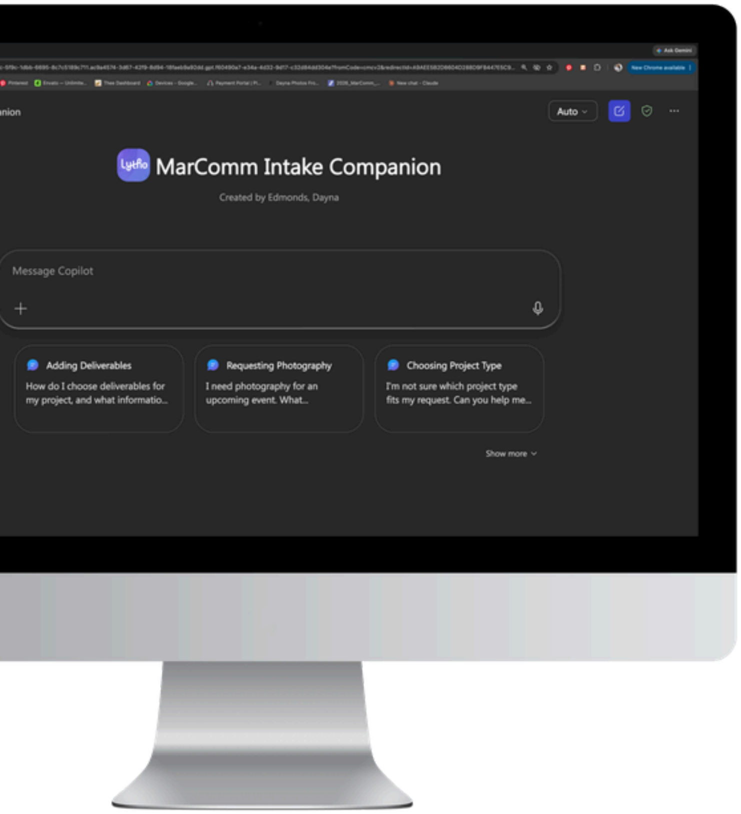
500+
Annual requests supported

1
Shared governance framework established

What Changed
The department gained a consistent way to intake, prioritize, plan, and deliver work across teams. More importantly, the framework created an opportunity for Marketing & Communications to move beyond a primarily production-focused function.

By improving visibility into upcoming work, resource needs, and organizational demand, teams are better positioned to engage earlier, plan strategically, and focus on initiatives with the greatest institutional impact.

What Success Looks Like
Success is not measured by form submissions, but by better decision-making. The long-term goal is to shift Marketing & Communications from a reactive service provider to a strategic partner, using shared governance, clearer prioritization, and improved resource planning to support institutional goals.



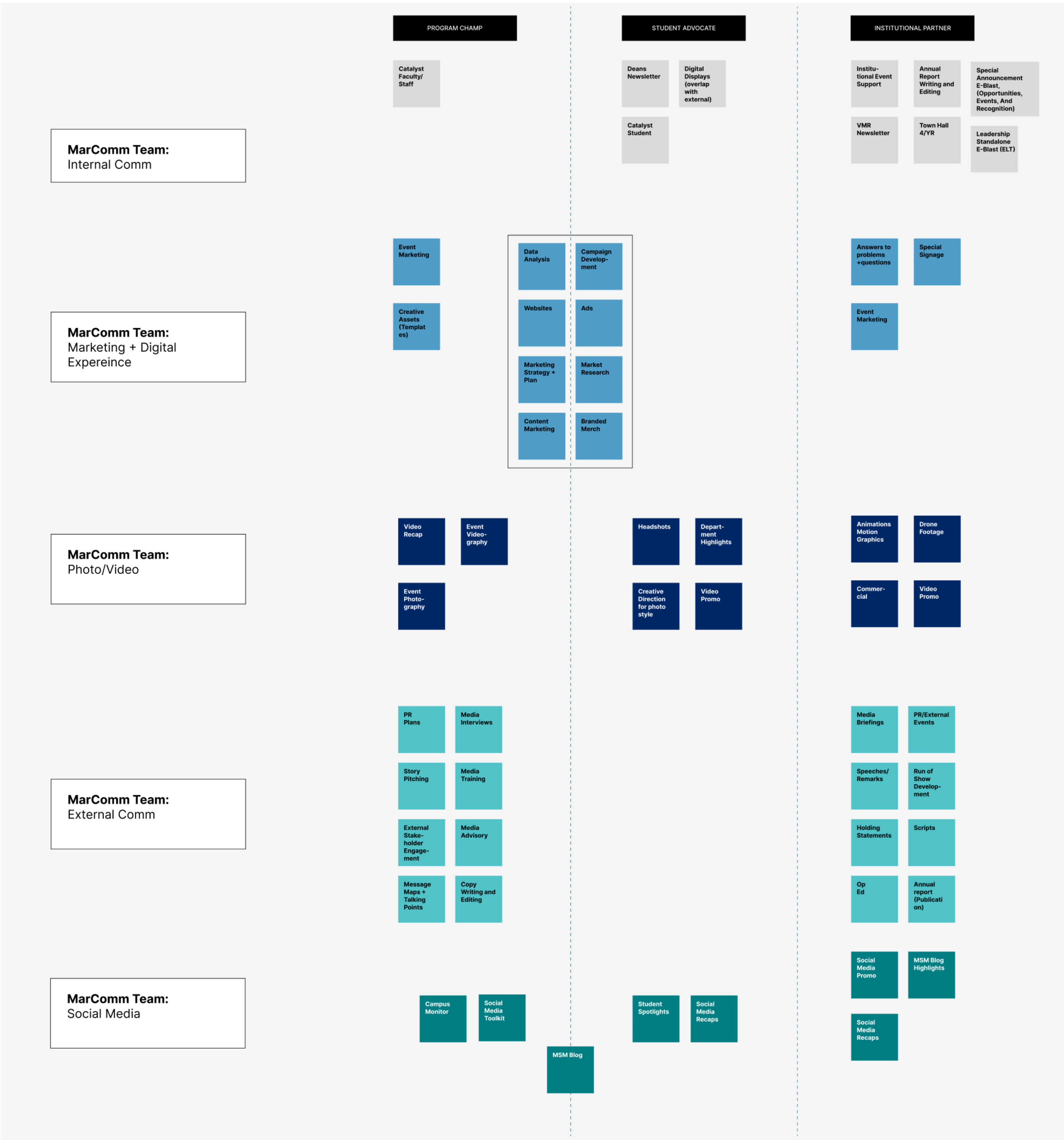
Beyond the Form

The launch of the new intake framework established a strong operational foundation, but the requester experience continues to evolve. To extend the requester experience beyond the form, I designed the **MarComm Intake Companion. This AI-powered guide helps requesters prepare more complete requests, understand project types, answer common questions, and navigate the intake process before submitting.**

Rather than replacing human interaction, **the companion extends MarComm's consultative approach by coaching requesters** through the planning process, reducing unnecessary revisions, and improving request quality.

Future iterations will use recurring user questions and feedback to continuously refine the intake experience, training resources, and operational guidance.

Workshop Recap: Appendix A



Appendix B

Personas + Project Types for the Intake Form

At Morehouse School of Medicine, the Marketing & Communications department serves a wide range of internal stakeholders — from academic program directors to student-facing offices and institutional leadership. As our campus grows, so does the volume and complexity of requests we receive. To better streamline our intake process, improve collaboration, and deliver meaningful outcomes, we needed to better understand ***who* is making requests, *what* they're requesting, and *why*.**

We analyzed 168 open project submissions and mapped them to common patterns. What emerged was clear: our requesters typically fall into **three main personas**, each with unique **goals, rhythms, and relationships** to communications and design.

🔷 The Program Champion

Often faculty, coordinators, or research staff — these stakeholders run initiatives that serve our internal ecosystem or community audiences. Their needs often involve promoting events, raising awareness, or improving program visibility.

🔷 The Student Experience Advocate

This group includes SGA, MICA, Student Affairs, and Admissions — the people most focused on nurturing student life, enrollment, and engagement. Their projects are often tied to student success, celebration, and communication clarity.

🔷 The Institutional Partner

These stakeholders represent MSM's most visible leadership — Advancement, Government Affairs, and the President's Office — and they require polished, high-level communications that reflect the brand's prestige and purpose.

By identifying these personas, we are now able to build a request form that feels *intuitive and personalized*. It lets each stakeholder feel seen and supported while **allowing MarComm to triage, prioritize, and route requests more effectively.**

1. The Program Champion

(Program Coordinators, Program Managers, Faculty, Department Directors)

“I’m running something meaningful that serves our community, and I need support getting the word out and showing up professionally.”

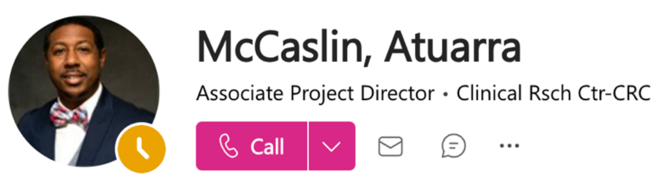
Who they are:
These are the people building and managing internal MSM programs — education initiatives, research efforts, or outreach activities. They often plan public-facing or internal events, manage deliverables tied to grants or academic calendars, and want their programs to look polished and have impact.

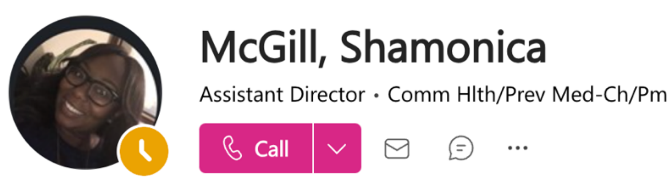
Their goals:

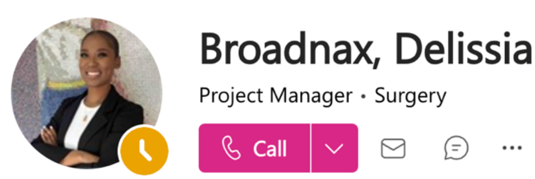
- Engage community members and stakeholders
- Host events that feel aligned with the MSM brand
- Promote awareness of services or research initiatives
- Get support without having to speak "design" or "marketing" fluently

Typical requests:

- Event coordination and materials
- Program flyers or reports
- Branded merchandise
- Website updates for visibility
- Internal news and program achievements







2. The Student Experience Advocate

(Office of the Dean, Student Affairs, SGA, Admissions, Financial Aid, MICA, etc.)

“We want to enhance, support, and celebrate the student journey at MSM.”

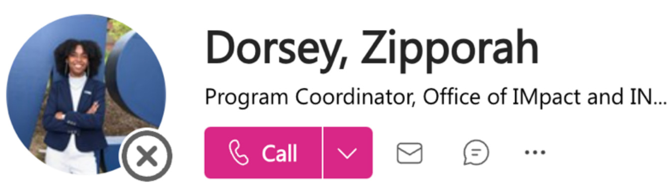
Who they are:
These stakeholders are dedicated to shaping the student journey—from recruitment and admissions through graduation. They plan events, coordinate services, and push out important communications that affect student well-being, academic success, and engagement.

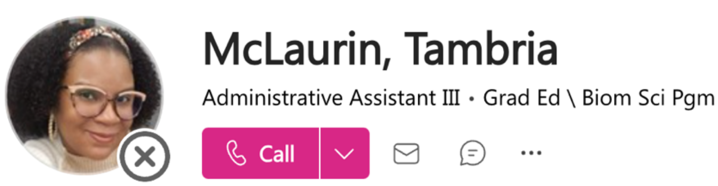
Their goals:

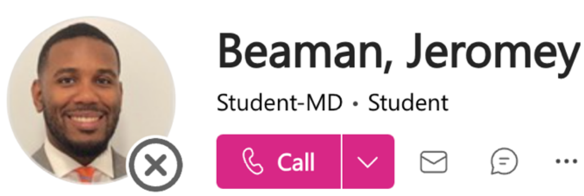
- Support student life with clear, timely info
- Celebrate milestones and achievements
- Share resources, programs, and deadlines
- Make communications welcoming, engaging, and inclusive

Typical requests:

- Recruitment campaigns
- Student newsletters or event flyers
- Orientation materials
- Celebration graphics (Match Day, Commencement, White Coat)
- Web updates for admissions or student-facing departments







3. The Institutional Partner

(Office of the President, Government Affairs, Institutional Advancement, etc.)

“We represent the institution at the highest level and need work that reflects our credibility and strategic vision.”

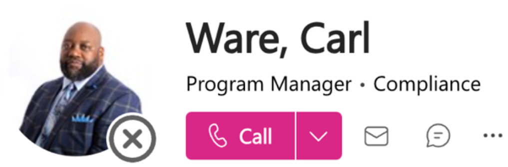
Who they are:
These are high-level requesters who handle critical relationships—funders, policymakers, accreditors, national collaborators. Their communications often have legal, reputational, or fundraising implications and must align tightly with the MSM brand and strategic plan.

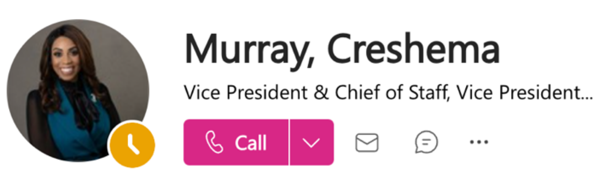
Their goals:

- Present a unified, world-class image of MSM
- Support presidential initiatives, campaigns, and speeches
- Promote major milestones, partnerships, and funding efforts
- Tell stories of institutional impact

Typical requests:

- Press releases and high-level announcements
- Editorial features or reports
- Institutional campaigns (branding, fundraising)
- Stakeholder communications
- Branded materials for events and national stages





Why Define Project Types?

In addition to who is making the request, **what** they're asking for also follows clear trends. Our analysis surfaced **seven core project types**, which form the foundation of how we categorize and manage incoming work:

1. **Merchandise / Apparel** – T-shirts, swag, giveaways, whitecoats
2. **Events**– Town halls, award ceremonies, conferences, panel discussions, speaker series, white coat ceremony.
3. **Announcement / News** – Press releases, MSM community updates
4. **Recruitment / Promotion / Awareness** – Campaigns to increase visibility and provoke action
5. **Website Updates** – Content edits, new pages, SEO improvements
6. **Editorial / Publications** – Stories, reports, newsletters, blog posts
7. **Special / One-Off Projects** – Custom requests that don't fit neatly into other buckets

Pairing **personas** with **project types** gives us a clear roadmap for form logic, timelines, ownership, and team resourcing. It also empowers stakeholders to communicate their needs more clearly and receive more strategic, creative solutions in return.

1. Merchandise / Apparel

You need branded items like t-shirts, hats, tote bags, or giveaways for an event, program, or campaign. These items are typically used to promote school pride, support event visibility, or create a memorable experience for attendees.

Examples: swag bags for symposium guests, student org t-shirts, volunteer shirts, branded water bottles.

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2. Event Support

You're planning an in-person or virtual event and need help organizing key elements such as the RSVP process, room logistics, livestreaming, scripts, or program development.
This request is **not just for flyers**—it's for the **coordination** of the event experience.

Examples: Town halls, award ceremonies, conferences, panel discussions, speaker series, white coat ceremony.

You'll be asked follow-up questions about location, audience, registration, signage, etc.

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3. Announcement / News

You want to share an update, milestone, or important information with the MSM community and/or the public. This may be an internal email, news post, press release, or institutional alert.

Examples: leadership changes, new initiatives, grant awards, accreditation updates, or major partnerships.

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4. Recruitment / Promotion / Awareness Campaign

You're trying to attract a specific audience to engage with a program, event, or opportunity. This includes campaign planning to reach prospective students, employees, donors, or community members through digital, social, or traditional channels.

Examples: recruiting students for a summer program, promoting a clinic service, raising awareness for a community initiative.

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5. Website Updates

You need to update an existing MSM webpage or add new content. This may include editing text, swapping images, adding faculty bios, or ensuring the page is optimized for search and accessibility.

Examples: adding new staff, updating program info, revising outdated content, or improving page visibility.

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6. Editorial / Publications

You need help developing written content for a long-form piece, publication, or internal/external storytelling platform. This might be a feature article, report, impact summary, or narrative that highlights MSM’s work.

Examples: alumni spotlight, annual report write-up, department newsletter, blog feature on research or community work.

MarComm Lytho Status Guide

How to Understand Statuses at a Glance

What Are Custom Statuses in Lytho?

Custom statuses in Lytho are **how we track, communicate, and coordinate work** across MarComm.

They allow everyone — project leads, collaborators, and stakeholders — to:

- Instantly understand **where a project or deliverable stands**
- Know **what stage the work is in**
- See **whether action is needed**
- Reduce emails, meetings, and status check-ins
- Use Lytho as the **single source of truth** for all MarComm work

Every campaign, project, and task in Lytho will always live in **one of three status categories**:

1. **To Do** — Work has not started
2. **In Progress** — Work is actively being worked on
3. **Completed** — Work is finished or no longer needs action

Each category contains **specific custom statuses** that give more detail about what's happening.

How to Read Status Colors Quickly

- **Gray** = Not started yet {Page 2}
- **Orange** = Actively in progress {Page 3}
- **Green** = Done / no further action needed {Page 5}
- **Red** = Blocking issue, action required immediately {Page 7}

Status Category 1: TO DO

Color Meaning: Gray = Work has **not started yet**

This category means the work:

- Is in planning
- Is waiting on information
- Or is not yet ready to begin

Custom Statuses in To Do:

- **Consult Needed / Requested**
  A strategic or planning conversation is required before work can begin. MarComm SME is assigned based on the context of the meeting.

- **Need More Information**
  The request is missing key details required to proceed. PM or Project Lead will reach out for more information.

- **To Do**
  The work is approved and in the queue, but has not started yet.

- **Brainstorm**
  The project is in early concept or ideation phase. This status can only be assigned by the Project Lead or Content Expert.

Status Category 2: IN PROGRESS

Color Meaning: Orange = Work has **started but is not finished**

This category means the work is:

- Actively being developed
- Under review
- Or moving through the workflow

Custom Statuses in In Progress:

- **Hold**
  Work is temporarily paused due to a dependency, decision, or external factor. Project Lead will be the one to solve the problem and reassign status.

- **Changes Required**
  The work has been reviewed and must be revised before moving forward.

- **In Progress**
  The work is actively being executed.

- **Editorial Review**
  Content is being reviewed by the Communications team.

- **Client Review**
  Stakeholders are reviewing the work.

- **Drafted**
  A first version has been created.

- **Publishing Scheduled**
  The content is finalized and scheduled for release.

- **Consult Scheduled**
  A planning or strategy meeting is on the calendar.

- **Ongoing**
  This is a recurring or long-running initiative.

Status Category 3: COMPLETED

Color Meaning: Green = No more work is needed

This category means:

- The work is finished
- Or no additional action is required for this line item

Custom Statuses in Completed:

- **Not Needed**
  This deliverable is no longer required.

- **Completed**
  The work is finished.

- **Approved**
  Final approval has been granted.

- **Published**
  The content is live.

- **At the Printer (Internal)**
  Files have been sent to our MSM Print Shop.

- **At the Printer (External)**
  Files have been sent to an external print vendor.

- **Utilized Template**
  A pre-approved MSM branded template was used and no new design work was needed.

- **Assets Upload Needed**
  The work is otherwise complete, but final files still need to be uploaded for record-keeping or delivery.

Special Attention: RED STATUSES (Immediate Action Required)

Color Meaning: Red = This item is **blocking progress** and needs immediate attention

Red statuses exist **inside each category** and indicate that:

- Work **cannot move forward**
- Someone **must take action**
- A new status **must be assigned soon**

Red Statuses by Category

In TO DO:

- **Consult Needed / Requested**
- **Need More Information**

Meaning: Work cannot begin until this is resolved.

In IN PROGRESS:

- **Hold**
- **Changes Required**

Meaning: Work has started but is **blocked** and cannot continue until resolved.

In COMPLETED:

- **Assets Upload Needed**

Meaning: The work is finished, but the project cannot be fully closed until files are delivered or uploaded.

How to Determine Your Project Type

Select the **one project type** that best fits your request. Each project type corresponds to a MarComm team lead and a defined workflow.

Project Type	Definition
Merchandise & Apparel	Requests involving branded products such as t-shirts, polos, giveaways, and uniforms that promote institutional visibility. Includes concept development, vendor management, proofing, and production logistics. These projects often align with institutional advancement, recruitment, or event efforts and require appropriate brand standards and approvals.
Event Support	Comprehensive support for planning, promoting, and executing institutional or community-facing events. MarComm serves as a **consultative partner**, helping you shape your event vision, define the audience experience, and align with institutional goals. Support may include logistics coordination, creative design, promotional materials, digital registration tools, and day-of event assets like signage and programs. Our goal is to **help bring your vision to life while optimizing guest experience and brand consistency.**
Announcements / News	Communicates timely institutional updates, leadership messages, media advisories, and internal announcements. Includes content such as press releases, Catalyst posts, newsletters, or milestone recognitions. **Internal Communications** leads when the audience is faculty, staff, or students; **External Communications** leads when targeting media or external partners.
Recruitment / Promotion / Awareness Campaign	Campaigns designed to attract applicants, participants, partners, or audiences for institutional programs and initiatives. May include digital campaigns, print materials, and social media promotions. Focuses on expanding reach and engagement through coordinated messaging across multiple platforms.

Website Updates	Requests to update MSM web properties (msm.edu, brandstore.msm.edu, or program microsites). May include content uploads, staff bios, program pages, image updates, and accessibility or SEO enhancements. Ensures that all web materials reflect MSM's current offerings and align with brand and accessibility standards.
Editorial / Publications	Long-form storytelling that highlights MSM's people, programs, and impact. Includes newsletters, reports, and feature articles for internal or external audiences. Led by Art Direction, which oversees layout and design, supported by content writers, editors, and photo/video specialists.
Design / Template Review & Approval	For internal teams or departments developing their own flyers, forms, or graphics. Submit your design for brand and creative review. MarComm will provide edits, feedback, or final approval to ensure institutional consistency.
Special Request	For projects that don't clearly fit into the above categories. Include as much context as possible to help MarComm determine scope and next steps.

If your need help determining the project type, email dedmonds@msm.edu with your project details and we can discuss which would be the best fit.

A. Internal Process — MarComm Team Workflow

1. Request Intake and Initial Review

- **Stakeholder submits a MarComm Project Request** through the intake form or interim email (marcomrequests@msm.edu).
- **Project Manager (PM)** receives the submission and performs an **initial completeness review** — checking for:
  - *Clarity of project goals*
  - *Correct project type selection*
  - *Required details and deliverables identified*
- If key details are missing or unclear, the PM flags it for clarification or schedules a short **intake meeting with the stakeholder**. (*Depending on complexity*, *in collaboration with Project Lead if needed*).

2. Expert Consultation *(Conditional Step)*

- If the stakeholder **struggles with project details or strategic decisions**, the form will prompt them to **book time with a MarComm Subject Matter Expert (SME)**.
- SMEs are determined by **project type**:
  - Event → Institutional Events
  - Campaign → Marketing & Digital Experience
  - Announcements/News → Internal/External Comms
  - Website → Digital Experience/Web Team
  - Editorial → Brand/Creative and/or Internal/External Comms
- The SME helps the requester complete the section correctly and ensures alignment with MarCom standards *(in collaboration with PM if needed*).

3. Project Lead Assignment

- Once a complete submission is received, the PM assigns the project based on **project type** the stakeholder selected during MarComm Project Request intake process:
  - Event → Director of Institutional Events
  - Announcement → Internal/External Comms
  - Marketing Campaign → AVP of Marketing & Digital Experience
  - Website → Director of Digital Experience
  - Editorial → Art Director or Comms Lead
  - Design/Template → Art Director
- PM and assigned **Project Lead** collaborate to ensure all necessary information is included before the request acceptance.

4. Project Huddle and Team Formation

- During **Monday MarComm Huddle/Touchpoints**, the PM presents:
  - *New incoming projects*
  - *Assigned Project Leads*
- The **Project Lead in Collaboration with the PM** determines and assigns **Content Experts** based on project needs (design, photo/video, digital, internal/external comms, etc.).
- Lytho automatically maps the project to the correct **Lytho Project Template** with pre-defined tasks and timelines. (Built by PM in collaboration with SMEs)

5. Project Planning and Client Confirmation

- The PM and Project Lead collaborate to:
  - Finalize deliverables and milestones
  - Build the **Project Plan** in Lytho

    - Determine if a **client meeting** is needed or if an automated confirmation email will suffice

- A **Project Plan Summary** is sent to the stakeholder outlining:
    - Deliverables
    - Expected timelines
    - Rounds of review policy (two rounds standard)

6. Execution and Collaboration

- Each **Content Expert** executes their deliverables in coordination with their functional team.
- The **Project Lead** ensures internal communication and alignment across teams.
- MarComm team members report updates during weekly internal touchpoints (Wed/Fri). Project Lead should be prepared to high-level project status update.
    - **MarComm Collaboration Sessions** scheduled by the Project Lead/PM as needed
    - PM check ins with Project Leads as needed
- The **Project Lead/PM** — not the entire MarCom team — communicates with the client for project updates.

7. Review, Approval and Delivery

- Stakeholders review proofs directly in **Lytho**, making comments or approvals within the system.
- Upon approval, deliverables are marked as **complete**, and campaign progress is updated in Lytho.
- Events remain open until post-event deliverables (e.g., recap video, photography, survey) are finalized.

8. Closeout and Feedback

- Once a campaign or project concludes:
  - PM sends a **Post-Service Survey** (created by leadership) for quality feedback.
  - Key learnings and metrics are documented for reporting and process improvement.
  - The project is archived in Lytho and tagged by type for analytics.

B. External Process — Stakeholder Engagement Guide

1. Initiating a Request

Stakeholders initiate projects via the new **MarComm Request Form** or by emailing **marcommrequests@msm.edu** during the interim period.

Before submitting, they should:

- Review the **Project Type Definitions** to identify which category fits their request
- Prepare a brief overview covering **who, what, when, where and why**
- Gather any supporting links, branding or event details

2. Completing the Form

- Stakeholders select a **project type** and answer guided questions tailored to that type.
- Each section provides examples and instructions to help describe needs clearly.
- If a question is too complex, they will be prompted to **book time with a MarComm Subject Matter Expert** for assistance.
- Once all information is completed, they submit the form for initial PM review.

3. What Happens After Submission

- The MarCom **Project Manager** reviews submissions within **24–48 hours** for completeness.
- Based on the project type, a **MarComm Project Lead** is assigned to guide the project.
    - **MarComm Project Lead** is the sole source of truth and communication about project status, updates and details
- The stakeholder will receive:
    - *A confirmation email that their request was received*
    - *Either a request for additional details or a scheduled consultation, or*
    - *A project acceptance notice and next steps*

4. Collaboration and Communication

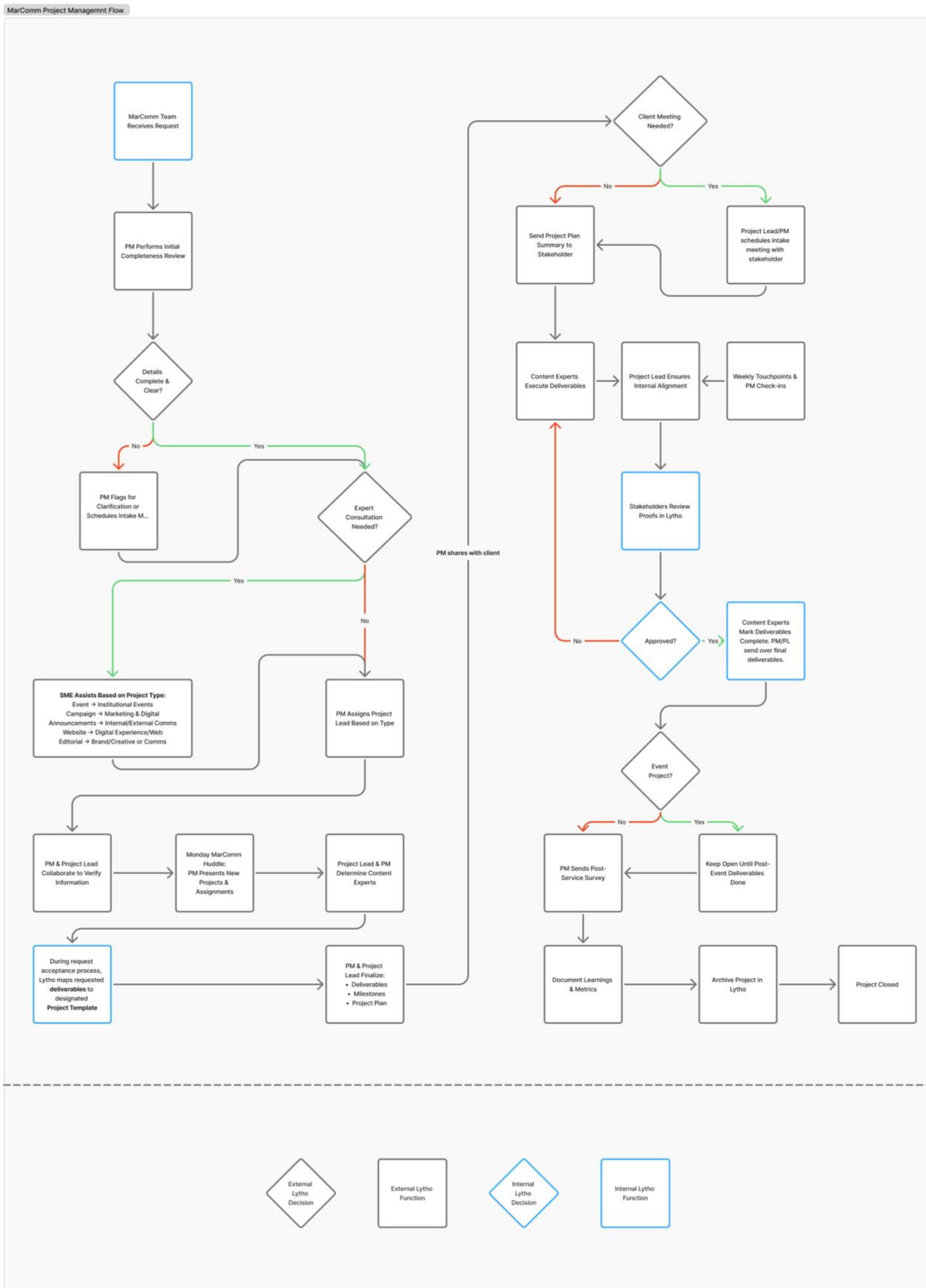
- Once accepted, the stakeholder may meet with the **Project Lead** for final alignment.
- Throughout the project:
    - The stakeholder's **MarComm Representative** remains their main point of contact.
    - Stakeholders can view progress and review deliverables through **Lytho Proofs and Project Dashboard**.
    - Two rounds of revisions are included; additional edits will extend timelines and costs.

5. Completion and Feedback

- Once the final deliverables or event wrap-up are complete, the stakeholder receives a **Project Completion Notice**.
- A **feedback survey** is sent to assess satisfaction, turnaround time and collaboration quality.
- Insights from surveys help MarComm improve processes and future support.

6. Key Takeaways for Stakeholders

- Prepare information *before submitting* (use the training companion for guidance).
- Select the correct **project type** to ensure the request reaches the right experts.
- **MarComm Representative** may save your progress and return to the form at any time.
- Work officially begins once the request is **accepted** by MarComm, not upon initiation or form submission.
- Collaboration is a partnership — **Stakeholders** bring the program goals; **MarComm,** the creative strategy and execution.


MarComm Project Managemnt Flow
MarComm Team Receives Request
PM Performs Initial Completeness Review
Details Complete & Clear?
No
Yes
PM Flags for Clarification or Schedules Intake M...
Expert Consultation Needed?
Yes
No
SME Assists Based on Project Type:
Event → Institutional Events
Campaign → Marketing & Digital
Announcements → Internal/External Comms
Website → Digital Experience/Web
Editorial → Brand/Creative or Comms
PM Assigns Project Lead Based on Type
PM & Project Lead Collaborate to Verify Information
Monday MarComm Huddle: PM Presents New Projects & Assignments
Project Lead & PM Determine Content Experts
During request acceptance process, Lytho maps requested deliverables to designated Project Template
PM & Project Lead Finalize:
• Deliverables
• Milestones
• Project Plan
PM shares with client
Client Meeting Needed?
No
Yes
Send Project Plan Summary to Stakeholder
Project Lead/PM schedules intake meeting with stakeholder
Content Experts Execute Deliverables
Project Lead Ensures Internal Alignment
Weekly Touchpoints & PM Check-ins
Stakeholders Review Proofs in Lytho
Approved?
No
Yes
Content Experts Mark Deliverables Complete. PM/PL send over final deliverables.
Event Project?
No
Yes
PM Sends Post-Service Survey
Keep Open Until Post-Event Deliverables Done
Document Learnings & Metrics
Archive Project in Lytho
Project Closed
External Lytho Decision
External Lytho Function
Internal Lytho Decision
Internal Lytho Function

Appendix: Glossary of Terms

A. Core Roles & Responsibilities

Project Manager (PM)
The central coordinator for all incoming MarComm requests. The PM reviews project submissions for completeness, assigns project leads, ensures cross-department collaboration, and manages project setup in Lytho. Oversees deadlines, workflows, and communication between teams and stakeholders.

Project Lead
A designated MarComm team member responsible for leading project execution. Serves as the primary liaison between the stakeholder and MarComm, ensuring clarity, timely delivery, and strategic alignment. Leads internal collaboration with Content Experts.

Content Expert
A MarComm specialist assigned to specific aspects of a project (e.g., design, digital marketing, communications, events, or photography). Provides technical or creative expertise for deliverables defined in the Lytho project template.

Stakeholder (Requester)
Any MSM department, office, or partner submitting a request to Marketing and Communications. Stakeholders provide project context, goals, and materials, and review deliverables during proofing rounds.

Subject Matter Expert (SME)
A MarComm or institutional specialist designated to guide stakeholders through complex questions on the intake form. SMEs are assigned based on project type (e.g., Events → Events Team, Campaigns → Marketing & Digital Experience, Editorial → Brand & Creative).

MarComm Representative
A designated liaison between a specific institutional department and MarComm, serving as the stakeholder's first point of contact for submitting requests, reviewing deliverables, and receiving updates.

B. Project Lifecycle Terms

Request Intake
The process of submitting a new project through the MarComm Request Form or interim marcomrequests@msm.edu inbox. Includes completion of guided questions to identify project type, goals, and deliverables.

Project Type
The predefined categories that determine how a project is managed, staffed, and tracked in Lytho.

Project Type Framework Summary Table

Project Type	***Definition / Description***	***Primary Project Lead***
Merchandise & Apparel	Projects involving branded items such as t-shirts, giveaways, uniforms, or retail merchandise. Includes concept development, vendor coordination, proofs, production, and fulfillment. These projects support institutional identity and revenue through merchandise sales or promotional campaigns.	**Creative Project Manager / Brand & Creative Services AVP**
Event Support	Covers planning and creative support for institutional, academic, and community events — from ceremonies and summits to workshops and retreats. Includes event branding, collateral (programs, signage, name badges), photography/video coverage, and coordination of day-of logistics.	**Institutional Events Director / Event Experience Specialist**
Announcements / News	Communicates timely institutional updates, media advisories, leadership changes, awards, partnerships, or milestones. May include press releases, internal announcements, or campus-wide Catalyst updates. Requires collaboration across external communications, writing, and creative.	**External Communications & PR Lead**
Recruitment / Promotion / Awareness	Campaigns or materials that aim to recruit students, participants, or employees; promote institutional programs; or raise awareness of initiatives or causes. These often span multiple channels (social, digital, print) and may include analytics tracking or advertising placement.	**Marketing & Digital Experience Director / Digital Content Strategist**
Website Updates	Requests for updates to msm.edu, brandstore.msm.edu, or microsites. Includes text changes, new content uploads, faculty bios, SEO improvements, accessibility updates, and page redesigns. Ensures web presence remains current, compliant, and strategically aligned.	**Web Manager / Digital Experience Strategist**
Editorial / Publications	Long-form storytelling or design-based communication pieces (print or digital). Includes newsletters, magazines, annual reports, research stories, or special features. Led by the Art Director, who sets the visual tone and structure, then collaborates with content experts (writers, editors, photo/video).	**Art Director**
Design / Template Review & Approval	Allows internal stakeholders to submit self-created materials (flyers, forms, presentations) for brand and creative review. MarCom provides edits, brand compliance feedback, or final approval for use. Encourages autonomy while maintaining brand consistency.	**Brand & Creative Team (Art Director or Designer)**

Deliverables
Tangible outputs or materials produced by MarComm (e.g., flyers, signage, digital ads, reports, videos). Each deliverable corresponds to a specific Lytho task or project template.

Project Template (Lytho)
A structured, repeatable workflow in Lytho containing predefined tasks, timelines, and assignments aligned with specific project types. Ensures consistency and efficiency in how similar requests are executed.

Campaign
A series of coordinated deliverables supporting a single goal or initiative (e.g., admissions recruitment, institutional milestone, or awareness campaign). Managed within a single Lytho campaign record.

Proofing
The digital review process within Lytho where stakeholders view, comment on, and approve creative assets. Stakeholders are typically allowed two review rounds before final approval.

Rounds of Review
The formal stages of feedback and revision tracked in Lytho's proofing module. Two rounds are standard; additional rounds may extend project timelines.

Huddle (MarComm)
A short, focused internal meeting led by the Project Manager to assign new projects, discuss priorities, and review project statuses. Occurs weekly (Mondays and Wednesdays).

Collaboration Session
Ad-hoc working sessions scheduled by Project Leads to resolve project-specific issues or coordinate across MarComm teams.

Campaign Closeout
The final step where approved deliverables are archived, surveys are distributed for feedback, and the campaign is tagged and reported in Lytho.

C. Lytho Platform Terms

Lytho
The centralized creative operations platform used by MarComm for intake, project management, proofing, and reporting. Supports automation, cross-department collaboration, and asset tracking.

Lytho Form
A digital intake form created within the platform to capture detailed project information from stakeholders. Uses conditional logic to guide users based on selected project type.

Lytho Proof
A built-in review and approval feature allowing stakeholders to view drafts, make comments, and provide approvals directly within the system.

Lytho Dashboard
The visual interface for tracking project progress, deadlines, proofing status, and upcoming tasks. Accessible by both internal MarComm users and stakeholders with permission.

Lytho Tags
Metadata labels applied to projects for filtering and reporting purposes (e.g., Project Type, Department, Pillar, or Campaign Theme).

Lytho Task
An individual action item assigned to a Content Expert or team member within a project template, often pre-populated with due dates and dependencies.

Lytho Campaign View
An overview dashboard summarizing all related projects, deliverables, and performance metrics under one campaign umbrella.

D. Communication & Governance Terms

Rounds of Approval
Formal checkpoints in the MarComm process where stakeholders review and approve deliverables.

Project Acceptance
The step where a project request transitions from *submitted* to *approved to start* after PM review and project lead confirmation.

Change Order
A modification made post-acceptance (e.g., new deliverable, timeline extension). Requires approval from PM and may adjust resource allocation or deadlines.

Stakeholder Training Companion
A digital or printed guide developed by MarComm to help requesters understand the intake process, project types, and best practices before submitting requests.

MarComm Strategic Pause
A temporary operational pause initiated by MSM MarComm to refine processes, integrate Lytho, and establish a sustainable workflow structure.

Project Closeout Survey
An automated feedback tool used to assess stakeholder satisfaction, turnaround time, and collaboration quality.

E. Lytho Specialty

A *Lytho Specialty* is a defined area of expertise or function assigned to a MarComm team member within the **Lytho project management system**.

Each specialty represents a skillset or role necessary to complete project tasks within a campaign. When project templates are created in Lytho, specialties are mapped to recurring task types (e.g., writing, design, event logistics, etc.), allowing project managers to automatically assign the right person or department to the right task.
In short:

Specialties = Roles that determine who does what inside a Lytho project template.

Consolidated and Defined Specialty List
Below is a **refined list** of unique specialties, each with a definition and—where applicable—a rationale for merging overlapping roles.

Strategy & Management

Creative Project Manager – Oversees project workflow, intake, timelines, and task delegation in Lytho. Serves as the central liaison between stakeholders and internal teams.

Project Manager *(merged with "Project Planner")* – Unified under one title; both refer to planning, scheduling, and resource management functions.
Rationale: "Planner" is not a separate specialty—it's part of project management.

Project Lead – Acts as the point person responsible for project execution, coordinating with content experts and reporting progress.

Campaign Manager – Develops and executes marketing campaigns, ensuring integration across digital, creative, and communications deliverables.

Marketing Director / AVP of Marketing, Digital Experience & MHC – Provides strategic oversight for major marketing initiatives and ensures alignment with institutional priorities.
Rationale: Combine into one specialty; use this title for leadership-level tasks.

Traffic Manager – Manages task flow, resource allocation, and ensures deadlines are met across multiple projects.

Brand & Creative Services AVP – Oversees the Brand & Creative team and ensures adherence to institutional visual identity standards.

Creative & Design

Art Director – Leads visual concept development and ensures design work aligns with brand standards and campaign strategy.

Graphic Designer – Produces design assets for print, digital, and environmental applications.

Creative Consultant – Provides creative and conceptual input on visual storytelling or campaign aesthetics.

UX/UI Designer – Designs user experiences and interfaces for digital platforms.
Wireframe Drafter *(merged under UX/UI Designer)* – Considered part of the UX process; not a standalone specialty.
Rationale: Wireframing is a function of UX/UI design.

Writing & Editorial

Copywriter (Internal/External) *(merged into one: Copywriter)* – Develops engaging copy for campaigns, announcements, web content, and reports.
Rationale: One role can serve both internal and external audiences.

Copy Editor – Reviews content for grammar, accuracy, tone, and alignment with MSM's editorial voice.

Content Strategist – Plans and structures content across channels to achieve campaign or institutional goals.

Content Manager – Oversees ongoing content production and maintenance (e.g., web updates, newsletters).

Content Creator – Produces written, visual, or multimedia content for MarComm campaigns.

Program Scriptwriter / Executive Speechwriter / Executive Media Briefing Writer / Opinion Editorial Writer *(merge under: Executive Communications Writer)* – Specializes in speechwriting, scripts, op-eds, and leadership messages.
Rationale: All fall under executive and narrative writing.

Newsletter Writer / E-blast Writer / External E-blast Writer / Blog Writer / Blog Supervisor *(merge under: Digital Publications Writer)* – Manages digital publication copy such as newsletters, blogs, and e-blasts.
Rationale: Consolidate under one specialty for all regular digital publications.
Press Release / Media Advisory Writer – Drafts and distributes official communications for media engagement.

Communications & Media

External Communications Director / Public Relations Director / Media Relations Director / Crisis Communications Director / Media Trainer *(merge under: External Communications & PR Lead)* – Manages public-facing communication, media relations, and crisis messaging.
Rationale: These roles overlap in function and focus on external narrative control.

Internal Communications Director – Leads employee-facing communications, newsletters, and internal campaigns.

Executive Assistant – Provides administrative support, scheduling, and logistics for executive communications.

Digital & Web

Digital Content Strategist – Designs digital content plans aligned with campaigns and analytics insights.

Digital Experience Strategist / Director of Digital / Web Manager / Website Updates Manager / Digital Monitor Publisher *(merge under: Digital Experience Manager)* – Manages digital presence, website content, and analytics strategy.
Rationale: All perform complementary roles within the digital ecosystem.

Social Media Manager / Social Media Supervisor / Social Media Analyst *(merge under: Social Media Lead)* – Oversees social media strategy, scheduling, and analytics.
Rationale: Consolidate titles into one adaptable specialty, with seniority defined by internal structure.

Events & Logistics

Institutional Events Director – Oversees planning and execution of institutional-level events.

Event Coordinator / Day-of Event Coordination / Event Experiential Specialist *(merge under: Event Experience Specialist)* – Manages event logistics, décor, vendors, and on-site execution.
Rationale: Day-of and experiential are subfunctions of the same specialty.

Run of Show Producer / Town Hall Producer *(merge under: Event Producer)* – Develops event scripts, cues, and timing for complex or high-visibility events.

Catering / Reservation / Vendor / Logistics Management *(merge under: Event Operations Coordinator)* – Handles vendor contracts, catering, transportation, and resource logistics.
Media Production

Photographer & Videographer – Captures and edits still and motion content for campaigns and events.

External Film & TV Productions Location Supervisor – Coordinates on-site logistics for external media productions or partnerships.

Printer – Manages print production and vendor proofing for physical deliverables.

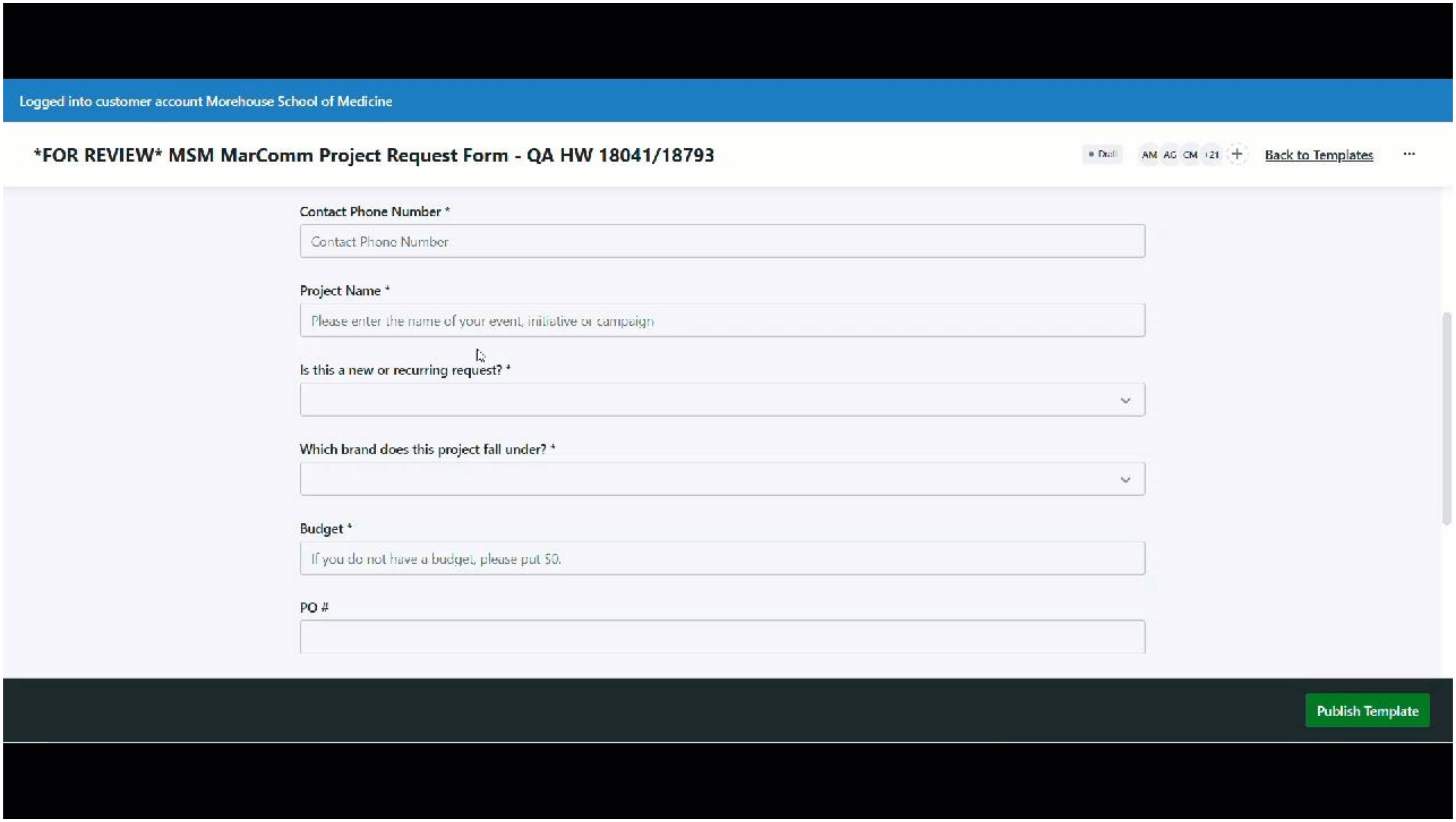
Analytics & Reporting

Analyst / Social Media Analyst *(merge under: Marketing Analyst)* – Gathers and interprets data from campaigns, events, and digital channels to inform strategy.

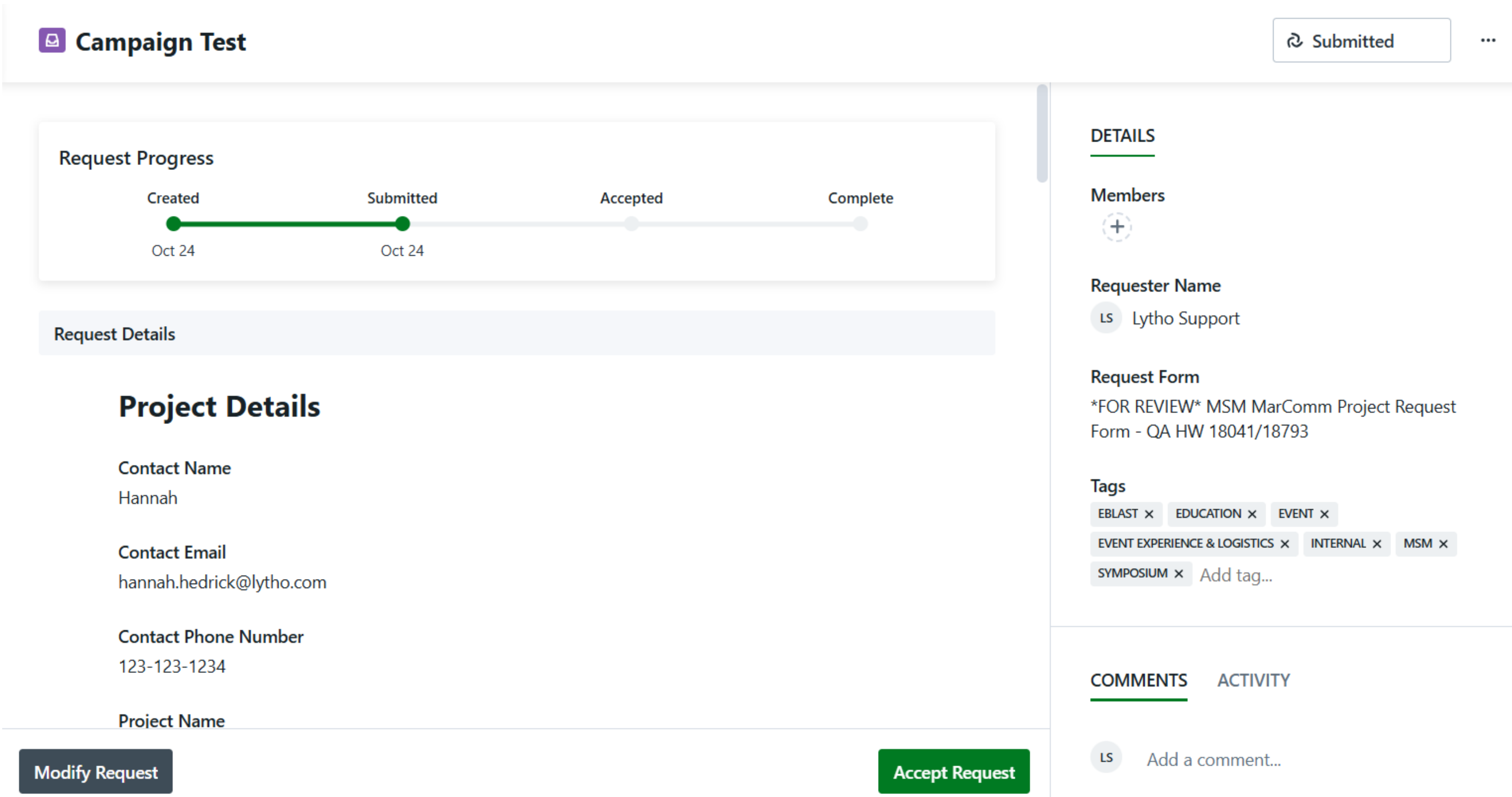
Appendix C Continued

Morehouse: Process Flow in Lytho Workflow.

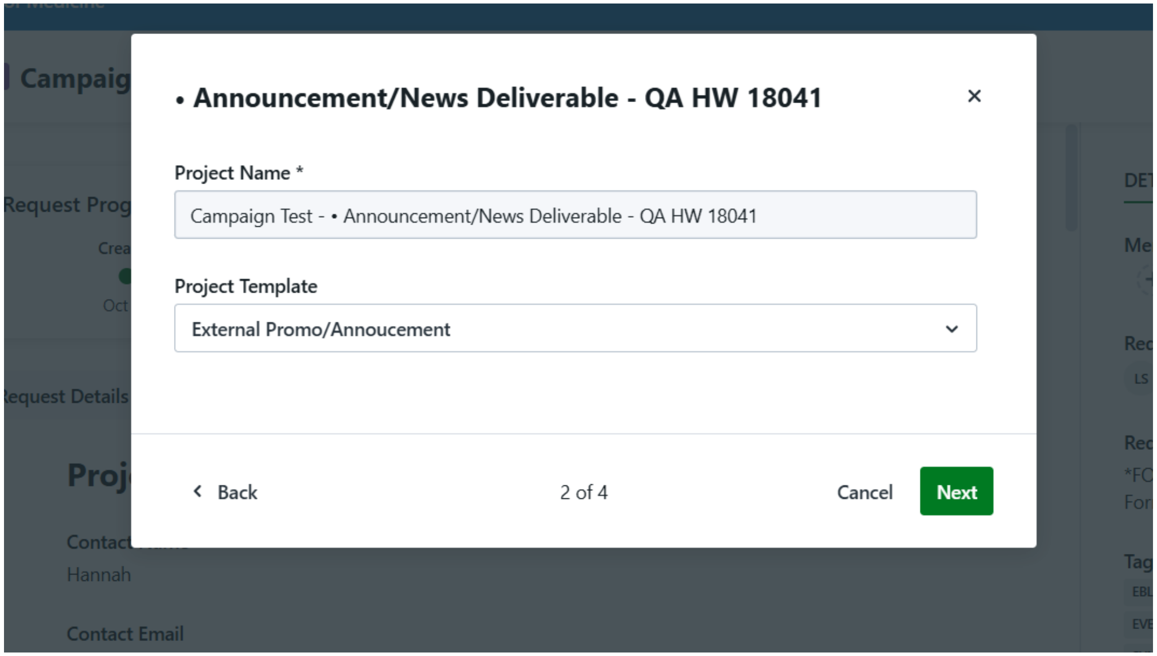
1. Requester utilizes new **Campaign form**, utilizing conditional logic to ensure:
    a. Requester follows "choose your own adventure" format, only presented with relevant fields based on their needs
    b. Creative team captures all relevant info upfront



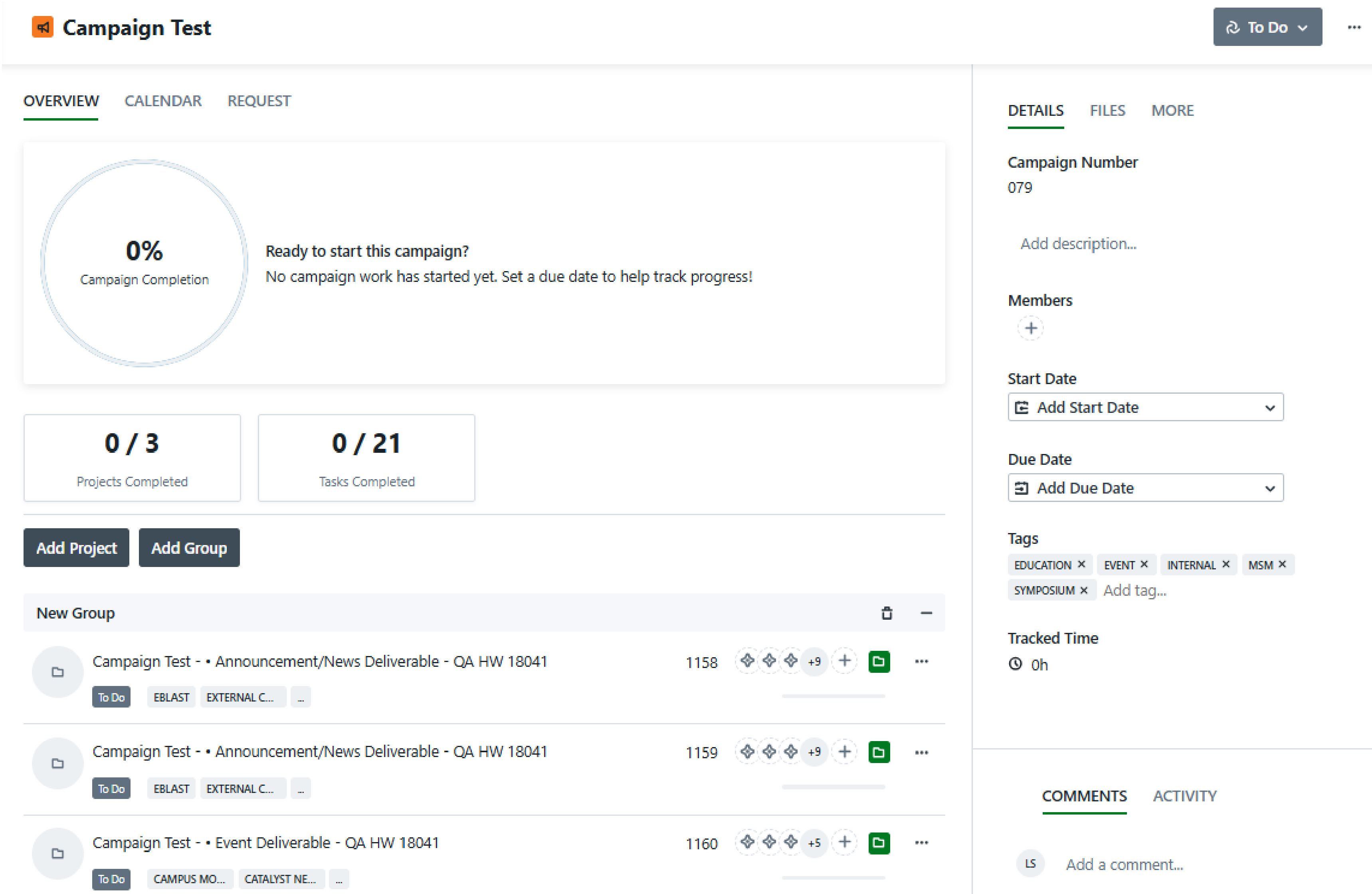
2. Request submitted, goes into cue for **Request Acceptor(s) to review.** Can accept or decline at this stage. Can also collaborate with requester via request comments if anything is unclear or requires further information before the request can be accepted. **Request** page appears as follows:



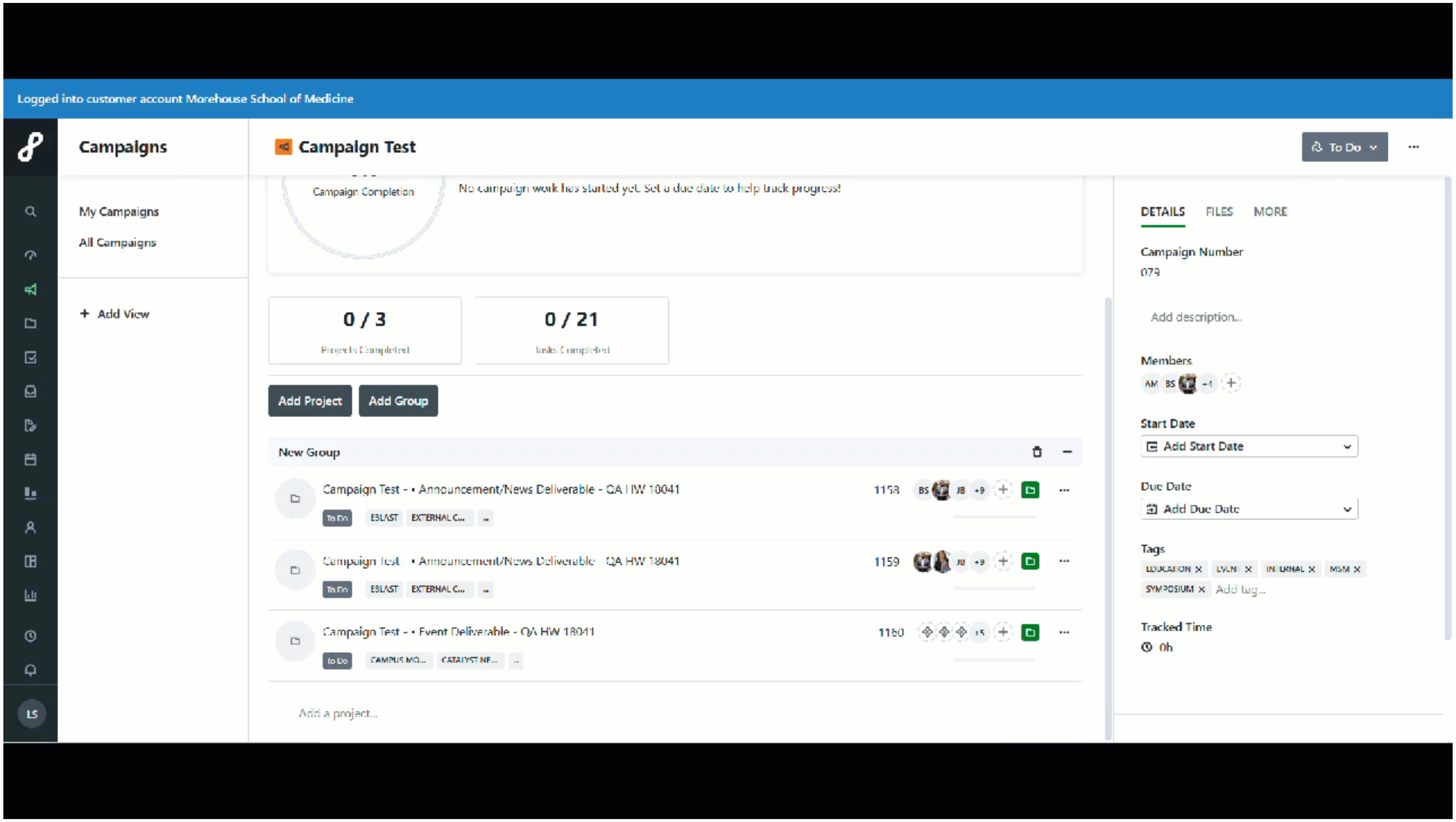
3. Once ready to accept, Request Acceptor(s) click Accept Request button, which prompts Campaign & subsequent Projects setup, Project templates automatically mapped from request form.



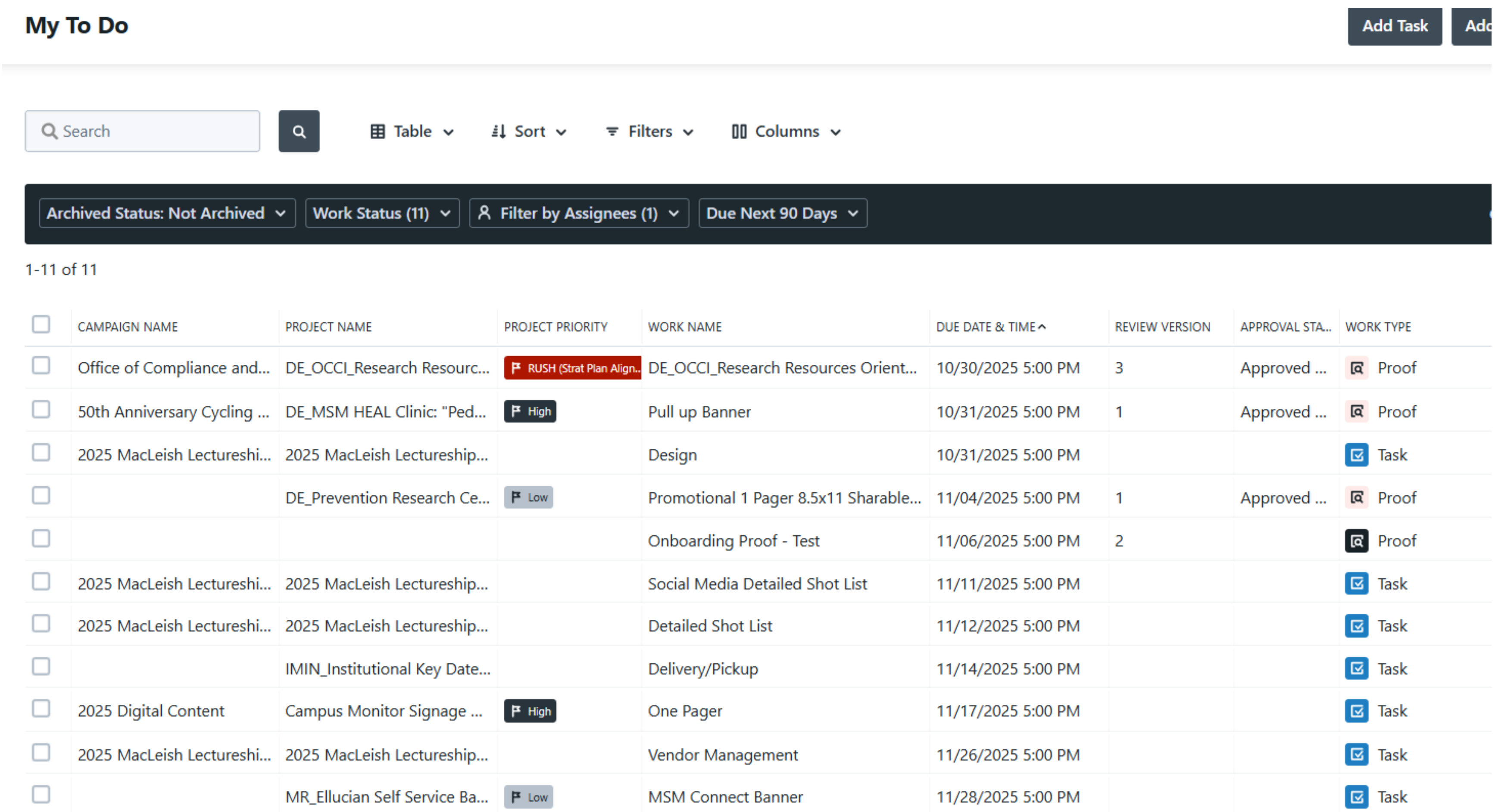
4. **Campaign** created, associated **Projects** created from selected/mapped project templates:



5. PM in collaboration with the Project Lead assigns team members based on Specialties, and adds dates as needed on **campaign, projects, and work items** (note that dates can be automated from request form and/or automatic date calculations in project templates. These automation can be refined as we work though the project over time.):



6. With team members assigned to projects and work items, and deadlines applied to those projects and work items, team members can **utilize My Work section** and/or **Custom Views** sorted by due date to confidently **prioritize** their action items. Think of this as your personal or team Todo list. For example:



My To Do

Add Task | Add

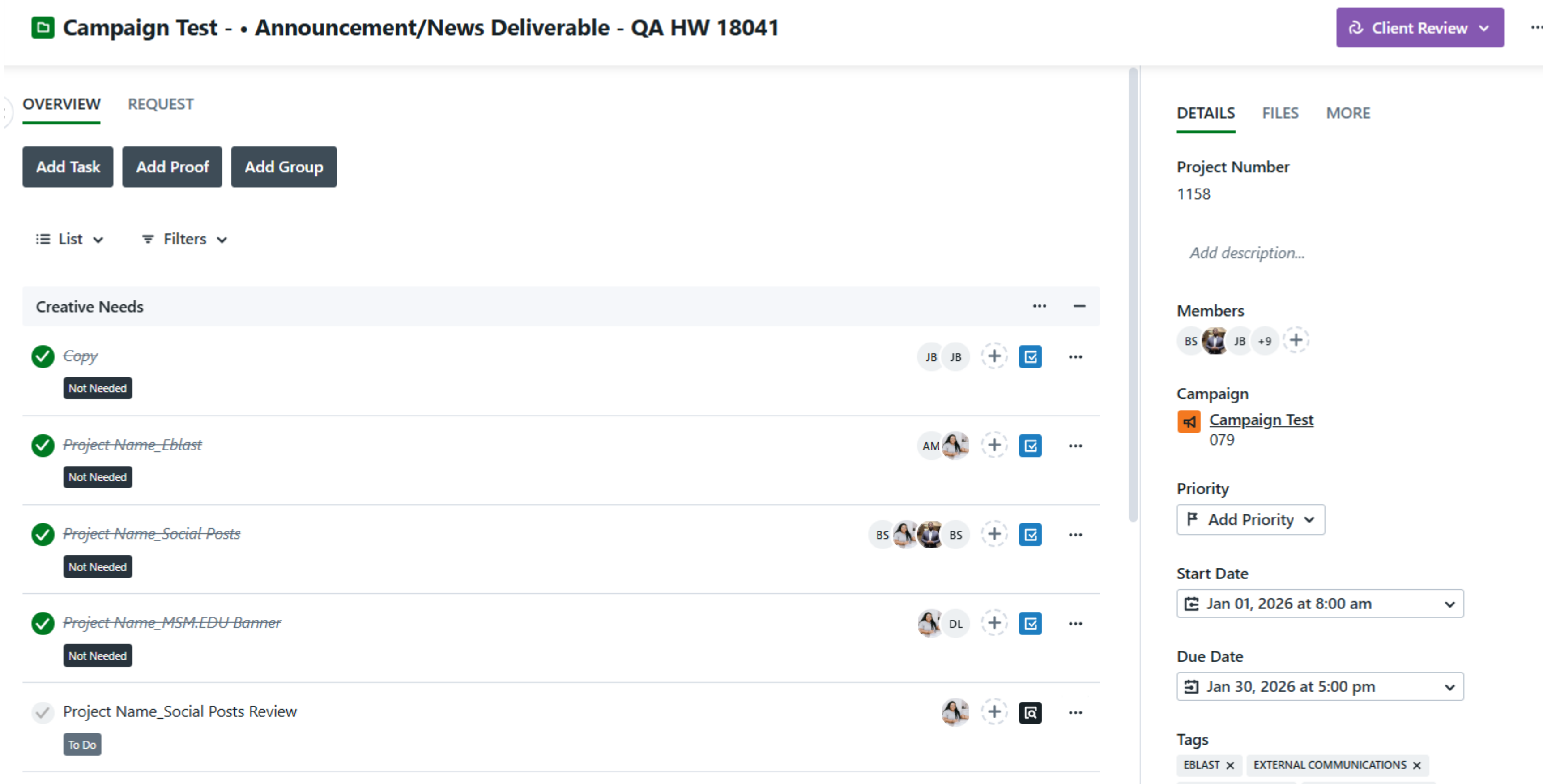
Search | Table | Sort | Filters | Columns

Archived Status: Not Archived | Work Status (11) | Filter by Assignees (1) | Due Next 90 Days

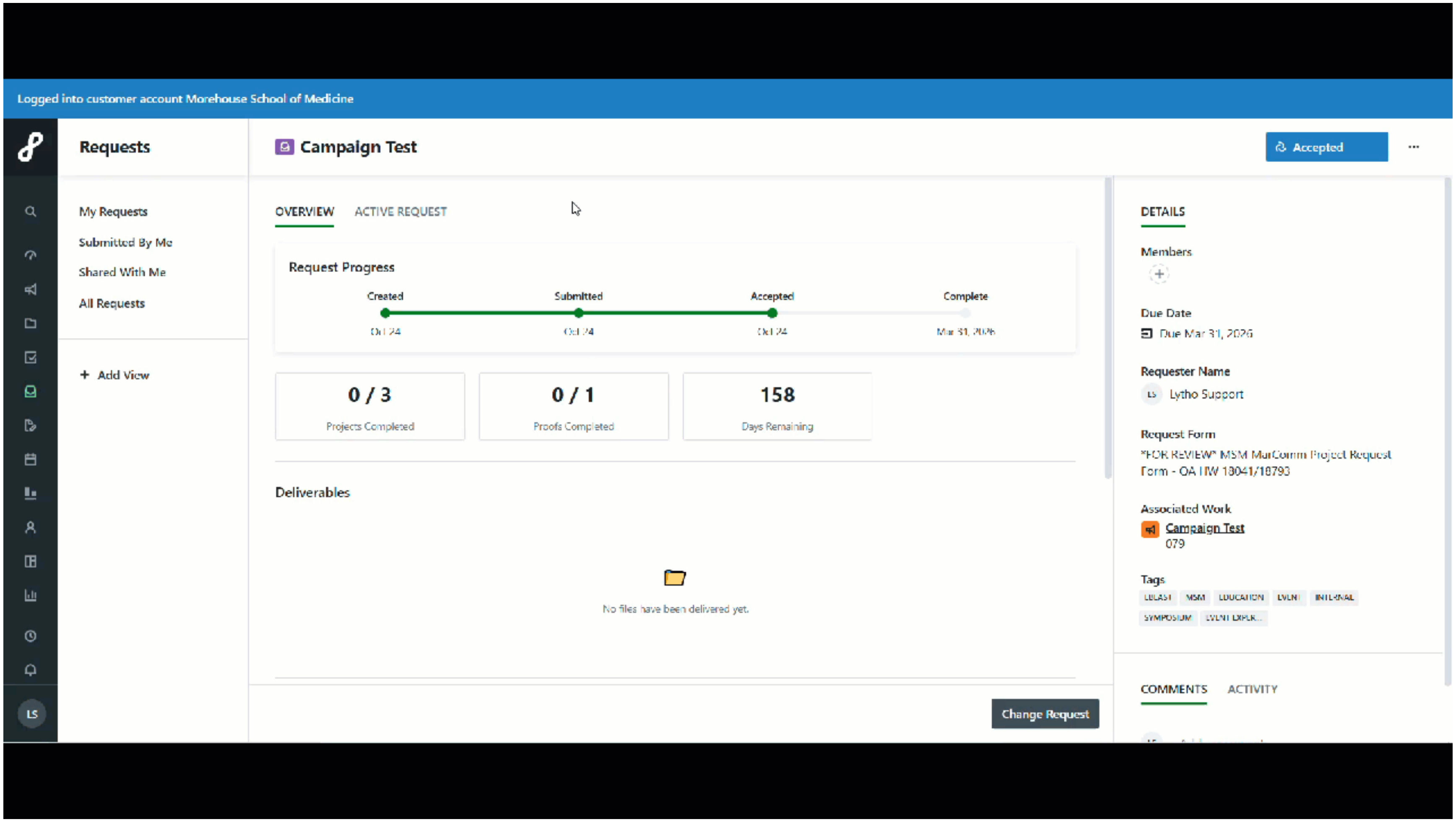
1-11 of 11

CAMPAIGN NAME	PROJECT NAME	PROJECT PRIORITY	WORK NAME	DUE DATE & TIME	REVIEW VERSION	APPROVAL STA...	WORK TYPE
Office of Compliance and...	DE_OCCI_Research Resourc...	RUSH (Strat Plan Align...	DE_OCCI_Research Resources Orient...	10/30/2025 5:00 PM	3	Approved ...	Proof
50th Anniversary Cycling ...	DE_MSM HEAL Clinic: "Ped...	High	Pull up Banner	10/31/2025 5:00 PM	1	Approved ...	Proof
2025 MacLeish Lectureshi...	2025 MacLeish Lectureship...		Design	10/31/2025 5:00 PM			Task
	DE_Prevention Research Ce...	Low	Promotional 1 Pager 8.5x11 Sharable...	11/04/2025 5:00 PM	1	Approved ...	Proof
			Onboarding Proof - Test	11/06/2025 5:00 PM	2		Proof
2025 MacLeish Lectureshi...	2025 MacLeish Lectureship...		Social Media Detailed Shot List	11/11/2025 5:00 PM			Task
2025 MacLeish Lectureshi...	2025 MacLeish Lectureship...		Detailed Shot List	11/12/2025 5:00 PM			Task
	IMIN_Institutional Key Date...		Delivery/Pickup	11/14/2025 5:00 PM			Task
2025 Digital Content	Campus Monitor Signage ...	High	One Pager	11/17/2025 5:00 PM			Task
2025 MacLeish Lectureshi...	2025 MacLeish Lectureship...		Vendor Management	11/26/2025 5:00 PM			Task
	MR_Ellucian Self Service Ba...	Low	MSM Connect Banner	11/28/2025 5:00 PM			Task

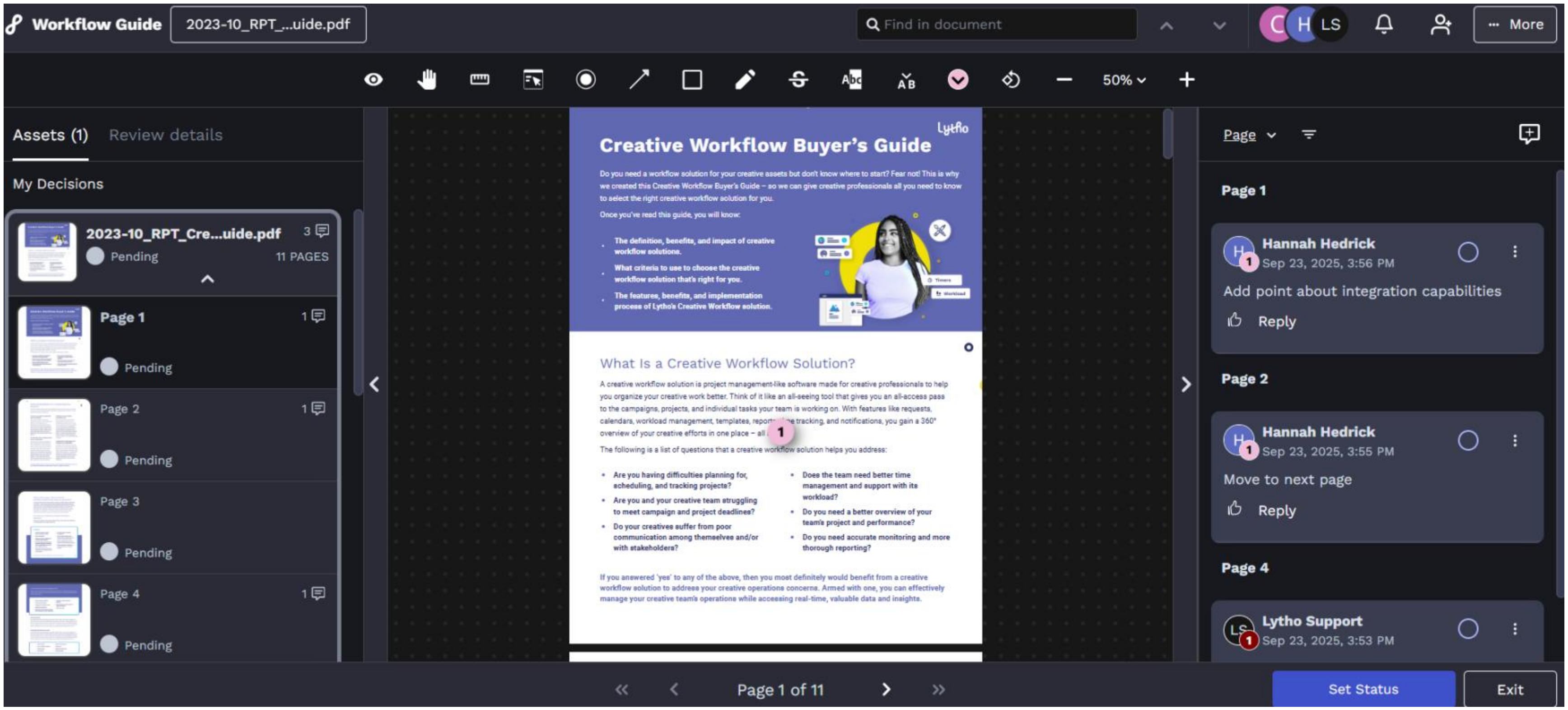
7. Project team members make updates campaign/project/work details as work is being done:



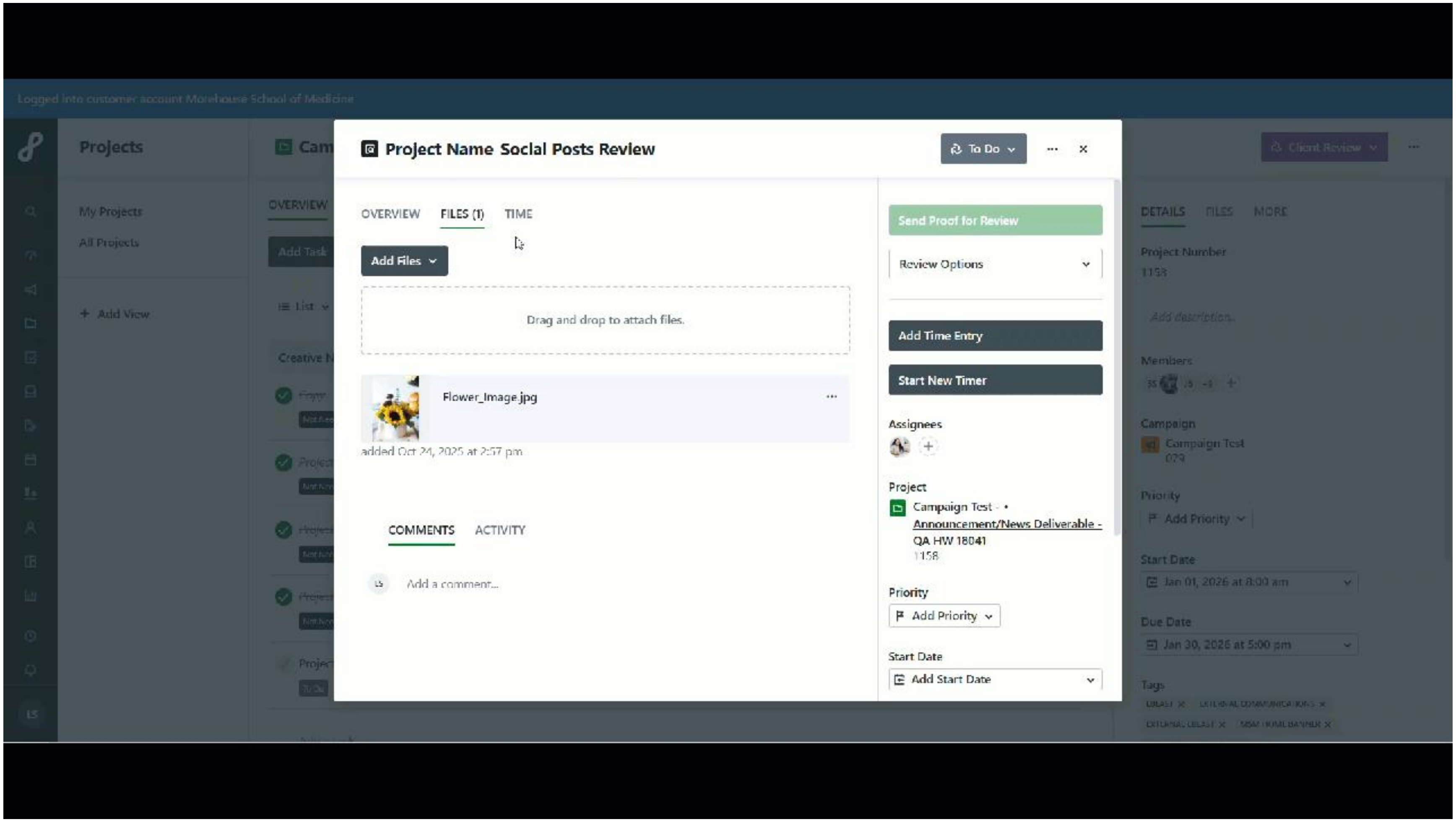
8. As updates are made to the campaign and/or projects, the requester can **track real-time, high-level updates** from **Request Page:**



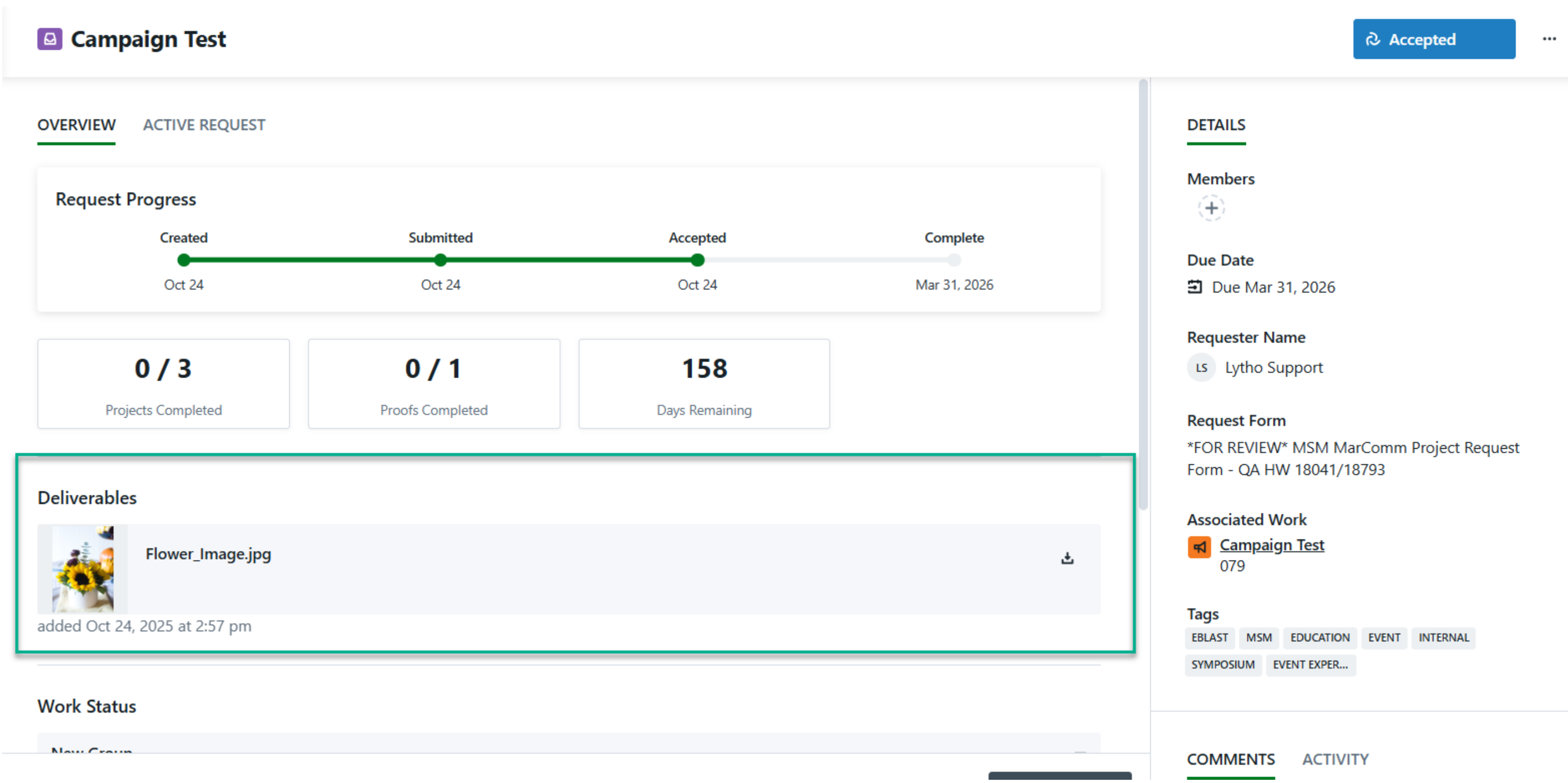
9. Project team members send out proof(s) for review, where requester can be invited to collaborate and annotate as needed (noting that not everyone has to be invited at the same time, review routes can be tiered and internal to MarComm):



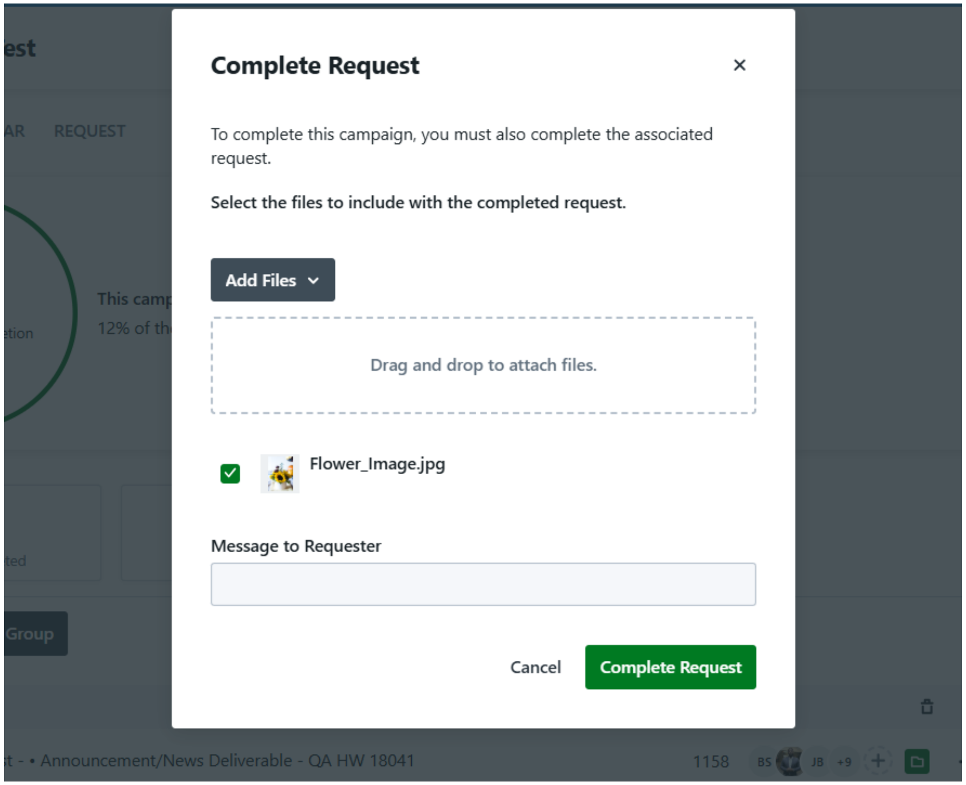
10. As proofs are finalized, creative team to upload final approved assets in Files section (can be in Campaign files, Project files, or Task/Proof files) and marked as a Deliverable:



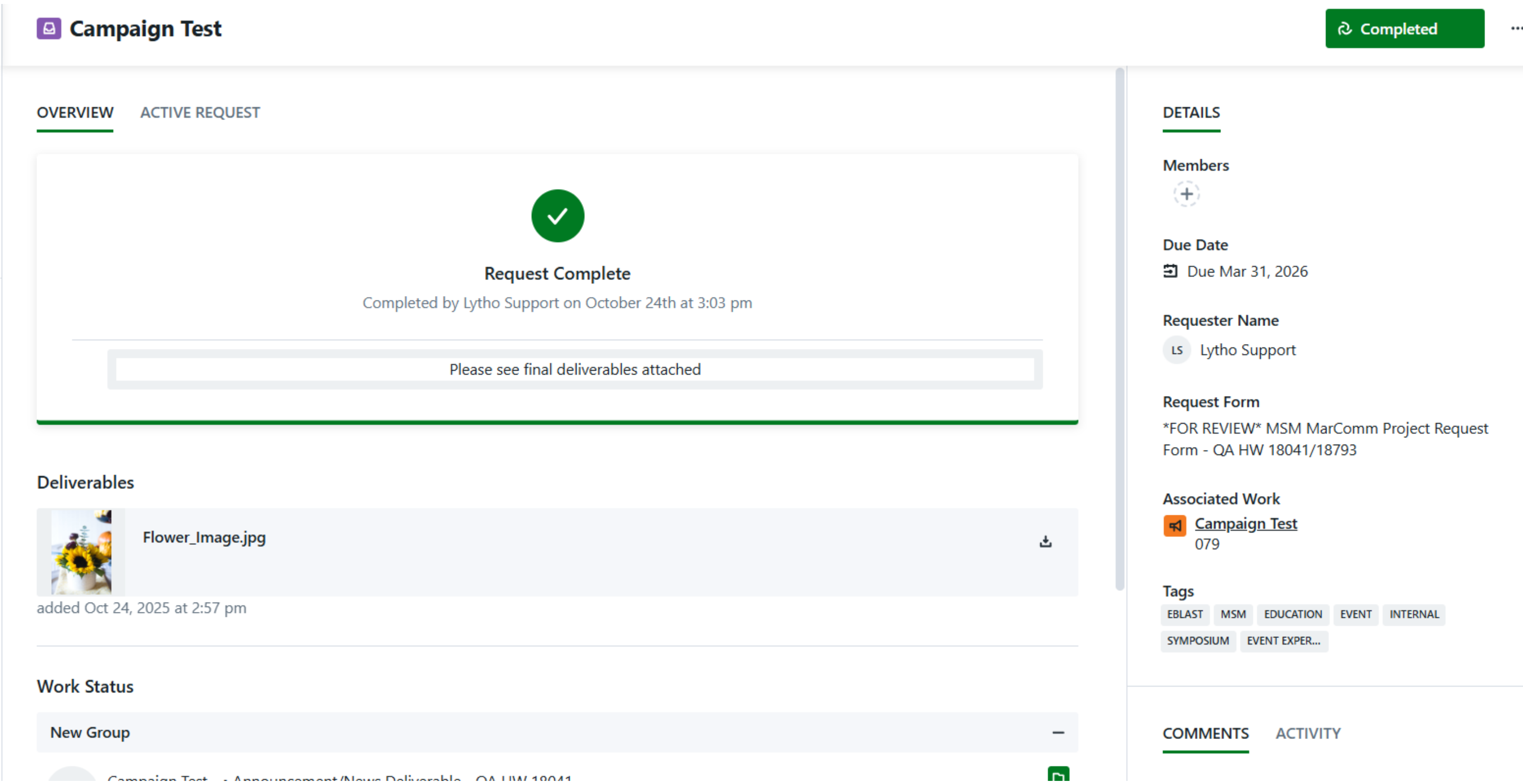
Once files are marked as a Deliverable, they are automatically made available in the Request. Requester is also notified as Deliverables are uploaded. They can then go into the **Request** to access/download Deliverables. Note that Deliverables are a reportable data point.



11. As the campaign and associated projects are updated to a Completed status, PM is prompted with final step to alert requester that all work is done. Option to adjust final deliverables if needed:



12. Once request completion finalized, requester will be notified their request has been completed. The Request page will appear as follows:



Managing Your Lytho Notifications

How to Customize Your Alerts for a Cleaner, More Useful Inbox

Lytho is designed to keep you informed about the work you're involved in — but *you* control how and when it communicates with you.

These settings allow you to:

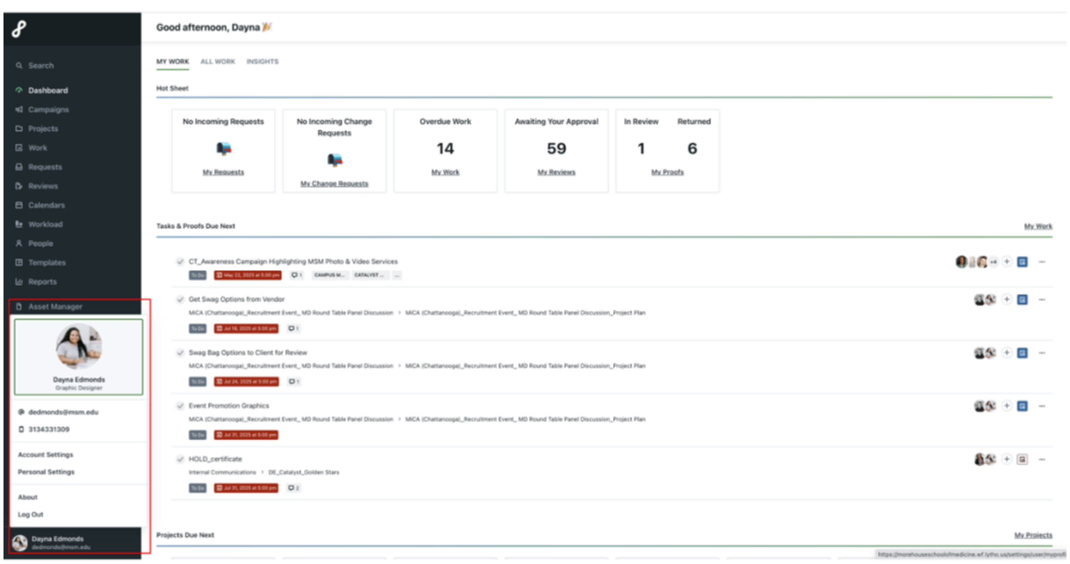
- Reduce unnecessary emails
- Stay informed about work you're responsible for
- Avoid missing deadlines, reviews, or assignments
- Use Lytho as your source of truth instead of relying on side conversations

Below is a recommended setup that balances **visibility, accountability, and sanity**.

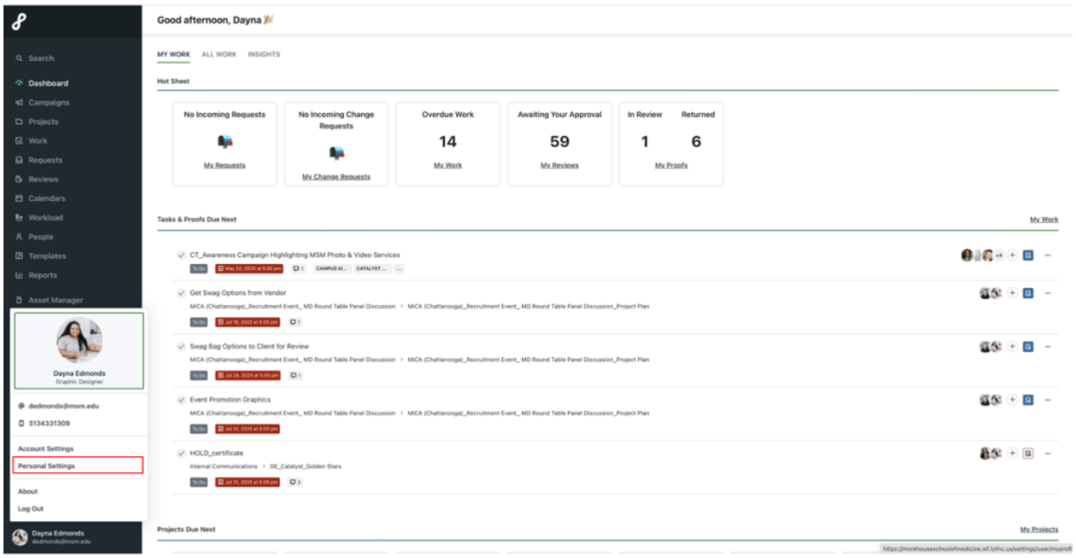
How to Access Your Notification Settings

From your Lytho homepage:

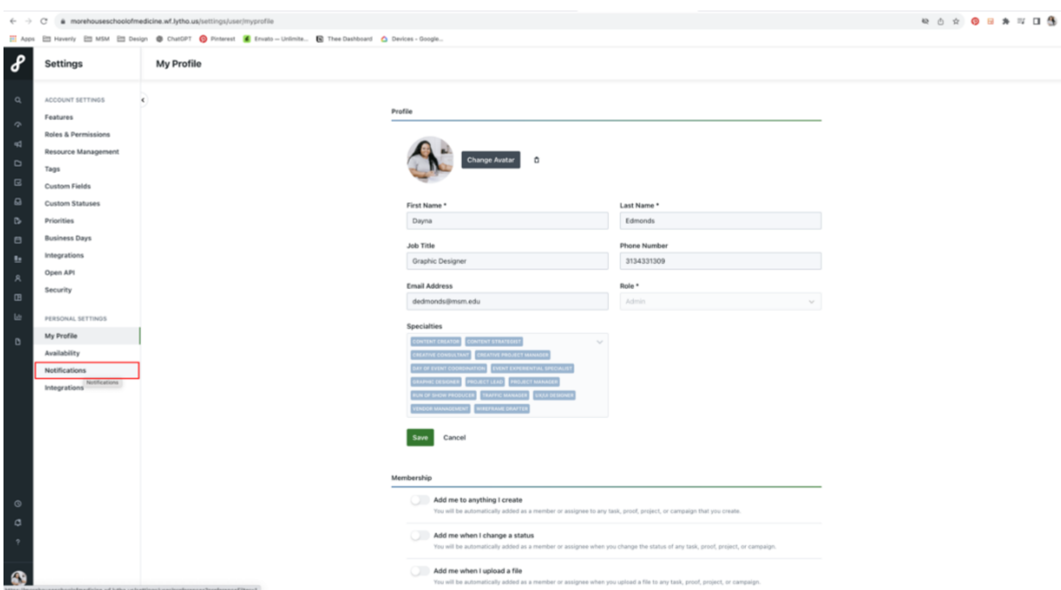
1. Click your profile photo in the bottom-left corner



2. Click **Personal Settings**



3. Go to **Notifications**



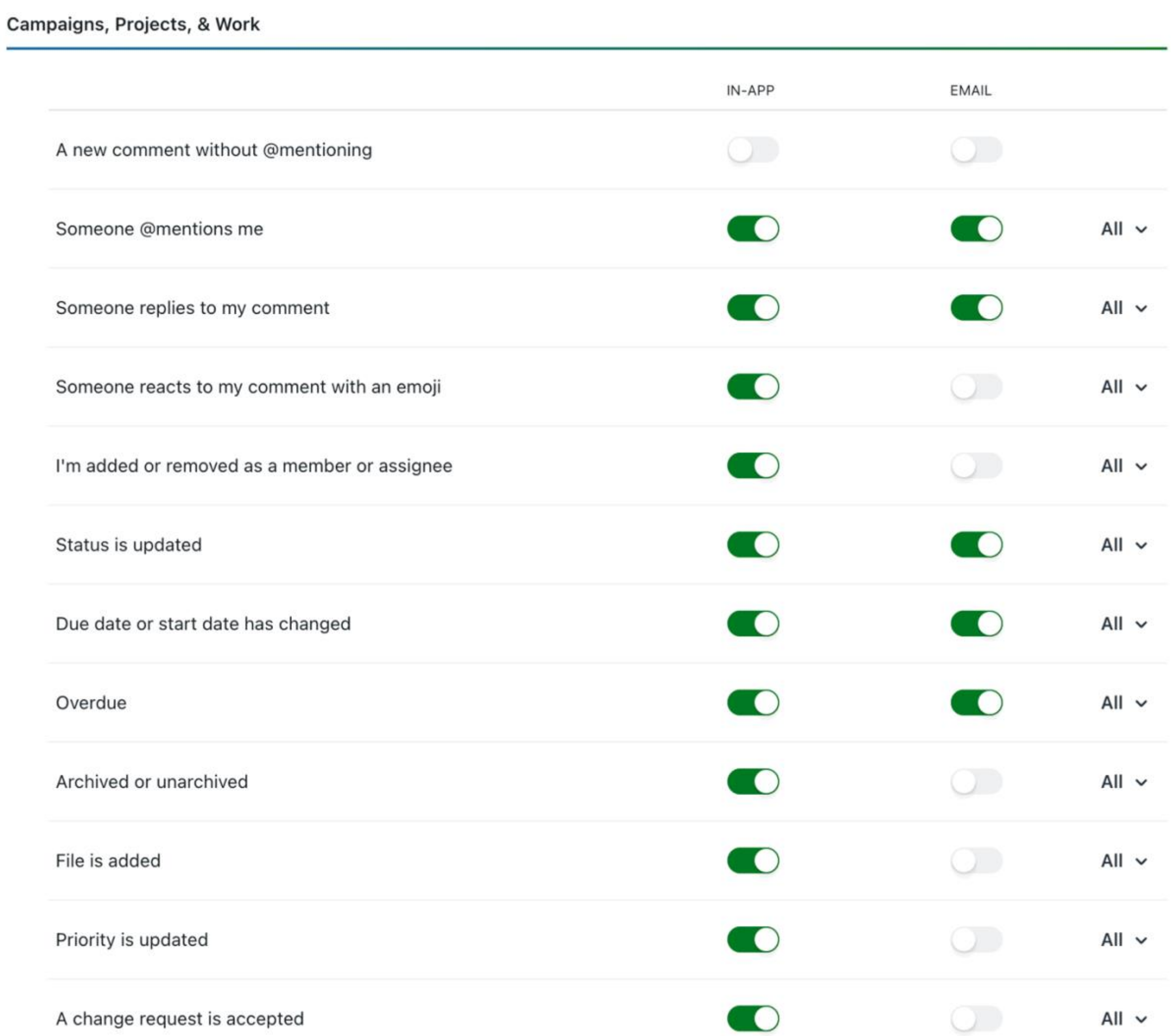
4. You will see sections for:
   - Campaigns, Projects & Work
   - Requests
   - Reviews
   - Additional Preferences

These settings control **what you see in-app** and **what hits your inbox**.

Campaigns, Projects & Work Section

These control what happens when **tasks, projects, and campaigns** change.

Recommended Settings:



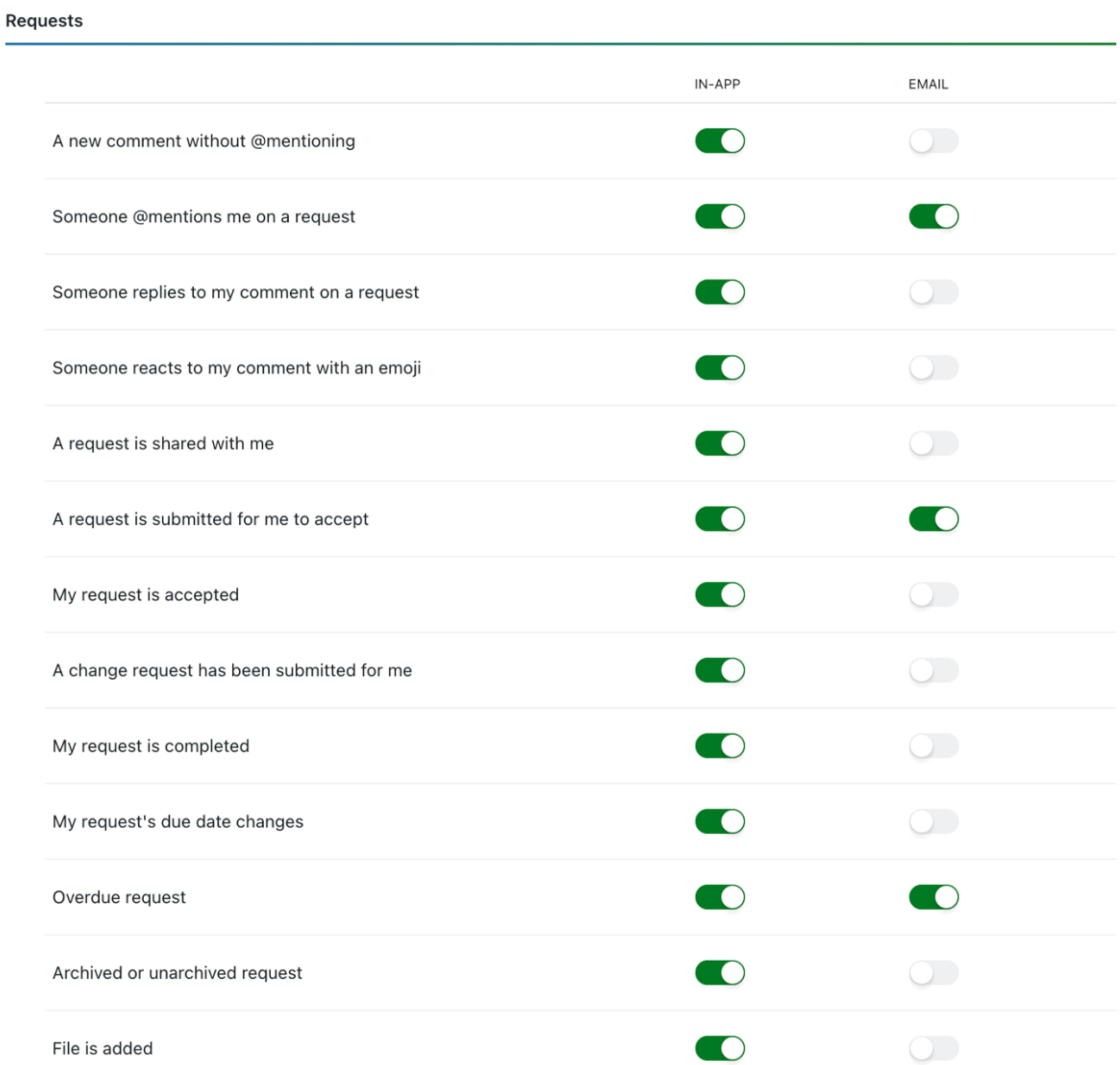
Why:

- You should get emails for: Things that affect **timing, scope, or responsibility**
- You do not need emails for: Routine collaboration activity & Background updates
- You'll always know when:
    - Something becomes overdue
    - A deadline moves
    - You're mentioned or assigned

Requests Section

These control what happens when **requests are submitted, accepted, completed or changed**.

Recommended Settings:



Why:

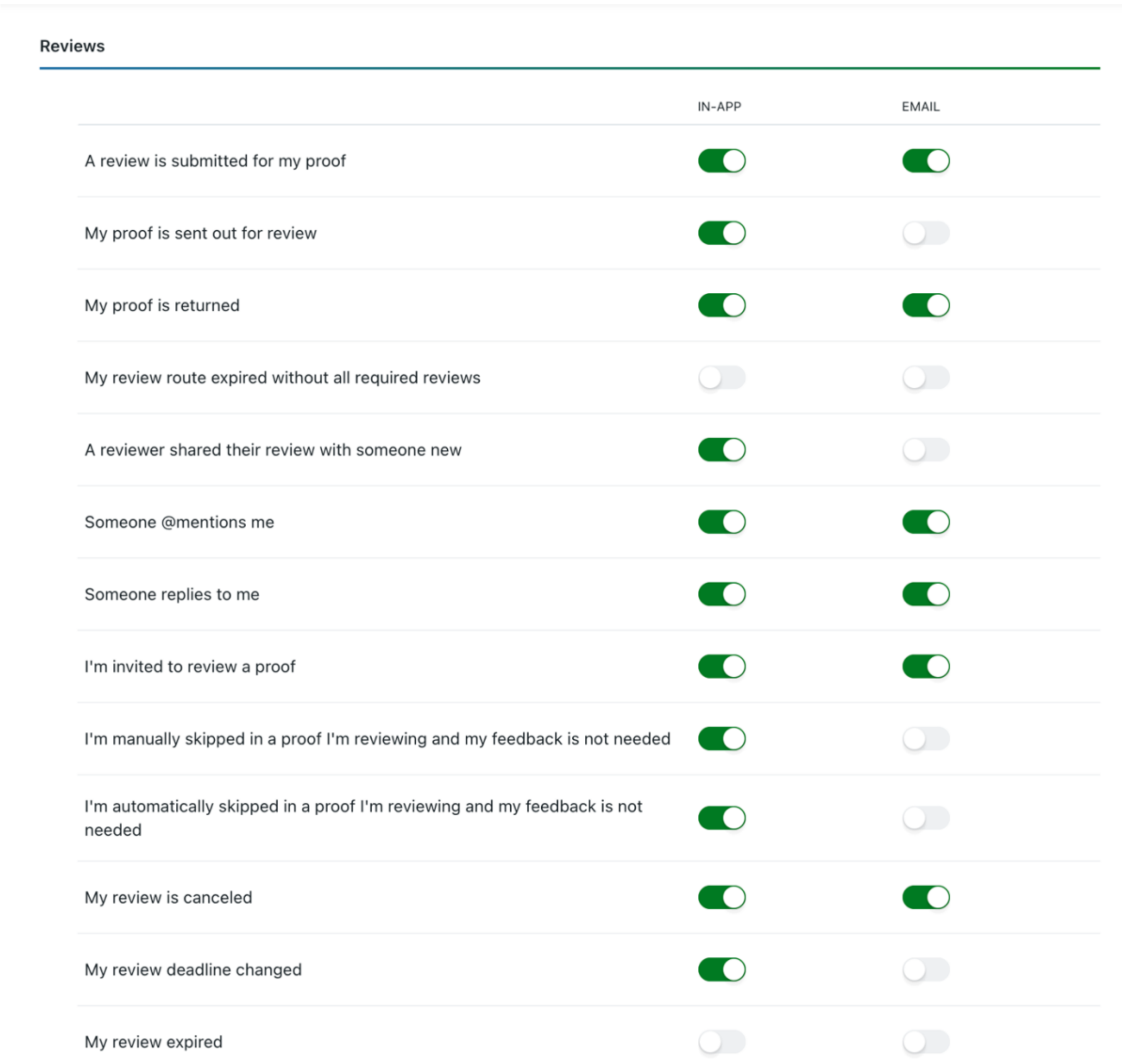
- You should only get emails when: **You are needed, something is late or something requires your action**
  - Everything else can be seen inside Lytho without clogging your inbox

![Morehouse School of Medicine logo]

Reviews Section

These control what happens when you are involved in **proofing and approvals**.

Recommended Settings:

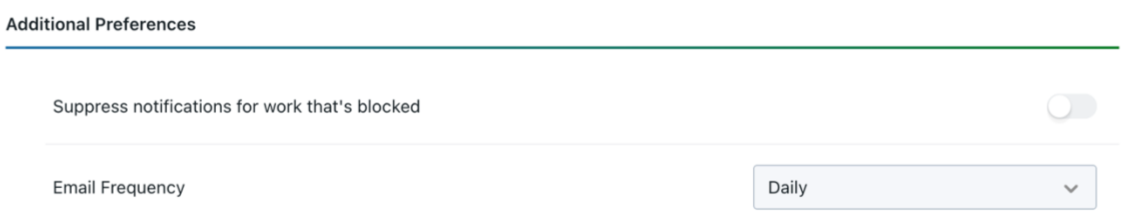


Why:

- You **must** know when something needs your review or feedback
- This keeps your attention on *action*, not noise
- You'll get emails when: **Someone needs your feedback, someone replies to your comment and your proof comes back**.

Email Frequency

Recommended Settings:



Why:

- You'll receive **one digest email per day** instead of dozens of individual emails
- This keeps you informed without overwhelming your inbox
- You can still see real-time updates inside Lytho

What to Expect:

- A daily summary of:
  - **New assignments**
  - **Status changes**
  - **Reviews needed**
  - **Overdue work**

You should still log into Lytho regularly for real-time work management.