



PREPARING THE PERFECT COMMUNICATIONS BRIEF

By Tom Beakbane



BEAKBANE MARKETING INC.

Going further, faster by diving deeper.

TABLE OF CONTENTS

3	Introduction
4	Background <ul style="list-style-type: none">The corporationThe visionThe productsThe historyThe consumer, markets and competitorsThe social aspects of the corporation
8	The Objectives
10	The strategy <ul style="list-style-type: none">The chain of satisfactionThe rate-determining stepWhat is the timing and the communications environment?Defining the brandBrand personality, tone and look
14	The Task, Process and scope <ul style="list-style-type: none">Task and scopeTimelines/approvalsResponsibilitiesBudget
17	Setting benchmarks
18	The briefing
20	Executorial Considerations <ul style="list-style-type: none">Advertising an promotional communicationsPackagingOnline Communications
26	Total Quality Communications

INTRODUCTION

This document is a guide for writing a brief for marketing communications. A sound brief helps in the process of creating communications that help achieve corporate objectives. Objectives can be implemented through strategic planning but they can only come to life through communications – there is no other way. No matter how well conceived the planning and strategies might be, they will come to nothing if the *communications* do not have their desired effect.

The approach taken in this guide is general and therefore it can be used for all types of projects including those that are selling tangible products as well as intangible services. It can be used by different types of companies including those selling to consumers as well as businesses. The forms of communication to which it pertains are across-the-board, including advertising, direct marketing, promotions, packaging, online communications and public relations.

Here we start with the assumption that there is a brand already in existence. In the case of a ground-up brand development project there are many questions posed that would not apply. Nonetheless this document is a useful starting point. The questions relating to business vision, the market and the consumer are in all cases applicable, the other questions can be ignored.

If you are preparing a brief, do not feel you need to answer all the questions. The best briefs are well thought out and are concise – that is they are brief! The answers to some of the questions might not be known – and might be part of the task that you need the agency to define. For instance, you might choose to define the objectives and leave the target market and the strategy open for creative thinking.

The first part of the guide relates to general questions about vision, objectives and basic strategies. The second part relates to more specific executional considerations.

You can use this guide by itself, or it might be more convenient to use it in conjunction with the Microsoft Word template which is available on the Beakbane Marketing website at www.beakbane.com/diving/briefing.html.

The methodologies that are advocated here are different from those traditionally used. They are based on Total Quality Communications, where there is a collaborative approach taken to the development of marketing communications, and the creative product is considered to be pivotal – rather than the more usual approach where the emphasis is on the strategy itself.

BACKGROUND

The best briefs are brief – however let's start by contradicting ourselves and state that when preparing the *background* there is no need to be concise, in fact it is preferable if the information is comprehensive. All participants need to understand the totality of the company, and that includes its history, the people that comprise it, the products, the markets and the distribution channels.

The background should be sizeable but that does not mean it is a lot of work to prepare – it need not be. In some cases a verbal account is best – particularly if it comes from the founder of the company. It is certainly not necessary to write up a neat summary, instead just photocopy everything you can get your hands on. For instance copy brand plans, market analyses, competitive reviews, magazine articles and so on. Also supply a list of all relevant web sites. It is quick for the agency to get a sense of the situation from all these materials and skim through those that are of only peripheral interest. At the start, no-one can predict where insight and inspiration may come from.

At the start no-one can predict where insight and inspiration may come from

The background should cover these areas:

THE CORPORATION

Summarize the history of the company and its products. Who started the company? Who owns it? How has the company evolved? How does the company view itself right now – is it riding high or fighting for survival?

How is the corporation organized? What are the divisions and strategic partnerships in this country and around the world? Who “makes the decisions” and who implements them? Who holds the rights to licenses, who needs to approve artwork and who has the right of veto?

THE VISION

Within the main body of the brief the objectives need to be defined, however it is critical to understand the broader context in which the company operates. Where is the corporation headed, or to put it another way, what is the corporate vision?

Every corporation wants to be successful but specifically how do the key business executives define success? What about the perspectives of the owners – do they share the same vision? Do they want to achieve rapid growth in sales and profitability or do they prefer financial stability? Is company reputation important? Do they want to be seen as innovators and technology leaders? Or do they want to build customer loyalty and brand value?

How do the key business executives define success?

Often the most compelling visions go beyond a simple statement about financial objectives. They take in aspects of pride, community, teamwork, professionalism competitive superiority or some higher pursuit that might have a spiritual dimension.

Getting a clear sense of the vision is necessary as one of the most common sticking points in the production of communications materials comes about when key players *assume* they share the same vision but in reality do not. The agency might believe that increased market profile and rapid sales growth are called for, when the vision of the key decision-makers is modest, risk-free growth – a vision they might be unwilling to state overtly. Do the owners see the business as a long term play, or do they want to roll the dice and cash out quickly?

Occasionally, in some companies there is a lack of vision – that is, none of the employees are very energized by what they are doing. If this is the case then it makes it almost impossible for the programs to deliver the desired sales results. Then, the vital requirement would be to try and create a compelling vision that helps galvanize the company to action. It is particularly critical that the salesforce and customer-support staff have bought into the vision and are energized by it.

THE PRODUCTS

Of course what is being sold needs to be clearly defined. That includes the products make-up, ingredients, packaging and price.

If the company makes money selling tangible products it is critical to understand their sensory aspects. What do they look like and how does the user feel when they use them? If the corporation is selling a service, the same questions apply: how are the services expressed in tangible forms and experienced by the customer? This might include the behavior of personnel, the appearance of all communications including uniforms, decals on vans and the design of corporate documentation.

When a single product needs to be promoted that is part of a larger stable of products, it is necessary to figure out its relation to the big picture. How does the product fit into the overall corporate portfolio and mission? Is it regarded as a “harvest brand” (non-growth, profit maximization) or is it a growth opportunity that has the potential to safeguard the future of the corporation?

THE HISTORY

Learning from history is critically important. Sometimes in marketing the sentiment is expressed that the *less* the agency knows the better because the past will taint them in some way, causing them to be less creative. However this

Corporations tend to have short memories of failures and so repeat them

perspective is counterproductive because it means that there is no opportunity to learn from previous mistakes and improve on techniques that *have* worked. If a fresh approach is required it is most productive to define what is considered “old” or unoriginal and then make clear what aspects are undesirable.

What programs have been successful in the past and which have not? Provide copies of recent advertising and promotional materials. Remember that more can be learned from failures than successes. Corporations tend to have short memories of failures and so repeat them.

In the same way, old research is considered to be out of date and of little use. However consumers do not change quickly so a lot can be learned from research studies no matter when they were done. What research has been conducted and what was learned? Were the results considered useful?

THE CONSUMER, MARKETS AND COMPETITORS

What are the overall trends in the market? Is purchase increasing, is it decreasing? What does the product compete with, not only the direct competitors but also other markets that compete for consumer spending, consumer time and interest?

Understand the geography. Where is the product sold? Why is it sold there? Where are the opportunities for expansion? What is the seasonality of both sales and usage?

Look at the situation from the perspective of the customer. What other purchase options do they have? You need to understand how your product compares with the alternatives, so that it can be positioned in a way that differentiates it and is not just a “me-too” product, and is in a strong position, not vulnerable to attack.

What are the key competitors doing? How do they present their products? Are they doing anything better than us that we can try and emulate? Do they have any weaknesses that can be exploited?

If the customers were going to group the products, into what categories would they split them? What are the other products they would see as being similar status or quality? How do they perceive the differences?

How does the consumer refer to the products? Jargon is often used in corporations to refer to their own products and it is easy to forget that it means nothing to everyone else. What is the language *they* use to describe the product, its attributes and benefits?

THE SOCIAL ASPECTS OF THE CORPORATION

It is helpful to take into account the human aspects of organizations. What are the departmental politics? How can you get participation in critical decisions so that key players have a sense of ownership?

What is the social ethos of the corporation? Does the management pride itself on its professionalism, its strategic abilities, its enthusiasm or its ability to run by “gut feeling”? When you are making presentations, how is it customary to structure them? Is it best to cite anecdotes or argue “strategically” and use a closely argued logic backed up by facts and numbers?

THE OBJECTIVES

The objectives are the most critical part of the entire briefing document as they provide the direction for all subsequent activity. This is the part of the brief that has to be spelled out carefully and there should be a consensus among key managers within the corporation that they are indeed correct.

Defining objectives is not easy. It is a highly *creative* act that carries with it an opportunity for leadership and nuance.

When defining objectives for a specific program here are two general pointers:

1. Define objectives that are measurable and can be used in post-evaluation. That means they should be quantifiable in some way. The most critical measure of performance is sales and profit, however often this is not an accurate measure because there are too many uncontrollable variables. See if you can find other measures that can be tracked.
2. The fewer objectives you have the better. Never have more than five. Three is OK. One is best. List the objectives in order of priority. Ask yourself, "If I achieved just this one objective, would I be satisfied?" If the answer is yes, then the objective is sound. If the answer is no, or you are not sure, try re-stating the objective so you arrive at the point where it is essential or if it is just "nice to have" you should move it into the background discussion.

On the one hand objectives should be simple, clear and measurable, however it is helpful to understand that objectives should not be over-simplified and that there are three that are distinctly different. There are *corporate objectives*, *marketing objectives* and *desired results*.

Corporate objectives

Corporate objectives are, for instance, to achieve sales of \$100 million with an EBT of \$10 million in three years. It is vital to figure out how the corporate objectives can be achieved at the level of regions, departments or individuals, and how can they be split into sales targets.

There are three levels of objectives and they are distinctly different.

In broad terms, it is useful to have everyone working to achieve the same objectives, however sometimes it is useful to present the objectives differently to different people. Say if they are overly audacious, they should be broken down into more manageable chunks to which team members can relate. It is

analogous to getting a team to the top of a mountain. If your objective was to get to the top of Everest, it would be more realistic to have the team focus on climbing Mount Washington first so they will not become demotivated when they encounter normal adversities.

It often helps to split the objectives into segments that have a defined period – in which case they are referred to as campaigns, seasonal promotions or programs. This has several benefits: It makes objectives look more attainable, it provides variety and focus for those involved in the implementation and it gives a sense of completeness once the program is over.

Marketing objectives

Marketing objectives are different than corporate objectives; they are subtler and longer-term. A key objective of all marketing communications is to define the way a product is viewed and create vocabulary for everyone involved in selling and using the product. The objective of an advertisement, for instance, might not be to merely increase sales but instead to define a suitable “positioning” for the company or product. It might also be to create metaphors and narratives that help sales people explain and sell the product.

Another marketing objective could provide a rationalization the consumer can use to justify a purchase *after* they have acquired the product. For someone who has bought a diamond ring, to be continually reminded that “a diamond is forever,” is reassuring. It confirms that the expense was justified and it also dissuades them from selling it and depressing market prices. De Beers has been supremely successful in achieving this strategy over the last six decades.

If one of the marketing objectives is to “re-position” a product, say it is perceived as being outdated. In your brief, you should ensure that directions regarding its image are illustrated with examples that define the words unambiguously. For instance the word “contemporary” is ambiguous and needs to be explained. Does it mean Martha Stewart homey? Urban black rapper? 1960’s retro? Or some other flavor of the moment? Give examples of other companies/brands/products that illustrate what you mean.

Desired response

The desired response defines what you want the target to do or think when they see the communication. If you want the target to take a specific action, like picking up the phone and calling, or logging onto your web site, ensure that the “call to action” is clear and the actions expected are convenient.

Sometimes the desired response is not considered to be an objective but is included as part of the strategy – in any event, it is a necessary part of the process of achieving corporate objectives.

THE STRATEGY

When preparing a communications brief it can be useful to outline a “strategy” – that is the “how” part of achieving the objectives. Traditionally the formulation of strategy has been treated as a logical, deductive process, however this is an anomalous perspective as successful strategies are invariably innovative. In most cases it is best to leave the strategy undefined in the briefing document, because it is best formulated collaboratively, as part of the creative process.

Much has been written about “strategy.” Most of the time the term is used to mean “logical” – that is, the program is not just “creative” but also the details have been planned and can be justified using a rationale that employs typical business logic. Most often, strategies are based on expected changes in market conditions and the anticipated moves of competitors.

So you should think ahead and plan for different scenarios, and map out the anticipated moves of competitors. How will they react to your initiatives? Are there ways of pre-empting them, or at least ensuring that your initiatives cannot be neutralized?

There is a negative aspect to this approach and that is that if you formulate company initiatives with an excessive regard for changes in the “market” and the anticipated responses of competitors it can be discombobulating – you will end up following rather than leading. Often it is more beneficial to stay close to your

customers and anticipate *their* changing situation. If the company understands their customers’ evolving needs, the relationship is more likely to remain strong.

If the company understands their customers’ evolving needs, the relationship is more likely to continue and remain strong

A focus on achieving sales by satisfying customer needs is often enough to ensure company success. Oddly, in traditional marketing this is the one aspect of strategy that is often overlooked – that is how the program will cause a lift in sales directly, not indirectly through changes in “brand awareness” but as a result of the salespeople booking bigger orders.

Key to this aspect of strategy formulation is to recognize that sales transactions are part of a complex web of interactions that at core are social. It is people that form a direct causal linkage between the company and the end consumer of the product

and every person is operating in a setting of peers, authority-figures, challengers, families and friends. In each case behavior occurs against a backdrop of an individual’s awareness of the reactions of other people. It is these dynamics – as much as they are known – that should be spelled out in the brief.

THE CHAIN OF SATISFACTION

One useful way of viewing “strategy” is to base it on a clear understanding of the *chain of satisfaction*. That is, the pathway of the transaction between the originators of the raw materials and the final consumers of the product. In a sense it is the “supply chain” but supercharged so it includes all the transactional and social components.

Everyone makes purchases with a view of how it will affect their standing with other people

It is a convenient simplification that “consumers” buy products from companies. In reality there is a long and complex chain comprised of individuals. So for instance, factory workers produce a product, salespeople then sell it to buyers, category managers then include the product on plan-o-grams, the product is then shipped to stores by delivery personnel, stock replenishers place it on the shelf, individuals then put it in their grocery cart, check-out staff collect money for it, then it is prepared somewhere and consumed by someone else.

Everyone makes purchases with a view of how it will affect their standing with other people. It is helpful to understand these complexities. Who are the immediate customers and what do *they* want? What do *their* customers want? What does the final purchaser want when they present the product to the end user?

THE RATE-DETERMINING STEP

The most critical parts of the process are the rate-determining steps, that is the steps that are holding back the flow of sales. In some cases it might be the purchasing manager for the distributor; in others it might be because the product is not being consumed fast enough in the home.

Communications and strategies can be defined with greater confidence when the chain of satisfaction is analyzed and understood. Sometimes it is more productive to target communications indirectly. For instance when promoting to distributors it is often best done obliquely; that is by creating communications that have the appearance of targeting *their* customers.

WHAT IS THE TIMING AND THE COMMUNICATION'S ENVIRONMENT?

Timing is everything. You can have a great product and a superb sales pitch but if the prospective customer is not in a mode to purchase you are wasting effort. If someone is in the situation of needing your product and they are ready to buy, then it takes little effort to close a sale.

In the brief, the factors that affect customer needs and the purchase cycle need to be defined. What are the ways you can focus your efforts to people who are ready to buy and how can you specifically target them?

The next thing is to understand the mindset of the consumer at the point when you are able to communicate with them. What are their biases, preoccupations and needs? How do they see themselves? What are the triggers that will cause them to recognize they have a need and that your product can satisfy that need?

DEFINING THE BRAND

When promoting an existing brand it is critical that all communications adhere to the look and feel of the brand. Brands have an image and personality and the more they can be reinforced, through consistent execution, the more effective the overall communications efforts over time will become.

Lots of jargon is used to describe a brand's attributes and it can be confusing (positioning, unique selling proposition, personality, tone, brand essence etc.). The most critical aspect of the brand is its "focus." There are two aspects of focus.

Positioning

The first is the "positioning," that is, the one position in the market that frames the brand in the best light. The positioning answers the question in less than four words, "what is the product?"

Let's illustrate this with a famous example. Bicarbonate of soda is a white powder. The answer to the question "what is the product?" could be that it is a "leavening agent." However not too many people bake so that makes for limited sales. When positioned as a "fridge deodorizer" there is a far bigger market. Arm & Hammer have successfully positioned the white powder in other ways: as a "carpet freshener" and a "tooth whitening agent."

All the most successful brands are built on a “positioning” that helps define them instantly in the consumers’ mind – simply and unambiguously. Think about it like this: for a product to be comprehended and registered in the mind it needs to be hung on a pre-existing peg – the peg is the “positioning.”

Never use ambiguous words like “service” or “solution” when defining the brand as they do not help the consumer find a specific peg.

Product benefit

The second aspect of focus is the product’s benefit. One method of expressing the benefit is to pick on a unique selling proposition (USP) or a key insight that differentiates the brand from the competition. What characteristics make our brand distinctive and better?

Brand focus

The positioning and USP can be rolled into one simple *brand focus* – a clear sentence that answers the question: *what is this product and what benefit does it have that makes it different and better than the alternatives?* The resulting sentence should use plain, matter-of-fact language and be believable.

The brand focus should differentiate the sales offering from those of competitors. This aspect of business strategy is the heart of effective brand development.

In the resulting brand communications, where the brand is difficult to define using plain language, it becomes necessary to invent a metaphor or icon that helps personify the benefit. Many of the most successful brands have done this. For instance the Jolly Green Giant for packaged vegetables, the walking fingers for the Yellow Pages and the bunny for Energizer batteries.

BRAND PERSONALITY, TONE AND LOOK

The single greatest deficiency in traditional marketing techniques is that consistency in branding takes a second place to “creativity.” This means that most brands never build a unified appearance or consistent character across all mediums.

For communications to be effective in the long term it is essential that a “look and a feel” for a brand is defined and then used consistently. This does not mean simply using a logo in accordance with a corporate graphics guide, but ensuring that every detail of the communication looks consistent and has the appearance of being conceived by one author.

The brand focus is the key to effective brand development. It combines the positioning and unique selling proposition.

Positioning

+

USP

↓

Brand Focus

Before a communications project is undertaken it is necessary to understand the “personality” of the brand and its sensory aspects including its visual look. Sometimes it can be useful to use visioning techniques that help describe the personality of the brand and compare it to others it competes against. The brand's personality can be defined by making comparisons to other things. For instance you can ask, “If the brand were a car, which would it be? Would it be a Cadillac, a Rolls Royce or a Porsche?” Or if it was a person, whom would it be most like. What is their personality? Would it be a long-time friend or an exciting new acquaintance? How would the person talk: serious, humorous or educated or a mix of these depending on the circumstance?

Brand value takes time to build but can be destroyed in a flash.

Recognizing the character of a brand and then enhancing it is profoundly important. Brand value exists in one place only – and that is in the mind of the consumer. It takes time to build but if mis-handled can be destroyed in a flash.

You can repeat these questions for the competitive brands. How do your products compare to theirs?

If the design of the brand has been defined in corporate design manual or has brand design guidelines these should be provided.

THE TASK, PROCESS AND SCOPE

This is the process side of the brief that allows you to manage the process and keep control of costs and ensure that timelines are met.

TASK AND SCOPE

Make the immediate task very clear. If you want something simple – just request it explicitly. For instance if you need an advertisement for the event program for the president's kid's soccer team and it can be "quick and dirty" – then make that clear. On the other hand if the project is a major corporate priority and everyone needs to be committed to the outcome then a detailed process needs to be defined and adhered to.

How can you use the program to generate buzz?

An important component of all communications, one that is sometimes under-appreciated, is that all activities need to be "merchandised." Everyone in the organization needs to know about the activity so they can support it and leverage it. How can you raise the profile of the program so it will not be lost? Management might wish to leverage it with shareholders. The salesforce might want to use it with the trade. And maybe it would make an interesting story for the press. How can you use the program to generate buzz?

TIMELINES/APPROVALS

Deadlines help motivate. Deadlines help everyone make decisions and get things done. Start with the launch date and work backwards, listing the items on a critical path.

What is the desired launch date – to senior management, to the salesforce, to the trade and to the consumer? How much time is needed for the different phases, including planning, design and production, legal and management approvals and then selling? The logistics take time, so build in adequate time for shipping.

Are there other more immediate deadlines – such as presentations at management meetings? Ensure that there is adequate time available for project approvals (it is also common to underestimate the time required for the approvals process). And don't overlook the time needed for debugging, testing, printing, and manufacturing, particularly if you are using new technologies.

RESPONSIBILITIES

A process should be put in place up front for all marketing programs. Who is responsible for different aspects of the project – is this clear to everyone?

For complex projects a cross-disciplinary team should be appointed. The different areas of responsibility should be spelled out and due dates agreed on.

Who needs to approve and will they need to be “sold”? Sometimes the hardest aspect of any project is the internal “selling.” If the activity is novel, or the communications particularly single-minded, then it may be a struggle to get everyone “on board.” The best way to get “buy-in” is to include all the key decision-makers in the process, not just at the point where you need their sign-off but earlier, so they can participate.

BUDGET

How much money is available for the initiative? If the budget has not been set, what is a reasonable minimum and maximum?

There are two approaches to setting budgets. One is to define the parameters and then ask for a quote. The other is to share the budget and work collaboratively to utilize the resources in the most effective ways.

For complex programs, with many possible variables where there is the potential for innovation, there is no alternative to working collaboratively and discussing how budgets are best spent. A close and trusting relationship is necessary for this to work optimally. For simple activities where the parameters can be defined up front, then providing quotes is practical.

SETTING BENCHMARKS

You can manage the process most easily if you define benchmarks at the outset. Determine ways to define expected levels of performance that are pre-agreed and based on comparisons that are not entirely subjective. The purpose of setting clear benchmarks is to allow the client to work “hands off” so those who are creating the communication can efficiently manage their own activities and “re-works” can be avoided.

Set benchmarks at the start so everyone has a clear idea of what constitutes desirable performance. Find examples of excellent work from other countries and other categories. In every case they should illustrate quality in different parameters – such as clarity, user-friendliness, intrusiveness, and relevance. Prioritize them and decide on which criteria are the most necessary to meet. Sometimes intrusiveness is paramount, other times it is clarity of information.

Benchmarks can also be used to illustrate unfavorable characteristics that should be steered away from.

As you go through the process of creating marketing programs make sure that you not only meet basic criteria, but more importantly, see the positives in what has been created and build on them. To make the process work you have to be open-minded, with a cooperative and constructive mindset. Note the positives and add to them, rather than the more traditional approach of directing and making decisions.

The process of setting benchmarks is an opportunity for defining management expectations so the process does not need to be micro-managed. It is also an opportunity to get excited about the potential.

*Setting benchmarks
is an opportunity for
defining management
expectations*

THE BRIEFING

The briefing document is the starting point but it should not be an anchor. The briefing meeting should be part of the creative process, an occasion for participants to become excited by the vision, to get potential issues on the table and to challenge each other. The session works best when all parties are knowledgeable, well prepared and have an in-depth understanding of the company, products, market and channels of distribution.

This document has guided you through the types of information needed to develop an effective and complete brief – however the most important aspects can not be included because they are human qualities. They are the qualities of *enthusiasm, confidence, empathy and trust*.

Everyone is most productive and motivated when they work on a project in which they believe and are excited by. A feeling of shared commitment to helping realize the vision is critical. Sometimes even trivial activities can be inspiring when they are well-led. Every project should be started with the mindset that breakthrough results that make history can be achieved.

Working as an effective team requires empathy – it helps to care about the people you are working with, and see the world in the same way as them.

In order to produce excellent marketing communications you have to use the services of experts in the creative arts. That is writers, artists, illustrators, photographers and when you are dealing with these professionals, it is helpful to understand that they are unlikely to be motivated by the business objective of selling 2,000 extra widgets. However they *are* motivated by creating superlative communications that are groundbreaking, inspiring, relevant, motivating and aesthetically pleasing.

Ask yourself how your team of creative professionals can be encouraged to turn out communications, meet your business objectives and fulfill theirs? Recognize that aesthetically pleasing communications that are engaging are more effective than communications that are clumsy, graceless and simple-minded. That means that the aspects of communications that excite the creative professional should be valued – why? Because they work.

It is important to feel confident that the information you are providing is accurate and reliable and that your business associates including sales personnel, and your boss/partners are “on board.” It helps if everyone makes clear the extent of their authority and the challenges they will face getting their colleagues on side.

Lastly, trust is key. It takes time to build and comes about as a result of honesty and a track record of delivering on promises. The business world is too demanding, complex and fast changing for there to be any room for faking. If everyone is honest and utilizes their skills and opinions for the good of the team then the results are more likely to be effective and the process fulfilling.

Trust takes time to build and comes about as a result of honesty and a track record of delivering on promises

EXECUTIONAL CONSIDERATIONS

The above questions are general, the following questions relate to more specific executional details which, if figured out by the time of the project briefing, will help the whole process to be more complete with fewer chances of errors occurring throughout.

ADVERTISING AND PROMOTIONAL COMMUNICATIONS

Sales presentations

The purpose of sales presentation materials is to enhance the ability of the sales rep to connect interpersonally with the target.

- What will the sales rep be comfortable using?
- What will suit the target best?
- Consider the process from initial planning, to booking appointments, to follow-up. How can you facilitate the process and track it?
- Most materials and direction supplied to sales people are close to useless and are ignored – how can you avoid that?

Promotions

- Retail trade or consumer?
- Who are you targeting, trade or end user?
- What is the type of activity and how will it help achieve objectives?
Contests, sweepstakes, discount or rebate offers, cross promotions, partnering, sampling, seminars, POP display, signage, dealer loaders, etc.
- What is appropriate for the segment/season/occasion?
- What are the points of leverage in the chain of satisfaction?
- How can you use minimal dollars and get others to contribute with money, merchandise or effort?
- Who is going to leverage/negotiate contra? – it takes time and skill.
- How can you make it easy for sales reps to execute?
- Is it easy for them to carry on planes/cars?
- There are so many variables that each program has to be planned carefully. Every stage has to be thought out and made simple to execute. Complexity at any stage in the execution will reduce follow-through.

Advertising

- What is the best media: newspaper, magazine, billboard, transit, more unconventional or guerrilla-like?
- Can you play up on the uniqueness of the media itself?
- Can you co-op the media with others?
- What are the technical specifications of the media?
- Who is responsible for managing the details for traffic and distribution?
- What are the ways the news media can be leveraged? How can you generate buzz?

Direct marketing

- Are there opportunities for demonstrations and free trials to bring the product to life?
- What is the most effective means of distribution: mail, email, courier, newspaper, other?
- What are the best ways to secure quality lists? Is there an in-house list?
- Are there privacy concerns/statements?
- Are there opportunities for co-op and partnering?
- The offer is critical – what is an appealing offer that will get noticed?
- Targets procrastinate and then forget – what is the best way to make the offer time-sensitive?
- Is it necessary for targets to opt out if they wish?
- What are the ways to test the offer, the list, and the execution so you can do a more effective job subsequently?
- The details of a direct marketing program are critical. Who is responsible for coordinating the details? Weights? Printing? Lists? Follow-up? Post evaluation?

PACKAGING

This section outlines some of the specific questions that should be addressed in a package design brief.

Objectives

- How similar or different should your product look in comparison to others in the category?
- What are the functional opportunities for the packaging?
- How can you maximize system-wide cost advantages such as sharing containers and closures?
- How can you maximize line speeds?
- Are there environmental and recycling considerations?

Strategy

- What are the federal, state and provincial requirements?
- What countries will the package be exported to?
- What are the opportunities for structural innovations?
- What is the priority of communication elements?
- Is there latitude to change the relative weighting required between mother brand, sub-brand, corporate signature and product descriptors?
- Does the category have any norms that if deviated from would be adverse/disliked?
- How is this category generally merchandised?
- Are there any public affairs issues?
- What are the retail channels and in-store locations?
- How will it be merchandised and will it go on displayers?
- Will a lip or shelf cover any part of the design? Sometimes the most revolutionary package innovations are structural – they can be the biggest successes and if not executed properly can be disastrous.

Technical/executional considerations

- Mandatories vary by category and jurisdiction, and they change over time – how can this be checked, and who is responsible?
- List SKUs, UPCs, weights, ingredients lists, nutrition information, kosher symbols, 1-800 numbers, and any other code numbers (such as part numbers)
- What claims, instructions, cautions or warnings are needed?
- What are the mandatory legal requirements?
- What are the mandatory corporate requirements (domicile, web site, manufacturer info)
- How will the package be printed and where?
- Managing quality of printing at a distant non-English-speaking location can be an issue – how can unpredictable results be avoided?
- What are the printing constraints?
- Will the packaging for different SKUs be ganged together?
- How many colors?
- What are the specifics of the printing process – how much can they be “pushed”? There are severe constraints in some printing processes – for instance flexo. Technical information is sometimes best handled directly between agency and the printer.
- Who is managing the printing process?
- How is the product shipped/distributed?
- Is breakage or security likely to be an issue?
- Who is responsible for ship testing?
- Dielines should be supplied with all nonprinting areas and other technical requirements shown – electronically. It is most efficient to have this provided before any work is started.

ONLINE COMMUNICATIONS

This section outlines some of the specific questions that should be addressed in a brief for online communications.

Objectives

- Is the site needed for transactions?
- How will you measure success against the objectives?

Strategy

- What is your current level of expertise with regard to online technology (servers, programmers, security experts, database administrators)?
- Do you have an information technology team that can support a web server?
- Who will develop on-going content for the site and update?
- Where will the site be hosted and who will maintain it?
- Do you have a hosting partner?
- What is the URL / IP address? Is a legal search required?
- What infrastructure engineering projects are in progress or planned that may influence the development of the site?
- How will the site be promoted and generate traffic?
- Do you have existing data about visitors' behavior?
- What do you already know about the behavior of the traffic you want? (e.g., how long do they sit? what sites do they visit?)
- Is further research needed on "usage behavior" to document how your target user behaves?
- How will visitor data be collected? (names, addresses, contact information, etc.)
- How much traffic is anticipated and who will analyze the data?
- How will you track and log user statistics and behavior?
- Does the content and design of the site incorporate diverse elements such as sound, images, links, animation, to enhance navigation and reinforce your key message?
- Are there geographical legal issues related to the site (countries/regions, language, legal jurisdictions)?
- Are there legal concerns with copyright or laws in jurisdictions other than your own?

Technical/executional considerations

- What is a typical user's connection speed, hardware configuration and browser version?
- Define maximum acceptable page download times
- Are there any current browser-support guidelines? Netscape (which versions), IE (versions), AOL (which versions), PC/MAC/UNIX, PLUG-INS (Shockwave, Flash, Real Audio, etc.)
- Do you have an Internet server on site?
- What is the server platform and operating system?
- Who is your service provider?
- What level of Internet connectivity do you have?
- Do you have access to your own server logs?
- Do you know how many hits your server gets daily?
- What is the expected traffic?
- Is there a separate server for e-mail?
- What kinds of Internet software are you running on the server?
 - Networking configuration
 - Operating system and version
 - Web server and version
 - Database(s) if available and version
 - Server-side scripting languages supported
- Are there other application servers (e.g., e-commerce)?
- Is there access to development, staging and/or live server?
- If so, how do you get an account (telnet, ftp, admin.)?
- How is content staged prior to going live?
- How is content moved from staging to live?
- Should the site be tied to a legacy system or existing database?
- Is code already developed or do you need to create code?

TOTAL QUALITY COMMUNICATIONS

The process of developing and judging marketing communications is critical to the success of companies and the development of valuable brands. It is an extremely demanding and high skill business because what worked yesterday may not work tomorrow. Customers are always changing and competitors are angling to displace you.

Traditional methodologies are no longer adequate, and just as in manufacturing new management techniques have been adopted, so too should they be in marketing. Much can be learned from the manufacturing industry in terms of effective processes, particularly from the techniques of *kaizen*, that capitalize on teamwork, pride, dedication to the task, and personal virtuosity. The resulting processes are known as *Total Quality Communications*.

For further discussion on linking strategy to creative, using research and evaluating marketing communications please go to www.beakbane.com/diving. For further details on *Total Quality Communications* and how to implement it in your organization please email tom@beakbane.com or call 416-787-4900 x232.