Canvas Process

So, you got assigned a Canvas Unit.

Working on a canvas takes creativity, collaboration, patience and understanding of the unit. Did I mention patience?

But fear not, for we have outlined the steps, best practices and inside tips to make sure your canvas avoids "happy accidents" and gets all the engagement it deserves.

Let's get crazy.

Step 1: Question everything

Before pen touches paper, the brief is the time to ask all the important questions that will help you in the longrun. Not all briefs are crearted equal, but here are some questions to get you going:

👍 Why are we doing this? (Canvas units have become a dime a dozen, but before starting a Canvas, make sure it's the best creative and media solve for a specific demographic, vehicle launch, etc.)

👍 What are we measuring this Canvas against? Dwell time? Click throughs?

👍 Do we have budget for an illustrator? (If money and time allow, hiring an illustrator to comp up concepts can be a great way to help visualize the story you're trying to sell to the client)

👍 Where can I find templates? (You can find most of them here, but make sure to ask if there any other documents you may need for your particular project)

Step 2: The Concept

Technology is nothing without a story that connects it with people. Before getting into the nitty gritty of how each frame will lay out and what each piece of copy will say, sell the overall concept. Start by decking up a couple of pages that describes the concept, as well as keyframes that helps visualize the story.

Before the client review, make sure concepts go to:

👍 Creative Director(s)

👍 Social Producer

👍 Broadcast Producer (when applicable)

👍 DS

👍 UX

👍 Internal review with Account Team

Concept presentation

There are two parts to deck up for an initial client review. First is showing the vision behind the overall concept and what people will initially see in-feed. The second is a basic skeleton of how the Canvas will function when a user taps into the interior of the unit. While none of the copy or art will be final by any means, the presentation should be clear enough to understand the overall concept and the general direction on where you plan on eventually taking the concept.

In-feed

Canvas interior

ABC's of Being Green - Master Video

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Honda will create a short film in which we pair each of the 26 letters of the alphabet with a way viewers can go green. Throughout the film, children will sing about the variety of ways we can preserve the future of our planet that correspond with each letter.
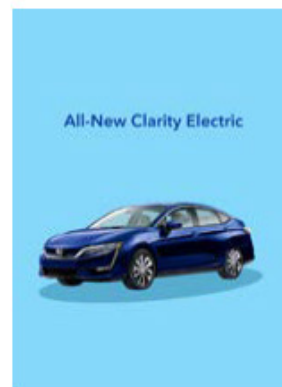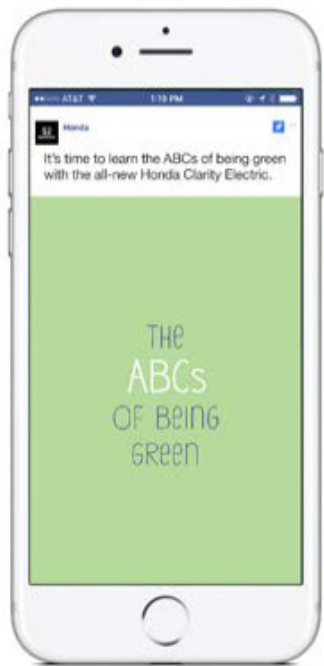
Post Copy
It's time to learn the ABCs of being green with the all-new Honda Clarity Electric.

Example Lyrics
A is for Avoiding Aerosol Sunscreen on your bod.
C is for Carpool with your coworkers.
F is for Fans instead of the AC.

Where it lives
• Facebook Video Ads
• Facebook Canvas Units
• YouTube

ABC's of Being Green - Canvas

• Master video

• Tilt to pan

• Graphic carousels spell out vehicle specific words
   Examples:
    - Clarity
    - Electric
    - Carpool

• Carousel featuring the Clarity Electric's features
    - DC fast charging capabilities
    - Spacious and tech-rich interior
    - Room for 5
   - Exterior styling

• Multi links tap through to linked canvases detailing different vehicle features

• Linked canvas begins new canvas experience specific to vehicle feature

Step 3: Wireframes

Once a concept has sold through, it's time to get wireframes started. Meet with the UX and DS teams to talk through the vision behind the Canvas unit. Much like a microsite, wireframes for Canvas Units are an essential part for the decision making process between the client and RPA. It's here big decisions or changes in content and structure to the Canvas should be made before getting into comp work.

Clients should be shown wireframes in two ways: in deck form and in a Facebook Canvas-building tool such as Creative Hub or the brand's Facebook test page within publishing tools. At this step in the process, it's the UX person's responsibility to upload the wireframes in the Canvas-buiding tool.
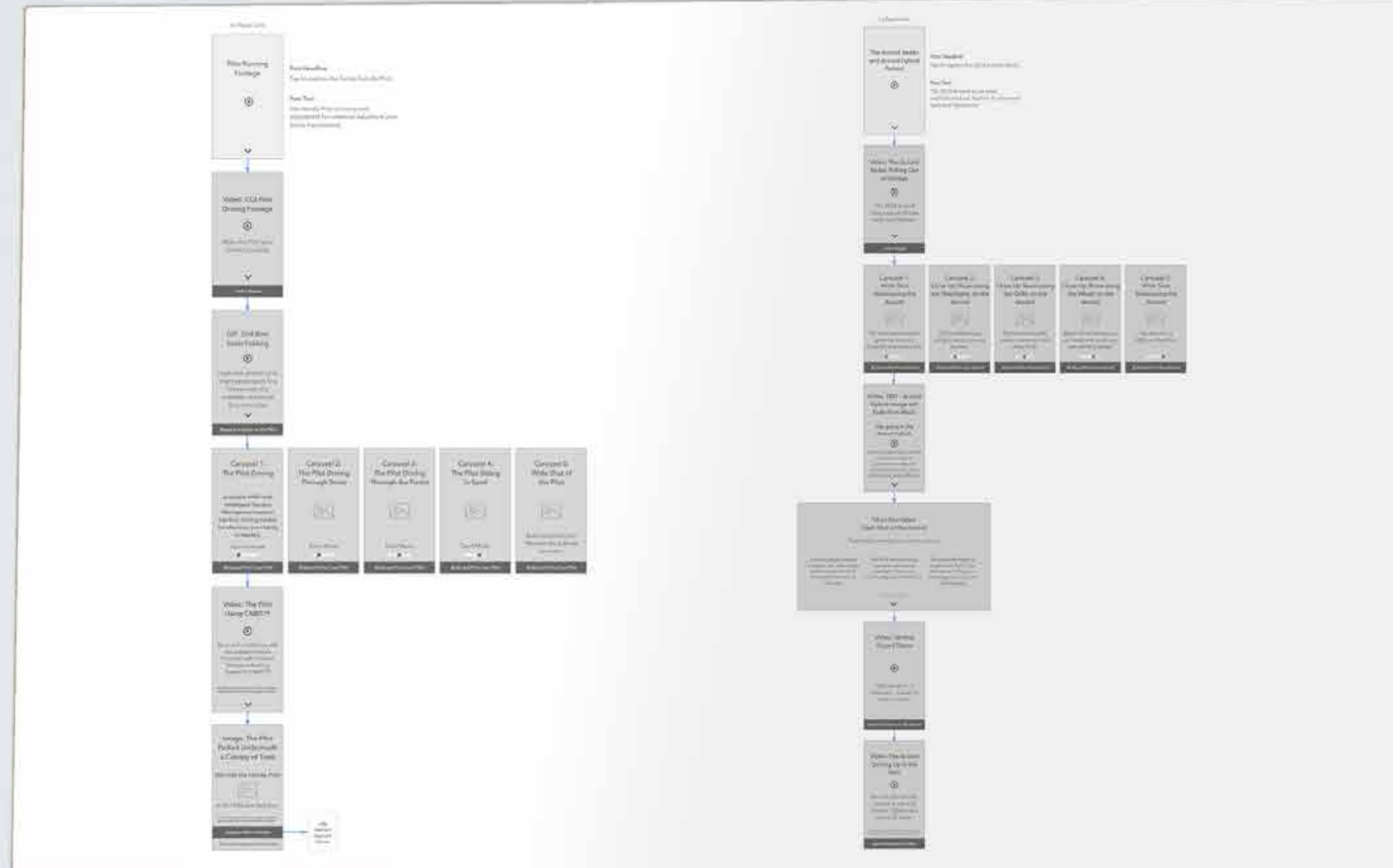
Wireframe example

A UX person can't figure out how to build a wireframe without a solid roadmap on what the Canvas unit will do and say. Start with a team meeting or two to brainstorm with UX and DS. From there, sketch out and give framework copy for each panel within the Canvas unit. Then, meet again to make sure all the parties understand and give feedback from a UX and DS perspective. From there, the UX person can take the sketch and make a wireframe for feedback back to the team.

After you, DS and UX are good, make sure wireframes go to:

👍 Creative Director(s)

👍 Social Producer

👍 Broadcast Producer (when applicable)

👍 Internal review with Account Team

👍 Client review
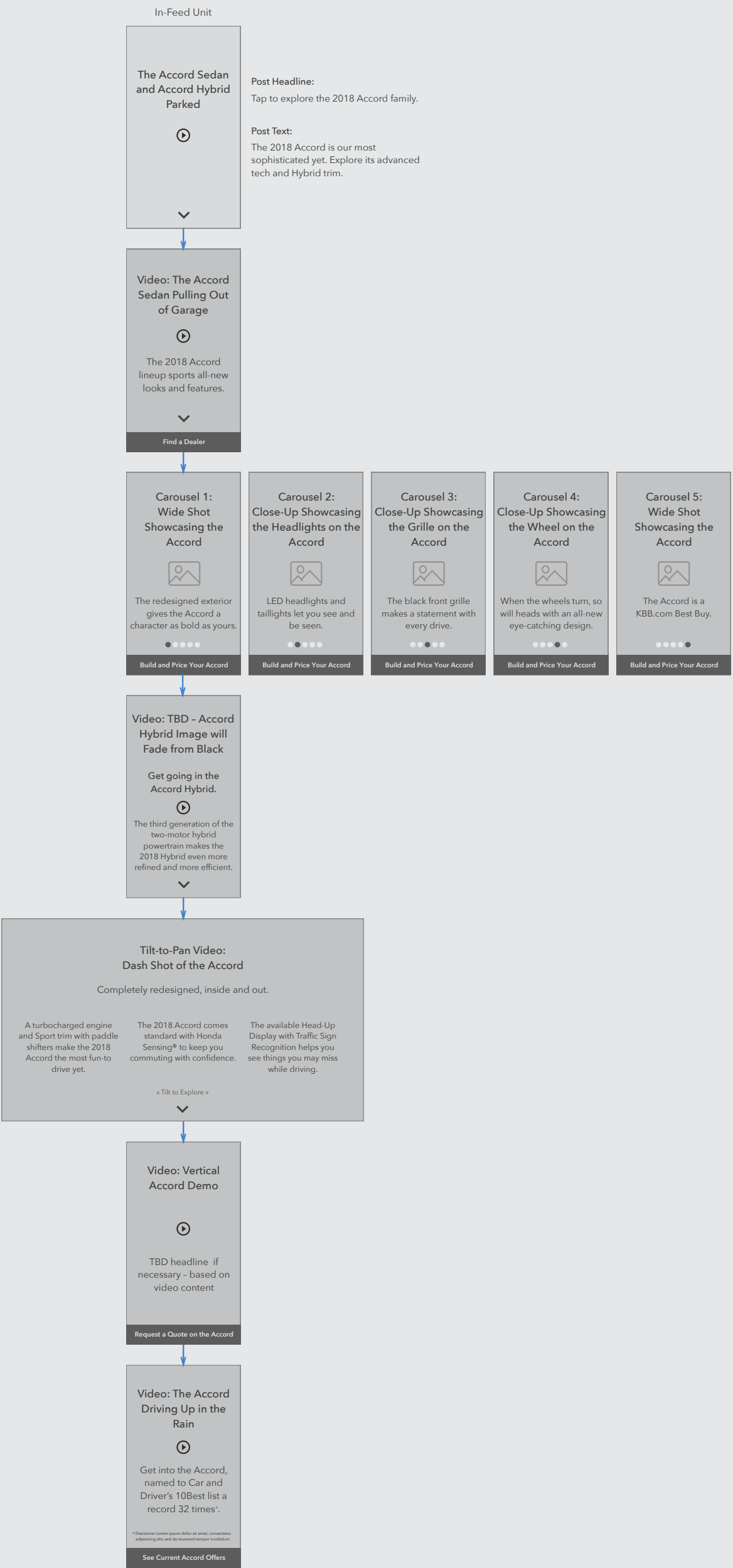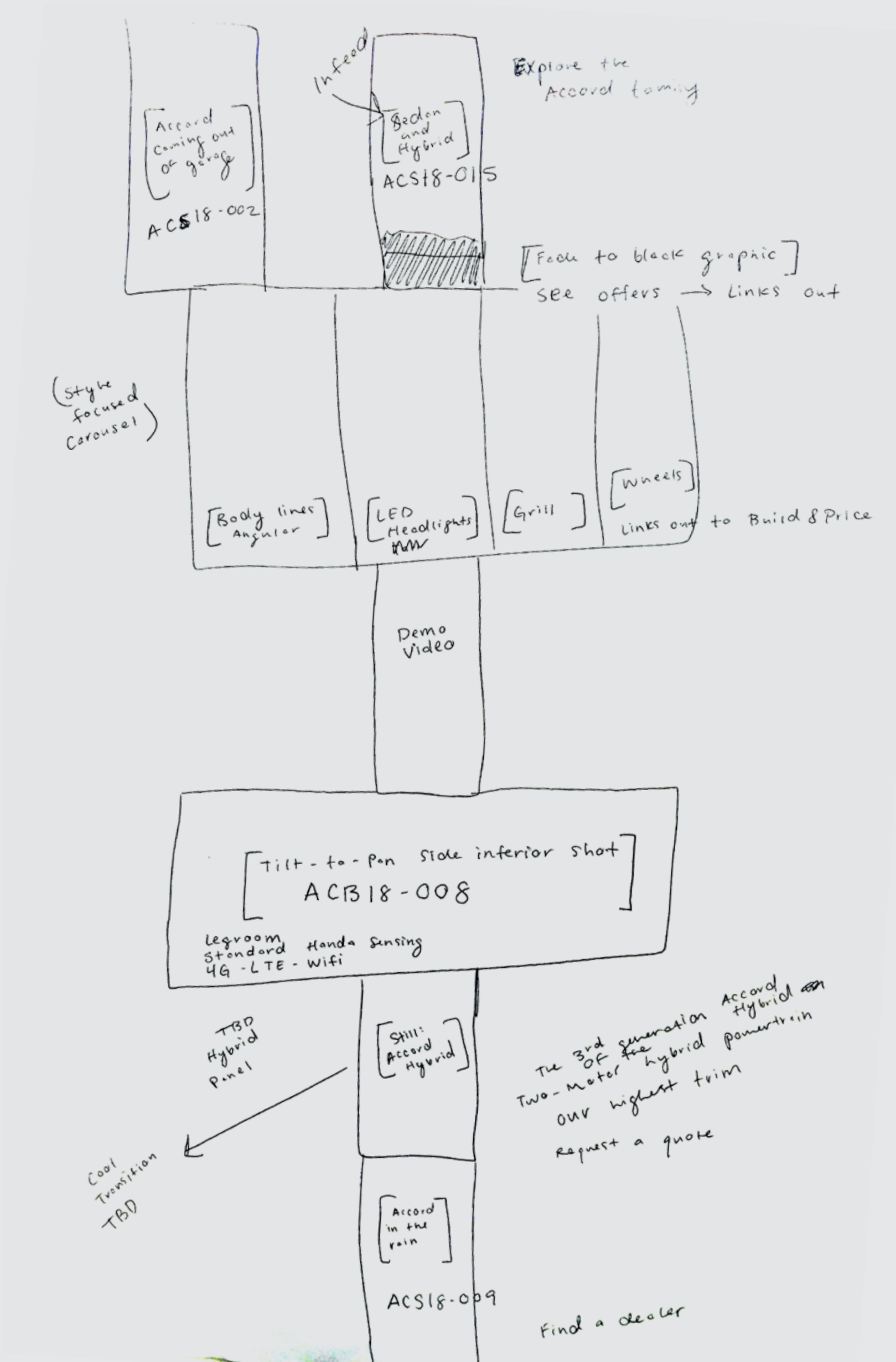
Step 4: Comp it together

Now that we have client sign off on the framework for the Canvas unit, it's time to roll up our sleeves and start putting it together. That's no easy task, so the following pages give a laid out process to help out.

The basics

Canvas units are made up of basic panels that have numerous functions, including basic videos or still images, tilt-to-pans, image carousels, tap-to-expand images and buttons. Always use artboards in Photoshop to set up the panels within your Canvas unit.

[Click here for a PSD Canvas template.]

Width is fixed at 1080px

Variable height with 1920px max

Artboard 1

These are basic video and image panels. When comping an artboard intended for video, use an FPO still frame.

Artboard 2

Artboards 3, 4, 5 & 6

When creating carousels, add additional artboards idicating the additional slides to the carousel to the right of the first slide in the carousel sequence.

Artboard 7

Tilt-to-pans are horizontal videos or images and the only exception to the 1080px fixed width and variable height rule. The panel dimensions for tilt-to-pans are: any variable width exceeding 1080px and a fixed height of 1920px.

Artboards 7, 8, 9 & 10

Buttons allow users to tap to a linked Canvas, website, or app store.

Videos and photos and carousels, oh my!

The main components you'll be working with in Canvas are videos, photos and carousels. Here are the highlights for each.

Standard videos & photos
– Must be 1080px width x variable height up to 1920px
– Fits to width of screen (1080px)
– Photos are linkable to:
    1) Website
    2) App Store
    3) Another Canvas Unit
– Videos are not linkable
– Videos will play on a loop
– To add buttons to your Canvas Unit, upload your button design as a linkable photo (DO NOT USE THE BUILT-IN FACEBOOK BUTTON TOOL. IT'S CRAP.)
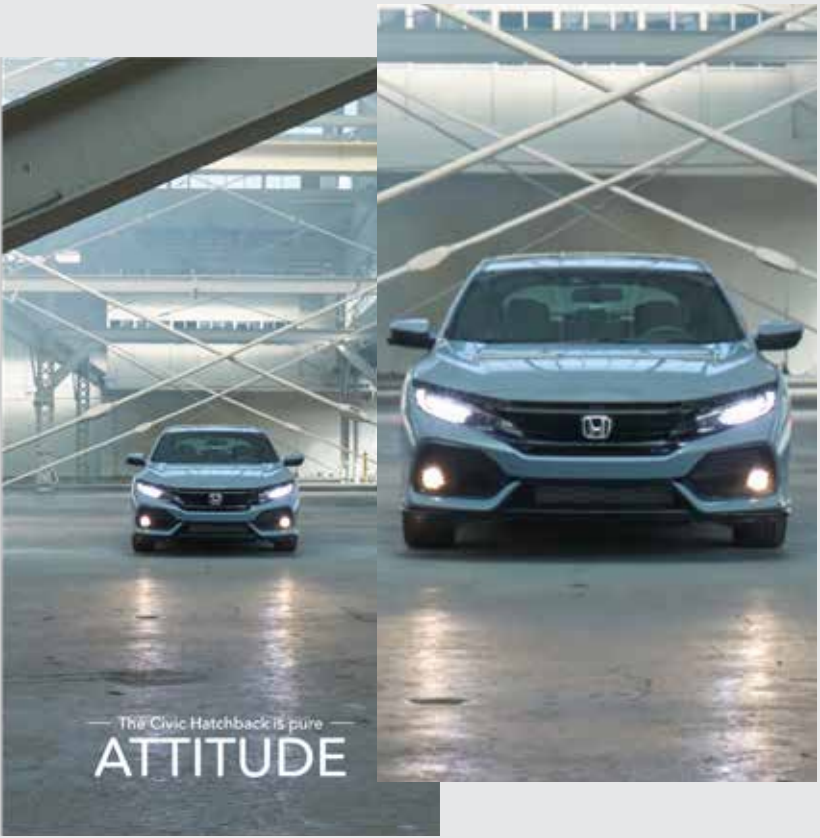
Tap-to-expand
– Must be 1080px width x variable height up to 1920px
– Fits to width of screen (1080px)
– Not linkable

Tilt-to-pan
– Horizontal videos or images with any variable width exceeding 1080px and a fixed height of 1920px
– Fits to height of screen (1920px)
– Both videos or photos are not linkable
– Videos will play on a loop
– Always have a point of interest on either side of the tilt-to-pan to give the user a reason to tilt
– Select tilt-to-pan for videos or photos with a dimension of 1080px x 1920px to lock it in place
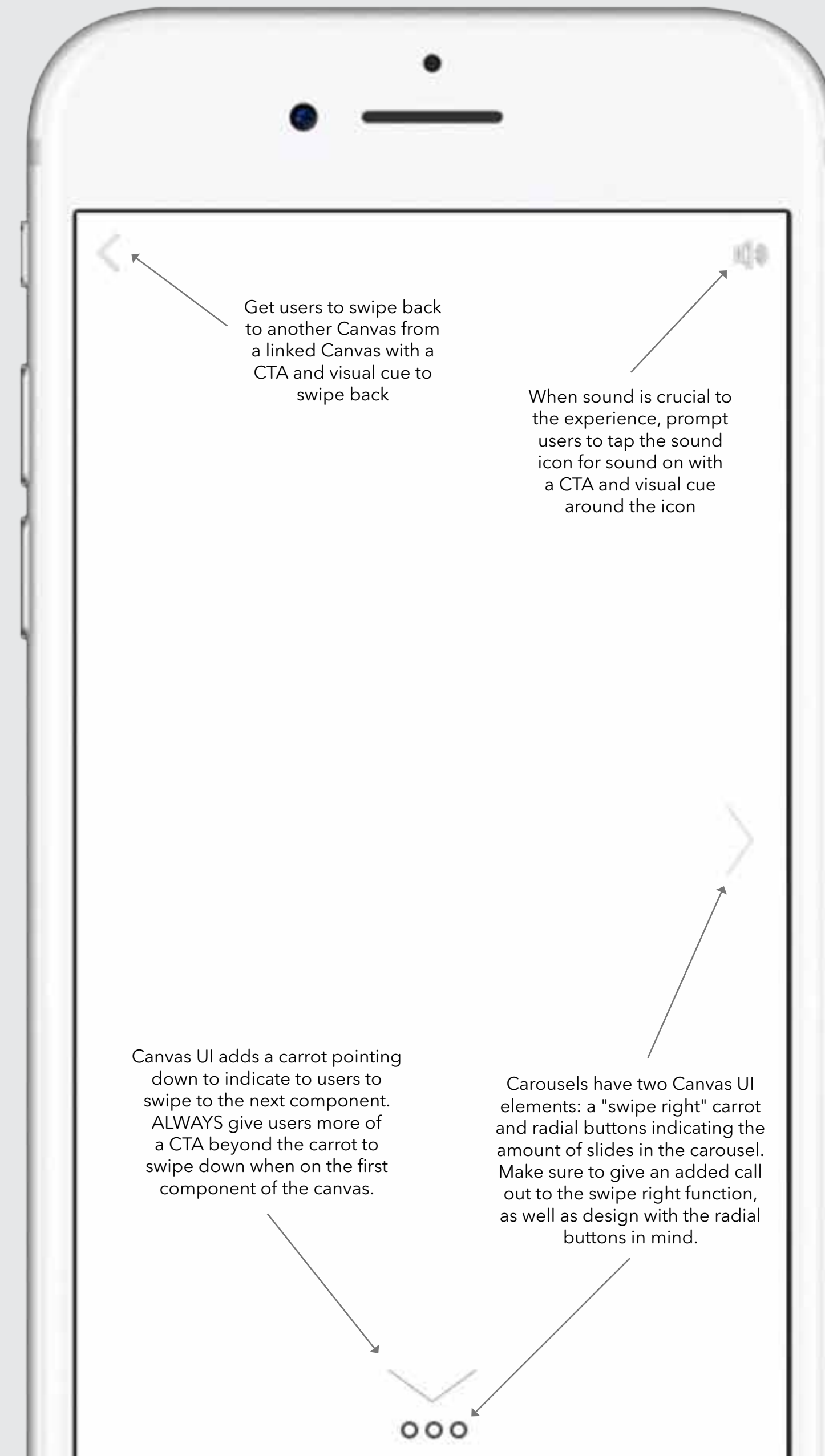

Carousel
– Must be 1080px width x variable height up to 1920px
– Photos only
– Fits to width of screen (1080px)
– Carousels are linkable to:
    1) Website
    2) App Store
    3) Another Canvas Unit
– Videos are not linkable
– Can have up to 10 slides per carousel, however try and keep carousels to 3-6 slides max
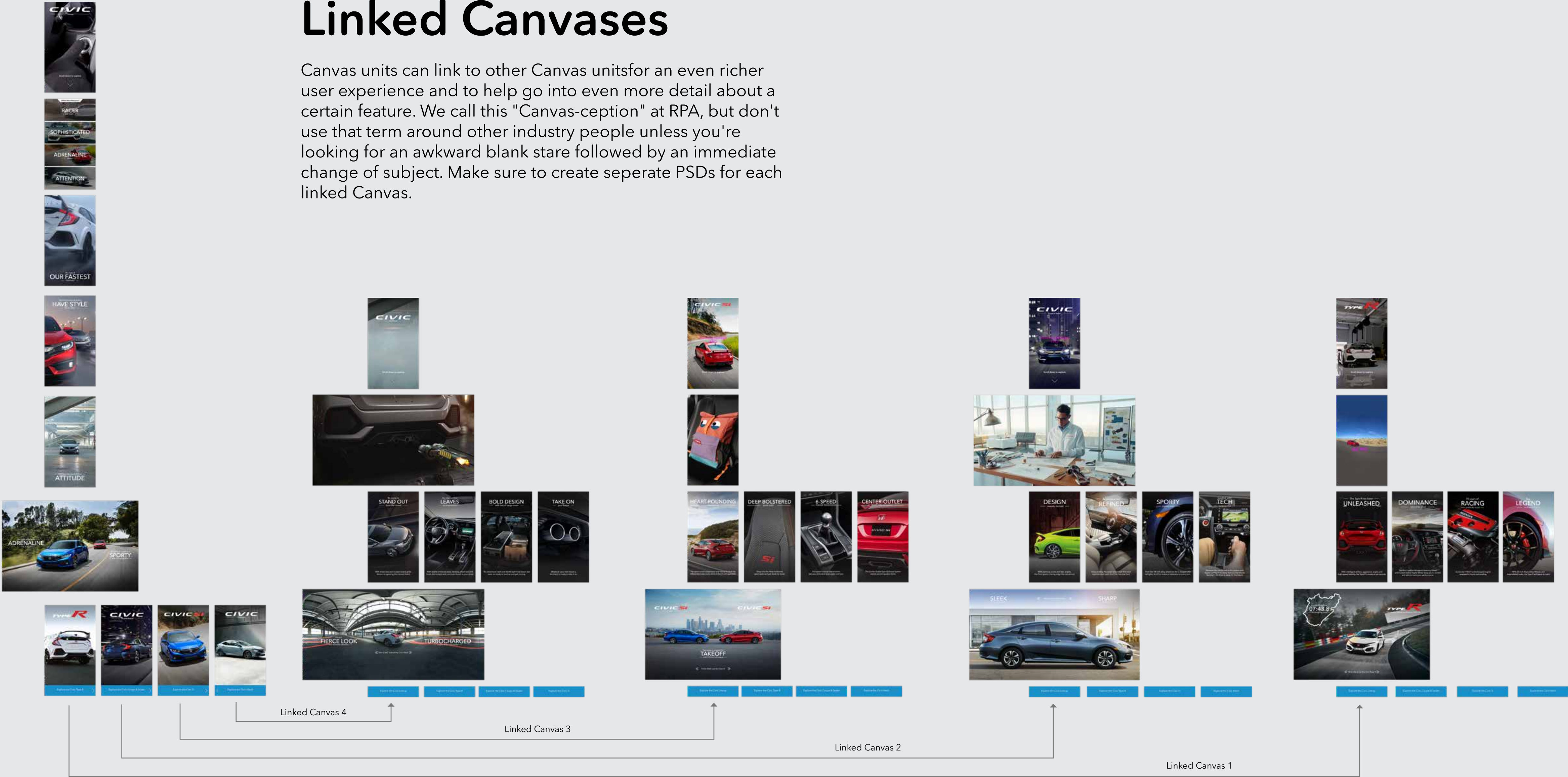
Canvas UI

Facebook has native UI elements baked into Canvas you create and view on your mobile device. Always design with the UI elements in mind and with certain element, make sure to call them out more than Facebook already does to entice users with a strong CTA, whether that's swiping, tapping or otherwise.

Get users to swipe back to another Canvas from a linked Canvas with a CTA and visual cue to swipe back

When sound is crucial to the experience, prompt users to tap the sound icon for sound on with a CTA and visual cue around the icon

Canvas UI adds a carrot pointing down to indicate to users to swipe to the next component. ALWAYS give users more of a CTA beyond the carrot to swipe down when on the first component of the canvas.

Carousels have two Canvas UI elements: a "swipe right" carrot and radial buttons indicating the amount of slides in the carousel. Make sure to give an added call out to the swipe right function, as well as design with the radial buttons in mind.

Linked Canvases

Canvas units can link to other Canvas unitsfor an even richer user experience and to help go into even more detail about a certain feature. We call this "Canvas-ception" at RPA, but don't use that term around other industry people unless you're looking for an awkward blank stare followed by an immediate change of subject. Make sure to create seperate PSDs for each linked Canvas.

Linked Canvas 4

Linked Canvas 3

Linked Canvas 2

Linked Canvas 1

Writing and proofing

A picture is worth 1,000 words, so don't clutter your Canvas with a ton of copy boring users with every detail and bullet point. Instead, have a compelling story to tell and entice user to to keep on swiping for more, while giving enough information about the brand or product to entice users to learn more.
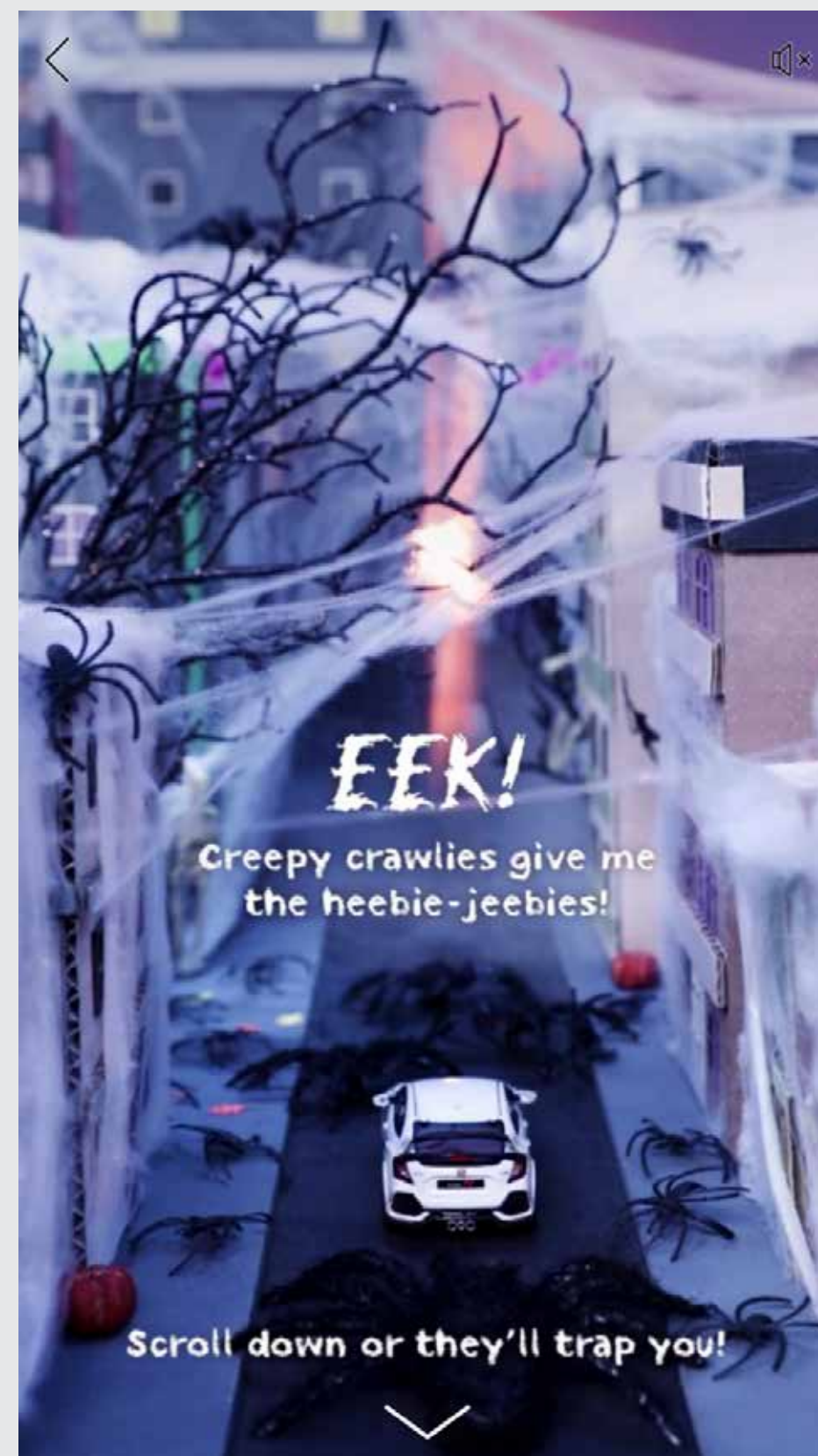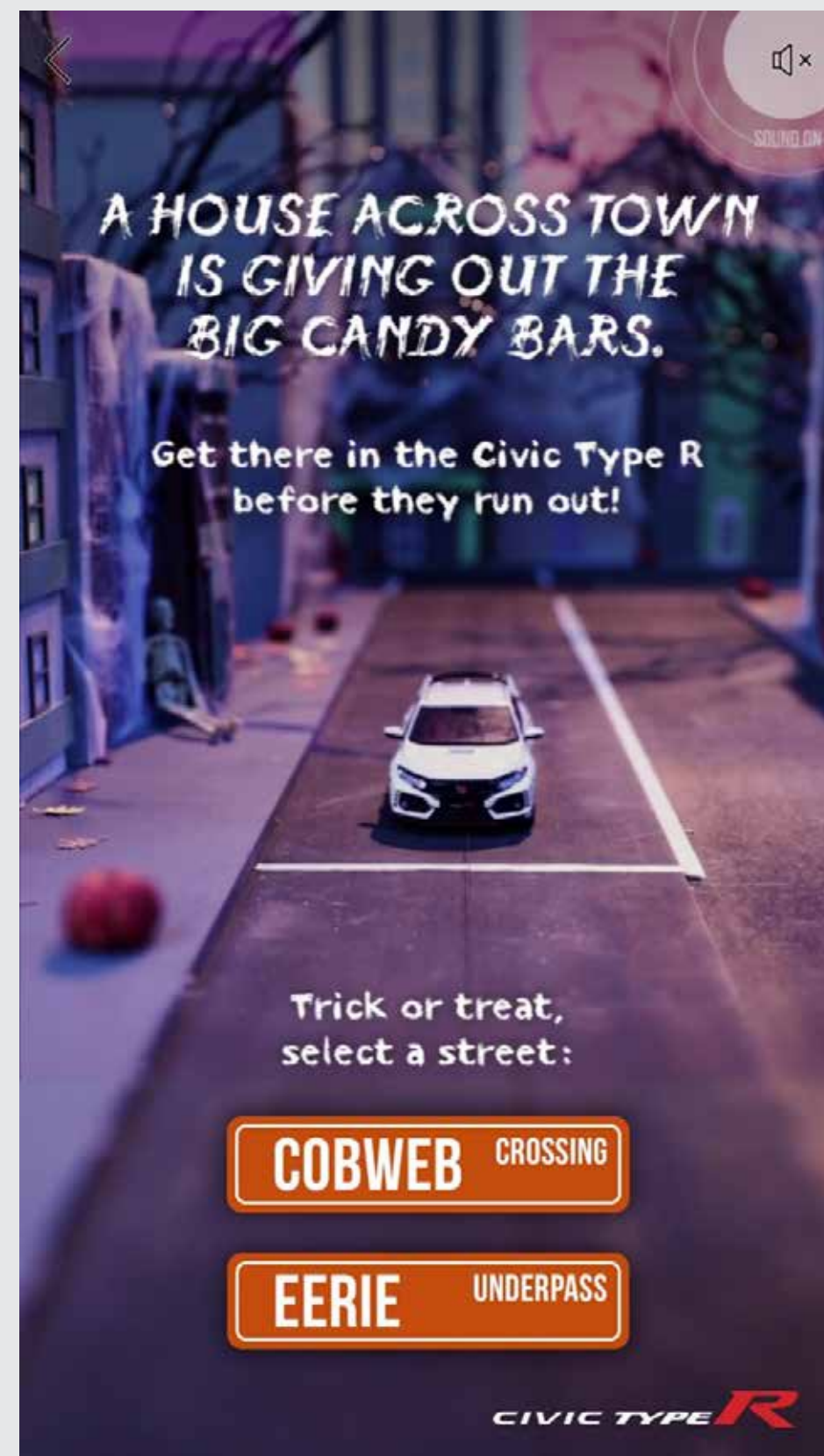
Organize your artboards

Imagine you're assembling a new piece of furniture, but all the instructions are in a foreign language you don't understand. That's what it's like getting a file from someone else when things are disorganized and not named properly.

Between the time you start comping, to the moment the Canvas unit goes live, there will be a number of people touching your files, from external vendors, to the production team, to Bös and even other Art Directors. Make sure everything from file names, to layers, to folders and artboards are easy to understand. Note: your files will get kicked back to you if your file(s) are disorganized. Just don't do it.

File naming
– General: PANEL# - GENERAL-DESCRIPTION + COMPONENT TYPE
    – Example: 02 - Type R Button
– Carousels: PANEL# - CAROUSEL-LETTER (GENERAL-DESCRIPTION)
    – Example: 07 - Carousel B (Civic Sedan)
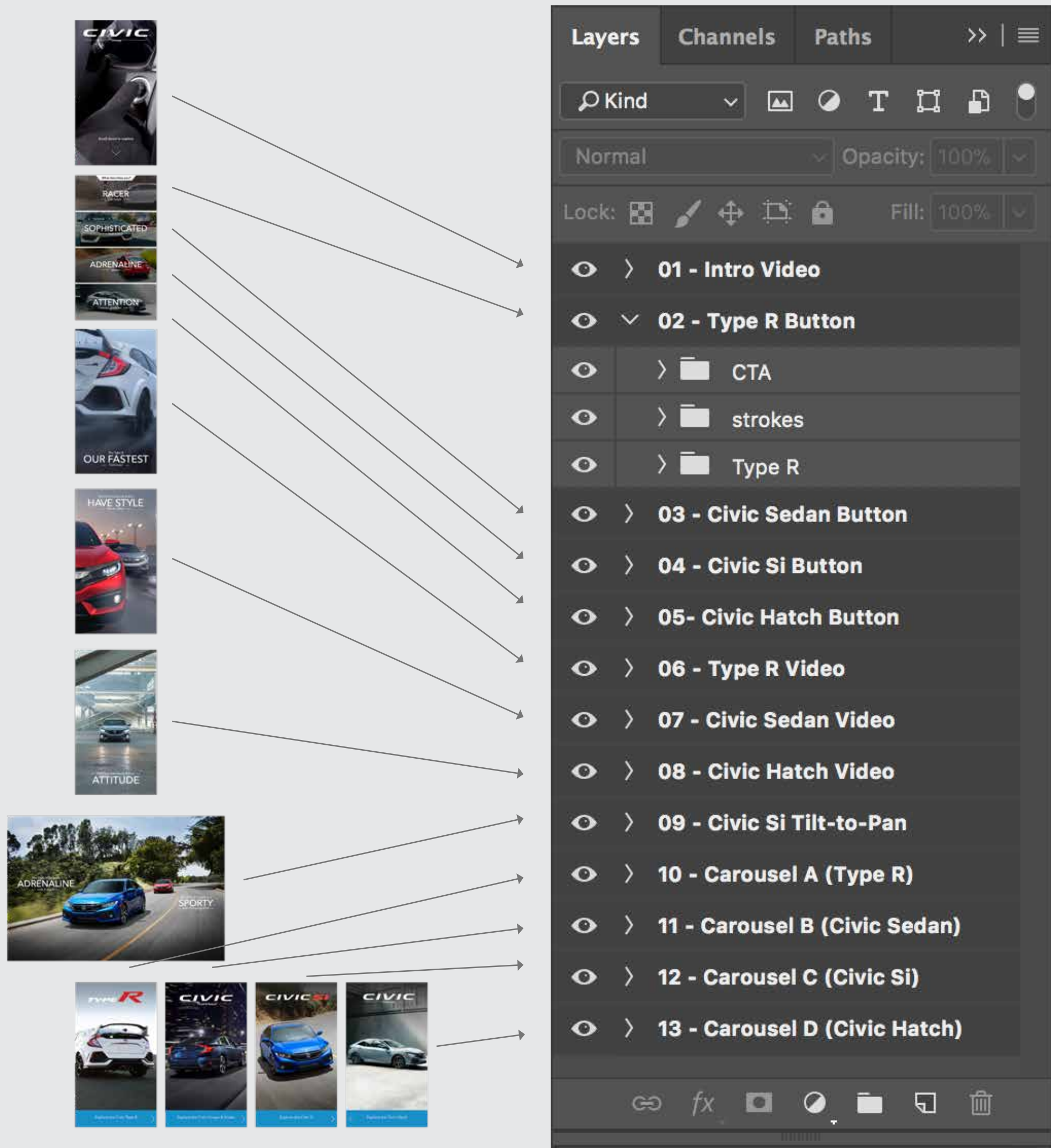
Add video/animation notes

Canvas is a visual media, so the likelyhood of having video content and/ or animated movement within the unit is relatively high. Make sure to leave detailed notes for whoever is creating your video or animated content, whether that's an outside vendor or Bös. Depending on the video content, you may need to provide a storyboard as well to help the vendor visualize the story.

The letter C is made out of a roadway in a suburban environment. The Clarity Electric is driving to five different houses and picking up each passenger, then they all get dropped off at the office.

Animate the color fields and image in this frame to raise up into place, creating some illusion of paralax.

Animate this frame to push in slightly as the words animate on frame.

The title animates in from the bottom up, then settles.

"The ABCs of a Brighter future" title animates up and fades in from the top of the car. Then We crossfade the title so it reads, "Brought to you by the all-new Clarity Electric."

No animation

Packaging files

Once you've built your Canvas unit in Photoshop, the production team will take it over to be uploaded to Facebook as a mockup to be presented to the client. Once the client has signed off, your final files will then be sent to DS to post.

It's extremely important important to have a file and folder structure so both production and DS know how and what to upload for each component.

File naming
– General: PANEL #_FILE-TYPE_GENERAL-DESCRIPTION
    – Example: 02_Vid_Civic_Intro
– Carousels: PANEL-#_CAROUSEL-LETTER_FILE-TYPE_GENERAL-DESCRIPTION
    – Example: 04_B_Carousel_ClarityElectric_Sensing

General folder structure
– Folder: PANEL#_GENERAL-DESCRIPTION_PANEL-TYPE
– 01_Intro_Video
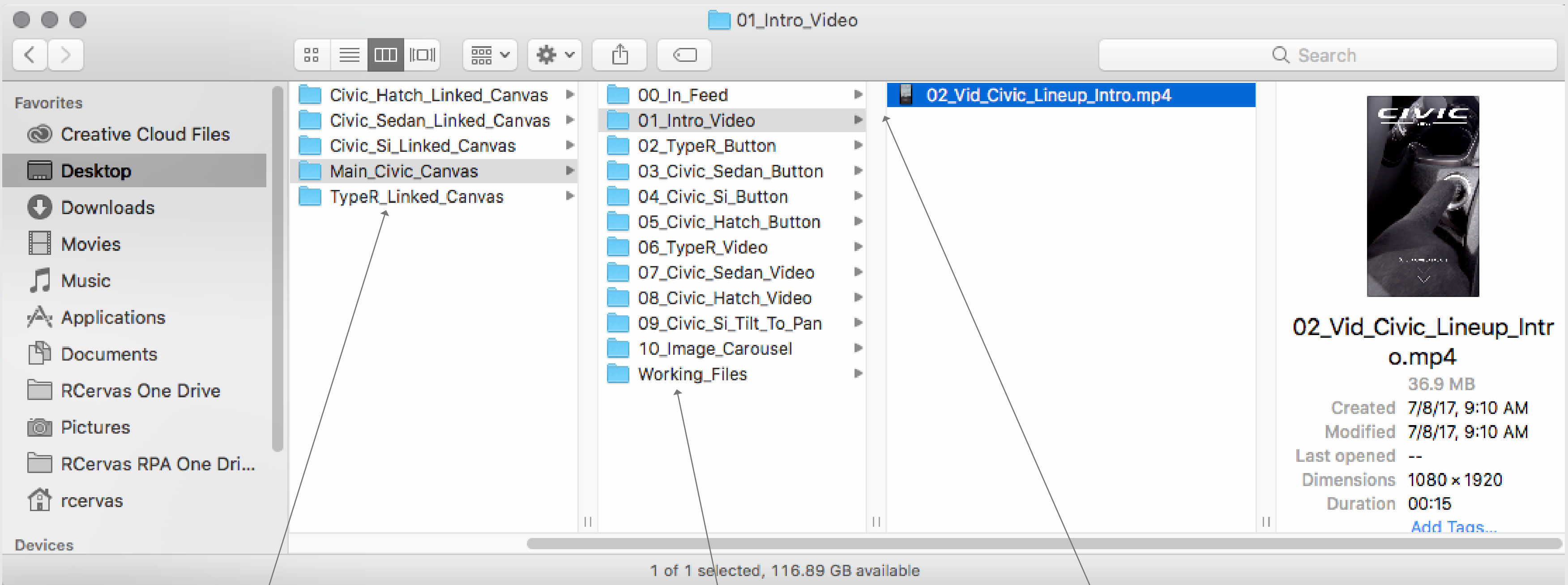
Make sure never to use spaces. When naming files and folders, use underscores to seperate words.
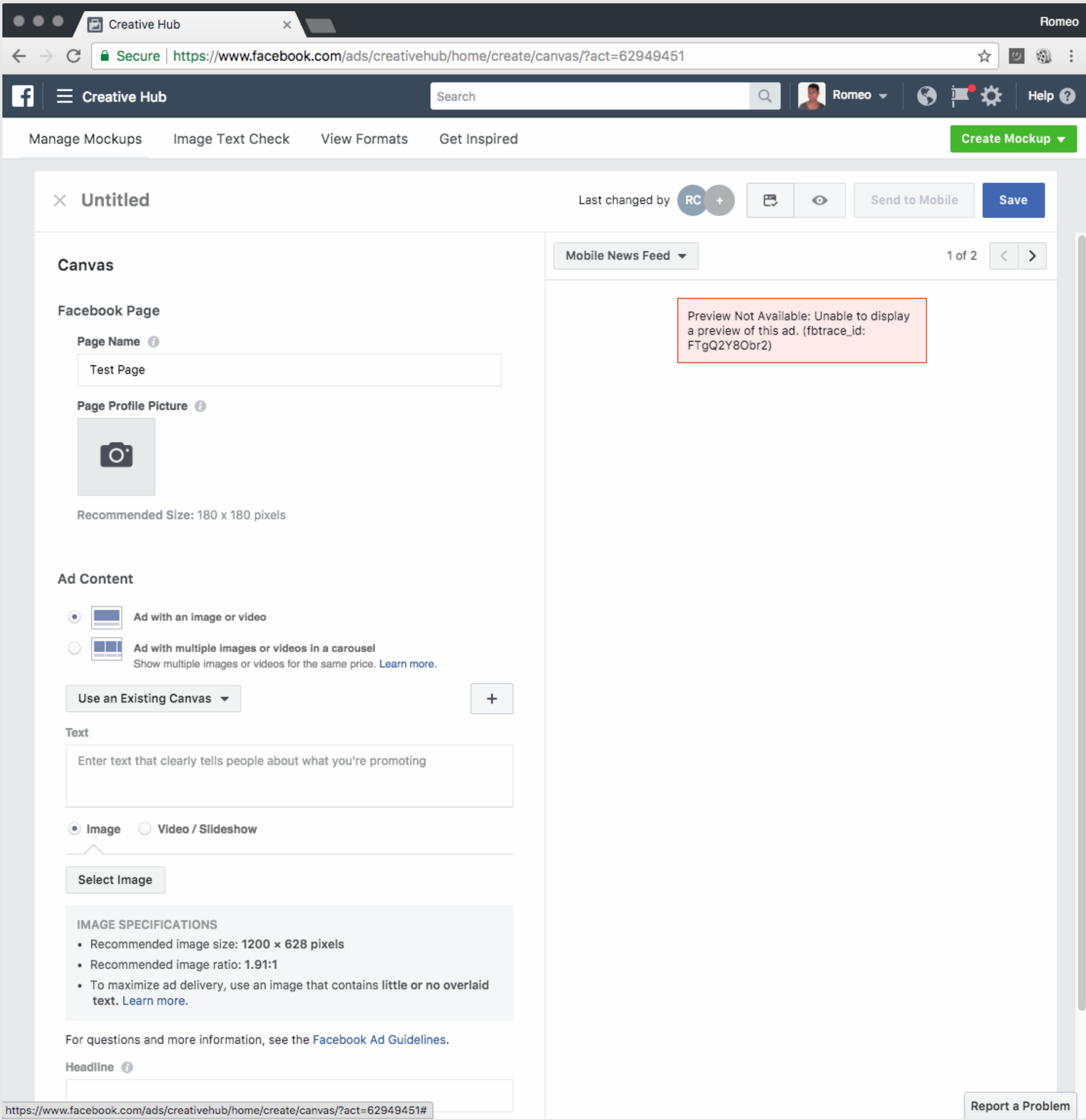
Place working psds, as well as links together in a folder.

Make sure to place any videos from outside vendors or Bös in the corresponding folder.

Creative hub

Creative Hub is a mockup tool created by Facebook to build the various ad formats that Faceook offers, including Canvas. There will be a number of times your files will need to mocked up in Creative Hub for internal and client review. Ultimately, the goal is to alleviate creatives from uploading to Creative Hub to concentrate on concept. However, there will be instances where a creative will need to either upload rough mocks or update minor changes. It's important to know how Creative Hub functions and how each tool works.

[For a detailed tutorial on how to use Creative Hub, click here.]

Facebook Canvas workflow

DETAILS	INITIATE	CONSULT	APPROVE	INFORM	PHASES + DELIVERABLES
PROJECT INITIATION					
Team Brief Meeting (Assumes campaign direction is approved)	Account	Strategic Planning, DS	Product (Honda only)	CD + Executive Producer, Gary + Joe,	Assignment Brief to initiate canvas build should include all pertintent information, including; key dates, relevant background information, learnings, and examples.
CREATIVE DEVELOPMENT					
Concepting (@ 2 weeks - 2 months)	Creative	UX + DS (2 meetings/week)	CD's + Sperling	Executive Producer	Creatives to coordinate with DP to align timing and logistics, and coordinate working sessions with UX + DS. Review MSL for asset gathering.
Internal Concept Reviews and Revisions (@ 3 days - 5 days)	DP	Creative + UX	Account, DP, Product (Creative, UX, DS)	Executive Producer, Gary + Joe	Wireframe, user flow, and key frame (if possible) review per concept.
Internal Conference Reports (@ 1 day)	DP	Account, Creative		Creative, Executive Producer, Account, UX, DS, Product, Gary + Joe	
Client Concept Reviews (@ 3 days)	Account	Creative + UX	Client	Executive Producer, DP, UX, DS	
Client Conference Reports (@ 1 day)	Account	Creative		Creative, Executive Producer, Account, UX, DS, Product	Client Conference Reports via Account. Creative to reply with any discrepancies. Account to follow up with Client as needed.
Internal Routing of Revised Creative (@ 1 week - 2 weeks)	DP	Creative + UX	Creative, Account, UX, DS, Product	Executive Producer, Business Affairs (if needed), Gary + Joe	Lock wireframes, user flow, and general layout.
Client Approval (@ 3 days)	Account	Creative + UX	Client	Executive Producer, Gary + Joe, DP, DS	
CREATIVE PRODUCTION					
Creative Assets Available. Build Unit in Creative Hub. (@ 1 week - 2 weeks)	Creative	DS, PA	Creative, Sperling	DP	Insert available creative assets and annotate animation direction.
Internal Concept Reviews and Revisions (@ 3 days - 5 days)	DP	Creative	Creative, UX, DS, Account, DP, Product	Executive Producer, Gary + Joe	Creative Hub and animation direction review.
Internal Conference Reports (@ 1 day)	DP	Account, Creative, Bo's/ MPA		Creative, Executive Producer, Account, UX, DS, Product, Gary + Joe	General ballpark costs for animation.
Client Storyboard and Animation Reviews (@ 3 days)	Account	Creative	Client	Executive Producer, DP, UX, DS	
Client Conference Reports (@ 1 day)	Account	Creative		Creative, Executive Producer, Account, UX, DS, Product	Client Conference Reports via Account. Creative to reply with any discrepancies. Account to follow up with Client as needed.
Internal Routing of Revised Creative (@ 1 week - 2 weeks)	DP	Creative, PA	Creative, Account, UX, DS, Product	Executive Producer, Business Affairs (if needed), Gary + Joe	Lock storyboards and animation direction.
Client Approval (@ 3 days)	Account	Creative	Client	Executive Producer, Gary + Joe, DP, UX, DS	
PRODUCTION					
Animations (@ 1 week - 2 weeks)	DP	Creative, PA	Creative, UX, DS, Account, DP, Product		Bo's or MPA to animate.
Internal Reviews and Revisions (@ 3 days - 5 days)	DP	Creative	Creative, UX, DS, Account, DP, Product	Executive Producer, Gary + Joe	DS to advise on specs as needed.
Add Assets into Unit in Creative Hub. (@ 2 days - 3 days)	Creative	DS, UX	Creative, Sperling	DP	
Client Review (@ 3 days)	Account	Creative	Client	Executive Producer, DP, UX, DS	
Client Conference Reports (@ 1 day)	Account	Creative		Creative, Executive Producer, Account, UX, DS, Product	Client Conference Reports via Account. Creative to reply with any discrepancies. Account to follow up with Client as needed.
Internal Routing of Revised Creative (@ 1 week - 2 weeks)	DP	Creative, PA	Creative, Account, UX, DS, Product	Executive Producer, Business Affairs (if needed), Gary + Joe	
Client Approval (@ 3 days)	Account	Creative	Client	Executive Producer, Gary + Joe, DP, UX, DS	
TRAFFICKING					
Final Creative Hub Links to Unified (@ 1 week - 2 weeks)	DS	Creative, PA	Product (Honda only)	Creative, UX, DS, Account, DP, ProducT	
Push Live (@1 day - 2 days)	Unified	DS, Account		Creative, Executive Producer, Account, UX, DS, Product, Gary + Joe	