

# The Marketing Brief

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When you are working with a client, you must understand that what the client initially asks for is a potential solution to a business problem. We tend to focus on promotional strategies as a panacea for the problems. Much of the time, I've observed, that marketing communication firms tend to focus on the tactics instead of having a clear understanding of the problem and subsequently developing strategies to solve the problem.

In your account service role you need to develop your knowledge about each of your clients. Once you have the knowledge, you are entitled to form certain opinions about how they operate and go to market.

If you are going to position yourself in an advisory role, you must understand that business problems come in all shapes and sizes. Here are some basic areas where problems occur:

The client's organizational structure. Of course, I'm not telling you to change their structure, but you have to understand how the company is organized, who reports to whom and the relationship between departments, division, subsidiaries, and more. You need to know this so you can "navigate" the organization.

Product and Services. You'll need a very clear understanding about each group of products and/or services the client offers. You'll need to know the history of each and what the plans are for the future. You just need to get involved and get really interested in what they are trying to sell, and to whom they are trying to sell.

You'll need to know which offer the greatest cumulative sales and profits. There just doesn't seem to be a lot of need to focus on minor line-items that produce little, unless it is newly introduced.

You will also need to know where the product/service is in its life cycle because *where* it is helps determine much of the content to the consumer. Educating the consumer about is critical in the early stage; differentiating between client/competitor offerings is critical as more providers enter the expanding market; where the consumer can get the product/service is the message as more providers have entered the market; and, lastly, if it is in the maturity stage, price seems to be the overwhelming attractor because of the commoditization that has taken place.

Distribution. You must know how they go to market. Is it direct to the consumer? Is it through their own sales force – to the consumer. Is it through independent manufacturers' representatives? A combination of both? How does it get to the retailer (if at all)? The good news is that every time the offering passes through another level, there is an opportunity for you to help. If you're working on fixing business problems, you will find a lot of them emanate from the distribution channel.

Financial goals. Businesses run on dollars. Don't kid yourself, this is all about the money. Most problems can be monetized. In other words, a problem creates a measureable cost. When you know the financial objective that will fix the problem, you can usually compute the return on the client's investment in the solution.

Customers: You'll need a good understanding of the different customer groups. You need to know the demographics, psychographics and geographic segments. What are the appeals to the primary and secondary (if any) group? You will certainly need to know who are the influencers, the buyers and the users to craft the proper solution.

Competition: You do need to know almost as much about each of the competitors. No football coach has gone to play a game without assessing the strengths and weaknesses of his opponent. You need to do the same, and like the head coach, you can't really relegate all the decisions to the position coaches. You need to have the research, then assess it, listen to recommendations, and then put together the strategic plan on where, when and how to attack the opposition.

When you become conversant in these areas, you're pretty much ready to be able to give advice on how to solve the client's problem. And, don't be too hasty to recommend what your company can do. Recommend the solution, and then coordinate putting the pieces together.

A simplified brief, I call the Marketing Brief can be found at the end of this section on page 8.

## Clarifying Your Purpose

What is the business problem that the client wants to solve? What does your client want the project or campaign to accomplish? How do you feel about that, and how are you going to explain it to the agency team?

If you want to achieve maximum impact, then it's not enough to say that what you and the team are creating is just "about" the client's product or particular service. What does the client want your work to accomplish? By helping the team understand the client's needed results, you give the agency's work direction and power.

## Identifying Your Objective

You should be able to state the client's business objective in a single sentence. The client may feel he/she has multiple intentions, but by forcing him/her to choose one primary purpose, you'll be setting their top priority and giving your client a precise focal point by which the marketing and creative departments can target the copy and design decisions.

When stating an objective, it's most effective to define it in active terms; put a strong verb in your statement. For example:

- Does the client want to sell something?
- Does the client want to promote a company image or rally for a cause?
- Is the client trying to teach prospects how to use a product?
- Is the client's intention to serve their readers with reference materials?
- Is their purpose to invite people to an event?

Avoid vague verbs such as "to tell," which could apply to almost anything. Also avoid abstract terms that center around adjectives, such as "to be the best" or "to be exciting."

The problem with adjectives is that they tend to isolate the client in a posture, or attitude, rather than connecting them to their audience in a dynamic relationship. A good objective defines desired results they can observe or measure. The more physical and observable your client's

objective is, the easier it will translate into design ideas and the better it will lead to clear, potent communications.

### **Background / Introduction of the business problem**

You'll need to tell your team what the current situation is and what challenge the team needs to address.

### **What is the objective?**

What do you expect the marketing tool to achieve – meet or exceed specific goals? What are they? What are the primary and secondary objectives? Monetize each?

### **Is there a specific budget for the project?**

How much of an investment is the client willing to make, or, what is the desired return on investment?

### **What is the key message?**

What is the ONE thing you want the audience to remember after experiencing this marketing tool? What are the support points for the key message? What makes the key message true?

### **Who is the consumer? One, two, three segments?**

Tell us who the target audience is. If it is a segment within one of your client's primary audience groups please indicate what makes this audience unique. Tell us about their personality, what they respond to, and what tone should be used to reach them.

### **What is the call to action?**

What do we want to audience to do? (Go to the website, call 1-800 #; complete a response card, etc.) Please provide the URL, email, phone numbers and mailing address where applicable.

### **What is the Reward?**

This would be your response if the audience asked, "What's in it for me?"

### **How will we reach the Audience?**

Describe in detail your message distribution plan? What has the client suggested that the team should know?

### **Are there any mandatories that need to be included?**

"Mandatories" might be logos, phone numbers, legal copy, signatures, etc. (Even though these may be on the server, or used on previous projects, the mandatories must be spelled out in detail. It is possible changes were made since the last project was completed.)

## **Mapping Your Tactics**

Once you and your client have established their primary objective, it can be helpful to set some secondary goals, which should function as tactics for achieving their objective. (Don't make the mistake of simply listing additional intentions; these goals should support their one, central objective.)

To establish your tactics, you must ask yourself and the client three important questions. The answers to these questions will help you make decisions about the most important messages and

appropriate tone. Keep answers to one simple sentence for each question. After reviewing your completed project:

1. What do you want the audience to understand?
2. What do you want the audience to feel?
3. What do you want the audience to believe?

For example, if the primary objective is to sell a digital phone, your sales tactics might be to make your readers:

- ... understand how your innovative chip-set delivers a clear, static-free signal; feel exclusive that once they own this digital phone - the best digital phone available that includes a digital personal assistant, complete with wireless web capability; and believe that using this phone, not only helps them be better at their job, but it helps them stay in touch in case of an emergency.

On the other hand, consider how different your design might be if you chose a different set of tactics for that same objective. You might decide to make your readers:

- ... Understand how many calls they may be missing with other phones; feel they had to spend more to own a separate digital personal assistant; and believe that their career is in jeopardy if they don't buy your digital phone.

Once you've answered the understand-feel-believe questions, ask yourself a fourth question, whose answer should always be in the front of your mind as you work with the agency's team to design the client's project: What action does the client want their readers to take?

For example, if the client's objective is to sell a product, what exactly do you want the audience to do immediately after viewing the publication/ad/website, etc.?

Do you want consumers to pick up the phone and order now? If so, the phone number should be placed prominently in the publication. Do you want them to go to the store and purchase the item? If so, the store name and address should be easy to see. Do you want them to spread the message and tell their friends? If so, you may want to use a direct call to action.

There used to be a shampoo ad that specifically told viewers to tell two friends who would tell two friends, and so on and so on. That ad was tremendously successful, and it's a perfect example of how a tactical goal can shape a creative concept. Good viral marketing strategy, too!

## Targeting Your Audience

Who are you talking to? Knowing what you want to accomplish is not enough; you must also consider what your readers-want, how they feel, and how they think. For example, if your goal is to sell candy, imagine how differently you would present your product to teenagers versus adults, especially adults with concerns about weight control. Or, maybe you're selling your candy to snack distributors for use in vending machines, and they care about price and length of shelf life. Knowing your audience is critical to setting tone, writing headlines, selecting pictures, and organizing content.

If you're not sure who the client's audience is, there are ways to find out. Talk to customers or clients who represent the audience you want to reach. Get information from interviews, focus groups, or surveys. The library and the Internet are gold mines of information. If you don't have hard data or the time to gather it put yourself in the readers place and use your intuition.

Let's say your client operates a small concert hall. How would the design and content of an ad, a poster, or a program change for the different audiences that various kinds of music attract?

As with setting your objective, it's best to narrow the audience for your publication to one primary target. You may also want to name a secondary audience, but you need to know which group takes top priority and make sure you're speaking their language.

Specific vs. General: As a rule, specific works better than general. A common misconception is that by communicating in indistinct or "generic" terms, you'll be able to reach a broader audience. In actuality, when you define your audience as everyone in general, you're likely to reach no one in particular.

To plan for your audience, address the following considerations:

Demographic profile: As much as you can determine and as much as you believe is relevant for your purposes, define your audience in terms of age range, gender, marital status, level of education, income, types of occupation, religious and political beliefs, even hobbies and recreational interests. There are rarely absolutes in defining a group by demographics, but consider the percentages and look for trends.

For example, the product you are selling may be appropriate for both men and women, but statistically, do more women or men tend to purchase this type of product? Perhaps research indicates that women are the primary purchasers, but you still may choose to target the untapped market in men; the importance is in knowing to whom you're speaking and why.

Attitudes: What are the consumers' opinions about the product or subject? It can be helpful to write a statement for yourself, and on the client's behalf that represents the beliefs and behavior of your target audience in terms of your objective. For example, if you're selling oil changes, how important is a trouble-free auto to your audience, how do they feel about it, and what are their preventative maintenance habits? A publication targeted toward people who change oil every 3,000 miles, maintain a thorough oil-change regimen, and believe they can make a difference in their automobile's performance would be quite different from one aimed at people who are careless about getting their oil changed regularly or consider poor auto performance an unavoidable fact of life.

Knowledge: What do your readers already know about the topic? Are they experts or are they new to the subject? A publication targeted toward opera buffs, for instance, would be very different from one for a first-time audience, especially if your readers fear that opera is difficult to understand or pretentious. If you're offering something that provides a solution to a problem, how well does your audience understand the problem? If you're selling a "breakthrough" product, how well does your audience understand the technology? Understanding your audience's knowledge level will lead you to the correct level of sophistication or simplicity. It can be self-

defeating to talk down to an educated audience or to talk over the heads of beginners (and remember that "talking" is done visually as well as with words).

Points of resistance: What are the possible obstacles to your achieving your goal?

- Is your audience indifferent, unsympathetic, or even hostile to your message?
- Are you challenging people's established opinions?
- Are you competing with a popular or highly respected brand?
- Is credibility an issue?
- Is lack of adequate understanding an obstacle to people appreciating your product or message?

The answers to these questions will help you decide how to make your point. For example, you might pose a question in big, bold letters to provoke indifferent readers, or include an entertaining cartoon to defuse resistance from negative readers. You might use conservative colors, dignified art, and high-quality paper to inspire confidence in skeptics.

Circumstances: Under what conditions will your message be read? If you're designing an ad for the side of a bus, the size of the elements and the few seconds you have to deliver your message call for a very different design from that of a mailed ad. But, keep in mind that while your reader might have more time to read the mailer, it's competing with other mail for attention, so the design of the mailer must be as arresting in its small way as the bus ad is in its big way. Also, will your publication stand alone or be supported by other publications or presentations? For example, are you creating a newsletter that will be mailed along with a company brochure? Will your brochure be presented by a salesperson or left on a kiosk for anyone to pick up?

### **What is your client's profile?**

- Just as you need to consider your audience if the client is to communicate effectively, you also need to be aware of their own identity and what's appropriate for the image they want to project.
- What defines the demographics they represent?
- What attitude do they want to convey?
- What's their area of experience and level of expertise?
- What are adjectives that describe their personality?

For example, is the client's company a bunch of young, hip guys setting way-cool snowboards?

Are they a group of highly intelligent, seriously studious scientists working to save the world from disease? Are they a collection of beautiful and glamorous women selling fabulously expensive cosmetics?

Once you've composed their identity statement, translate it into visual ideas.

- What color suits their image?
- What shade of color is most appropriate? If they had to choose a mascot, what animal would they want to represent them? (You may not include an actual animal image in their work, but having an animal in mind can lead the creative team to fluid, curvy, catlike lines, for example, or big, burly, bear-like lettering.)

- What type of music would they want associated with their organization?
- Is there a particular period in history or type of art that expresses their style or point of view?

# MARKETING BRIEF

Agency Management Roundtable LLC

Job Number

Client Name

## What is the client's business objective?

Tell us what business objective the client is trying to meet. What role will the agency and the program or project have in meeting those objectives?

## Project History

Is this a new project or is it a revision of a previous project? Will you be using this piece as a companion piece to other materials? (Please attach a sample of the previous work or companion materials if applicable.)

## Background/Introduction to the ISSUE

Tell us what the current situation is. What is the challenge that this marketing tool needs to address?

## What is the OBJECTIVE?

What is this marketing tool expected to achieve? (Meet or exceed specific goals? Increase impressions? Increase prospect calls, etc?)

Primary objective:

Secondary objective:

## What is the Key Message?

What is the ONE thing you want the audience to remember after experiencing this marketing tool?

What are the support points for the key message? What makes the key message true?

- 1.
- 2.
- 3.
- 4.

## Who Are We Addressing?

Tell us who the target audience is. If it is a segment within one of your client's primary audience groups please indicate what makes this audience unique. Tell us about their personality, what they respond to, and what tone should be used to reach them. (Please provide research if available.)

Primary audience profile:

Secondary audience profile:

## What is the Call to Action?

What do we want to audience to do? (Go to the website, call 1-800 #; complete a response card, etc.) Please provide the URL, email, phone numbers and mailing address where applicable.

## What Is the Reward?

This would be your response if the audience asked, "What's in it for me?"

## How will we reach the Audience?

Describe in detail your message distribution plan? What has the client suggested that the team should know?

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# THE CREATIVE WORK PLAN

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*“Without a strategy, advertising belongs in the theater of the absurd... provocative, ambiguous, interesting...but what’s it all about? How can you sell anything repeatedly without a strategy?”*

*David Ogilvy*

## **Procedure: How to Use the Work Plan**

You will find many parallels in the information contained in this plan and the Marketing Brief. However, most Creative Work Plans are written for overall campaigns and brand presentation projection. This is a document that pretty well describes how all the communication materials are to be standardized creatively.

### **Who Should Write The Plan?**

It should be written by the Account Executive with the client input and in concert with the Creative Director -copy. Creative staffers should be involved in developing it since the primary purpose of the plan is to guide creative personnel. Yet, the Account Executive must plan a major part in the writing since he is most intimate with the market and product facts critical to creative strategy development.

### **When Should the Work Plan Be Written And Approved?**

The Creative Work Plan is not written until after a marketing brief has been agreed to by Client and Agency. Creative Work Plans may be included as part of the strategy review document but they are not required.

It should always be written before creative work begins It should also be approved before creative work begins: by the management supervisor, and always by the client responsible for the project approval. This saves more time that it takes. It saves false creative starts and wasted enthusiasm, saves client misunderstanding and disappointment saves lengthy debates during clearance of communication. It should be reviewed prior to any presentation of executions.

### **When Should The Work Plan Be Reviewed And Possibly Changed?**

A good creative strategy should have permanence. It should represent a basic direction. It should allow a variety of Executional approaches. It should not be changed by whim.

At least once a year it should be reviewed and reevaluated in consultation between creative and account management and client.

It should be reviewed, and probably changed, when: the product changes, the market changes, the competition changes, the communication climate changes, OR when there is sound creative reason to change, either an Executional problem, or a new Executional opportunity.

### **When Do You Need More Than One Work Plan?**

If a product has more than one important market, or seasonal factor, or different media opportunities, two (or more) work plans may be required.

Two clear separate statements are better than one fuzzy catch-all.

The Importance of Brevity and Clarity. A good creative Work Plan should be only long enough to state the relevant facts...never more than a single page. And it should be clear enough to narrow down to the best prospects, the key consumer benefit, and a single-minded reason why.

Better creativity should be the result...because the prime purpose of the Creative Work Plan is: "To set creative people free...in the right direction."

## The Need for a Creative Work Plan

The function of the Creative Work Plan is to eliminate one whole area of debate on proposed communication by establishing prior agreement between Client and Agency as to what the communication should be trying to accomplish.

There is wide agreement on the importance of creative strategy, but little agreement on what creative strategy is. The purpose of the Creative Work Plan is to achieve that agreement by:

- Defining creative strategy and establishing the terms and terminology which will be used.
- Standardizing a way of thinking and working on creative strategy.

### The Creative Work Plan: A Definition

The Creative Work Plan consists of the essential building blocks necessary to construct a coherent and persuasive communication message.

It is a diagram. A set of war plans. An architectural blueprint. It is a complete guide to where the creative effort should be directed. It doesn't tell you "how". But, it does tell you "what".

It is a process of logical thought in which each step leads to the next, so the creative department has before it a clear outline of the task. Why this discipline? Simple. "A problem, well stated, is half solved."

### The Basic Elements

There are four elements in the Creative Work Plan:

1. A statement of the KEY FACT, based on an analysis of all pertinent facts.
2. A definition of the PROBLEM the communication must solve in light of this key fact.
3. A statement of the COMMUNICATION OBJECTIVE which stems from the problem.
4. The CREATIVE STRATEGY itself, divided into its essential elements. To this may be added any MANDATORIES that are essential to creative direction.

### Key Fact

A single-minded statement that sorts out from all the information about product, market, competition, etc., the element that is most relevant to communication. For example, here are some key facts that could pertain to specific strategies:

Recent research indicates that the major reason engineers do not specify the client's flexography printing presses is because of poor maintenance records.

Many exciting new developments in the paper converting industry have made our client's particular process less of a buying factor with the end-user.

Although our client is the leading brand in their basic market, latest population figures show that market segment is becoming smaller.

Most groups of people, both users and non users, have no clear image of what our client's product really is.

According to Nielsen, the introduction of a heavily advertised competitive brand is taking away many of our client's regular customers.

What is indeed "key" about the Key Fact is that it is a fact upon which communication can act. It may involve product performance or product improvement. It may refer to a consumer attitude or usage pattern. It may revolve around competitive activity. Be sure it impacts on communication.

Economic activity or share changes may be helpful to know, but unless it impacts on communication, leave it out! The key fact is not a laundry list of information... it is the one or two most important facts.

### **Problem the Communication Must Solve**

This should grow out of, and be directly related to, the key fact. It can be a product problem, a market problem, an image problem, but it is always problem communication can help correct.

The problem is never the high cost of ingredients, or federal regulation, or distribution or low communication budget.

Here are some examples of problems related to the key facts cited earlier:

- Our client's brand is expensive to maintain.
- Our client's converting process is not the most cost effective.
- Our client is not getting as much use as they could within their basic market segment.

All the end user knows or cares about is what he sees in the commercial or ad or collateral materials. The commercial, ad or collateral materials must deal with his/her concerns. The problem is the end-user's problem -not a manufacturer's problem. It is an attitude or a perception of some behavior on the part of the end-user ... behavior that reflects his use of the client's product(s).

The problem the communication must solve grows out of its key fact.

It is always stated in terms of the end-user. It is not what the product needs— more sales, more saliency or more shares. It is what the end-user needs and something that communication can influence.

## Communication Objective

The communication objective is a clear, concise presentation of the effect you hope the right communication tactic will have on the end-user (consumer)... what it hopes to accomplish in terms of end-user (consumer) attitudes or actions... to solve the stated problem. Often it is a positive “action” plan of a stated problem.

The communication objective is what the cumulative effect of the communication program should achieve.

Its function is to indicate, in general terms, the overall net impression the communication is to communicate. It is also a fuller explanation of the key consumer benefit—somewhat more detailed—of what it is you want the consumer to believe based on the benefit you are promising.

The objective should not be to gain awareness or to increase share. Those are media and marketing objectives. It is something that affects or impact on the consumer’s attitude or usage habits.

Usually it is to get consumers to:

- Change Ideas. For example, to revise their idea about an “outdated technology.”
- Change Brands. To be convinced of the superiority of our client’s brand versus their competition.
- To Use Our Client’s Products More Often. To use disposable patient gowns for every patient visit, not just when x-rays are taken... to use motion detectors for convenience in the office setting, and not just for home security.
- To Use the Client’s Product in a New Way. To use Ace’s Colossal Bowls for taco salads and fruit bowls instead of limiting them to ice cream usage.

## The Creative Strategy

The Creative strategy consists of four elements. These are the prospect definition, principal competition, key end-user (consumer) benefit, and the reason why.

### Prospect Definition

See the marketing brief. The prospect definition is a meaningful characterization of the client’s prospect that will help creative (not media) develop a properly focuses message. Ideally, the prospect definition goes beyond mere demographics. It is not enough to say “men 34-55 who are engineers in the paper converting industries.”

This doesn’t do much for a writer. To write communication personally directed to prospects requires more than zip codes and salaries. We need the psychographics interests of the prospects in order to understand their needs and wants, their hopes, fears, insecurities, vanities.

The prospect definition should characterize the prospect in terms of demographics, product usage and psychographic. Here are some good examples that go beyond demographics:

- “Medium and light users of disposable patient gowns who now buy only when the gowns are on sale.”

- “Distributors are more concerned with customer service than product quality as the customer is considered a ‘guaranteed’ user.”

### **Principal Competition**

The principal competition is a clear, crisp statement of the arena in which the client’s product or service will do battle. The competition should go beyond a listing of competitive brands/ companies. It describes the source from which your claim will be judged...the segment of the total market which the client’s brand/ company will be positioned against.

The principal competition defines the market segment in terms of source or sales, competitive environment and area of positioning.

- “...will be positioned against heavy users of disposable gowns, not against drape sheets, table paper rolls, or disposable garments in general.”
- “...cake cones and waffle cones, which while satisfactory cones, do not provide the nutrition or taste attributes of the new Ace Baking Colossal cones.”

### **Key End-User (consumer) Benefit**

The key consumer benefit is the heart of the Creative Work Plan. It is the best argument the brand/product can offer the consumer in light of all the information available.

The key consumer benefit is one well-honed, well-aimed, well-thought-out communication that triggers the desired action by the prospect.

It is the primary message to be communicated and any ad / commercial / collateral’s effectiveness should be evaluated to a significant degree, on registration of the key consumer benefit.

Every effort should be made to phrase the key consumer benefit in terms of a benefit, not a product attribute.

- “It is not the strength of the paper, but the colors used in the print pattern.”
- “It is not the fastest re-winder, but it consumes the least energy and requires the least maintenance.”
- “It is not the most powerful particulate incinerator, but the protection and confidence the user gets.”
- It is not the product improvement -whether it’s thicker, faster, longer, lighter, and cheaper. It is what the improvement will do for the consumer.
- In writing the key consumer benefits, there are four guidelines:
- Ideally, it should not be a product attribute, but a consumer benefit.
- It should be as competitive as possible.
- It should, to the best of your judgment, have the ability to motivate the consumer to a desired way of thinking and behaving.
- It should not be stated in the actual language of communication or communication terms. It is not “copy”. It should be expressed broadly enough so that creatives have freedom on how best to convey the intent. At the same time, it should be precise enough to prevent any misinterpretation.

## **Reason Why**

The reason why grows out of the promise and directly supports it. Most likely the reason why will be the product attribute or attributes that make the key consumer benefit believable and persuasive.

Guidelines for writing the reason why are:

- Strive to list only a few key reasons why and not a catalog of information about the product.
- The facts should be prioritized. The most important one should be first to be sure it receives appropriate attention in communication.
- All facts you include should be usable, meaningful, believable statements of support for the product claim.
- If there is no product reason why, authority and persuasiveness can sometimes be borrowed from company reputation or consumer testimonial or celebrity endorsement.

There is one optional element of the Creative Work Plan to be used only when necessary.

## **Mandatories and Policy Limitations**

These are any restrictions or client data which are necessary to clear understanding of creative direction. For example:

- Legal cautions
- Carry-over of a successful slogan
- Items of line to be featured
- Type of casting that is acceptable
- Corporate tags

There are two elements which do not belong in the Creative Work Plan:

1. **Tone and Manner Statements.** As usually written they are meaningless. If the rest of the strategy is clear they are unnecessary and confusing. Tone and manner of your communication grow out of the brand's personality, an intimate understanding of the prospect and product positioning. If unusual circumstances make a tonality statement imperative, it should not be put under the "mandatories" section.
2. **Executorial Phrases and Descriptions.** They should not be defined in a strategy. If a strategy is strong, it should be able to be executed in a number of ways. Executorial guidelines serve only to restrict creative exploration of the problem.