COACHYU

DESIGN GUIDE

THE COACHYU DESIGNER'S HANDBOOK

DENNIS YU
Host of the CoachYu Show

GUIDE VERSION
coachyu_design_style_guide_v3.6_2022_0121

Table of Contents

Welcome!

This guide is for all VA designers who have intermediate experience in Adobe Indesign and Illustrator.

This guide is also perfect for owners and agencies who want to train their VAs to customize our templates for their brand. And we also have a corresponding course for design VAs, since we have courses on everything we do.

In this guide, you will learn the CoachYu branding methodology as well as how we work, skin, and redesign our guides. You will also learn to prepare presentation decks and our course creation process, as it relates to design.

Professional branding immediately gives people the impression that you're an established, confident, and trustworthy company. That is why you need to learn these basic principles before you start designing.

We are incredibly grateful that you have chosen us to help your VAs develop these important design skills and look forward to your success as you seek to develop a professional brand!

Dennis Yu

Host of the CoachYu Show

The CoachYu Logo

This is our logo.
Our logo is simple, clean, and crisp. It easily translates through most forms of media that we use. Keep in mind that simplicity is key when working with our logo, the design should not create conflict with the logo's design style. It is important to note that when working with our logo, it is a must that we work on it through Illustrator and not photoshop because vectors preserve scalability and quality.

Logotype
This is what we use for most of our materials. Make sure that the text and fine lines are still legible when the logo design is scaled down.

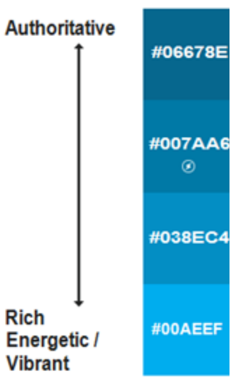
How we use the logo
We usually add the logo to the lower left side of our printed materials and guides. Logo use in our videos can vary from this format. Be watchful for overuse of the logo, it should be enough for the logo to show up once or twice per page unless it is needed to occur more (ie. diagrams that need our logo to show up multiple times).

Also, be aware that the logotype is not to be used heavily in our designs.

Color Palette

Using color to focus content

We have a color we call CoachYu Blue, our other colors stem from that particular hue of blue. Lighter colors are best suited for design purposes when other content, such as images or words, need to be the focal point.
This isn't to say we can't stray away from the palette. Just be sure to take function over form. The boxes that have our signature bolt are part of the basic palette.



CoachYu Blue, the swatch with the bolt icon, is our main hue of blue. Used mostly in our logo, it is also good for headers and sub-headers when used sparingly. #00AEEF is used for our hyperlink style.

#222323 is our main text color. We refrain from using actual black and prefer grays because it is less straining to the reader's eyes. We have a lot of content and we have to make sure we get and retain the reader's attention. Lessening the harshness of the text color helps with that. The lightest colors in our pallette work great with the two darkest grays when used sparingly.

Our yellow palette is good for adding contrast to our guides. It is great for adding splashes of color to compliment our blues. Not great for light font styles against a white background though it may work when used with a heavy font style and large font size.

Reds are the trickiest color to use in our palette. Mainly used for catching attention or as a warning system. Adding a splash of red to a note makes it seem more important. Red isn't recommended for use as the main color scheme since it clashes with our CoachYu Blue color palette. It is also good for highlighting text.

* Here's an example of a note that uses red to add emphasis.

Top and middle green works great against a white background.
It can be used for headers and/or sub-headers. Green is a good alternative to a blue color scheme with yellow/orange as its complimentary color.
#D7DF23 green is not great for light fonts against a white background.

Beige is good for strokes on paths and/or lines. It is great as a base color for shadows. You can play with the opacity to serve your needs.

Gradients and Color Combinations

Gradients give depth to our images. By using gradients, we add an additional dimension to an otherwise plain design without contradicting the clean design theme. You can mix and match colors from our palette however you see fit, just remember that subtlety is key.

Subtle progression

Make sure that the progression of the tint is slow and subtle from dark to light, left to right. Jarring color changes and combinations look weird and are reminiscent of 90's WordArt.

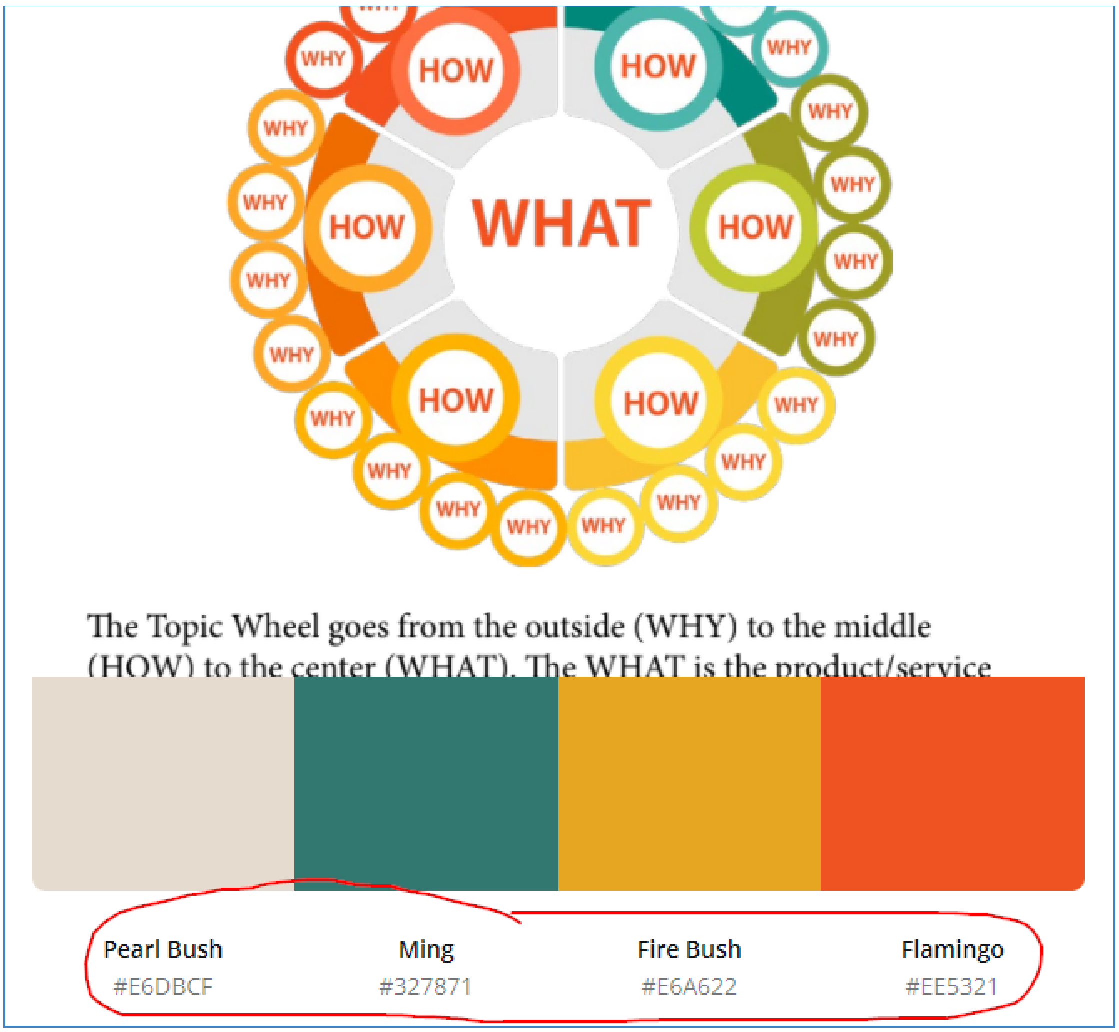
Basic combinations

Here are some basic combinations for both light and dark themes that you can use.

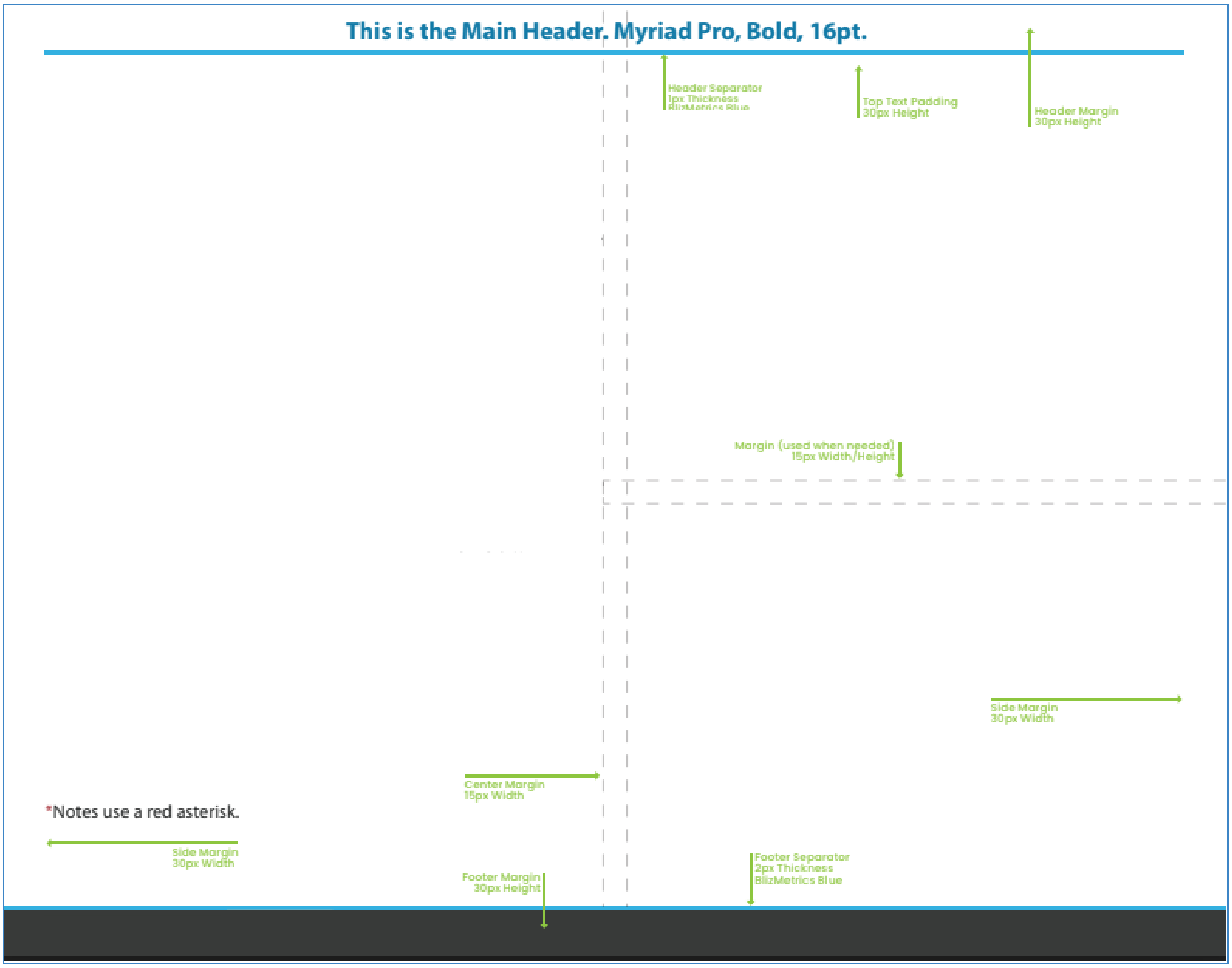
How To Get Hex Codes of A Logo

1. Go to [Canva palette generator](#) and upload the logo.

2. Select the logo from your computer.
3. After uploading the logo, the HEX Codes will be generated automatically.



Typography and Margins



We use the font 'Myriad Pro' as our main Typeface
The typeface goes well with our CoachYu logotype font. We need to minimize the number of fonts used in our guides. *Less font variation = more consistency / more professional look*.

This is a Sub-header, the font used is 'Myriad Pro, 14pt font size. 14pt Leading
This is the main content text. The font used is 'Myriad Pro', 12pt font size.The leading is 14pt. Sometimes we use an italic version, for example, ***"Quotes such as this one, which uses Myriad Pro Italic, 12pt, bold. Using italicized styles make the sentence seem more important."***

We always use left-aligned text. We also set the Kerning to be Optical and make sure that we don't or at least, lessen breaking words midword.

Here's an example of how we add lists to our guides

1. Make sure listed items end with a period.
2. When dealing with a paragraph as the list item, make sure that the text is indented to be after the number.
    a. Sub-lists use letters.
        I. Further sub-lists use Roman numerals.
3. When listing items that are in no particular order, we use a bulleted list..
    - Like this.
    - And this.
    - And this.

When creating a hyperlink, make sure we use the CoachYu link style

Let's use the link to the Design Style Guide folder in the Team Drive as an example. You can click on the link ***here***.

The Cover Page

The cover page and first impressions.

The cover page is the first thing the client or customer sees, having a professional looking cover creates a good first impression and further legitimizes everything within the guide even before they flip the pages.

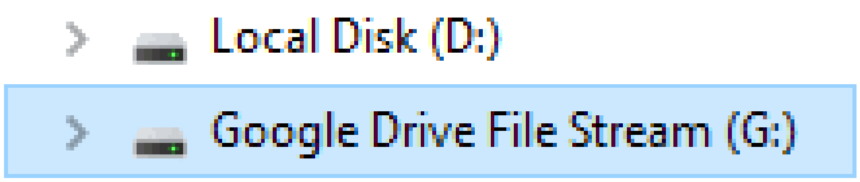
For Google Documents, you can use "Wrap Text" on the text wrapping, and "Fix position on page" on the Position section to align the image properly.

Google File Stream and the CoachYu Graphics folder

What is Google File Stream?
It is a free service from Google which allows you to access files in your Drive from your computer, freeing up space in your disk drive and network bandwidth. Because Drive files are stored in the cloud, any changes you or your collaborators make are automatically updated everywhere.

You can also make Drive files available for offline access. These cached files sync back to the cloud when you're online, so the latest version is available on all your devices.

Download Google File Stream here.



*You can view files from your computer as if it was stored in a physical drive locally.

The CoachYu Graphics folder
We have our images in a single folder called the CoachYu Graphics folder. We have it all in one place so we don't have any problems finding files and removing duplicates.

NO. DUPLICATE. FILES.
A significant amount of images that we have are reused throughout our guides, that's why we only have one version for each file that we use often. This eliminates duplicates and different versions of an image in our guides. When you're going to work on an image, make sure there isn't an existing one beforehand
.
For example: Image A is used and linked to both Guide B and Guide C. When we edit Image A, it is automatically updated in both Guide B and Guide C.

Vector images and why they matter
Vector graphics are used throughout our guides. A vector graphic is made up of points, lines, and curves that are based upon mathematical equations, rather than solid colored square pixels.

We only use vector graphics for our guides, we want to preserve quality in the images because we export guides as PDFs. This way, when people zoom-in to the PDF, they will never encounter pixelation with the exemption of raster images like photos.

Also, when we use photos, we use a large resolution to reduce pixelation.

The Master Guide, Master Presentation, and Checklist Architecture

The Master Guide
As the name implies, this guide is the 'master' file from which all guides are compiled. The Master Guide must always contain the most recent version of our guides.

The Master Presentation
The Master Presentation is a direct counterpart of the Master Guide. It is a presentation version of the Master Guide. Every guide we have has a presentation version which is compiled in this guide.

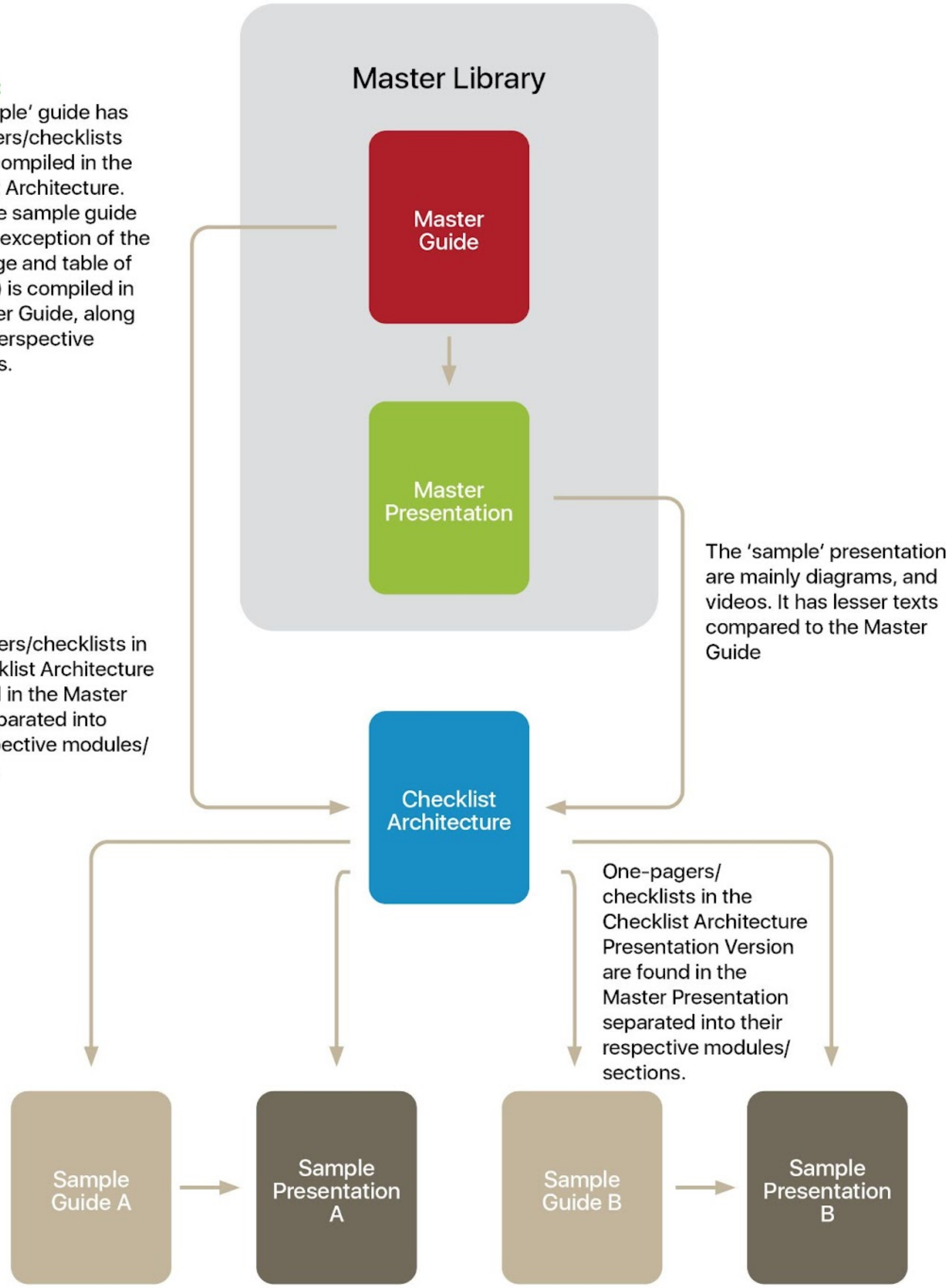
The Checklist Architecture
The Checklist Architecture is a compilation of checklists found throughout all guides. Slides in this file are compiled in the Master Guide. The Checklist Architecture has a presentation version which is compiled in the Master Presentation.

What is a presentation version?
As the name implies, presentation versions are used in slides for keynote speeches and presentations. The slides should be less-detailed but must remain understandable enough with one glance. It should not be saturated with text.

Summary
- Guides contain one-pagers/checklists.
- One-pagers/checklists are compiled in the Checklist Architecture.
- Guides are compiled in the Master Guide.
- Guides, the Master Guide, and the Checklist Architecture have presentation versions.

Diagram:
The 'sample' guide has one-pagers/checklists that are compiled in the Checklist Architecture. The entire sample guide (with the exception of the cover page and table of contents) is compiled in the Master Guide, along with its perspective checklists.

One-pagers/checklists in the Checklist Architecture are found in the Master Guide separated into their respective modules/ sections.

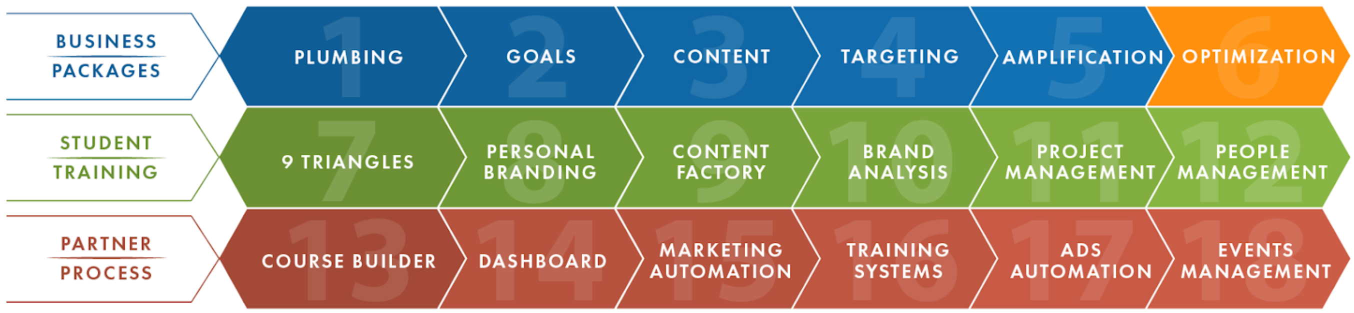


Every guide has a presentation version, which is a less-detailed version of the original guide.

Master Page templates and Section Prefixes

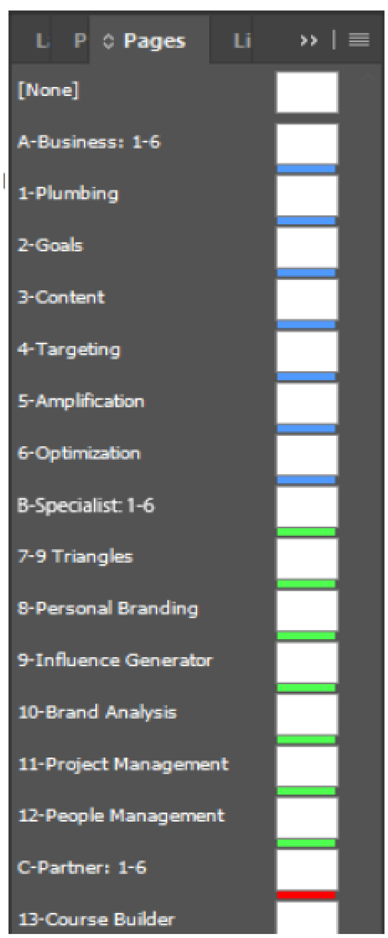
A template for every guide.

We have a template for every guide that is based off our 18 Modules, seen below.



The first module in the diagram is the Plumbing module. In our templates in the Pages tab, it is found as **1-Plumbing**.

Important: Every guide should use its respective template. This not only reduces errors in the future, but also helps in tracking.



Overview guides.

If you notice, there are templates called A-Business: 1-6, B-Specialist: 1-6, and C-Partner: 1-6. These represent the 3 guides that are overviews of the 6 guides within themselves.

The 3 overview guides are:

Social Amplification Engine. It is an overview from Plumbing to Optimization.

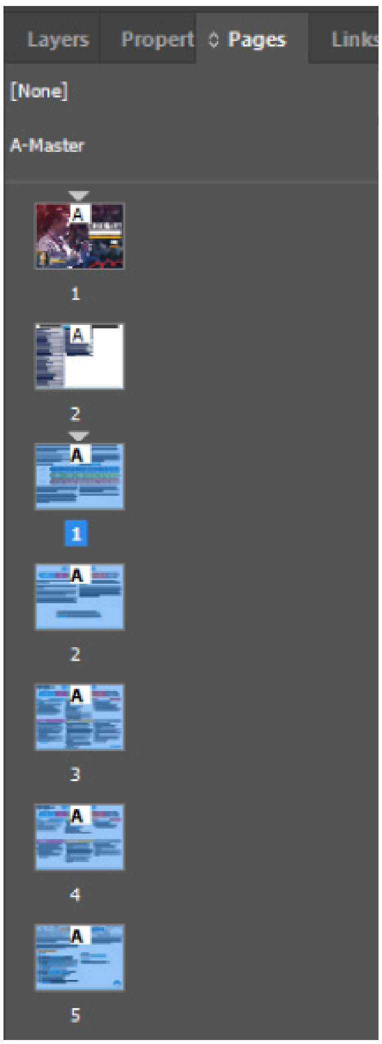
Digital Marketing Training System. It is an overview from 9 Triangles to People Management.

The **Partner** overview guide is yet unfinished but will be labeled according to our template. It is an overview from Course Builder to Events Management.

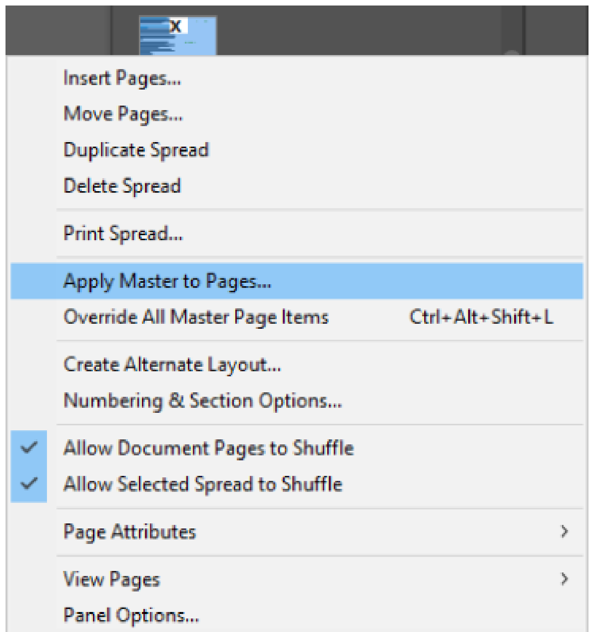
How To Apply Our Templates To Pages

Here’s how to make your job easier.
If you’re working on a new guide or updating an old one which doesn’t use our template, these steps will help you migrate into a much easier and efficient workflow.

How to apply our templates to pages.
Step 1: Select the pages from the Pages tab which you want to apply the template. See below.



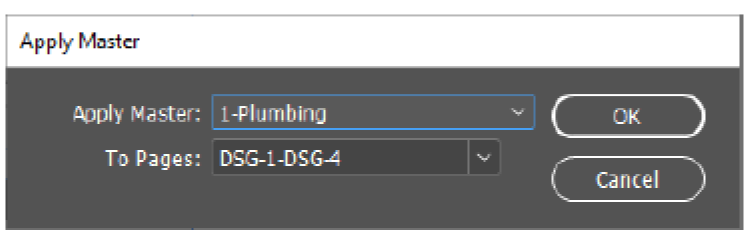
Step 2: Right-click on your selected pages and select **Apply Master to Pages**. See below.



Step 3: On the **Apply Master**: dropdown menu, select which template you would like to apply to the pages. See below.

On the **To Pages**: menu, you can see which pages are going to be affected by your changes.

Click **OK** and you’re done applying the template.



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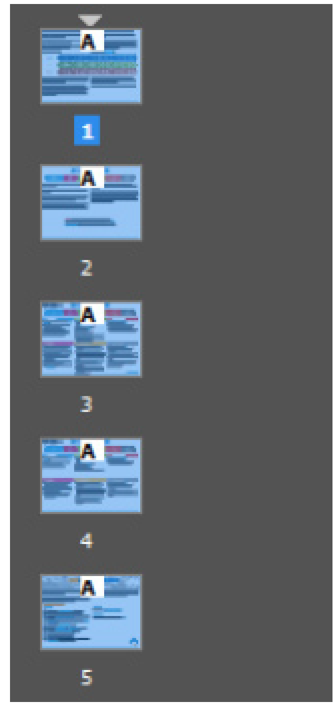
Prefixes and Page Numbering

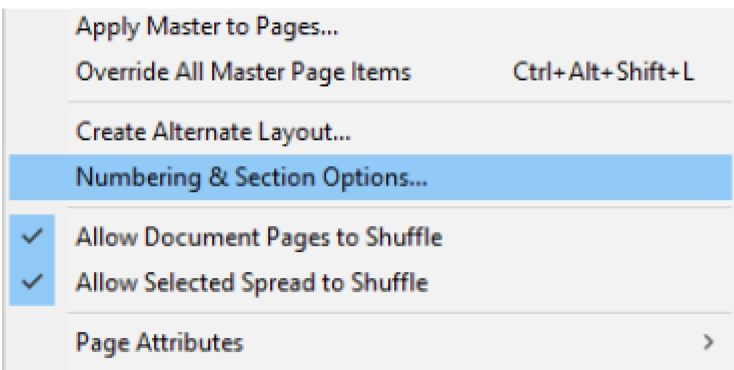
Let's label our pages.
Like in the last tutorial, if you're working on a new guide or updating an old one which doesn't use our template, these steps will help you label the pages correctly. This will help you, as a designer working with InDesign to track your pages.



How to label your pages.
Step 1: Select the pages from the Pages tab which you want to label. See right.

Important: Do not include the Table of Contents pages when selecting pages to edit.

Step 2: Right-click on your selected pages and select Numbering & Section Options. See below.



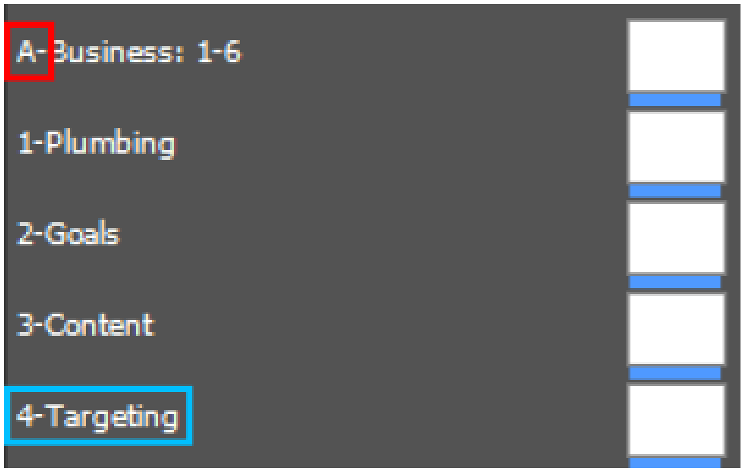
Important: Do not select the Start Page Numbering at: option if you are not working on the Master Presentation, Master Guide or Checklist Architecture.

The reason being that if you are working on the guides mentioned, and the pages you are editing are in the middle, clicking on the said option will create another page 1. This in turn will mess up the succeeding page numbers in the footer and the Table of Contents.

Step 3: To understand our numbering convention, we will use Targeting, the fourth module in our 18 Modules as an example. See below.

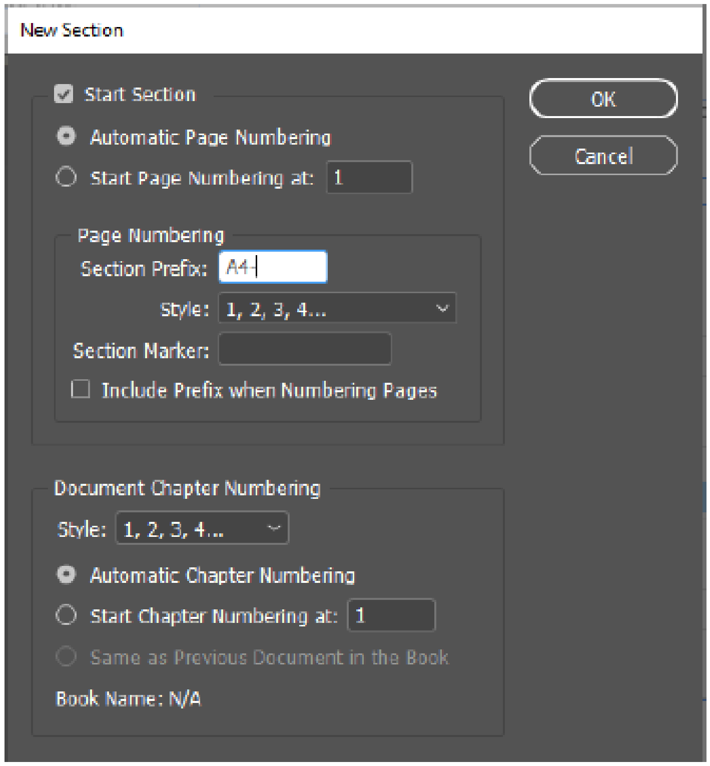
A is the section in which the pages you selected are a part of. A being the Business Packages.

4 is the number in the 18 Modules that the pages are a part of. Since Targeting is the fourth module, we use 4.



Step 4: Therefore we write **A4-** (the - is used as a spacer between the prefix and the actual page number) on the Section Prefix.

Select **Automatic Page Numbering** and click **OK.** Congratulations, you just eliminated headaches from trying to find your slides in the Master Presentation and similar guides.


New Section
Start Section
Automatic Page Numbering
Start Page Numbering at: 1
Page Numbering
Section Prefix: A4-
Style: 1, 2, 3, 4...
Section Marker:
Include Prefix when Numbering Pages
Document Chapter Numbering
Style: 1, 2, 3, 4...
Automatic Chapter Numbering
Start Chapter Numbering at: 1
Same as Previous Document in the Book
Book Name: N/A
OK
Cancel

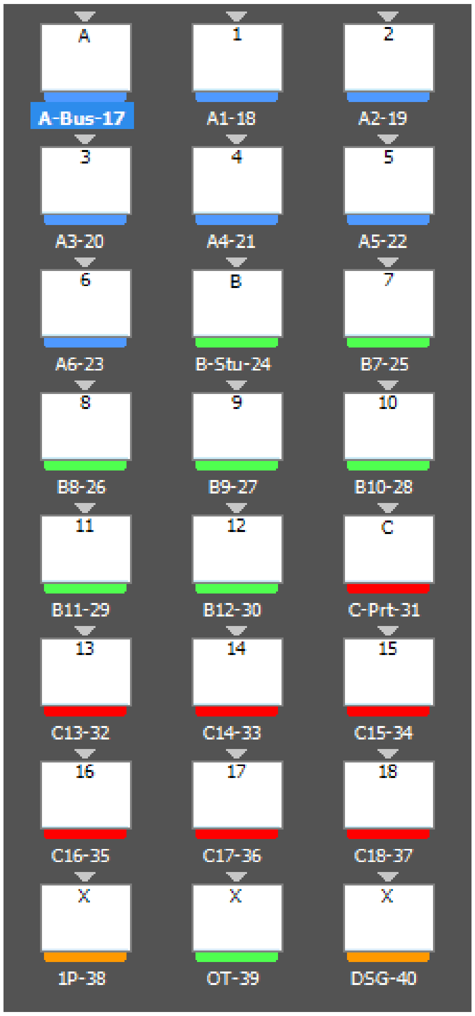
Page Numbering Codes

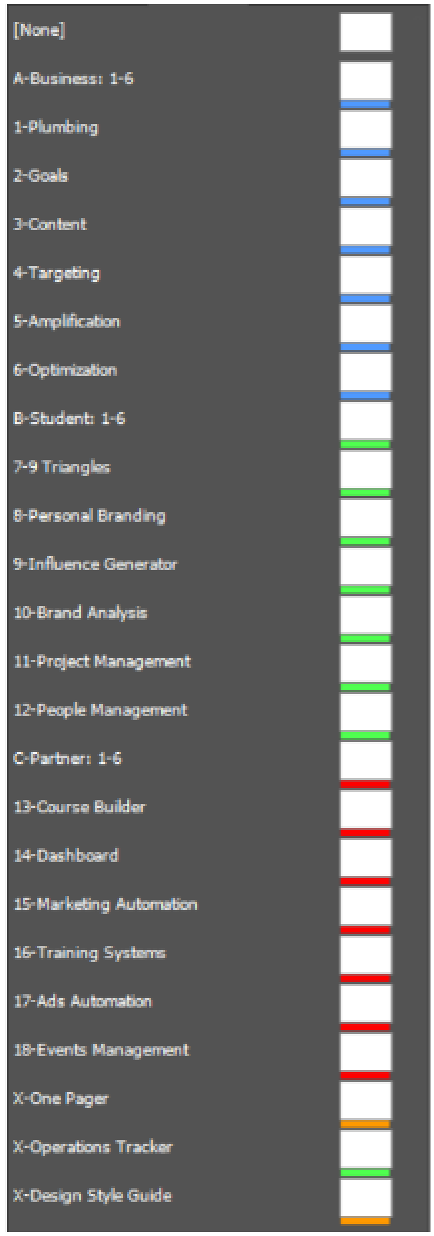
Here's how to make your job easier.
Using page codes in your InDesign file will help you in tracking your files, especially when you're adding them to the Master Presentation, Master Guide, and Checklist Architecture which have a lot of pages.

Here are the codes for the page numbering.

Page Code	Master Template	Course Name
A-Bus-	A-Business: 1-6	Social Amplification Engine
A1-	1-Plumbing	Digital Plumbing
A2-	2-Goals	Goals Analytics Checklist
A3-	3-Content	Content Marketing
A4-	4-Targeting	Dollar A Day
A5-	5-Amplification	Amplification Checklist
A6-	6-Optimization	Optimization Guide
B-Stu-	B-Student: 1-6	Digital Marketing Training System
B7-	7-9 Triangles	Business Framework Triangles
B8-	8-Personal Branding	Personal Branding
B9-	9-Content Factory	Content Factory
B10-	10-Brand Analysis	Brand Analysis
B11-	11-Project Management	Success Tracker/Asset Tracker
B12-	12-People Management	Meetings Checklist
C-Prt-	C-Partner: 1-6	N/A
C13-	13-Course Builder	Course Builder
C14-	14-Dashboard	Dashboards
C15-	15-Marketing Automation	N/A
C16-	16-Training Systems	N/A
C17-	17-Ads Automation	N/A
C18-	18-Events Management	Events Checklist
1P-	X-One Pager	N/A
OT-	X-Operations Tracker	Operations Tracker
DSG-	X-Design Style Guide	Design Style Guide

The example below shows the **Page Codes** applied to pages. *Ignore the right- most numbers, those just show the actual page numbers that InDesign adds to our template.*





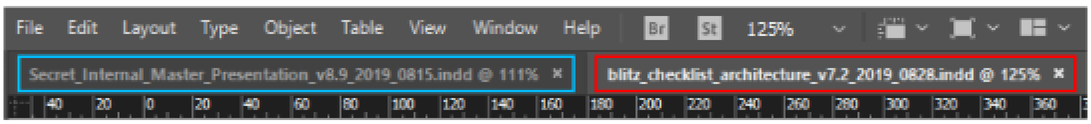
The screenshot below shows the **Master Templates** that we have ready to be applied to your old guides.

How To Transfer INDD Pages To Another File

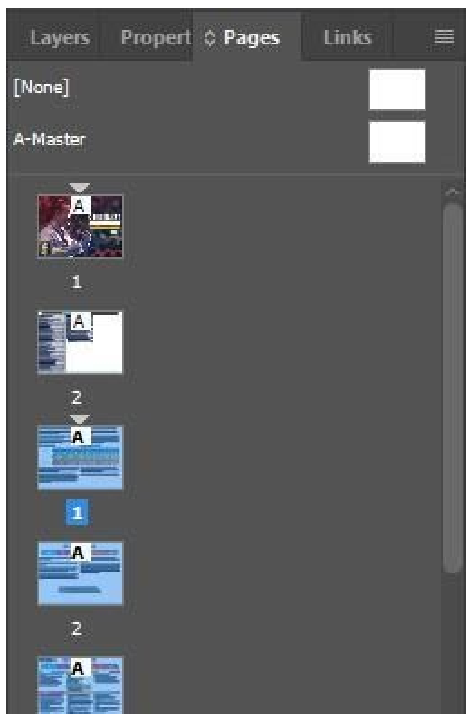
Why do we transfer INDD pages to another INDD file?
Transferring pages from one INDD to another file preserves the editing capabilities of the objects in that page. When you edit the original file (where you're transferring from) it also updates the objects in the new file. This is much more efficient than copying and pasting one page at a time.

How to transfer INDD pages to another file.

Step 1: Open your two files in InDesign, one file where you're going to be moving pages from and one where you're going to be moving the pages to. In this example we'll be moving pages from the Checklist Architecture to the Master Presentation. Select the Checklist Architecture file.

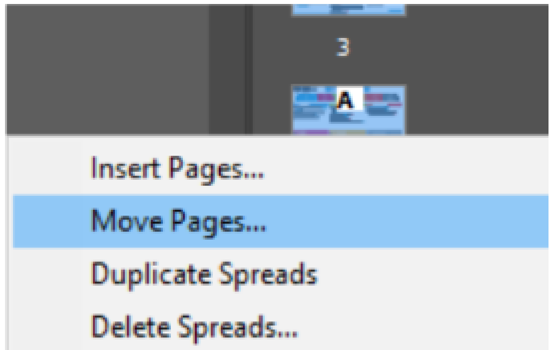


Step 2: Click on the **Pages** panel in the upper-right corner of the artboard and select the pages you want to transfer.

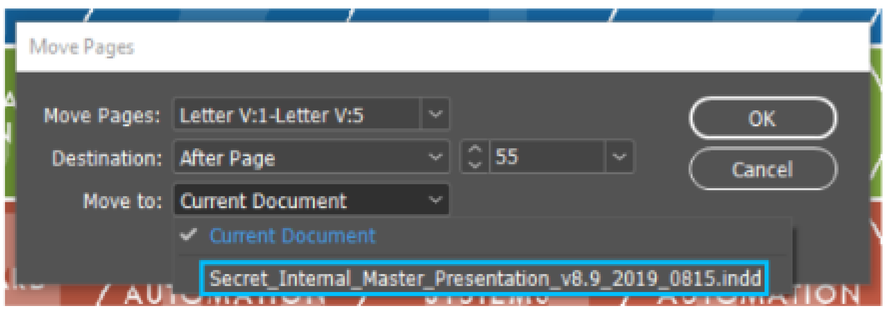


Important: Never import PDF pages to the INDD file.
Importing PDF pages into an INDD file removes all interactive objects from the file. Think of it as importing a JPG image into a PDF, there would be no clickable links, no tickable checkboxes, and no video.

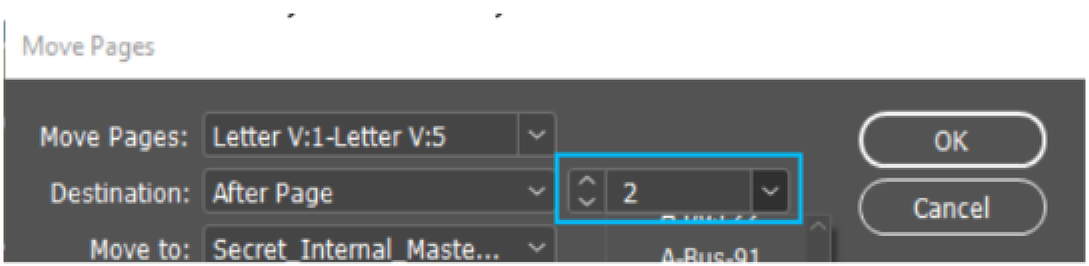
Step 3: With the pages selected, right-click on the pages panel. Click on **Move Page**



Step 4: Click on the **Move to:** dropdown menu and select the file you're going to move pages to. In this case, it's the Master Presentation.



Step 5: Choose your destination (where you want to insert the pages) and Click **OK**. Save your files and you're done.

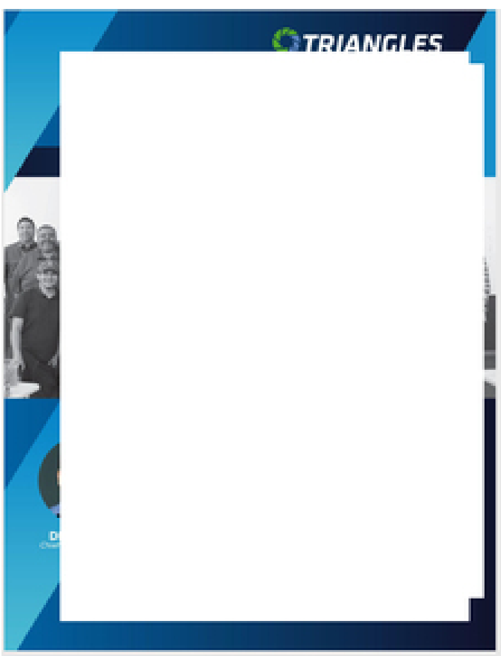


How To Partially Export A Google Document To A PDF

1. Press "Ctrl + P", then it will prompt to print the document.
2. Input the following:
    - Destination: Save as PDF.
    - Pages: Custom, then input the pages. For this example, it's 1-30 (excluding page 31, Pending Process Update).
3. Hit Save.

There is a glitch with a Google Document when a user exports the file. The PDF shows a white space on the top of the cover. This happens when a suggestion comment or an addition using “Suggesting Mode” is on the first page.

Simply move the suggestion to the next page or ask for a process developer, or an operations specialist to resolve the comment. Do not resolve it yourself.



Exported PDF

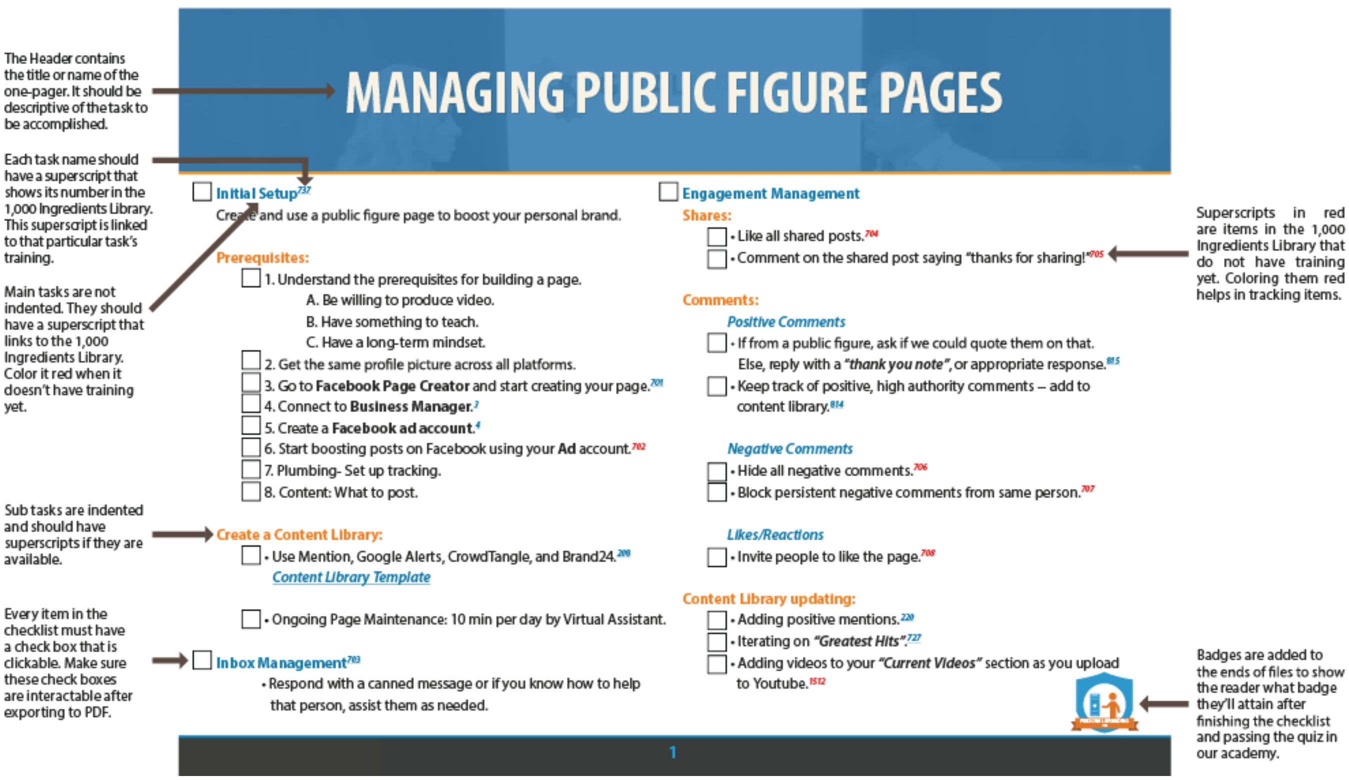
The Cover on the Master Specialist Guide Document

Creating One-pagers

What are One-pagers?
One-pagers contain a checklist of the steps that need to be taken to complete a task. It can be printed out so people can check off items as they complete the steps. *All one-pagers and checklists are compiled in the Checklist Architecture.*

Items in the checklist should be concise and easy to understand with no room to be misunderstood. We used the Managing Public Figure Pages one-pager as an example as a template to help you understand what a one-pager should look like. We have the example below.

Download the One-pager Template [here.](#)

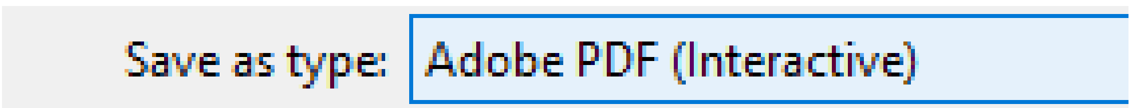


Interactive files and Basecamp

Why do we use interactive files?
Every guide or one-pager we create is handed out to clients and customers. We give them the option to learn and do the training themselves, that is why we leave them links, check boxes, videos, etc. to help them out. Interactive files do just that.

Think of it this way, when you see a hyperlink in your standard - every day book, it would be impossible (obviously) to click on it. You would have to type the URL into your browser, and that is incredibly time consuming. Having a PDF eBook on the other hand, allows you to click on that link.

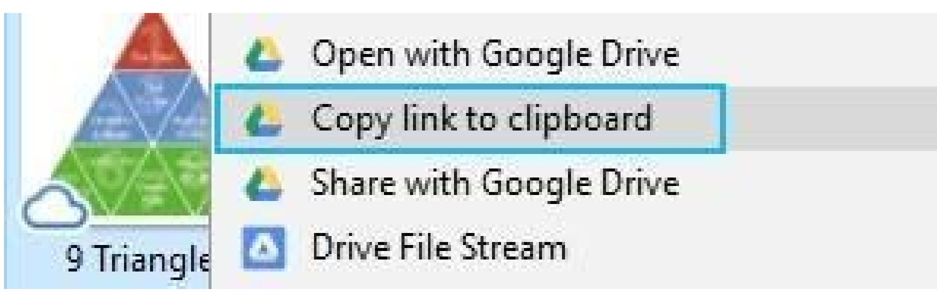
Important: Always save your files as *Adobe PDF (Interactive)* when you export your INDD file to PDF.



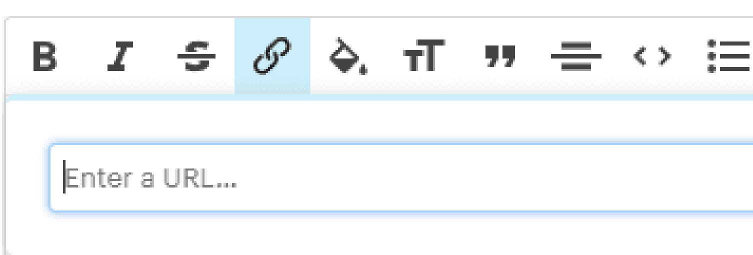
Basecamp is where we live
We use ***Basecamp*** to communicate with the team and track tasks. Updates on the threads should be often and detailed.

Basecamp is a great tool for communication, but not very good for storing files. It only allows for a few gigabytes of total storage of uploaded files, when we used up our allowed storage, we would have to delete older files that were uploaded. This is a very tedious task to do since we update threads very often. A very good alternative is to use Google File Stream instead.

We copy the link from our team drive (from your computer), then right- click on the file we want to add to Basecamp, then click on **Copy link to Clipboard**. You can now add that URL to the thread without using up storage space in Basecamp.



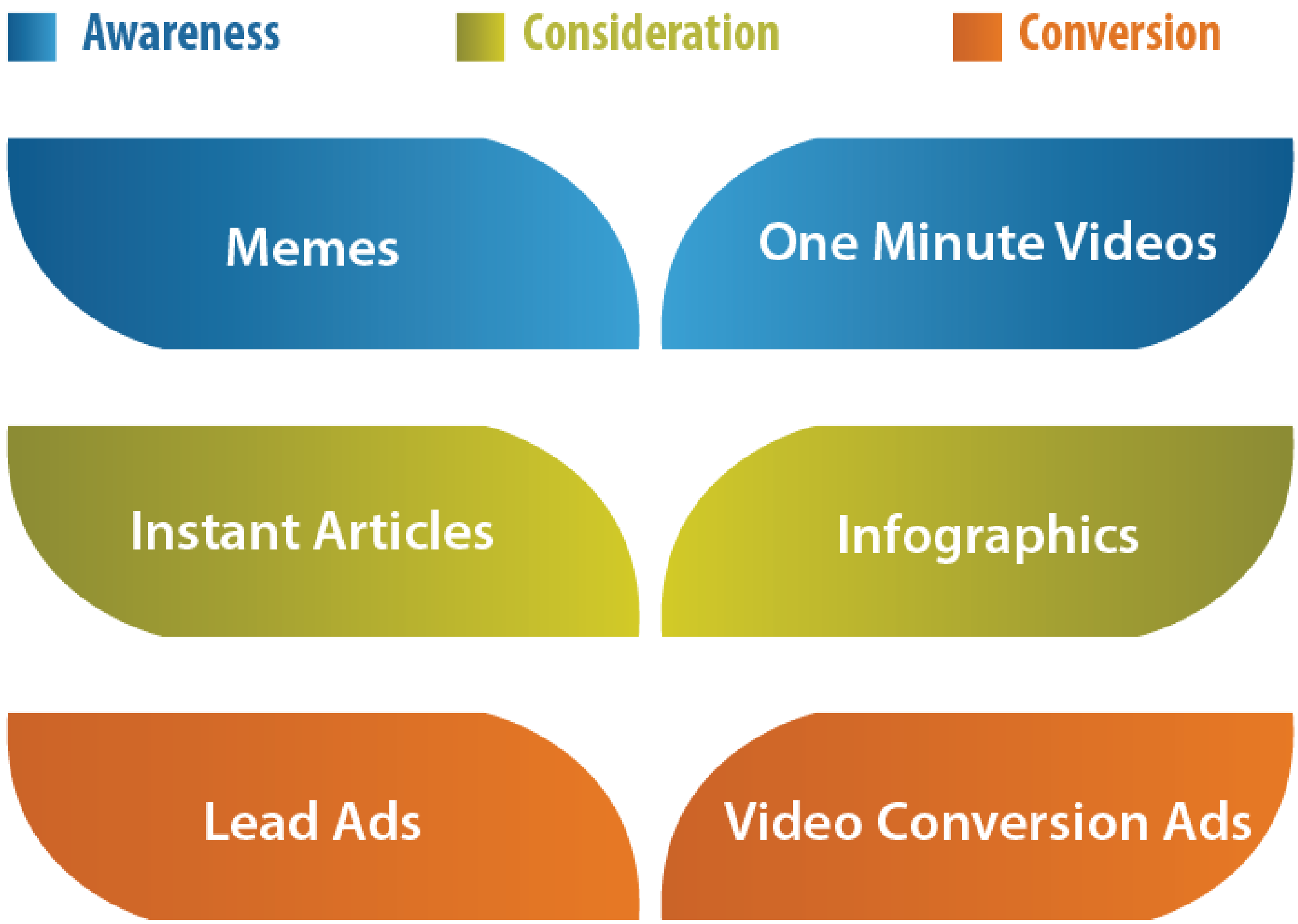
In Basecamp, you can paste your copied link to the comment you're adding



6 Types of Visual Content

We design 6 types of visual content.

We design for Memes, One Minute Videos, Instant Articles, Infographics, Lead Ads, and Conversion Videos. Check this ***link*** to see the details for each type in order to gain an understanding on how we should be designing for each of them.



Course Creation Process

1. Create a Basecamp Project for each full-blown course.
2. Create a list of lessons and topics.
3. Film or collect course videos.
4. Edit the videos (Upload to Wistia)
5. Transcribe Videos (If you use FancyHands, follow the correct process)
6. Create a guide from the transcription of the videos.
7. Load the videos (Wistia Videos, not YouTube) and course content into the Academy. This includes a quiz and badge upon completion.
8. Build a landing page (Who it's for (and not for), Why it's valuable, Process after purchasing). Include the guide download upon purchase.
9. Make a product and order form in IFS. (Do not do this if you have not taken the Infusionsoft Basics Course).
10. Make course tags in Infusionsoft and add to the Academy. (Level 4+ only).
11. Post from public figure page.
12. Boost and promote the course to drive awareness.
13. Create a fulfillment campaign in Infusionsoft.

Course Creation Checklist One-Pager

- ☐ This course has an introduction and a title.
- ☐ It has a one-pager (checklist/cheat-sheet).
- ☐ It has a cover photo.
- ☐ It has the current guide available after purchase.
- ☐ The course has a quiz (MICRO courses should have 10 questions and standard courses should have 20 questions).
- ☐ It has a badge loaded with the correct requirements.
- ☐ It has a landing page with a CTA checkout button that links to the shopping cart/order form.
- ☐ It has lessons/topics that contain edited videos with no RAW mistakes and are embedded through Wista.
- ☐ The course is set up with Dynamic Conversion tracking.
- ☐ It has associated auto-enroll tags associated with Infusionsoft.
- ☐ There is no content with previous specialists/VA's who are not with us anymore.
- ☐ Has an active fulfillment campaign in Infusionsoft.

AFTER PUBLISHING

- ☐ The course has been promoted on Social Media for $1/day for 14 days.
- ☐ The course is in our Course Catalog, Asset Tracker, Project Tracker tabs (we want all of these in one document)
- ☐ Update the Course Tracker in the Asset Tracker to document and track all course assets.

Components of a Course

Introduction with Title

1. This course has an introduction with expectations of the courseware and a title.
2. “Why <guide topic>”. You need people to understand why Personal Branding or the topic is important.
3. The strategy behind the checklist. How it fits with the other checklists (no checklist stands alone, since they’re all linked together).
4. A few sentences from the guide owner (whoever is “adopting” this guide as the resident expert/ curator/ figurehead).

One Pager (Cheat Sheet)

1. The checklist boiled down to just one page with checklists items that have check boxes.
2. Summarize the content to a single page of 5 primary items. Each item will have one or more steps.
3. Show overall time summary as well as section times: how much time for a trained analyst to complete the checklist once.
4. Show a single number for *Training Time,* which is the number of hours to learn the strategic concepts and tactical knowledge necessary to be able to implement (not the implementation time).

Full Checklist with Steps (optional)

1. If the listing takes 3-4 pages to list out the 5 primary checklist items and step-level detail, then include this section.
2. Show time at the step level, aggregated to the item level and then overall checklist level.
3. Ask the checklist owner to supply what is missing.

Structure Your Course with Video Topics

1. One pager showing the *Introductory Video* (a live video which should be on the landing page for this checklist, and optional accompanying videos (some made by us and most to be made by LDS Business College team).
2. Three categories of videos:
    - Live video is a person talking in front of a camera (used for the introductory video).
    - How-To screenshare is a Go-To-Meeting desktop recording in our YouTube channel showing click-by-click how to do something.
    - Expert Interview is a partner explaining one of the key concepts.

5 Types of Content

As we are tagging content with various tags for level, topic, related task, and so forth--make sure to have a column (not a tag on what level access the content is for:

- **Public** -- anyone can see it, like on a public figure page or blog.
- **Gated (free)** -- they must be logged in to our system.
- **Gated (course specific)** -- they must be customers of that course.
- **Gated (Office Hours)** -- anyone with a current, valid membership.
- **Internal** -- CoachYu team members only.

Work-in-progress content is internal, by definition, since it's not ready for publishing. As we are tagging content with various tags for level, topic, related task, and so forth.

Google Doc versions of our checklist guides are **INTERNAL GUIDES** in finer detail so that **internal resources can execute these steps**.

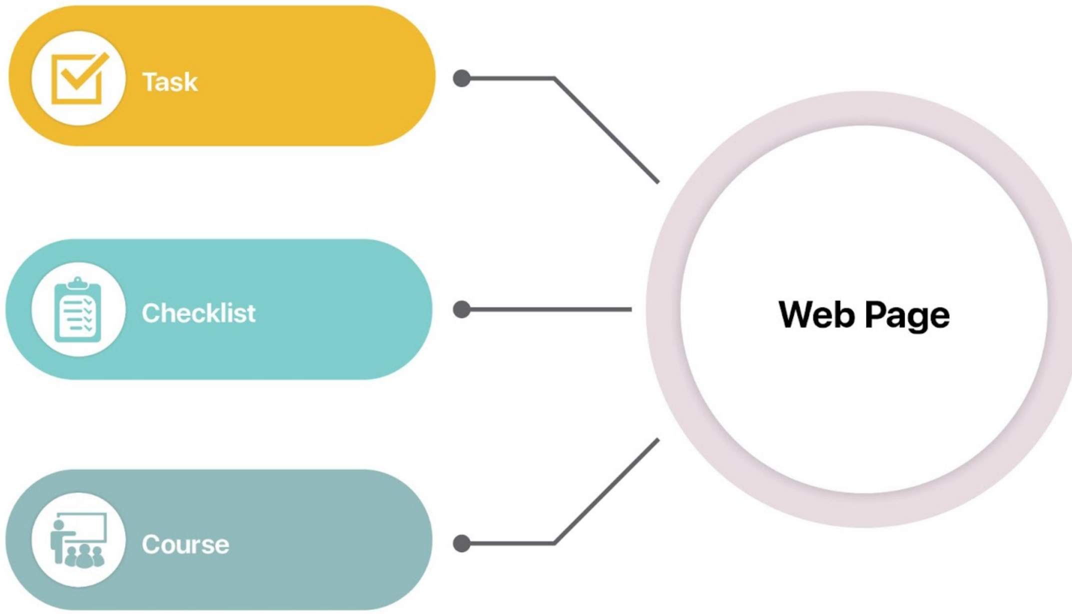
The differences with the internal guides (besides living in Google Docs instead of in these PDFs) is that internal users (our team members):

Have access to specific systems that we've integrated to help us speed up the work--increasingly so, because we are trying to automate the whole thing. Of course, businesses who buy a $7 guide don't get access to these, except the dashboard for metrics.

Task verification and QA-- of course, we don't provide human support to non-clients. And given that they're not working for us, they don't have to agree to or abide by our standards. But we can provide automated follow-up in Infusionsoft and the dashboard to nudge non- clients along for the DIY path.

Payment and job progression-- to get paid per hour/task based on level, as in our leveling system. This is the analyst track-- running parallel to the business track-- not what a busy business owner would want to understand nor spend sufficient time to do themselves.

So it's okay to have PURCHASABLE GUIDES and INTERNAL GUIDES, so long as we understand that the former has step-by-step instructions to accomplish the tasks via systems they have access to without support from us. The internal guides should be built from the purchasable guides-- not the other way around.



- Every **task**, **checklist**, and **course** should have a web page explaining it.

Design Templates

Advanced template for co-branded Fiverr and CoachYu
[https://drive.google.com/open?id=19NnHBiR_-eeTsF4vvkpi3vSrcop_ HeSF](https://drive.google.com/open?id=19NnHBiR_-eeTsF4vvkpi3vSrcop_HeSF)

V1.1 on blitz PBM template... added page numbers then fixed some of the pages for easier editing.
https://drive.google.com/drive/folders/1Jf59BhsTCORgr_uC89w5FCmq9sxNvM9b?usp=sharing

Video on editing the Indesign file
https://www.loom.com/share/d420006085084fb0ab439619923187ee Basic template here
https://drive.google.com/drive/folders/1qyRdo7095xAiEbV-bYutslS4XDgay9QV?usp=sharing

Video on editing the Indesign file

https://www.loom.com/share/d420006085084fb0ab439619923187ee

DESIGN TEMPLATES
Still images for promoting webinars, events, promos and interviews

Understanding The Whole Course Building Process

Designers should study both

1. The course-building process for the course-builders (reader of the ***Course Builder Course***) and the

2. The design process for the designers within the Design Guide.

That seems to be more sensible since the chapters that are relevant for a designer within the Course Builder Course are spread out rather than compiled in one chapter.

In fact, even if these reasons are invalid, we still have to update the design guide eventually for the Marketplace anyway

SKINNING GUIDE

Made for those who have background in InDesign

COACHYU

Welcome to CoachYU Skinning Guide. This guide will help you in skinning, not just any particular guide in CoachYu, but everything needed to jumpstart your agency or company.

To give you a background on what we are currently doing. We have 60-70 plus guides that we are presently maintaining, most of it averages into 100-200 plus pages. We also categorized our design into three parts:

- Guide,
- Book, and
- Presentation version.

We usually provide the Indesign files for major guides made. However, for skinned versions, we just do the fast and non-traditional way of doing it.

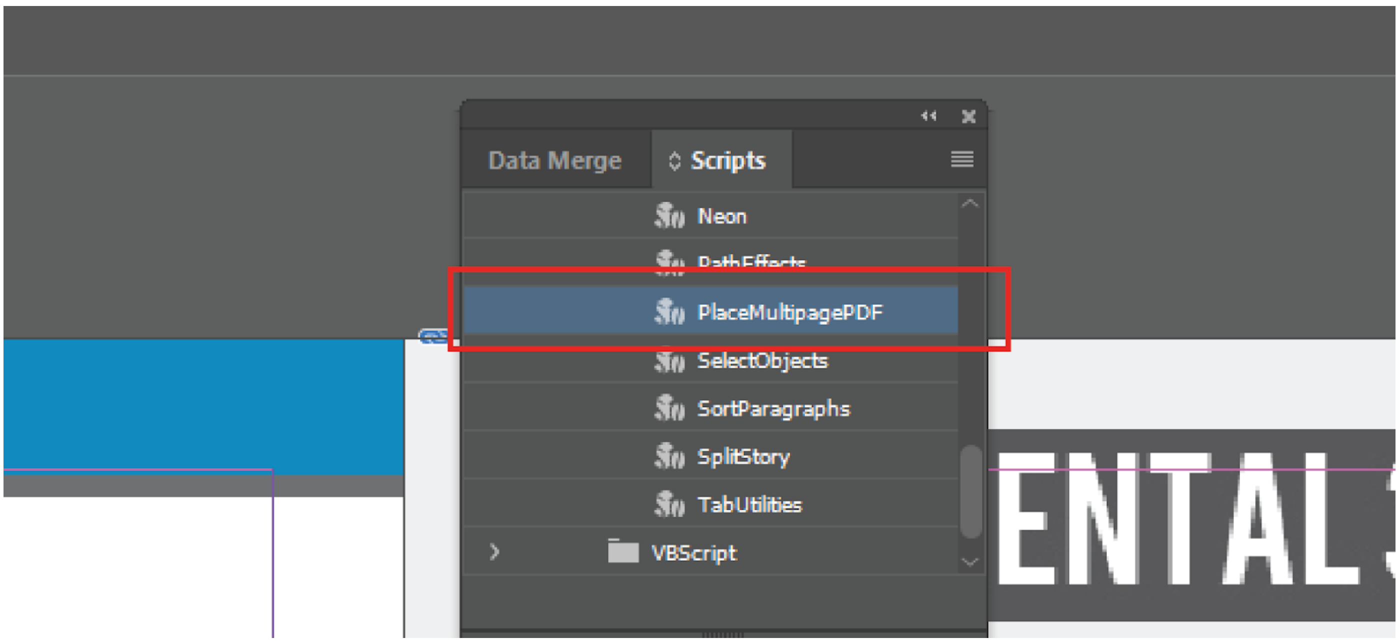
Skinned guides usually are the easiest thing to do; we just replace the cover, add pictures, redo the paging, add a logo, and lastly, the conclusion page.

So let’s get started.

Opening PDF Using Multi-Pages Script

If we don't have an InDesign file for a particular guide, we don't have to worry as long as we have the PDF. All we need to do is open up in Indesign. Then **Locate the Window tab > Utilities > Scripts**

Then locate the "PlaceMultipagePDF" locate the PDF that you want to open.You can open it in a "new document" or add it to a previous indesign file that you already opened. Click Okay.

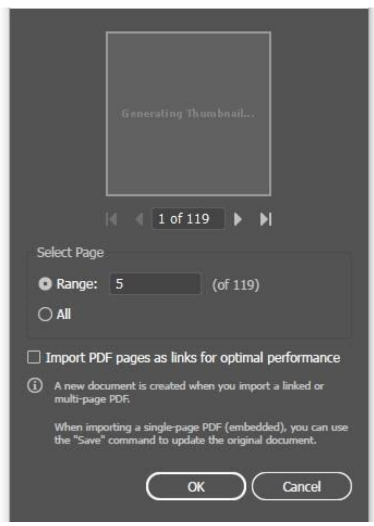


Editing the PDF

After doing the script, you now have a working PDF in the Indesign file, which you can add, edit, and iterate.

In editing the PDF, you need to edit this using Adobe Illustrator. For example, on page 5 of a specific guide, you need to change the sentence or add an illustration.

You go to the main PDF and click open within Adobe illustrator. And input the page you want to edit in the range section (see screenshot below). Once open you can now edit the page then after just click save. Then update the link in Indesign.

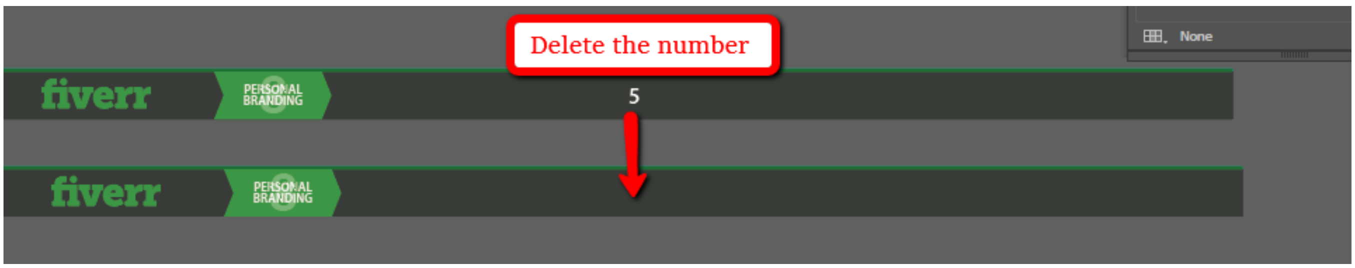


Pagination and Master Page

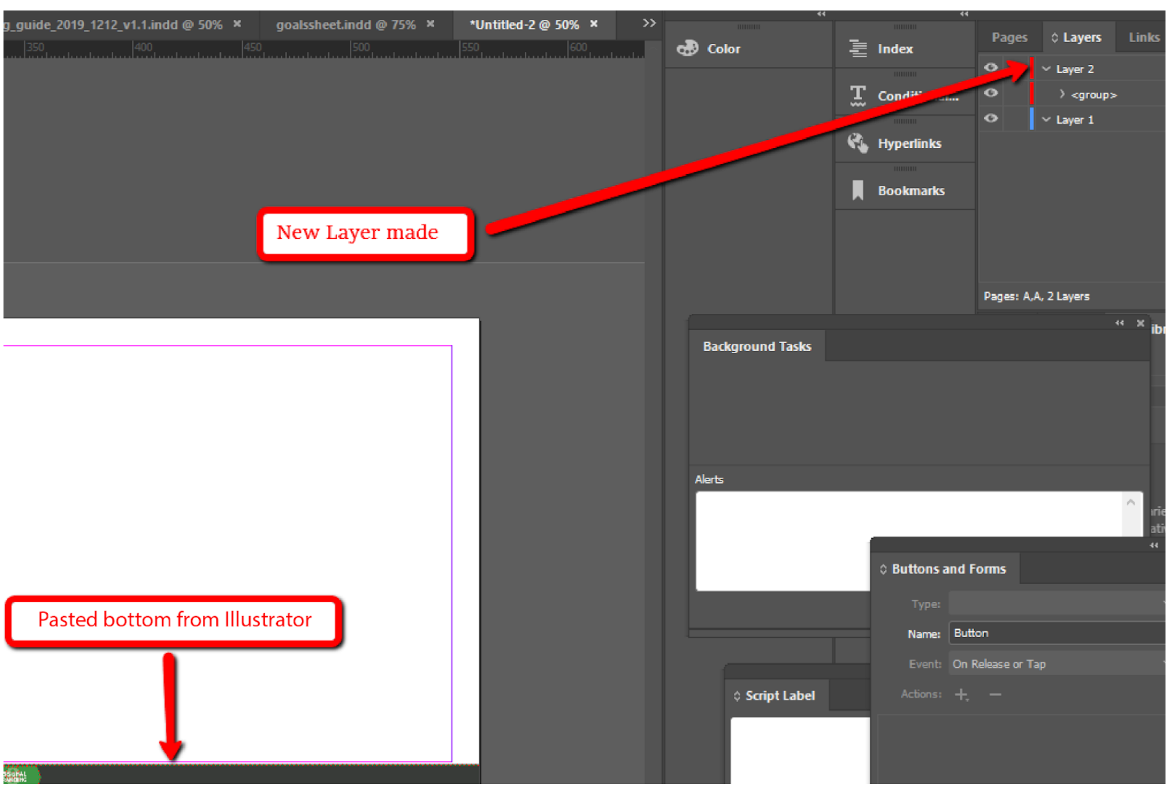
Pagination is the most tricky part of skinning a guide. Since most of the PDFs already have a permanent page in them. If you are that hardworking, you can edit each page and change numbers. However, it will take you hours to do if you are going to change a 200-page PDF.

Here are the steps:

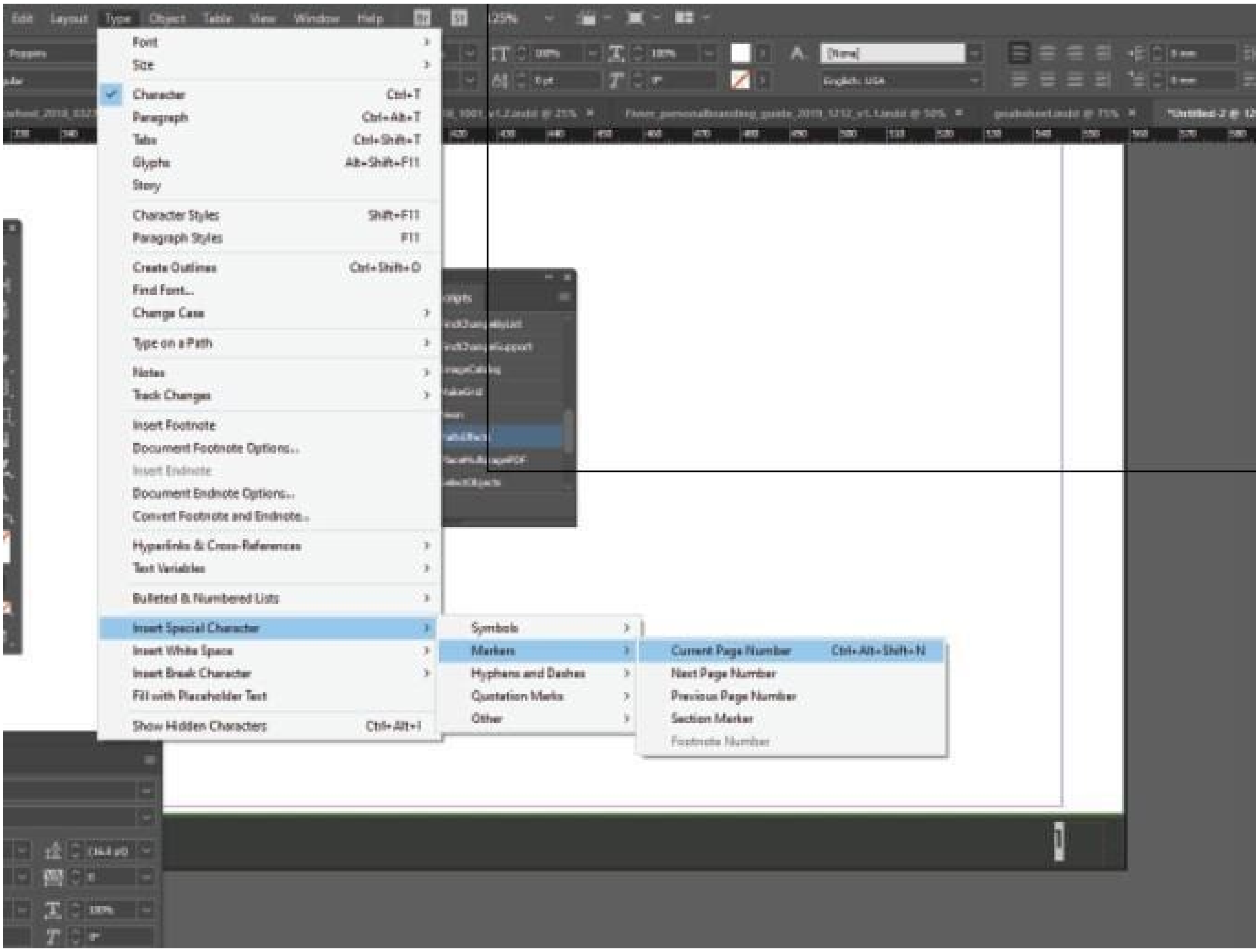
1. First, we replicate the bottom part of the guide using Adobe illustrator.



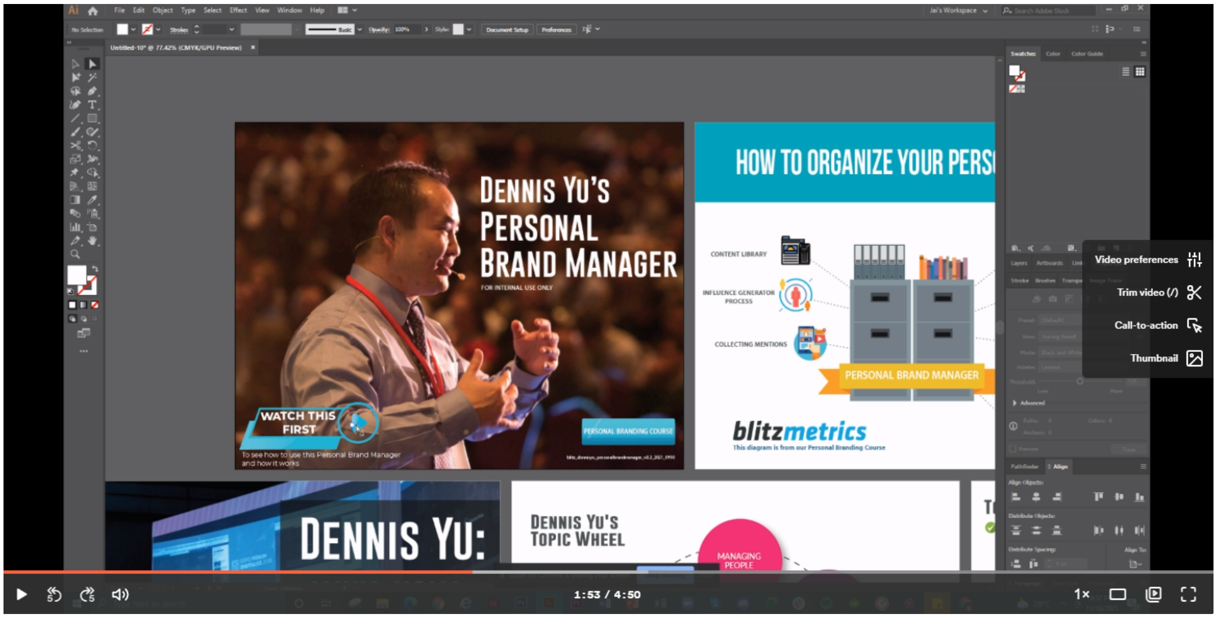
2. Then, group the replicated part and copy.
3. Open my Indesign file. Locate the Master file. Make a new layer. Then paste. (see new page for screenshot)



4. You can then add a text. Type any number.
5. Then go to “type” > insert special character > Markers > Current page

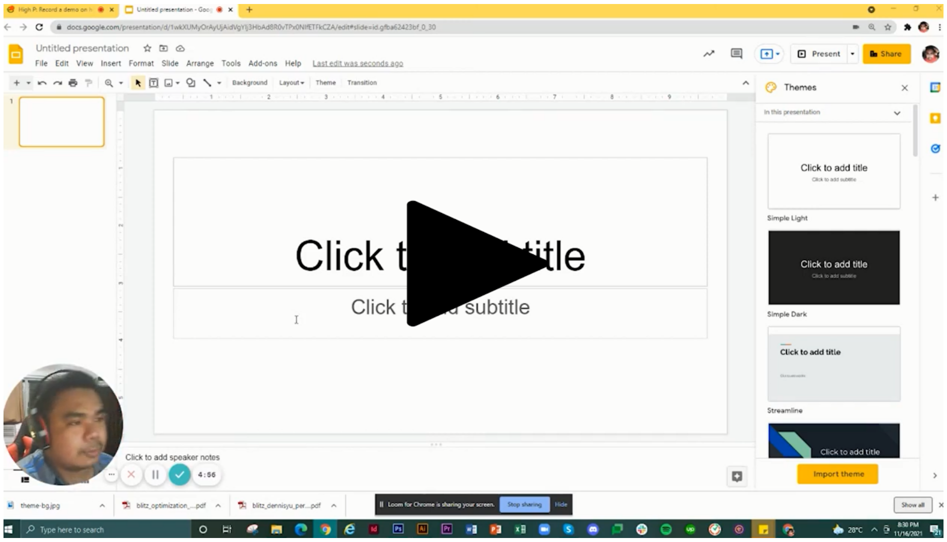


How To Convert A PDF To A PowerPoint



https://www.loom.com/share/0c7d475ddfae4aef85a3c12feb796623

How To Convert An Adobe Indesign File Or PDF To A Powerpoint File



Convert An Adobe Indesign File Or PDF To A Powerpoint File (06:23)

How To Update An Existing Guide Or Presentation

1. Follow file naming convention.
    a. "companyname_nameoftheguide_version_year_date

2. Upload the PDF to access@blitzmetrics.com

3. Update the Asset Tracker
    a. Column for Guide Versions
    b. Column for Presentation Version

4. Make sure that the PDF Guide and Presentation are "Viewable by anyone".

5. Upload the Call To Actions (CTA) buttons to the first module.
    a. CTA for Guide
    b. CTA for Presentation

6. Hyperlink each CTA button with the corresponding file.

HOW TO SKIN THE FIGUREHEAD PICTURES

How To Skin The Figurehead Pictures

If you are asked to skin a guide for a particular figurehead. We only need to gather the following:

- High-resolution picture
- High authority picture
- Adobe Photoshop

Step 1: Open the high resolution picture into your Adobe Photoshop

Step 2: Use the tracing tool

Step 3: Trace the edges until you close it.

Step 4: Right-click the “Make selection”. Put Feather Radius as 1 then press okay.

Step 5: Inverse selection by clicking “Ctrl-Shift-I”.

Step 6: Cut the background by clicking “Ctrl-X” Step 7: File save as a PNG.

Step 8: You can now edit the cover guide with your new cut figurehead picture replacing Dennis.

Step 9: You can also make the high authority picture as your background image and fade it accordingly.

I think that is pretty much how we do our skinning the easiest and fastest way, although there are other challenges and designs needed to make it really different from the original.

This guide is particularly made for those people or designers who already have prior experience and knowledge in Indesign. So we don’t have to go deep on basic things. I wish you best of luck and if you got any problems please do email me at
jireh_naive@blitzmetrics.com

Standard Last Page Design

- Grab high authority picture to be your background on the page
- If the client doesn't have a vector logo or high definition PNG. You need to retrace it in Adobe Illustrator to make it into a vectored logo which can be used anywhere in the guide.
- Have a "Thank You!" message
- Have a high authority picture cut out for the client.
- Add a social media page button and email.


SAMPLE LAST PAGE DESIGN
BBB
Start With Trust
Thank you!
@getfound
dennis@blitzmetrics.com

How To Reskin A BlitzMetrics Google Document To Coach Yu

When Reskinning BlitzMetrics Google Documents to Coach Yu, you must retain the previous file such that at the end of your reskinning, you have 2 files—a BlitzMetrics Google Document and a Coach Yu Google Document.

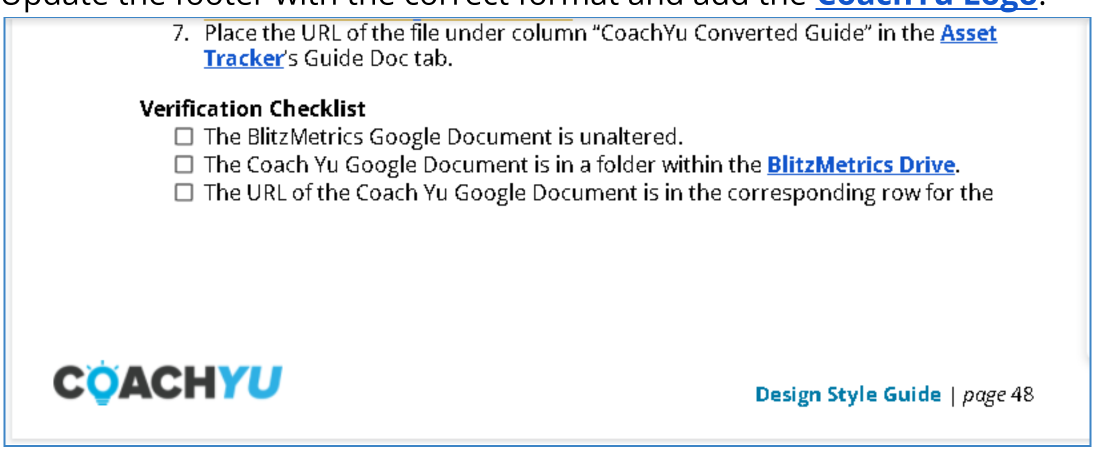
Estimated time to complete the task: 1.5 hours.

Ingredient Checklist

- ☐ BlitzMetrics Google Document.
- ☐ A Gmail account that has editing access to the **Asset Tracker**.
- ☐ A Gmail account that is a **Content Editor** or **Contributor** to **BM Assets & Processes**

Execution Checklist

1. Verify if the BlitzMetrics Google Document is in **BM Assets & Processes** or the **BlitzMetrics Drive**.
    a. Click the Move icon.
    b. Click this icon to Open folder in a new tab.
    c. Next, determine if the file is within **BM Assets & Processes** or **BlitzMetrics Drive**. IF the file is not located within the **BM Assets & Processes** or **BlitzMetrics Drive**, THEN make a duplicate and place it in **Unsorted**.
2. Make a copy of the Google Document.
3. Place the document in the proper sub folder within **BM Assets & Processes**.
    a. IF the BlitzMetrics Google Document is in **BM Assets & Processes** or the **BlitzMetrics Drive**, THEN place the file in the same folder that the BlitzMetrics Google Document is in.
    b. Otherwise, place the file in **Unsorted**.
4. Rename the file by removing "Copy of " and adding " - Coach Yu" at the end.
5. Reskin the file.
6. Update the footer with the correct format and add the **CoachYu Logo**.



7. Place the URL of the file under column "CoachYu Converted Guide" in the **Asset Tracker**'s Guide Doc tab.

Verification Checklist

- ☐ The BlitzMetrics Google Document is unaltered.
- ☐ The Coach Yu Google Document is in a folder within the **BlitzMetrics Drive**.
- ☐ The URL of the Coach Yu Google Document is in the corresponding row for the

COACHYU

Design Style Guide | *page* 48

7. Place the URL of the file under column "CoachYu Converted Guide" in the **Asset**

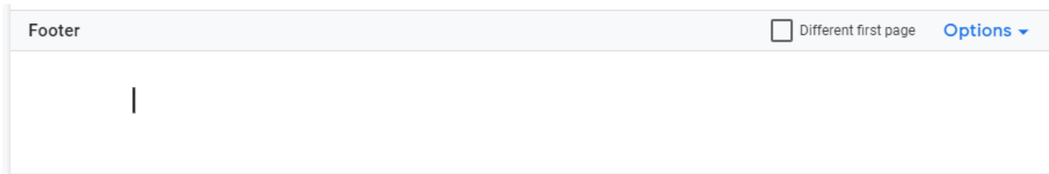
Tracker's Guide Doc tab.

Verification Checklist

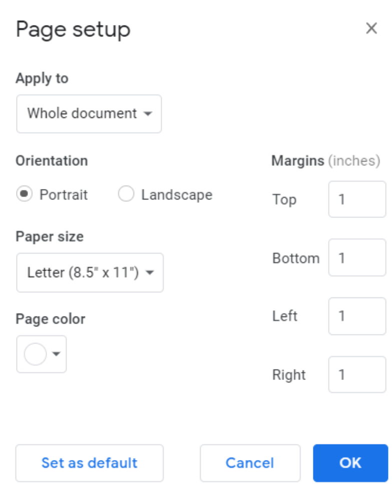
- ☐ The BlitzMetrics Google Document is unaltered.
- ☐ The Coach Yu Google Document is in a folder within the **BlitzMetrics Drive**.
- ☐ The URL of the Coach Yu Google Document is in the corresponding row for the

How To Format The Footer Of A Master Guide Google Document

1. Click **Insert** > **Headers & Footers** > **Footers**.

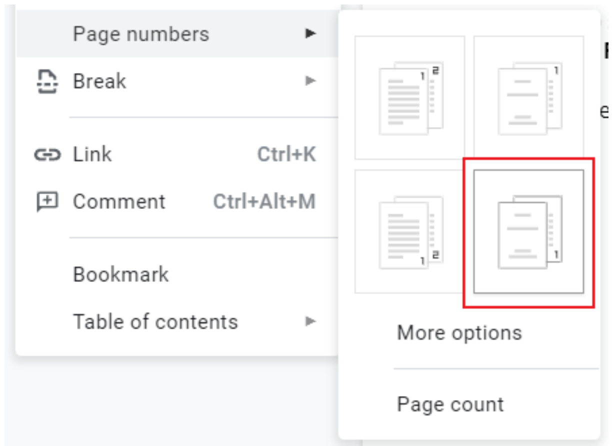


2. Head to **File** > **Page setup**, then set the Bottom Margin to 1”.



3. Set the Document name and page number. Set the alignment to **Right Align** (Ctrl + Shift + R).

   File format will be: “**Document Name** | *page* [n]”
   - For guide name, it should be bold with the blue color of the logo: #2eb0e4
   - For the word “page” it’s italic.
   - Where [n] is the current page number. To set the page number, after you write the word “page” click on the **Insert** > **Page Number** > select the option where the page will be set to the bottom right.

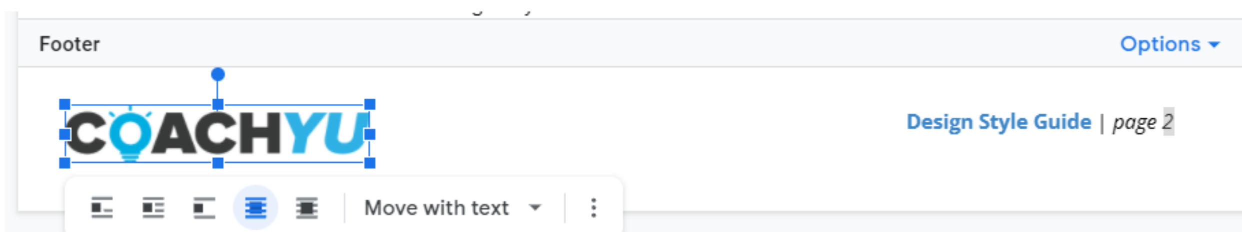


4. Insert the **CoachYu logo**. Insert the logo anywhere in the Footer. To do this, click **Insert** > **Image** > **Upload from Computer**. The logo is at [CoachYu Logo]().

5. Select the **CoachYu logo**, set the Format of the Image to **Text Wrapping: Behind Text**.

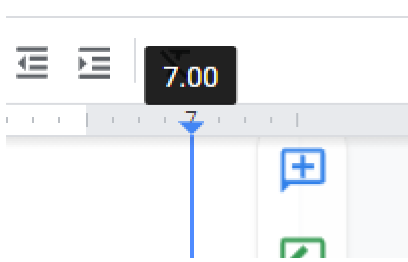
   To do this, click on the image. Head to **Format** > **Image** > **Image Option**. On the right side, an option will appear. Select on **Text Wrapping** and set to **Behind Text**.

   Adjust the image size to look like on the image below:



- Select the **Options** > **Footer Format** and mark the **Different First Page**. This is intended for the Cover on the first page.

Note: *Make sure the Document name and Page Number is set to 7.00 inches in the ruler guide of the document.*



Most Common Mistakes Designers Make

1. The designer wrote the wrong file name.
2. The designer removed all hyperlinks to the succeeding iteration.
3. The designer spent too much time on the task.
4. The designer added unnecessary designs.
5. The designer did not use an existing template.
6. The designer encountered an upload glitch and decided to not upload at all, instead of looking for alternatives to share the file.
7. The designer uploaded the file to their own personal drive.
8. The designer uploaded only the PDF file without the project files, e.g. Adobe InDesign file and the images.
9. The designer did not iterate on the existing Basecamp Thread, or To-do; or chose not to create a Basecamp Thread or To-do.
10. The designer sent a message on Basecamp while not following #RACI (Responsible, Accountable, Consulted, Informed).

TEST QUESTIONS

1. What are the main software used in skinning guides?

2. How do you open a multi-page pdf in Indesign?

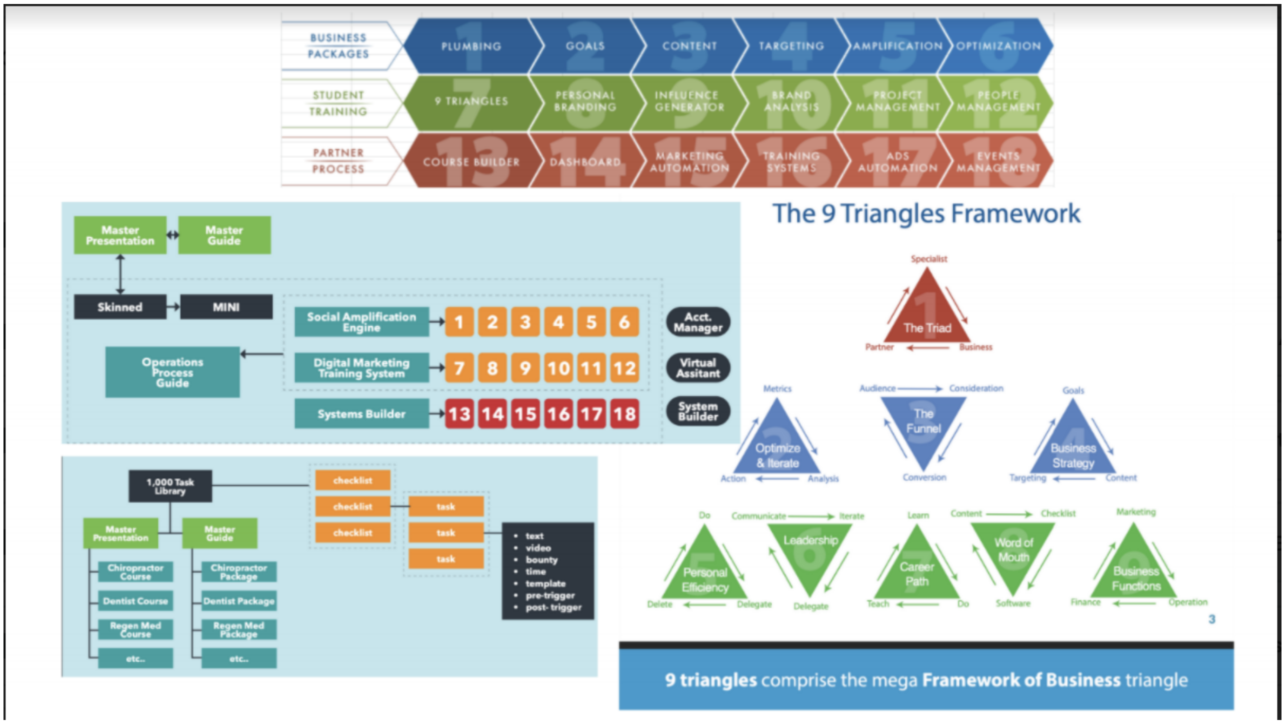
3. How do you fix the problem with page numbers?

4. In tracing a figure head what software do you use?

5. When you “make selection” what radius should you use when you feather?

Designer Skill Assessment

Task 1. Remake this exact image in Adobe InDesign. ReMAKE, not re-design.



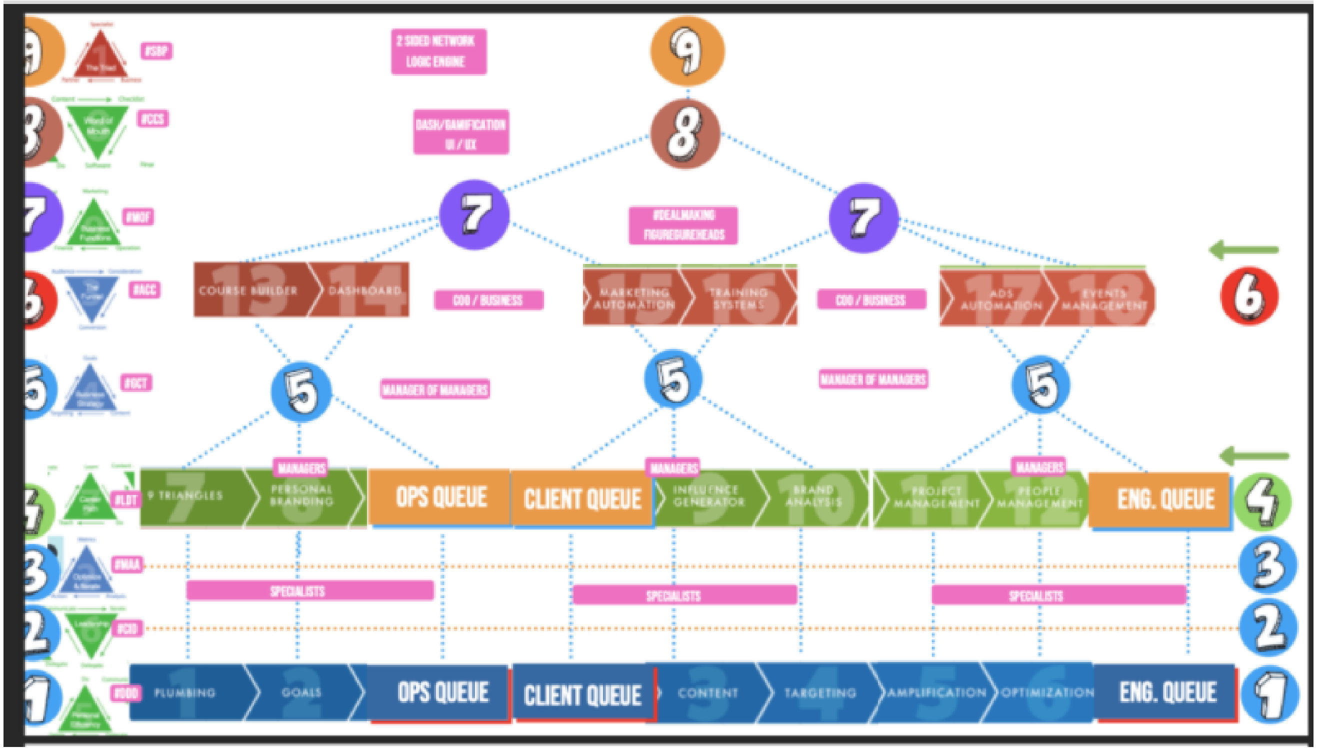
Project files:

[18_module_Diagram_9_Triangle]
[chirorevenue_ops_training_diagram1_v1.2_2021_0120]
[explode]

Results:

1 PDF.
1 Adobe InDesign Project file.

Task 2.



1. Clean up this image into something more like our branded look—image in task 1.
2. Make everything symmetrical.
3. Change the numbers to all be the same color and fonts to the same fonts you're using.
4. Make the colors of the numbers with circles and the pink boxes white.

Project files:

[18_module_Diagram_9_Triangle]
[chirorevenue_ops_training_diagram1_v1.2_2021_0120]
[explode]

Results:

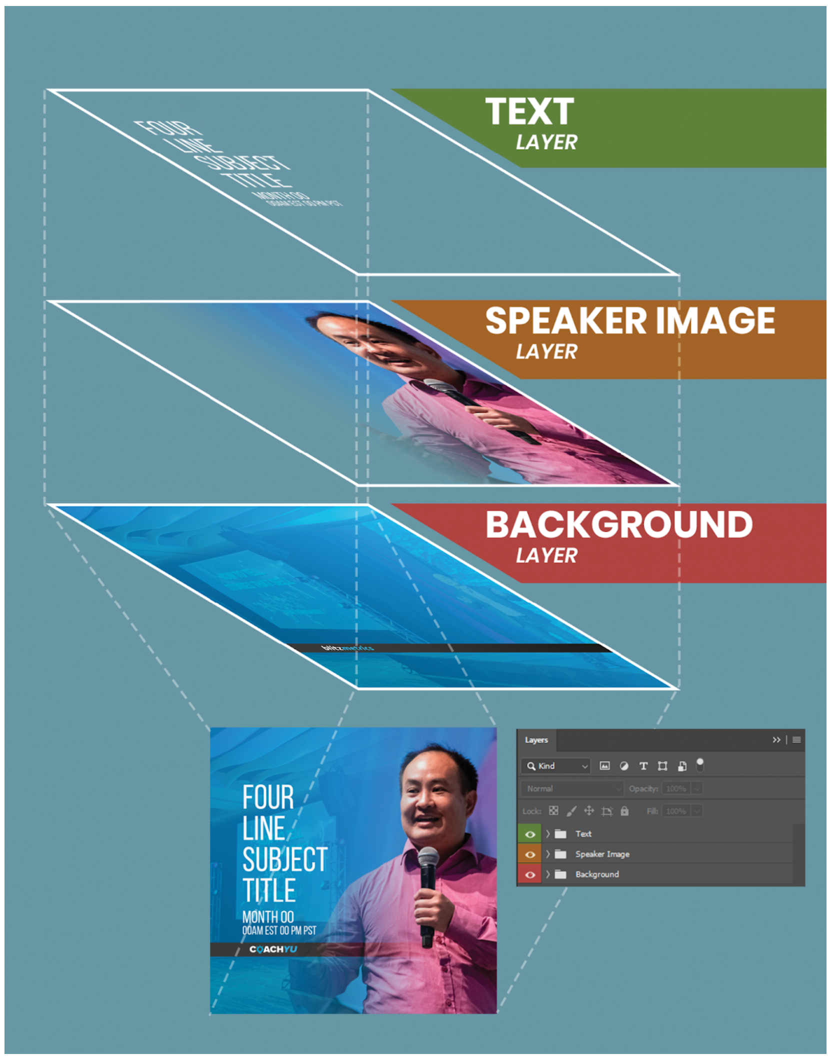
1 PDF.
1 Adobe InDesign Project file.

Anatomy of a Template

Anatomy of a template

Each of the templates here are made in Photoshop CC and should be compatible with Photoshop CS6. They have been configured to the standard resolution of the most popular social media, as well as print media for events.

In the layers panel, you will find that there are 3 main groups of layers. These are: Text, Speaker Image, and Background. All of which may be customized as needed.



Text Layer

This is the top-most layer where you include the details of what the image is meant to convey, e.g. event title, time, date, venue, speaker or guests name, etc. Font, font size and spacing may vary depending on the intention of the design.

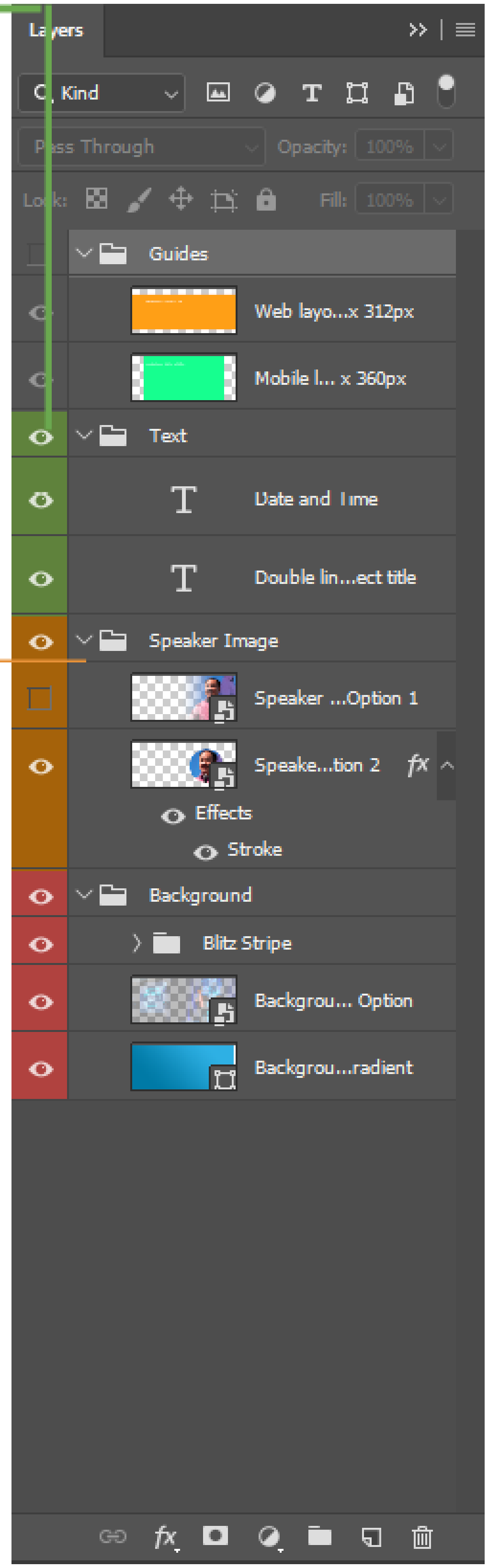
However, when using the image as a Facebook Ad, one needs to adhere to the 20% text to image rule. This rule will be discussed later under Facebook Ads.

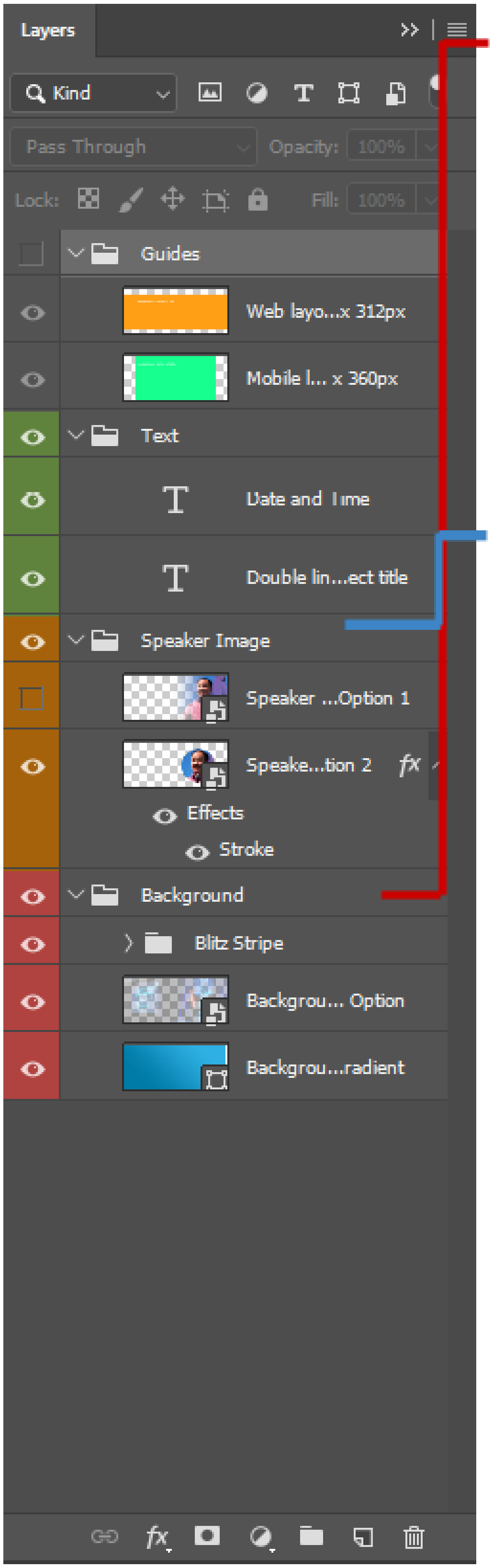
For CoachYu, the font used is Bebas Neue which can be downloaded here. This can be substituted by any font that adheres to your brand guidelines.

Speaker Image Layer

Two options for speaker images are presented here. Though you can make your own, these have been presented to save time.

Each layer is presented as a smart object. Double click on the smart object icon to replace customize the image with your own. This will open another layered file embedded in the PSD file. Copy the image you need want to include and position accordingly.





Background Layer

This group layer is composed of your logo, an optional background overlay and a background gradient. All these may be adjusted according to your brand design guidelines.

Guides Layer

These are often turned off and may not be included in all the templates. This layer helps illustrate important notes to aid the designer in putting together with a layout.

Smart Objects

All templates have layers with smart objects. In order to change the content simply double click on the smart object icon and replace the image with the one you prefer.

Guides

Guides are lines that can be seen in production but not in the final image. These help designate areas in the image and aid in producing the layout. If you do not see the guides, simply toggle Ctrl + ;

Social Media Templates

Social Media Templates

All the templates provided here cover the most commonly used formats for still images used in Social Media.

Facebook

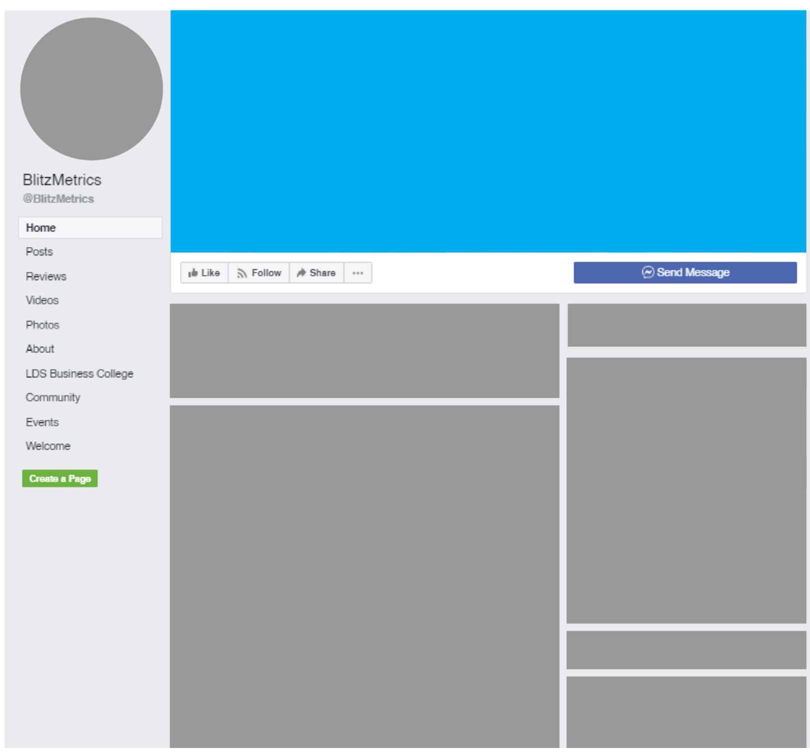
Cover Photos

The tricky thing about putting this together is that the image must work well on both web and mobile. The solution is to put together a layout that works on both.

Turn on the visibility on the “Guides” layer to have an idea of how this works in your layout.

Technical specifications

- Full image dimensions: 820 px x 360 px
- Mobile layout dimensions: 640 px x 360 px
- Web layout dimensions: 820 px x 312 px
- **Template**



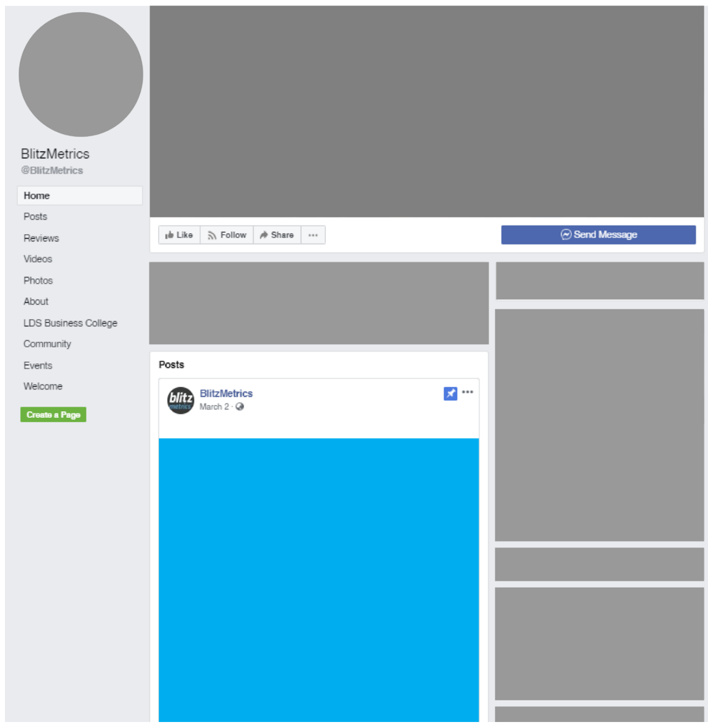
Images for News Feed

These images are for posting on the News Feed that do not need to be promoted. These are generally in the form of quotes. Though there are 2 options you can choose from to make a post like this, it is recommended that the mobile-friendly, square 1080 px 1080 px format be followed.

This format takes into consideration that most people view Facebook on their mobile devices. These are also the same dimensions for Instagram posts.

Technical specifications

- Square image dimension: 1080 px x 1080 px
- Template
- Rectangle image dimension: 1200 px x 628 px
- Template

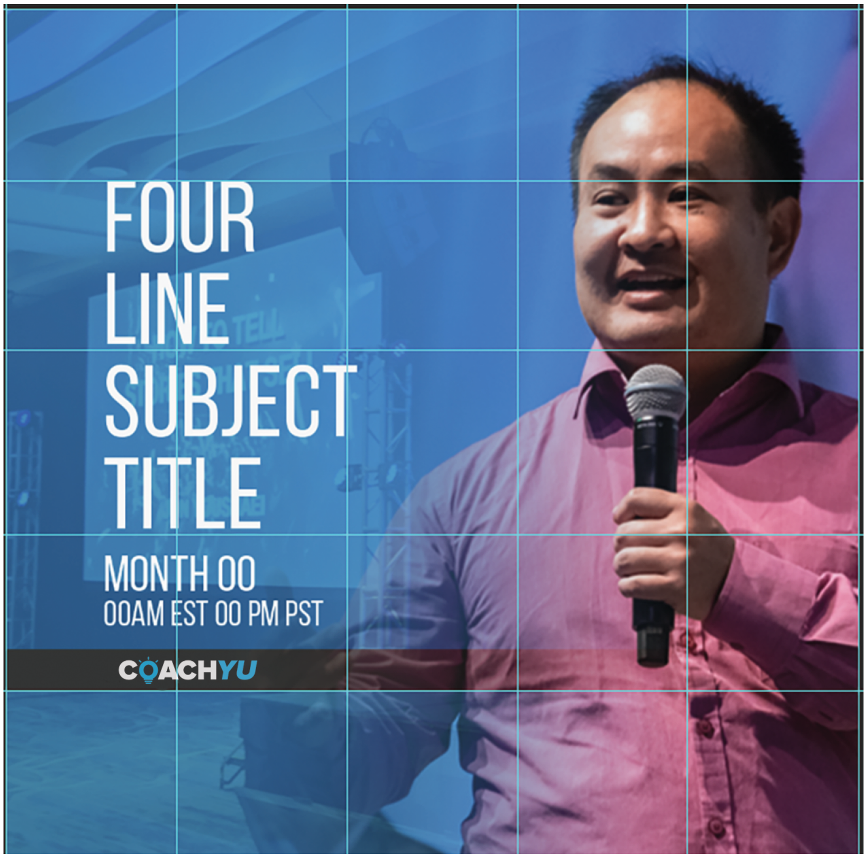


Images for ads

Facebook requires that text on ads be, at the most, 20% of the image. Finding out if your text is 20% of an image is quite challenging. First thing to do is to place a 5x5 grid on the image. If the text on the layout occupies 6 areas on the grid then it's within 20%. Now, this is a hack and not a rule, but it has proven to be accurate most of the time.

Examples of the 6 areas on the 5x5 grid are shown below:

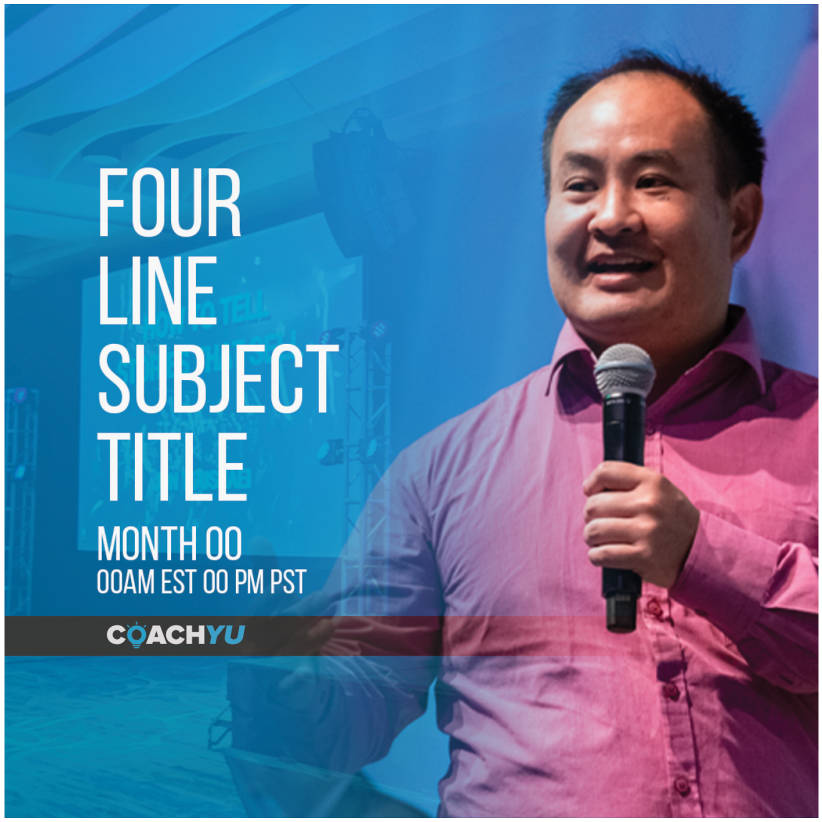
Toggle the guides on the template by pressing Ctrl + ;



As a final step, make sure to use the Facebook text overlay tool here.

Technical specifications

- Square image dimension: 1080 px x 1080 px
  Template
- Rectangle image dimension: 1200 px x 628 px
  Template



Instagram

Instagram Ads and News Feed posts generally follow the same technical specifications as Facebook except for the addition of Instagram stories.

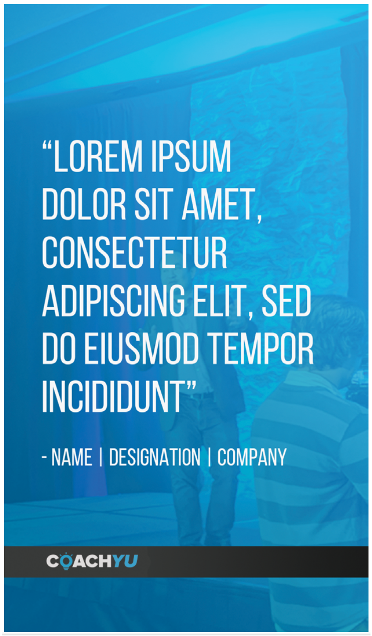
Instagram Stories, has a vertical orientation and takes up the whole screen of the phone. The layout has been put together to give some allowance to the Instagram User Interface. Feel free to toggle the "Guides" layer to find out how this comes out in the layout.
Another difference is that the 20% text rule doesn't apply here.

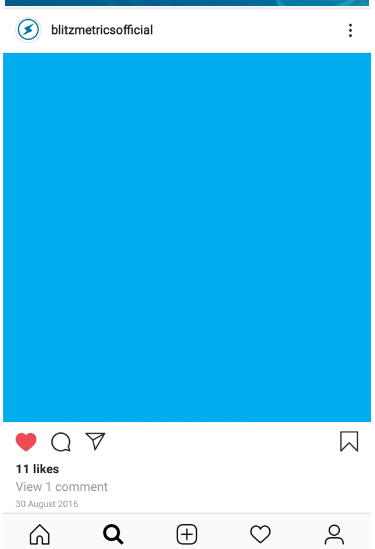
Technical specifications

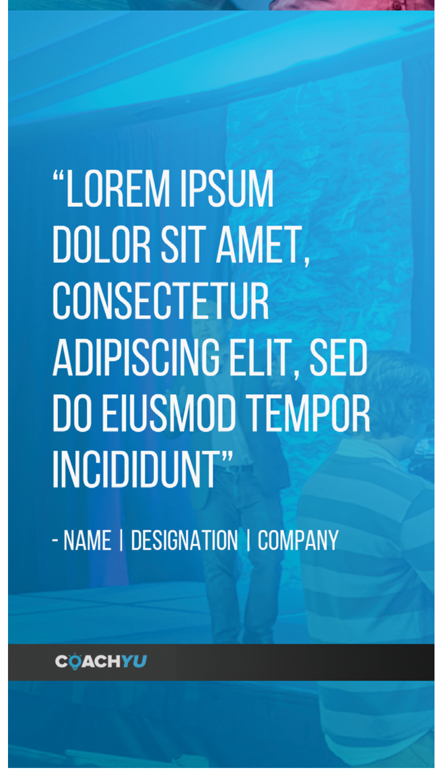
- Square image dimension: 1080 px x 1080 px
  Template
- Rectangle image dimension: 1200 px x 628 px

[Template](#)

- Instagram Stories Dimensions: 1080 px x 1920 px
  [Template](#)





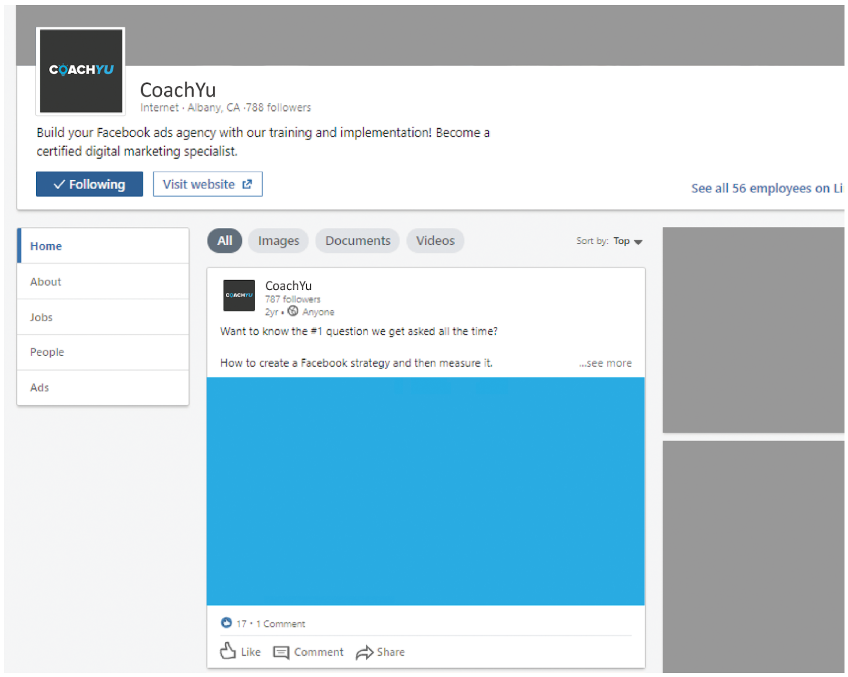


LinkedIn

LinkedIn helps you reach out to audiences catered towards the more professional market. Topics usually range from career advice to business insights and professional development. When putting together a composition it's important to put together a layout that's relatable to your audience. Like Instagram Ads and News Feed posts, the 20% text rule does not apply here.

Technical specifications

- Rectangle image dimension: 1200 px x 628 px
- [Template]



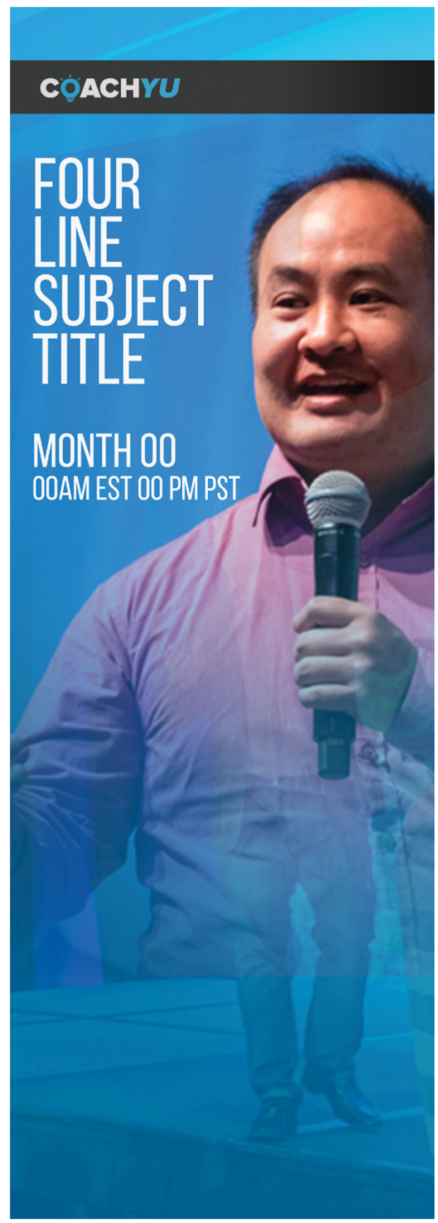
Event Templates

Event Templates

There may be times when, as participants or hosts in conferences or a summit, we may need to put together physical banners at the venue. Putting together digital assets for printing is quite different from those that are viewed on the screen.

In terms of the layout, one must always be aware of the distance of the banner from the viewers, as well as if the main point of focus is within eye level.

Another thing to consider is the pixel density. Printed material is often at a higher density than material that shows up on screens. Printing for banners located in events are generally set at around a density of 150 ppi/dpi.



Technical specifications

- Standee Banner Size: 6′ x 2′
  [Template]
- Event Banner Size: 2′ x 8′
  [Template]

Video Billboard Templates

Video Billboard Templates

Video Billboard Templates are still images that are usually flashed on the screen to introduce and highlight the guest speaker. These can either be used as a slide on the show or as part of the set background when in a broadcast.

Technical specifications

- Image dimensions: 1920 px x 1080 px
  Template

Graphic Templates

Graphic Templates
These layouts are meant to serve as guides. We've provided a few other graphic templates below which you can mix and match with the templates above to give you more variety.

Other resources
We've provided you with the list of templates above to make things run a bit faster. However, if you choose to be a bit more adventurous feel free to jump in and check out the following resources.

- Facebook Creative Hub – your complete guide to ads on Facebook; **https://www.facebook.com/business/inspiration/creativehub**
- Instagram Business – a comprehensive guide to Instagram ads and marketing; **https://business.instagram.com/**
- Adobe Spark – a completely free online software that helps you compose images; **https://spark.adobe.com/**
- Canva – a drag-and-drop online design software, also free; **https://www.canva.com/**

How To Prepare A Presentation Deck

The more presentations you see me give, the more you'll notice that I tell a story, teach from that example, then extrapolate to the bigger picture. Then I repeat again, starting with another specific story.

Contrast that with showing just tips, which comes off as professorial, and you'll see why we tell stories to teach. In fact, it's why we are constantly teaching people how to do a WHY video (when I was, I believe that, I am)-- we are literally following this framework thousands of times.

Now that you know this, consider how to adjust these decks to fit the style I've used for years. Part of the reason I use this presentation style is to be able to speak when there aren't any slides or when the slides aren't usable. Of course, we prefer having usable slides instead of forcing me to open tabs to narrate (as you typically see me do hundreds of times in the last few years).

Note also that the presentation version is for me to present (I'm narrating, so we don't want lots of text) and we hand out a guide version (a "book" that people can read later at their leisure, not narrated verbally by me, but with text to read). The good news is that the guide versions are just re-skinned versions of what already exist. You'll see that what we want to present here is 95% the same as the base presentation I've been doing for years-- mainly just skinned and narrated differently.

At both the beginning and end of a presentation, we want to list the key points as bullets-- especially again at the end, so we can recap. Most attendees won't remember the particular tips, so they will feel lost without a "Top 10" list. So be sure to not only do this here, but make sure we put it in our Course Builder Course, so others will know, too.

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From Smart Traffic Presentation to Social Media Marketing World using the same deck. Note also that the presentation version is for me to present (I'm narrating, so we don't want lots of text) and we hand out a guide version (a "book" that people can read later at their leisure, not narrated verbally by me, but with text to read).

The good news is that the guide versions are just re-skinned versions of what already exist. You'll see that what we want to present here is 95% the same as the base presentation I've been doing for years-- mainly just skinned and narrated differently.

VIDEO THUMBNAILS

- Make sure the play button is centered perfectly within the thumbnail.
- Include the video title at the bottom-right of the thumbnail in bold.
- Include the run-length of the video after the title in standard font (not bold).

IMAGE DESCRIPTIONS

- In the case of replaced images or career changes, make sure the images descriptions are up to date and accurate.
- With very few exceptions to this, format all image descriptions like so:FirstName LastName (position in image), Title | Company

QUOTES

- Always include the quoted person's headshot before his or her quote is introduced.
- Italicize quotes
- Most of the time, quotes should be a lighter color than the body text, typically gray.
- Never forget the open and end quotation marks.

WE DON'T WANT EVERY LEVEL 1- 2 VAS WORK TO MUST GO THROUGH QA BY THEIR TEAM LEAD, FOR TWO REASONS:

- QA work creates bottlenecks and slows down the deliverables although sometimes necessary.
- We should be able to rely on our trained team members to deliver results to our expectations without going through QA by Team Lead.

But when we see a trend of poor workmanship from the team members, the business leaders and myself may ask that the work goes through QA by the Team Lead temporarily. This brings back some accountability to the Team Lead to re-train or let go of the team member.

Submit a small summary and your answers to the test questions and get these badges.
Email us at operations@blitzmetrics.com

Thank You!

@getfound

dennis@blitzmetrics.com