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Marketing and Advertising Planning for Nontraditional Media

This chapter will look at how nontraditional media is used in both marketing and advertising. Additional discussions will define how a marketing plan is used in advertising to develop a creative brief that will eventually define the brand's visual/verbal voice.

Working Together: How Marketers and Advertisers Define Business and Creative Direction

In this chapter, we first define and outline the differences between advertising and marketing, how they routinely interact with each other, the role of marketing in the advertising process, and how advertisers interpret the business of marketing. Next, we discuss the role research plays in the development of both a marketing plan and creative brief and how each lays the groundwork for the development of a creative idea that sells, resonates with the target, and delivers a consistent and long-lasting message. Understanding how all of the aspects of the business and communication process work together: 1) helps the advertising team understand how the marketing plan lays the foundation for the visual verbal message, 2) lays out for the advertising team what the client wants to accomplish through their advertising efforts, 3) helps the client understand the metamorphic change from marketing plan to creative brief, 4) outlines the creative process for the client, and 5) educates the client on the time, effort, and costs behind last minute changes or imprecise direction.

Being aware of how each team approaches a stated problem is the first step to successfully reaching the intended target audience with a message that triggers their interest and ultimately their reaction. To accomplish this, it is important that students of advertising and marketing, as well as small business owners not only know the ins and outs of their own professions but how each element affects the other. It is simple to reduce any process down to the business and communication or who works for whom, but it's a lot harder to understand how each role or task affects the overall outcome or finished product.

It is not unusual that many people interacting with both professions are confused and uncertain about just exactly what the differences are between marketing and advertising, so let's begin with a few definitions. The American Marketing Association (AMA) defines *marketing* as "the activity, set of institutions, and processes for creating, communication, delivering and exchanging offerings that have value for customers, clients, partners, and society at large."

Advertising, on the other hand, uses a promotional set of vehicles that the sponsoring brand employs to persuade, inform, educate, entertain, and remind in order to build a lasting relationship with the intended target. It almost exclusively uses paid forms of nontraditional and mass media vehicles to clearly and creatively identify the sponsor of an advertised message.

After reading both definitions, it is not surprising people still don't understand the differences between advertising and marketing. Don E. Schultz in his book *Essentials of Advertising Strategy*, clarifies the differences even more when he says, "marketing is all those factors which go into the sale of a product or service such as price, distribution, wholesale and retail support, plus advertising and promotion" (Schultz, 1996). "Advertising," Schultz goes on to say, "consists of only two basic parts, the creative product or message and the medium or method used to get the message to the audience" (Schultz, 1996).

Despite their definitions, advertising and marketing are two professions that have a long history of successfully blending business with creativity. Advertising is probably the best known aspect of marketing, but the reality is that advertising is only one aspect of the marketing process. At its core, marketing is all about: 1) the conceptualizing of a product or service based on research gathered, 2) the development of the product or service, 3) using advertising to promote the product or service, and 4) sales. It is the goal of advertising to use research to develop a creative and brand-unique visual/verbal message, and to use one or more media vehicles to successfully promote the brand product or service.

Marketing Is the Product or Service

A marketer is the company who produces a specific product or offers a specific service to the public. The individual who works as the liaison between the brand or the specific product or service and the advertising agency can be known by many titles but the most common are brand manager, marketing manager, and business or communications manager. This individual is responsible for creating a marketing plan or the brand's business plan of action for the forthcoming year.

Depending on the requirements and the overall size of the company producing the brand, it is the brand representative's job to act as a bridge between the company's upper management, any inside and/or outside advertising agencies, and other involved departments in the company, such as development, customer service, and distribution.

These diverse and combined company and agency efforts then educate everyone on what the brand can do, what the target wants, what competitors are doing, and so on. Input and cooperation between departments and outside agencies helps develop a consistent visual/verbal message throughout all internal and external communication channels and helps to build a strong loyal consumer base.

Although advertising first ignites awareness and may encourage trial, consumer loyalty has very little to do with advertising and a lot to do with product quality, and level of customer service. It cannot overcome inconsistent or poorly made products or rude or incompetent customer or technical service representatives. Creating and maintaining strong relationships is essential for a successful marketing plan. Many businesses consider *customer relationship management* (CRM) as an important part of their day-to-day business practice. Relationship marketing makes it easier for marketing and advertising efforts to focus on those individuals most likely to purchase the designated product or service, to design products or services that address that specific target's needs and wants, and to reach those selected individuals with a customized message.

It is not the job of the marketing department to write copy or stage a photo shoot. However, it is the role of company marketing: to approve all creative before it goes public in any form; ensure all visual/verbal messages are cohesive; strategically accomplish the marketing and communication objectives; and focus on a specific feature and benefit, or a combination of features and benefits, that strongly promote the product or service offered.

It is important that the brand manager be very clear to all involved parties about what needs to be accomplished. It is equally important that the advertising team keep the brand manager informed about any changes or

problems that may arise while the visual/verbal message is in development. If all elements are not constantly updated, indecision and second-guessing become a part of the final approval process, ultimately resulting in often expensive and time-consuming changes.

Changes are inevitable, even if the client was actively involved during the campaign's development. Most changes are inconsequential, while others may require major design alterations, especially if the client changes or dislikes the final visual/verbal look of the campaign. Deadlines for publication and production dates do not change based on client changes, so it is important for the brand manager to understand that any drastic changes made late in the design schedule must be made within the existing timeframe.

Advertising, the Visual/Verbal Voice of a Product or Service

When a brand needs to reach a large number of consumers belonging to no particular market segment, advertising is the best way to deliver the message. It's the brand's visual and/or verbal voice that reflects the times in which we live and catalogs our history of consumption, attitudes, beliefs, and social norms. Advertising not only sets trends and reflects social and cultural influences, but also it can induce change. For example, by using science to prove certain foods can lower cholesterol, it can influence what people buy and how they eat. Additionally, advertising must constantly reflect what is happening locally, nationally, and internationally, as well as being economically and politically relevant to the target.

Advertising is only one piece of the marketing puzzle. Its job is to visually and verbally bring the brand to life, by publicizing its attributes and tying those attributes to the target's lifestyle so that the brand becomes important and significant to them. Advertising is also responsible for developing a promotional and media mix that strategically reaches the target wherever they are located. This is both a time consuming and expensive process, but when done right, advertising can propel a product or service into the limelight. The ability to talk to the target in a language they understand, about a problem they have, is the essence of advertising.

To ensure the success of a brand, the advertising must:

- Creatively and accurately promote a company's product or service,
- Increase sales,
- Actively develop and maintain both the brand's identity and image,
- Launch new products or services,
- Announce updates or improvements to existing products,

- Make a product stand out among the competition, and
- Encourage buzz.

Good advertising is more than a creative visual/verbal message; it's about knowing who the target is and knowing what they want. Messages that help the target accomplish something—satisfy a need or want, or solve a problem—are more successful than any single brilliant idea that doesn't achieve anything.

In its simplest form, advertising is the art and science of reaching the correct target with the correct message, at the right time and place. And to do that effectively requires having a media vehicle and a creative idea that the audience is not expecting in order to ensure that they see and respond to the message. When advertising is successful at accomplishing all of the steps defined above, then it should be viewed as an investment. However, if even one of these steps misses the mark, it becomes an expense.

Although advertising's form and delivery methods have multiplied and changed over time, "Many a small thing has been made large by the right kind of advertising," said Mark Twain, and never has that been truer than in today's multimedia, target-fractionalized world (Twain, 1889).

The Working Relationship Between Advertising and Marketing

The main objective of both advertising and marketing is to build awareness for a product or service, to build consumer loyalty and brand equity, and to increase sales.

To do this effectively, the brand manager (client) works with the account management or account executive (advertising) to coordinate what the company wants to achieve over the next six months to a year and to produce a creative campaign designed to achieve those goals. It takes a team of advertising professionals to bring an advertising campaign to fruition. Typically, there are three very distinct components to an advertising team: account management, creative group, and media group. The account manager is the liaison between the agency and the client. He or she develops the creative brief, advises team members on what needs to be accomplished, and presents final creative direction to the client. Along with the client, the account manager may attend brainstorming sessions, approve changes to strategy, media, copy, and layout. Typically, the two may also attend production meetings, photo and television shoots, and approve ads.

The advertising creative team is composed of at least one copywriter and one art director. Each is responsible for developing a consistent visual/verbal

message that is on-target, on-strategy, and memorable. The advertising media team includes at a minimum one media buyer and one media planner. Their job is to plan for and buy the media vehicles that reach the target, at the right time and place.

The remaining team members might include, for example, specialists in public relations, digital, guerrilla or direct marketing, and sales promotion, depending on the promotional mix employed and the direction of the overall campaign. Aside from using these outside agency groups, many large corporations have their own in-house agencies that design and write copy for only their company brand(s). Additional projects that require advanced skills have to be delegated to freelancers or to the advertising agency of record.

In the past, it was not unusual for the partnership between a marketer and their agency of record to last decades; the agencies often knew the company brand almost as intimately as the client, which resulted in many memorable agency campaigns. However, today's relationship between a marketer and agency is no longer an intimate one; it is less secure and more temporary, with the average working relationship usually lasting only four to five years.

One of the reasons for a more strained client/agency relationship is the fractionalization of media options, or the movement from a limited assortment of traditional or mass media vehicles to the inclusion of a multitude of diverse nontraditional options. In order to ensure the best results and to capitalize on the multiplicity of choices, many marketers have become more comfortable employing multiple agencies that specialize in traditional, non-traditional, direct marketing, sales promotion, and digital options, to name a few. Because communication between these different agencies is often minimal, it is critical that the brand manager ensure everyone involved in the campaign is on the same page with the content, timing, delivery, and business goals of the message.

An online *Advertising Age* article titled, "Why the Client-Agency Bond Just Isn't What It Used to Be," quotes Bill Duggan, executive vice president for the Association of National Advertisers: "There are always peaks and valleys in relationships. Before, clients were more willing to ride out the valleys because they knew that the peak was around the corner. Unfortunately, brands don't value agencies as much as they once did" (Parek, 2011, para. 8). However, this trend may be changing, according to a recent research poll appearing in the August 8, 2011, online *MediaDailyNews*, by Steve McClellan, entitled "CMOs Using Less Agencies, More Collaboration." The poll was commissioned by the digital communications firm The Horn Group and conducted by Kelton Research and shows that marketers are looking at reducing the number of agency collaborations for simplification and better management and

supervision, while acknowledging the difficulty of finding a fully functional all-purpose agency. Additionally, many marketing executives reported that multiple agencies do not always work well together, even though over half of those surveyed acknowledged that most of the problems originated within the company and not with the agencies.

Telling the Brand's Business Story

The brand manager, research, and the marketing plan all help the advertising team understand the product or service, the target audience, and the overall objectives that any communication efforts are to address. Once this information is conveyed, it is the advertising team that first converts the marketing plan into a creative brief and then into a visual/verbal message that educates, entertains, and sells.

Let's begin by looking at how marketers determine how to integrate a systematic approach to developing products and services that fit and enhance the target's lifestyle, address their individual needs, and assimilate the entire marketing effort. Each step helps develop the final visual/verbal message, beginning with research and ending with a detailed marketing plan that the advertising team uses to develop a creative brief.

The Role of Research in Marketing and Advertising

Before any product can be developed, sold, or integrated with a creative message, both marketers and advertisers must determine who will ultimately purchase the product and what kind of trigger(s) can activate a purchase. What is happening in the marketplace that might negatively or positively affect product development? What are competitors doing? How does their brand compare to your brand? What does the intended target think of the brand and/or any additional brands your company might currently offer? What needs to be said, shown, or demonstrated? Where will the target most likely see the message?

The questions asked and research gathered depend on the product or service offered, its life cycle stage, economic conditions, and what competitors are offering and saying in their advertising efforts.

Research for both the marketing and advertising teams is conducted in basically the same manner. The major difference is in the desired information extracted from the research. Marketers focus on the marketplace and how it affects the brand, target audience, and their competitors. Research helps to build competitor and target profiles, establish target behaviors,

suggest the appropriate type of advertising and promotions, as well as assist in determining pricing and distribution issues. Advertising research, to identify just a few objectives, focuses on the brand's role in the lifestyle of the target, determines what the competition currently does or does not say in their advertising efforts, and assesses what the competition currently delivers within the brand category and the brand's position in the target's mind compared to the competition. In their pursuit of answers and opinions, marketers and advertisers rely on quantitative, qualitative, observational research, and focus groups. Let's take a quick look at each one.

Quantitative Research

Deductive research, also known as *quantitative* or *primary research*, is original or new data that is gathered by either the marketing or advertising team. This type of research uses a large sample of respondents in an attempt to find the answer(s) to a specific set of questions.

Quantitative data is very specific about its objectives. Usually, it employs the use of controlled response surveys where there are a finite number of responses from which participants can choose their answers. There are two types of surveys: formal and informal. Formal surveys are most often employed when the survey taker wants to know how the respondents feel about something or requires responses to be ranked in some kind of categorical order. This type of survey typically uses closed-ended questions where participants choose from a predetermined set of responses, such as strongly agree, agree, disagree, and strongly disagree. Informal surveys are used when there is no definitive answer solicited or you want the respondent to give an opinion in their own words. These surveys often yield a great amount of quotable material, which can be used in later testimonials.

Qualitative Research

Qualitative research, also known as *inductive* or *secondary research*, uses existing data and/or small groups of respondents to gather information that will not be analyzed using statistical techniques. This type of research assists in pinpointing any past trends or significant changes, or trends that are currently occurring in the marketplace, and to identify any emerging opportunities or threats to the brand. Rather than using predetermined responses, it allows participants to freely give their opinions to questions asked. Qualitative techniques may also employ the use of surveys, one-on-one interviews, or focus groups. The use of observational techniques also falls under this qualitative research umbrella (e.g., where shopping, television, or Internet habits are surveyed to determine brand perception or target audience usage).

Focus Group

Although the client supplies the majority of research, agencies often need to isolate the target's opinion on any number of topics such as their knowledge about a brand and competing brands, as well as receiving feedback on copy, layout, packaging, and so on.

A *focus group* is usually made up of 10 or 12 members of the researched target audience, who are asked to interact with the brand or its advertised message in a controlled environment. Participants are asked to openly discuss a series of topics or respond to a set of questions that are prepared in advance. The session(s) may be conducted by the agency's creative team or by an experienced moderator, usually in an environment where both the client and advertising team can watch the proceedings through a two-way mirror. To ensure honesty, it is important respondents are secure in their anonymity. Anyone participating in the focus group who is interested in the results should receive a copy on completion of the research. Opinion-generated research is a great way to collect and decipher demographics, psychographics, and business data in order to improve both the product and advertising visual/verbal messages.

Each type of research method is designed to define a problem or to understand the participants' knowledge, attitudes, and beliefs about the product or service. Research reveals that when honest reasons are given for the research gathering, the less intrusive the research seems to potential respondents.

Business and Communication Plans

Marketers and advertising agencies work with a clearly defined plan. Marketers lay out their sales objectives in a marketing plan. Advertising agencies use a creative brief to plan their communication objectives in order for the marketing plan to be successful. Business plans make certain that everyone is on the same page and that directions are clearly communicated to all involved parties.

The Marketing Plan

Very basically, a *marketing plan* is a company's business plan of action. It is often a hefty sales-related document that varies in scope depending on the size of the company. Its purpose is to detail what the brand wants to accomplish, usually over the next fiscal year. Each plan is implemented based

on a detailed analysis of the target to be reached, competitive brands, the marketing objectives or goals the company wants to achieve, what strategy or tactics will be implemented to achieve the objectives, as well as budget issues and evaluation tactics.

The look and scope of a marketing plan varies by brand and/or company, so finding a traditional format or outline is difficult. However, a typical marketing plan might include the following: 1) executive summary or mission statement, 2) target market overview, 3) competitive review, 4) product and/or business review, 5) situation analysis using SWOT/SLOT (Strengths, Weaknesses/Limitations, Opportunities, and Threats), 6) marketing plan objectives, 7) marketing strategy, 8) performance analysis and implementation schedule, and 9) evaluation methods. Let's take a very brief look at each one.

1. **The Executive Summary or Mission Statement.** Although placed first in the written order, the mission statement is often written last, after all research has been gathered, analyzed, and detailed. It presents a brief summary addressing each of the sections found within the plan.
2. **Target Market Overview.** The target market or target audience is the group that marketers aspire to reach through their advertising efforts. This section involves identifying and profiling potential primary and secondary buyer groups in order to understand: who they are; why they buy; what characteristics define them as potential buyers of a product or users of a service; how the product or service fits into their lifestyle; and the profile of their buying patterns.

Marketers will use the research gathered to analyze and accurately describe the target most likely to buy their product or use their service. In order for advertising efforts to talk to the target in relatable and understandable language, analysis breaks the target down into four different market segments, including demographics, psychographics, geographics, and behavioralistics.

Demographics deals with characteristics such as age, gender, income, marital status, level of education, and number of children in the household, to name just a few. This type of information helps marketers and advertisers alike speculate about how this group makes purchase decisions. For example, a young married couple with two children is more likely to buy a minivan or SUV than a sports car. These statistics also define the type and size of the message delivered. For example, for consumers age 48 to 65 years of age, ad copy might use a slightly larger type size and include more detailed copy in comparison to an ad targeted to the young married couple above.

Psychographic data focuses on the target's lifestyle, attitudes, activities, and interests, and how this information affects the target's views on product repurchase. This data determines if they are loyal to a particular brand or open to new products or trends, how the product or service affects their lifestyle, if it fulfills a rational need such as food, or an emotional want such as jewelry or expensive electronic gadgetry. As the advertised message becomes more individualized and interactive, advertisers and marketers are increasingly finding that psychographics is a very powerful resource. For example, research consistently corroborates that using a target's age alone shows no direct correlation between purchases and media viewing habits.

Understanding a target's lifestyle often defines where they reside geographically. *Geographics* are used to determine where the target lives regionally, with additional breakdowns by state, city, and even zip code. Where a person lives also reveals a lot about how they live. For example, people living in northern climates will rely less on air conditioning and more on heating options than those living in Florida or the Deep South. Where a person lives increases the ability to isolate cultural influences that can affect purchasing decisions, such as finding more Hispanic groceries or restaurants in larger multicultural cities throughout the United States. Geographic profiles can also be used to gauge the type of media vehicles and events that the target is exposed to on a regular basis.

Behavioristics or behavioristic segmentation is basically a combination of all target data that help to determine the reasons why a person buys and how they purchase. Do they buy on a whim or are they more prone to research before buying? Are they brand loyal? Do they spend time browsing in brick and mortar stores or do they do most of their buying online or through catalogs?

These basic segmentation profiles can be used in any combination to influence creative direction and to select the most appropriate media vehicle(s) to deliver the marketing message. The target may also be segmented by usage patterns, economics, marketplace opportunities, or any other relevant segment based on the brand's overall business objectives. Segmentation can also be based on purchase behavior—for example, whether the target makes self-purchases (primary) or purchases on behalf of another (secondary).

The *primary market* refers to the users/consumers currently using the product or service or those who are likely to use the product in the future. The *secondary market* encompasses those users/consumers most likely to purchase the product on behalf of the primary audience or those who influence the purchases of the primary audiences. For example, commercials for the Apple iPhone may advertise its cool features to high school kids, but the price generally requires a parent or grandparent's purchase before the

primary target can own it. To reach this secondary audience, it requires a different creative message, strategy, and media mix than the advertising directed at the primary audience.

3. **Competitive Review.** Once the target has been identified, research is used to analyze how the competition positions itself within the market category, identifying any shared or unique product features that may or may not be associated with other brands, and classifying current advertising, packaging, media use, and so on. A breakdown of competing attributes assists both marketing and advertising to determine ways that the product or service can set itself apart in some memorable way from the competition.

This section in the plan thoroughly outlines who the brand's closest competitors are, or those who offer a similar product with similar attributes. It is also a good idea to look at products that may not actually be similar to the product but offer a variation. For example, if you sell coffee you are also competing with other types of coffee: decaf, flavored coffees, instant coffees, and coffee beans.

4. **Product and/or Business Review.** This section lays out the details of the brand, such as use, price, features, positioning in the brand category and in the target's mind, current advertising and promotions, and packaging and distribution channels.
5. **SWOT/SLOT Analysis.** This section looks at the strengths and weaknesses of a product, service, or company, and any external threats and opportunities presented. Each is closely examined in order to determine a market strategy. The analysis helps the marketing representative predict the direction of the marketing activities, the current status of the brand or company, and future projections. The selected direction often depends on several factors; therefore, it is necessary to review other factors within the marketplace that might affect the marketing efforts and strategy—for instance, the current social and political atmosphere, any technological advancements, or competing brands. Advertisers look closely at the SWOT analysis to help determine the ideal strategic direction for the visual/verbal message.
6. **Marketing Objectives.** This section, usually written in terms of sales goals, describes what the brand or company wants to accomplish within a certain time frame, typically for one year. This is where the executive summary or mission statement is fleshed out into achievable actions or objectives, and eventually into results or goals to be reached.

Under this heading you find both sales and marketing objectives. Sales objectives outline goals to be achieved such as profit margins, advertising, distribution channels, and targeted markets, as well as the ways that sales

initiatives will be achieved. Marketing objectives are measurable, time sensitive goals that look at what a brand or company is attempting to achieve with its marketing activities. Marketing objectives also determine the expectations for each target segment based on the advertising message (this includes existing and new customers).

After the target has been selected, the marketing objectives outlined, the current and desired positioning for the company, product, or service determined, then the next step is to determine the best way to strategically implement the marketing strategy.

7. **Marketing Strategy.** This section outlines the tactics to use in the marketing mix to accomplish the stated objectives.

The marketing mix is the specific type and number of vehicles that a company uses to control, orchestrate, and accomplish its business objectives. The four Ps of product, price, promotion, and place (or distribution) make up what is known as the *marketing mix*. All elements of the mix must work together in order to successfully facilitate a relationship between the buyer—the targeted audience—and the product, company or service—the seller. Very basically, the marketing mix entails all the steps a company employs in order to efficiently drive a brand into the marketplace while executing the marketing strategy. The marketing mix needs to deliver a quality driven product or service that reinforces the company’s position and successfully continues to build consumer loyalty and brand equity, as well as accomplishing the stated marketing and financial objectives. Because advertising today is so consumer-focused, many marketers have added a fifth P—people—to the marketing mix.

- **Product.** Product or services’ tangible attributes—for example, features, packaging
- **Price.** Price paid for any product or service affects how it is marketed
- **Promotion.** Deals with any method of advertising or promotion
- **Place or Distribution.** Refers to where a product or service can be obtained
- **People and/or Personnel.** Includes anyone—outside target or inside personnel—who uses or comes in contact with the product or service as well as the competence level of customer contact points

A well-researched, well-developed marketing plan ensures each of the five P’s has been thoroughly addressed in the overall plan.

Basic marketing strategies employ two fundamental types of marketing principles, “push” and “pull.” Marketers decide to use either a push or pull strategy as a way to encourage purchase or the use of a product or service. Each strategy type reaches different consumers. For example, a *pull* strategy

is most commonly used for promoting consumer products and targets those consumers most likely to buy the product or use the service. The targeted message is often delivered using advertising, sales promotion, and direct response to “pull” the target in or nearer to the brand. A *push* strategy, on the other hand, focuses its messages on members of the distribution channel such as retailers and wholesalers. It is their job to “push” the message to the consumers.

It’s the controllable combination of all the “P” elements that make up the whole of the marketing pie. The level of control depends on the internal environment of the originating brand and external perception. Each decision surrounding the five P’s should be consumer-focused in order to establish a value-driven position in the target’s mind as compared to the competition.

8. **Performance Analysis and Implementation.** This section is a type of media plan that outlines what specific vehicles will be used in promotional efforts. This will become more finely tuned when dealing with the brand’s advertising agency. It consists of three specific areas: Budget, performance analysis, and implementation schedule. The budget section outlines the cost to carry out the projected marketing plan as well as outlining the expenditures necessary to accomplish the plan’s objectives. The implementation schedule is the marketing plan of action; it contains a timeline of when specific tasks will be performed, the responsible parties for the tasks, and the overall financial implications. The performance analysis outlines the expected results and financial impact of the plan.
9. **Evaluation.** This section very simply looks at what is working and what is not. What should be continued and what should be tweaked or completely discarded (see Fig 2.1 at the end of the chapter for a sample marketing plan).

From an advertising perspective, before the visual/verbal solution can be found and before developing the creative brief, the account management team meets with the client to review the marketing plan in order to thoroughly understand the client’s strategies and objectives for their advertising or communication efforts.

Advertising, the Marketing Plan, and the Development of the Creative Brief

Once the advertising team understands what the client wants to accomplish, the account executive assigned to the account uses the marketing plan as a template to develop a *creative brief*. The brief is the first step in

the communication process. The creative and media teams, along with any nontraditional media suppliers, use the brief as a springboard to determine what communication activities need to be accomplished. It is the creative brief that outlines how advertising efforts are to achieve the business directives laid out in the marketing plan.

This small one or two page internal agency document keeps all team members on-target and on-strategy throughout the development stage. Although there is no set length for this brief, it has a large mission: It redefines the primary and secondary target audience; sets communication goals; outlines individual brand features and their benefits or relevance to the target; determines a key consumer benefit, also known as a big idea or unique selling proposition, that is emphasized throughout the campaign; highlights the competition and basic brand positioning; determines a tone of voice; and, finally, outlines tactics. It is the document that summarizes all the information the advertising team needs to define the visual/verbal message. Think of it as a roadmap that helps the advertising team to find the best concept or idea, and to guide the target with a message directed to initiate their response.

The creative brief is built from solid research; it does not generalize or speculate, nor does it determine the look or sound of the creative element. Its job is to ensure that everyone working on the campaign, including the client, understands all objectives that need to be met.

Elements Contained Within the Creative Brief

Similar to a marketing plan, the content and format of a creative brief varies by agency but usually contains a mixture of the following: 1) target profile, 2) communication objective(s), 3) product features and benefits, 4) competitive outline, 5) product positioning, 6) key consumer benefit, 7) creative strategy, 8) tone, 9) support statement, and 10) tagline or slogan and logo.

1. **Target Profile.** The creative brief takes a less detailed look at the target than the marketing plan. However, the same four categories that applied to the marketing plan are just as important: demographics, psychographics, geographics and behavioralistics. The advertising team uses the information they have about the target to determine the overall message, and the media team uses the data to determine media placement.

Research on the target informs both the client and the agency about how the target buys, their level of brand loyalty, their purchase reasons, and the best media mix required to reach them, as well as helping solidify the best visual/verbal message to inspire the target to action.

Larry Percy discusses in his book *Strategies for Implementing Integrated Marketing Communication* (IMC) that to further increase sales the target audience can be divided into one or more of the following four groups: a) New brand category users. The message should encourage trial based on specific features and benefits, b) Brand loyal users. Message should encourage expanding current use, c) Brand switchers. Message should feature reasons why target should switch permanently rather than wait for a promotion, d) Consumers loyal to other brands. Message should compare and contrast features against a competitor's brand (Percy, 1997).

2. **Communication Objectives.** Communication objectives are the attainable goals advertising efforts need to accomplish. Highly structured campaigns focus on one to three objectives. Most objectives focus on what consumers should think or feel about a brand or what advertising efforts should motivate the target to do. To effectively achieve such a goal advertisers need to know the extent of the target's knowledge about a brand. This sometimes requires a quick look at the brand's life cycle in order to determine the brand or product stage and whether to assess, review, update, highlight, or reinvent based on the stage.

Communication objectives look at the size of the target audience to be reached, how often they need to be exposed to the message for recall and action, and the type of interaction required.

3. **Product Features and Benefits.** This is a short list of product features such as size, colors, uses that are unique or inherent to the product and their relevance or benefit to the target. Although features are important, it's benefits that catch and hold the target's attention and ultimately sell a product.
4. **Competitive Outline.** This section briefly outlines the brands that are in direct competition with the client's brand. It is important to know what competitors are saying and showing in their advertising as well as in their package or product design, in order to ensure that the client's brand is not following what others are doing but setting the standard in the brand category.
5. **Product Positioning.** Positioning looks at how the target perceives competitors' products as compared to the client's brand. It is not unusual for this section to include focus group or other feedback gathered by advertising researchers, such as survey collection, or observational sessions, to name just a few. This section uses information gathered to carve out and create a unique brand position in the target's mind. Most brands are not unique to any one product or service category, so it is important to find a new use or to focus advertising efforts on a feature to make it unique to the brand—this feature might be inherent in all category brands, but the competitors are not using this element in their advertising. This type of approach forces competitors into a “me too” category. It takes more than one advertisement to build

up a distinctive position; this individuality develops a unique persona and fortifies a distinctive brand identity as opposed to the sameness presented by competitors within the brand category.

6. **Key Consumer Benefit.** The key consumer benefit (KCB) is the one feature/benefit combination that is either unique to the brand—known as a *unique selling proposition* (USP)—or can be positioned as unique through creative advertising efforts, known as a *big idea*. The KCB is that one feature/benefit combination that research has shown is important to the target. Because of this, it drives the campaign's visual/verbal message. It is featured in headlines, demonstrated in visuals, and defined in copy as well as is the centerpiece in promotional events. This key selling point may or may not have been identified in the marketing plan but was later identified as important during subsequent advertising research, so it is important the client buy into the reasoning behind the focus on this particular feature/benefit combination. Because of its relevance to the target, it must speak directly to their interests and reflect their lifestyle in such a way that it encourages the desired action outlined in the communication objectives.

Ways to determine the KCB:

- List one or two features and benefits unique to the product or service.
- Does the product or service fulfill a rational or emotional need for the target?
- What can the product or service do that competitors are either not pushing in their advertising or that the competitive product or service physically cannot do?
- How can you strategically deliver these differences and still accomplish the communication objectives?
- Know the reasons why your target would use your product or service or switch from their current brand.

Brands lacking a unique selling proposition should avoid using vehicles employed by the competition. Duplication can affect memorability, retard growth, and greatly affect ROI. Brands with a truly unique feature, stronger image, or with a larger share of equity in the category, which are focusing efforts on the same or a similar target as the competition will stand out when placed within the same vehicles. Mass-produced brands in categories with a large amount of product parity often require more advertising to compete in a brand category, and thus require a bigger budget in order to stand out, gain, and retain market share.

7. **Creative Strategy.** Strategy refers to the tactics that will be used to accomplish the communication goals. It tells the creative team the best way to talk to the target, exploit the key consumer benefit, position the brand in order to effectively stand out from competing brands, and how to assure that the brand is top of mind when repurchasing. Most strategies focus on either the brand or the consumer and determine whether an emotional or rational appeal will be employed.

Strategies also are influenced by the brand's life cycle stage. A brand-based strategy builds up or focuses on an existing brand personality for the purpose of building or reinforcing a relationship with the target. A consumer-based strategy will focus on the brand's benefits to the targeted audience.

8. **Tone.** The tone section of the brief defines the personality and overall tone of voice the advertising efforts employ. The choice of tone depends on the key consumer benefit and the determined target audience. Once the direction of the creative effort is determined, it is important to decide how the information is to be delivered. There are basically two types of tones used in advertising, emotional and rational. The difference between an emotional and rational approach depends on the content delivery. For example, an emotional tone can use sex to sell the product or service or employ testimonials that use humor, whimsy, threats, or even reprimands, to name a few. A rational tone, as expected, uses facts, employs a technical or scientific approach, or can be authoritative or instructional, to name just a few. Whatever the tone applied, it must be the unifying element between the target, key consumer benefit, and the strategy.
9. **Support Statement.** Often the brief also promotes a support statement or another important feature/benefit combination that is used to support the key consumer benefit.
10. **Slogan or Tagline and Logo.** Most logos are accompanied by either a slogan or tagline. Wherever used, these three to five word statements can usually be located either above or below the logo. A *slogan* can be used indefinitely and is most often tied to company philosophy or overall mission statement. A *tagline*, on the other hand, is temporary and is usually tied to a current campaign. A *logo* is a product, service, or corporate symbol. It appears everywhere the brand or company is seen. It can be a single line of text, a simple graphic, or a combination of the two (see Fig 2.2 at the end of the chapter for a sample creative brief).

It is important that the creative team adhere as closely as possible to the creative brief in order to accomplish both the marketing and communication goals. However, based on research there can be times when the brief needs to be overhauled in order to reflect new attitudes, image, use, and so on.

Nothing happens to a product, a service, or any advertising message until both marketing and advertising have a solid direction shaped by the assembled research. Research is the first step each team must undertake before the brand manager can develop a marketing plan or the account manager can develop a creative brief. Working together, they define the target, their needs, wants, and lifestyle, what competitors are or are not doing to respond to these needs, what media vehicles can reach the target where they work, play, or live, and send an active message that initiates a reaction from the target.

A thorough understanding about the target, marketplace, brand, economic and cultural or social trends ultimately helps the creative team

develop a creative direction and helps marketers with increased sales, and ultimately builds brand equity.

Chapter 2 Exercises

1. Break up into groups of four or more. Divide one half of the group into the marketing team and the other half into the advertising team.
2. Using a new or existing marketing plan for a national brand, develop a creative brief for that product or service.
3. Members of the advertising team must present, defend, and sell the direction laid out in the brief and explain how the directives presented in the marketing plan would be accomplished. Additionally, both teams must discuss how and why the business/creative direction is different from the competition's.
4. Create or use a second marketing plan for a small business. Then create another brief, but this time, reverse the advertising and marketing roles.

Memory Box

Marketing

Advertising

Marketing Mix

Unique Selling Proposition/Big Idea

Qualitative Research

Quantitative Research

Marketing Plan

Demographics

Psychographics

Geographics

Behavioristics

Primary Market

Secondary Audience

Creative Brief

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1. Executive Summary
2. Market Overview
 - a. market segmentation
 - b. target audience profile
 - c. primary audience breakdown
 - d. secondary audience breakdown
3. Competitive Review
4. Product and Business Review
5. SWOT Analysis
6. Marketing Objectives
 - a. sales objectives
 - b. marketing objectives
7. Marketing Strategy
 - a. product
 - b. price
 - c. promotion
 - d. place or distribution
8. Performance Analysis and Implementation
 - a. media plan
 - b. budget
 - c. implementation schedule for media plan
 - d. performance analysis
 - e. people
9. Evaluation

Figure 2.1 Sample Marketing Plan

1. Target Profile

2. Communication Objective(s)

3. Product Features and Benefits

4. Competitive Outline

5. Product Positioning

6. Key Consumer Benefit

7. Creative Strategy

8. Tone

9. Support Statement

10. Tagline or Slogan and Logo

Figure 2.2 Sample Creative Brief

