

The Copy Workshop

Strategy Seminar

Based on work done for
Apple Computer

*“In business as on the battlefield,
the object of strategy is to bring about
the conditions most favorable to one’s own side.*

*In strategic thinking,
one first seeks a clear understanding
of the particular character of each element of a situation
and then makes the fullest possible use of human brainpower
to restructure the elements in the most advantageous way.*

*Phenomena and events in the real world do not always fit a linear model.
Hence, the most reliable means of dissecting a situation into its constituent parts
and then reassembling them in the desired pattern
is not a step-by-step methodology
such as systems analysis.*

*Rather, it is that ultimate nonlinear thinking tool,
the human brain.*

Kenichi Ohmae, “The Mind of the Strategist.”

Your Objective

is to make your work more effective
and to make the way you work together with others more effective.

Our Strategy

is to help you improve the process by sharing our experience.

The Tactic

is this seminar
and a few pieces of paper we picked up along the way.

Definitions:

Effective communications depends on a common vocabulary.

Here are commonly accepted definitions of important words and concepts:

Mission, Objective, Strategy, Tactics = M.O.S.T.

Mission - Principles by which a company is run.

Some companies are founded on Mission Statements, but, for the most part, they tend to be written after the fact. Mission Statements can also change over time.

As an example, Apple's recently stated mission was: *"Our goal is to put Macintosh computers in the hands of as many people as possible."*

In this case, their Mission Statement was also an Objective Statement.

Objective - A specific task to be accomplished.

P&G believes that objectives should be: Specific, Measurable, Achievable and Compatible (with other objectives and policies). The P&G acronym is "SMAC."

Defining Objectives is key to good Strategies. An example of an Objective Statement for a marketing strategy might be: *To double unit sales of low-end computers next quarter.*

Strategy - How you will meet an Objective.

There are many types of strategies: advertising strategies, communication strategies, marketing strategies, promotional strategies, and design strategies, to name a few.

There are often alternate strategies available even when the objective is clear.

Example: *Our strategy will be to: a.) increase advertising, b.) offer price-off incentives, c.) provide easier financing, d.) lower the retail price, e.) some or all of the above.*

The chosen strategy tends to be the best hypothesis as to how to meet the objective. Sometimes this is based on experience, sometimes not.

When something is "on-strategy" it conforms to the hypothesis. When it is "off-strategy" it may fail to meet the objective or it may represent an alternate hypothesis.

Tactics - Specific planned actions that execute the Strategy. Ads, sales materials - the whole range of marketing communications tools are tactics. So is a sales call.

Example: *Advertising materials featuring Mac Classics starting at \$999.*

Strong strategies beget strong tactics. A mediocre execution of a correct strategy is better than an excellent execution of an incorrect strategy. In theory.

Key Fact. (Y&R Creative Work Plan) Based on analysis of all pertinent facts, the key piece of information that defines the business problem.

Problem - In this context, the specific issue that marketing communications must overcome to meet our objective.

Much of the work we do in developing Strategies is aimed at overcoming Problems.

In the Y&R Creative Work Plan, they look for *"The Problem the Advertising Must Solve."*

Solving that problem usually becomes the Objective.

Example: *People perceive Macintosh as too expensive.*

Mandatories. Legal requirements or other aspects of corporate policy.

Example: *Macintosh is a registered trademark of Apple Computer, Inc. Classic is a registered trademark licensed to Apple Computer, Inc.*

Target Talk.

Target (Target Audience, Target Consumer, Target Customer, Prospect)

The person most likely to buy or influence purchase.

The person at whom the marketing communication is usually aimed.

Demographics. Specific quantitative facts about the target: age, income, etc.

Psychographics. Qualitative information about the target, sometimes based on quantitative information, sometimes based on smaller qualitative studies, sometimes based on considered judgement. Life Style, attitudes, etc.

Usage. Information based on use of product, product category or competitive products.

Examples: *Bi-focal wearers, users of Lotus 1-2-3, etc.*

Attributes, Benefits, Features and Laddering.

Much Strategic discussion focuses on the Benefit that a Product offers the Target.

Sequencing these factors is called "Laddering."

Here are generally agreed upon factors listed bottom to top:

Attribute (Product Attribute) Characteristic of Product, usually inherent or natural.

Applesauce comes in wide-mouth glass jars.

Product Feature (Feature) Aspect of Product, usually based on some manufactured or designed aspect. *Applesauce spoons smoothly out of the jar.*

Product Benefit. A benefit to the consumer, usually based on a Product Feature or Attribute.

Applesauce is easy to serve.

Customer Benefit. (Consumer Benefit) A benefit to the consumer, usually based on how the Product Benefit delivers a positive result to the consumer. *I save time and my children get extra nutrition (which they enjoy), because I serve Applesauce.*

Values. The human dimension reinforced by the Benefit.

I'm a good mother because I serve Applesauce.

Laddering is the process of moving through this sequence.

The general method is to ask people why is that Feature (or Benefit, etc.) important and the answer generally moves you to the next level of the ladder.

A continuing issue is where to stop on the ladder - because, carried to extremes, every food product reinforces nurturing values, every business product allows us to "be our best."

Generally, the farther down the ladder you are, the more product specific your message. The higher up the ladder you are the more you are dealing with the consumer's life and the less you are dealing with and differentiating your specific product.

This is a major area of strategic choice.

Debate and re-examination are ongoing.

Other Terms & Terminology

Support, Tone & Brand Character

Strategies usually have a Support or "Reason-Why" section, generally indicating the reason that the product delivers the selected benefit.

Support - Facts or information that support the claim or benefit stated in the Objective section of the Strategy.

Examples: *Mac Classic. \$999.00 _____ Apple Sauce. In the Easy-Serve Jar.*

Reason Why - a specific reason that a product delivers a benefit or that proves an advertised claim.

Permission to Believe - a piece of information, factual or otherwise, that allows a person to believe the delivered benefit or advertised claim.

"Nine-Wheel Logic" Type of Support which seems to prove a point, even though it doesn't.

Example #1: *"Daddy, why does the train go so fast?" "Because it has all those wheels."*

Example #2: *New colors are sometimes added to a product to symbolize a new ingredient or feature which may be colorless and technically difficult or uninteresting to explain.*

Advertising strategies often have Tone, Brand Character or Tone & Manner Statements designed to describe and define qualitative aspects of the brand or the advertising.

Brand Character. This is a statement about core values of the brand itself.

Examples: *Macintosh is friendly and easy-to-use.*

_____ *Apple Sauce is nutritious and easy-to-serve.*

Tone (Tone & Manner) This is generally a statement about the kind of advertising that will appeal to a certain Target in a certain product category.

Examples: *Advertising will appeal to competitive executives.*

Advertising will appeal to mothers concerned about their children's nutrition.

To date, people tend to have one or the other (sometimes neither).

Multi-product marketers might consider an overall Brand Character statement for the company with Tone statements appropriate to different Target Audiences.

Some Important terms with varying definitions:

Event Marketing. 1. Marketing an event. 2. Treating advertising or promotional programs as events.

Position. 1. Place product resides in mind of consumer (Trout & Ries - *"Positioning. The Battle for the Mind."*) 2. Also used to describe relative position (or place) in market.

Positioning. 1. The process of determining the correct position. 2. The process of achieving that position in the marketplace.

Re-Positioning. 1. Changing current position in market or mind of consumer.

2. Changing the advertising.

Strategy Format Review:

To understand the strategy development process and then develop a Strategy system of your own, let's look at some of the best models available - a collection of materials from a number of advertising agencies and two marketers - P&G and GE.

The P&G "Copy Strategy Memo"

The Original Y&R Creative Work Plan

A Guide to Correctly Completing a "CWP"

(+ Strategy Selection Grid)

Y&R "7 Questions"

GE Focus System

JWT Brand Strategy/Creative Brief

DDB/Needham "R.O.I. System"

Leo Burnett Strategy Worksheet

BBDO Philosophy & Procedures

Others:

FCB Creative Brief

Ogilvy & Mather Creative Brief

Generic Creative Strategy Worksheet

Beber & Silverstein 4-Step (Strategy Review)

CM-E Creative Blueprint

Isidore & Paulson Work Plan (Y&R)

NobleLink (Dual Audience)

Tracy-Locke - 6 Elements (P&G)

Chiat/Day & Account Planning

Next Steps:

Culture and Procedures

A Two-Step Format:

Bibliography and Disclaimer

P&G Copy Strategy Memo:

A copy strategy is a document which identifies the basis upon which we expect consumers to purchase our brand in preference to competition.

It is that portion of the marketing strategy which deals with advertising copy.

The fundamental content of a copy strategy emerges directly from the product, and the basic consumer need which the product was designed to fulfill.

A copy strategy should state clearly the basic benefit which the brand promises and which constitutes the principal basis for purchase.

While not mandatory, the strategy may also include:

- A statement of the product characteristic which makes this basic benefit possible.
- A statement of the character we want to build for the brand over time.

PURPOSE OF A COPY STRATEGY.

The copy strategy provides guidance and direction for a brand's advertising.

The copy strategy should be considered a long-term document, not subject to judgement changes.

The copy strategy provides guidance and direction for the agency's creative people. It prescribes the limits within which an agency is to exercise its creative imagination, while being sufficiently flexible to allow latitude for fresh and varied executions.

The copy strategy provides the company and agency a common basis upon which to evaluate and discuss the merits of an advertising submission in terms of intent and idea content.

A clear copy strategy can save a great deal of creative time and energy, because it identifies those basic copy decisions which we do not intend to review and rethink each time we look at a new piece of advertising.

CHARACTERISTICS OF A GOOD COPY STRATEGY.

Here are some of the things which characterize a good strategy statement:

- **It's clear.** The basis upon which the consumer is being asked to buy our brand in preference to others should be quite clear to everyone involved.

- **It's simple.** Key here is that the number of ideas in the strategy be kept to a minimum.

- **It's devoid of executional considerations.** The copy strategy identifies what benefits we are to present to consumers, avoiding executional issues which deal with how these benefits are to be presented.

- **It's inherently competitive.** The copy strategy should provide the answer to the question "Why should I buy this product rather than some other?"

Y&R Creative Work Plan

1. KEY FACT:

2. CONSUMER PROBLEM THE ADVERTISING WILL SOLVE:

3. ADVERTISING OBJECTIVE:

4. CREATIVE STRATEGY:

A. Prospect Definition:

Product Usage

Demographics

Psychographics

B. Principal Competition

C. Consumer Benefit (or Promise):

D. Reason Why:

5. (IF NECESSARY) MANDATORIES AND POLICY LIMITATIONS:

Product_____Date_____ Creative Supervisor_____

A Guide to Correctly Completing a Creative WorkPlan.

Key Basis for Opportunity. What single aspect of the product, competition, marketplace, economy or consumer behavior offers the greatest point of leverage for advertising? What is the big opportunity for the brand?

Consumer Barrier the Advertising Must Overcome. What may keep the prospects from buying or using your product or service in ways that would benefit them?

Creative Objective. What will advertising do to overcome or act upon this and what do you expect the prospect to do as a result? Realistically and specifically.

Principal Competition. More than a list of brands. A definition of the market segment that will be the source of business. What the prospect will be buying, doing, thinking, if they don't "buy" you. (Not always other brands, sometimes habits and attitudes.)

Summary of Prospect Profile. A brief synthesis to how we see our prospects. Taken directly from the Prospect Profile.

Key Consumer Insight. This section should be a creative interpretation of all the available information and perspectives about the consumer that provides a unique, important "discover" about the prospect and/or their relationship with the product (category). (It should be lifted from the Prospect Profile.)

Consumer Benefit Not what the product *is*, but what the product will *do for the prospect*. Where possible, an end benefit.

Reason Why The one reason the brand will deliver the benefit you promised. Occasionally, but rarely, multiple reasons. *Never* a catalog of all the brand's good points.

Mandatories (If Necessary) The fewer the better. None, if possible. Only what must be done or not done in advertising. Legal and medical, corporate considerations, spokesperson or slogans that must be continued, tone and manner mandatories.

Y&R Strategy Selection Outline

| | STRATEGY I Current English | STRATEGY II (Preferred) | STRATEGY III (Alternate) | STRATEGY IV |
|---|-------------------------------|----------------------------|-----------------------------|-------------|
| PRODUCT CLASS DEFINITION | | | | |
| TARGET GROUP SELECTION | | | | |
| MESSAGE ELEMENT SELECTION | | | | |
| RATIONALE BASED ON INFORMATION AND/OR JUDGEMENT | | | | |

7 Questions/Y&R

Creative Strategy Summary

Client:

Product:

Date:

1. Define the Competitive Frame. Consider with whom we compete, source of current/future business.

What is most important about the market? Consider category development/trends/share trends, current positioning of brand and competition, etc.

2. From the Consumer's Perspective, what is most important about the product or category? Consider attributes, benefits, values, brand personality, etc.

What is the most important way our brand/product differs from the competition in fact and/or perception?

Consider attributes, benefits, values, brand personality, etc.

3. What is the Marketing Objective? Include: Share, volume, other specific marketing goals and over what time period.

4. What is the Role of Advertising in achieving this objective? Consider trial/retrial, reinforce/increase usage, switch brands, etc.

5. Who should the advertising talk to? Describe the Prospect you want to reach in terms most relevant to the product (or category).

Why was this prospect selected over others?

Consider demographics, category/brand attitudes and usage, wants/needs, lifestyles, etc.

6. What do they now think/feel about the brand?

Why were these particular thoughts (rational)/feelings (emotional) selected as most relevant?

What data, analysis/logic, etc. supports this?

7. What do we want them to think/feel? What is the single most important idea about the brand you want the prospect to take out of the advertising?

Why was this idea selected over others?

Consider: competitive consumer leverage at attribute/benefit/value levels.

NOTE: This document is signed by members of Account Management, Creative and "Consumer Insights" (Y&R's Account Planning function).

GE Focus System

General Electric is a client that produces numerous communications in-house.

Their Advertising and Sales Promotion Operations division developed a simple three-step process that helps them do effective work.

1. FOCUS ON THE RECEIVER.

First, you must know the Receiver. Singular, not plural.

You must know this audience as a person, with needs and wants beyond your product.

2. FOCUS ON THE PROPOSITION.

“The Proposition relates what we know about the product to what we’ve learned about the receiver.”

GE believes it relates to a “Key Fact” (Y&R) and a “position,” (Trout & Ries) the way they are perceived by the receiver.

The Proposition is a strategic statement, not a headline. BUT, if you just set the proposition in type and ran it with a picture of the product, “you’d have something useful.”

3. DRAMATIZE THE PROPOSITION.

With the proposition as the basis, the challenge becomes “break the boredom barrier.”

Find a way to communicate the proposition in a dramatic way.

TWO IMPORTANT POINTS

1. The three elements must be approached in precisely that order - dramatization before the other elements are in focus is a waste.

2. The three elements call for different kinds of thinking.

Thinking about the Receiver involves *Analytic* thinking (and empathy).

Thinking about the Proposition is an exercise in *Strategic* thinking.

Dramatization demands *Creative* thinking.

JWT Brand Strategy & Creative Brief

One of the places “Account Planning” began was the Marketing Department of JWT London. There, they evolved “The JWT Planning Cycle” and a two step system.

First, they positioned the Brand with a Brand Strategy Summary.

Then, they prepared a “Brief” for the Creative Department to clarify the issues that were key to developing effective advertising.

This is The Creative Brief.

JWT Brand Strategy Summary

1. Most Critical Issue Affecting Where We Are in the Marketplace.

(Not necessarily a problem advertising alone can address)

2. Why We Are There.

Most important factors in market/social factors/etc. which contribute to brand's strength or weakness.

3. Most Critical Issue Affecting Where We Should Be.

The target set for the brand may have a number of elements:

- Market Share/Volume/Sales/Profits etc. - marketing goals
- Brand Positioning - what people should think of the brand vs. the competition
- Consumer Behaviors/Usage - What do you want people to do? Use more, switch brands, add your brand to their repertoire, etc.

4. What Will Help Us Get There.

Here, we address solving the problem.

Advertising may be a large part of this, but it may also address issues ranging from pricing and product formulation to other forms of marketing communication.

If advertising is needed, a **Creative Brief** is then prepared.

JWT Creative Brief

1. What is the Opportunity and/or Problem which the advertising must address?

A brief summary of why you are advertising. Take the consumer's point of view, not "sales are down," but, rather "consumers are choosing cheaper alternatives."

2. What do we want people to do as a result of the advertising?

3. Who are we talking to?

Try to develop a rich description of the Target Group.

Indicate their beliefs and feelings about the category.

Avoid demographic information only. Add personality and lifestyle dimensions.

4. What is the Key Response we want from the advertising??

"State succinctly, what single thing do we want people to feel or notice or believe as a result of advertising."

5. What information/attributes might help produce this response?

It could be a key product attribute, a key user need which the brand fulfills, etc.

Avoid a laundry list.

6. What aspect of the Brand Personality should the advertising express?

7. Are there any media or budget considerations?

8. This could be helpful...

Any additional information that might affect the creative direction.

"Feel free to use a visual summary, a picture, drawing or any object which aids in understanding the nature of the brief."

The “R.O.I.” System

DDB Needham

ROI stands for Return on Investment

At DDB/Needham, it also stands for a belief that *“Great advertising is distinguished by three fundamental qualities: Relevance, Originality and Impact.”*

Their ROI Strategy System is similar in many respects to the Y&R Work Plan, but there are important exceptions - particularly in the inclusion of certain tactical elements (demonstrations) and a Media section.

5 Basic Questions

The System is built on five questions:

1. What is the purpose of the advertising?
2. To whom will the advertising be addressed?
3. What competitive benefit will be promised and how will that promise be supported?
4. What personality will distinguish the brand?
5. When, where and under what circumstances will the target be most receptive to the message? And what media will deliver that message to the target at the lowest possible cost?

The system is covered in great detail in “Planning for R.O.I.” published by Prentice-Hall. Here are some of the high points.

Purpose and Target

When determining the purpose of the advertising, the ROI Planning process focuses on the specific desired behavior and source of business.

The target section should both demographic and psychographic information.

When defining the target, DDB/Needham looks for “Aiming Points” which allow you to think specifically and personally about your target.

Even though the larger target may be a good deal broader, they say, *“Think of a large target with a small center.”*

An example would be “Cereal eaters who are interested in sports” for Wheaties.

Promise and Support

“The promise of a competitive benefit and the support of that promise are the two most important decision the strategist will have to make.”

The ROI system definition states that *“consumer benefits exist in the mind and attributes exist in the product.”*

The advertiser promises a benefit for using the product.

A matrix is provided for examining alternative promises.

Support is everything that lends credibility to the advertiser’s promise.

There is a heavy focus on demonstrations - both *literal* and *dramatic* (an example of a dramatic demonstration is the Bud Light “Bar Call”).

When demonstrations are found or developed they are added to the strategy document.

In addition to product facts and demonstrations, this section allows for what DDB/Needham terms "*external support.*"

This includes sales promotion, PR, and direct response. When these play a major role, they must be included in the strategy and coordinated with the other media.

An example of external support would be the pictures of well-known sports figures on the Wheaties package.

Brand Personality

This is a separate section.

It may be treated simply -

State Farm Insurance - straightforward, warm, a good neighbor.

Or it may demand more complexity -

Ist Nationwide Bank (parent organization)

- Visionary and "can do."
- Passionate about banking
- Dedicated to the needs of the middle market
- Customer service oriented.

There are additional personality attributes for the bank's "products" (Home Loans, etc.).

Media

"The ROI System ensures that the media will match the purpose of the advertising."

The ROI System integrates media planning in to the strategic process.

DDB/Needham has also been in a leader in promoting an integrated view of media expressed as the "*Personal Media Network.*"

A key part of this is the concept of "*aperture,*" the time that "*a customer is most likely to notice, be receptive to, and react favorably to, an advertising message...*"

The Process

DDB/Needham believes that the process is most productive when agency and client work through it together. For this purpose, a Workbook is also provided.

"Planning for R.O.I" and the *"Planning for R.O.I Workbook"* are published by Prentice Hall (ISBN 0-13-679466-1 and ISBN 0-13-679473-4), though not generally available.

Leo Burnett Strategy Worksheet

CONVINCE

Target Audience -
Current Belief
re: Brand/Category

THAT

Desired Belief
(Benefit)

BECAUSE

Focus of Sale
or Proposition
(Key Drama)

SUPPORT

Reasons Why

FCB BRIEF

Client _____

Brand _____

Date _____

Marketplace Reality

1. Explain the success of those competitors who are factors in the marketplace.
2. Express what is different about our clients' product or service that is most likely to bring success. (Consider *key factors* affecting the product *category* today; *key* competitors - who and why, and their strengths and weaknesses; real or perceived product/service differences; us vs. key competition, etc.)

Advertising Objective

1. Explain the task of the advertising. (Consider what the advertising must accomplish in communication terms to meet the product's marketing objective: increase awareness, change an attitude, generate trial or repeat purchase, etc.)

Prospect Need

1. To the alternative groups of people who represent the best prospects for our client's product or service, express the *human need* (not the "consumer need") which can be satisfied in part by purchasing our client's product or service. (Consider consumer behavior, attitudes, values, your own intuition, etc.)

Purchase Decision

1. Express an understanding of how the product fits into the prospect's life. Explain how the purchase decision takes place. (Use the FCB Grid as a starting point. Also consider product user information and your own intuition, judgement, etc.)

| | |
|--|--|
| | |
| | |

Preliminary Advertising Strategy

1. Explain who represents the best prospect for having their needs met by our client's product or service.
2. Express what the advertising should communicate to this prospect in order to trigger the desired response. (Consider all other facets of the BRIEF, mindful of strategy's role to stimulate relevant and unexpected advertising.)

TEAM PARTICIPANTS (Signatures)

Research _____

Creative _____

Account Mgmt. _____

Ogilvy & Mather

Sample Creative Brief

(Currently no “official” form. But here is the type of piece that is used.)

Product:

Key Issue (Problem):

The Promise:

The Support:

Our Competition:

Target Consumer: Who are we talking to?
Demographic & Psychographic

Desired Behavior: What we expect.

Target's Net Impression:

Mandatories:

Tone & Manner:

BBDO Philosophy & Procedures

BBDO works to combine a “Product” (Performance) image with a “You” (User) image. They have a formal methodology as well as some proprietary research tools.

WHY “PRODUCT” AND “YOU.”

BBDO observes that “people do not experience products or their performance directly through advertising.” It can come from sampling or past experience, but not advertising.

“From advertising, people experience *images* of the users— people the advertiser associates with the product. Often these images are mixed together.

The key thing we must remember is this: It’s all images. Advertising is all vicarious experience for the viewer.”

“Product” image alone is limited because;

- Many product edges (advantages) are short lived, and quickly met by competition;
- Many product “edges,” as perceived by advertisers, are not important to consumers;
- Many product claims address category issues, but not underlying consumer problems;
- Performance claims often provide little added value;
- Finally, differentiating claims can sometimes have the opposite effect — and lead to perceived parity. Particularly when imagery and experience do not match.

The “You” image is critical, because;

- It takes positioning beyond logic into the realm of emotion;
- It adds value to performance claims;
- It can build product relevance and personality;
- It puts product truths and benefits into a meaningful framework for the consumer.

The “You” image takes the consumer beyond fact, and into feeling. It can build brand loyalty and help provide competitive insulation.

Finally, BBDO believes that execution is strategic.

Creative artistry must marry the “Product” image and the “You” image simultaneously in the execution itself. Which, of course, is the way the consumer receives it.

BBDO STRATEGIC DEVELOPMENT

BBDO works to:

- Determine the best “Product” image
- Determine the best “You” image
- Combine them in an execution that marries the two seamlessly and dramatically.
- And, at all times, AVOID THE OBVIOUS...

To do this, they use a number of tools.

BBDO PROPRIETARY RESEARCH

1. Understanding the Market

They work to understand the market from the consumer's point of view, using a tool called **Market Structure Audit**. Consumers sort cards and indicate which brands are alike.

Example: Big Red Chewing Gum

Wrigley had believed that chewing gums competed primarily on a sugared and sugarless basis— sugared competing against other sugared and sugarless against other sugarless.

The Market Structure Audit discovered that the gums actually competed more on a flavor basis— cinnamons competing against cinnamons, mints vs. mints, etc.

This study revealed Dentyne to be Big Red's major competitor. By comparing the two, a flavor claim against Dentyne was developed.

"Big Red" became one of the fastest growing Wrigley brands.

2. Prospect

Once the competition is defined, BBDO focuses on the prime prospect: *Who* currently consumes competing products?

It's important to view prime prospects not just as demographic statistics, but as human beings— to consider how they live and what they do with their time.

Lifestyle Indicators (LSI) are used to develop a flesh and blood understanding of the prospect, which is very helpful in strategic planning and creative development.

3. The Prime Prospect's Problem

BBDO has found that the best way to get a purchase decision in your favor is to solve a problem for the prospect.

There are two kinds of prospect problems—"Product" image and "You" image problems.

They use a **Problem Detection System (PDS)** to help understand "Product" problems.

This method approaches the product from a "Problem" standpoint, as opposed to a "benefit-attribute" standpoint.

The Problem Detection approach frequently draws new insights, and drastically different conclusions than from a purely benefit/attribute approach.

Example: Dog food.

When asked what they want for their dog, consumers most often respond with "nutrition" or "good taste," which is what much dog food advertising has stressed over the years.

But when asked what problems they have had with dog foods, consumers complain about their dog's bad breath and the food's odor or mess.

You can see from this example that this could lead strategically to some radically different planning. Plus, if you can pinpoint a problem that is frequent and preemptable, then you have some grist for the development of a not-so-obvious strategy.

Photo Sort is a process BBDO uses to help identify "You" image problems.

They give typical consumers pictures of people, and ask, "Of these people, which use this brand?" This results in an array of pictures of people who use your brand vs. others.

Example: Canned beans— Del Monte users vs. Green Giant users.

You would think that the users of these commodity products would be perceived to be more or less similar. Not true. One has strengths not held by the other.

4. Position

A BBDO position combines these elements:

Brand Equity. Brand Equity tradeoff analysis helps to determine which are the most important “Product” imagery problems operative in the equation vs. the competition and which are the most important “You” imagery problems.

With this additional information from the consumer, they develop the Strategy— the “Product” image and the “You” image— that will position the product.

Product Positioning. The “Product” position is developed by client and agency with BBDO research input (i.e., Market Structure Audit, Problem Detection Study).

Like all marketers, they isolate key performance characteristics— but rather than offering category benefits, they focus on solving consumer problems.

“You” Positioning. To develop the “You” position, BBDO uses research tools such as Lifestyle Indicators and Photo Sort for insight into user dynamics and imagery.

BBDO believes understanding “You” in terms of *Attitudes* versus *Lifestyles* is the key to the differentiation of selling messages. Understanding attitudes can provide deeper insights into the consumer and lead to true differentiation.

“PRODUCT” STANCE + “YOU” ATTITUDE = ADVERTISING

Here are some examples of this approach at work:

1. Pepsi Cola

The “Product” stance is Leadership. The “You” attitude is Contemporary (“Hot,” “In”).

The resultant combination is the campaign, “Pepsi. The Choice of a New Generation.”

2. Gillette-Dry Idea Antiperspirant

The “Product” stance is that it “goes on dry, stays dry.” But this did not differentiate this superior performing product until the “You” attitude was added: Control, Aspiration.

The resulting theme, “Never Let Them See You Sweat,” and a campaign featuring young entertainers.

3. General Electric

The “Product” stance is “contemporary products of good quality.

The “You” attitude is Contemporary (“Hot,” “In”) and Quality (“The best I can afford”).

The campaign uniting these elements is, “We Bring Good Things to Life.”

BBDO believes the result of their approach is IMAGERY THAT WORKS.

Creative Strategy Worksheet:

Before you write word one of your advertising copy, you must review all of the research and analyze all of the facts on your product or service and its market, customers and competition.

From this background, you will put together a single-page creative strategy statement. It clearly and concisely identifies the purpose of your advertising, whom you want to reach, what you want to convey to your audience and how you want your message to be received.

The Creative Strategy Statement Planning Worksheet provides you with a format and instructions for preparing this important document.

Purpose: A brief statement of what you want the advertising to accomplish or what you want the consumer to do after exposure to the message.

Target Customer: A series of short descriptive phrases that define to whom you want to talk in demographic, psychographic, lifestyle and/or product usage terms.

Key Benefits: A clear and simple statement of those real or perceived consumer needs and wants which the product or service will satisfy or that consumer problem which the product or service will solve better than will its competition.

Reason Why: Those significant and unique qualities which convince the target consumer that the product or service can and will deliver the promised benefits.

Tone: The feeling, style or approach of the advertising that will create a living personality for the product or service.

The Consumer "Take Away": The total reaction you want from the consumer— in the consumer's own words— after seeing or hearing the message. Did you get through?

Beber & Silverstein 4-Step:

Our procedure for determining creative objectives, and the strategies to meet them, involves a four-step approach.

1. The assigned creative team or teams receive an intensive education, including:
 - an overview of the marketplace and the competitive environment;
 - specific marketing/advertising objectives, so our creative strategy will further the total business strategy;
 - briefings with client senior management and key staff members
 - a review of diagnostic research, both qualitative and quantitative;
 - a study of information from secondary sources (newspapers, business magazines, trade publications, etc.).

2. For each creative strategy, we outline the message (benefit and reason why), the target audience, target competitors, and the rationale for the strategy.

If you agree with that strategic approach, it becomes both input for the creative team(s), and the basis for evaluating different executions.

3. We develop several executions consistent with the strategy, and analyze each one until we agree on a direction to recommend to the client.

4. We evaluate all creative work internally through:

- the agency's Creative Review Board, chaired by our President, Joyce Beber, who must approve every creative strategy, concept and significantly different execution before it is released for client approval.

- The **Strategy Review Board**, made up of all department heads.

Its purpose is to evaluate long-term strategic planning.

The Board considers changing factors in the marketplace, target-prospect trends, and other variables that point up new marketing opportunities.

*Beber Silverstein & Partners Advertising, Inc.
Miami, Fla.*

CM-E Creative Blueprint

Before writers and artists are asked to create the advertising, the following Creative Blueprint must be filled out and agreed to by the senior creative people, the account people, top management members at the agency, and the client.

The Blueprint consists of seven questions, the answers to which set the guidelines for the message and character of the advertising.

- 1. Business Goals.** These will be the key sales and marketing goals which can be affected by positioning and advertising. They probably will be repeated from the long-range marketing strategy.
- 2. Consumer Profile.** Whom must we influence? Think of a specific kind of person defined in terms of psychological as well as demographic characteristics, i.e., habit patterns, hopes, fears, attitudes, age, occupation, ownership of something, physical characteristics, etc. Almost invariably this will describe the kind of person to be considered in positioning.
- 3. Current Attitudes.** On what attitudes can we capitalize? What must we overcome? Or are we simply unknown?
- 4. Desired Attitudes.** What attitudes must we establish or change? What habits do we want formed? Do we want that person to know something new has happened, or become aware of additional product uses, or sample our product, or change a negative attitude or misconception?
- 5. Desired Action.** Do we want the prospect to send in the coupon, or cut out a coupon and go to the store, or send in for more information, or look for us in the grocer's freezer case, or try the recipe, or welcome the salesman when he/she calls, or store away the information and decide in our favor when the buying decision occurs six months from now? *(This answer should be given in specific measurable terms, if possible, because the changes here should serve as the basis for measuring the effectiveness of the advertising.)*
- 6. Main Selling Proposition.** What is the key message or selling argument that works with this person? Almost invariably, this will include the "certain kind of product" specification for positioning. It should be written not as copy, but as an expression of the idea in your own words. The basis for this argument will come out of your knowledge of the kind of person you are trying to sell and of your product.
- 7. Personality.** This should be appropriate to the person and the key thought we are trying to establish. Usually it should reflect a unique personality in its field, i.e., modern or traditional, fun or businesslike, innovative or conservative, successful, friendly, etc. Sometimes this point can only be settled when a creative execution is selected.

The Isidore & Paulson Creative Work Plan

The Isidore & Paulson Creative Work Plan has nine “Fill in The Blank” sections:

1. KEY FACT.

The single most important fact upon which advertising can take action or have an effect.
This fact will relate to:

2. PROBLEM THE ADVERTISING MUST SOLVE.

This should be related to people’s attitude, ideas or actions.
Focus should be on **what the consumer needs**, not what the brand needs.

3. OBJECTIVE OF THE ADVERTISING.

What effect is the advertising supposed to have on the Consumer?
This Objective Statement which will be used in...

4. THE STRATEGY.

Here, you outline the specifics of how to achieve the Objective that will solve the Problem whose cause is stated in the Key Fact.

The format is the same as the one shown in the Strategy section of this book.
Tone Statement is optional (See Prime Prospect— “Taste”).

5. PRIME PROSPECT.

Focus on your best prospect— the heavy user, the decision-maker, etc.
Consider three types of description:

Demographic- Age, Sex, Income, etc.

Psychographic- Consumption patterns, Attitudes, etc.

“Taste”- The Prime Prospect’s taste level and orientation.

For example, what does he/she read or listen to?

6. POSITIONING.

Define the market category and in what segment the product will compete.
In the case of a new product, it should be a statement of the product’s reason for being.

7. PROMISE.

Focus on the **Best Argument** the product can offer the Consumer (or Prime Prospect).

8. REASON WHY.

Focus on why the Product delivers the benefit to the Consumer.

9. MANDATORIES.

This is the place for legal considerations, pieces of the brand’s heritage, corporate considerations, and things such as “policy regarding comparative advertising.”

Noble & Associates

“NobleLink”

Our advertising strategy development system is called “NobleLink” and it consists of the following six steps:

1. Define the problem/opportunity and the objective.

This should come from the client’s business/marketing plan, and paint a clear picture of the advertising/marketing environment, as well as the objective.

2. Identify the dual target audiences.

Determine both the key consumer and the key trade prospects.

3. Examine the purchase dynamics (for both consumer and key trade targets).

Understand how the consumer uses and thinks about the product, category and brand and how the trade thinks about/uses the product in terms of profit, turns, packaging/pricing and the shelf environment.

4. Dimensioning.

Evaluate (a) the greatest consumer need, (b) the category standard by which all brands are judged, and (c) the actual product attributes.

These are ultimately linked together to create “Key Link.”

By linking together the ultimate audience need, the standard or attribute by which all competing brands are judged by the audience, and the specific attributes or dimensions of the product/brand, the strongest positioning is determined.

5. Develop the strategic/tactical solution.

Given the positioning developed, spell out the final advertising strategy.

6. Execution concepting.

Develop specific advertising/communications concepts and executions, consistent with the strategy, position, purchase dynamics, audience and objective identified by the total “NobleLink” process.

Tracy-Locke - 6 Elements:

The characteristics of good creative strategy consist of:

- Brevity. It should be brief, reflecting a boiling down of numerous facts.
- Simplicity and Clarity. It should use simple language and be incapable of more than one interpretation.
- Competitiveness. It must identify why the consumer should buy the brand in preference to another.
- It should be void of executional overtones.
- It should be a long-term document not subject to frequent change.
- It should establish the one key idea which must be communicated for the message to be successful.
- It should reflect consideration of what the competition is saying.

Specifically, there are six key elements to be carefully considered in developing our creative strategy:

1. Target Audience. The target audience is the person or persons at whom the advertising is aimed. This will normally be the person who makes the buying decision. Describe the individual you are trying to reach, not the mass.

2. User Benefits. User benefits represent the advantages that will accrue to the user/purchaser upon use of the product. The physical characteristics of a product are not its user benefits.

User benefits can come from research, but are often obvious. They are usually the reason why a person uses a product category or would prefer a particular brand. Be sure that each benefit is clear, simple and incapable of more than one interpretation.

3. Reason Why. Describe the unique attribute or reason which makes possible or otherwise lends credibility and believability to the user benefits.

Other products may claim the same or similar key user benefits.

You must have an important and unique reason why.

4. Brand Character. Brand character is the personality/image to be created for the product...the distinctive qualities that distinguish the brand.

It should help the target audience differentiate the brand from competition over a period of years. Brand character differentiates a campaign from an ad.

5. Focus of Sale. The four sections previously discussed collectively represent an inventory of all strategic considerations essential to the total advertising message.

Now, carefully review these elements and select from them the principal basis upon which we are asking the consumers to purchase the brand: the focus of sale.

It should reflect a firm decision to focus upon the one (or, at most two) key ideas upon which the sale stands or falls.

The focus of sale represents the primary conceptual element to which the creative people will address their attention: the benefit promise they will seek first and foremost to render into a selling idea, visualize and dramatize. As such, it is succinct, and very brief.

6. Tone. This is the desired executional tone of voice for the finished advertising; its feel.

This should describe as clearly as possible the emotional mood of the execution, and it should be expressed in specific understandable language.

Brand character refers to the brand. Tone refers to the execution.

Chiat/Day & Account Planning

“The accounts at Chiat/Day are staffed by tri-disciplinary teams; alongside the usual Account Supervisor/Executive and Creatives.

On a day-to-day basis— we assign an **Account Planner**.

The Planner’s ongoing function is to continuously accumulate, originate, and synthesize data pertinent to the advertising’s target audience; to independently pre-test, post-test, and continuously monitor— as an ongoing account assignment— both the advertising itself and the dynamics at work in its marketplace.

The result of this structure is a shifting and strengthening of individual responsibilities: the AS/AEs are responsible for the client-agency business relationship and for overall agency support; the Creatives are responsible for the conceptual and executional distinctiveness of the advertising itself; and the Planner is responsible for the advertising’s target-audience relevance.

In effect, we have integrated research, which falls under the Planner’s purview, into our basic client service structure, as opposed to the maintaining the traditional Research Department.

The philosophy is centered on the end product: advertising that is

- conceptually and executionally instinctive,
- tightly focused on end-user needs, and
- relevant in tone and content to specific target audiences.

The real reason the advertising is effective is an amalgam of

- an entrepreneurial clientele that is both reasonably permissive and demanding of both long and short term results, and
- shared human values, a unique account team operating structure, and a loose-tight working environment.”

Procedures:

As you can see, most Strategies and Work Plans work from very similar values and vocabularies. But there's one other thing they have in common.

A procedure is followed.

There is a way jobs are initiated, a way Work Plans or Briefs or Strategies are generated, a way they're approved and a way they're used.

Certainly one approach vs. another may yield different results and, of course, much of the difference will be in the skill of the people involved.

But the real key is that it becomes part of the culture.

A Work Sheet is more than a piece of paper (just what we needed, another piece of paper). Each company that uses one views it as an Important Document.

Often, the procedures include a review process, such as a Strategy Review Board to see that these things are done well (just what we needed, another meeting).

Often, supplements are developed, ranging from "Cheat Sheets" and "Guides" to lengthy seminars and full-length books. When things go wrong, these documents are analyzed to find answers to why things didn't work.

When things go well, these documents are kept and studied by those who want all of their projects to go as well.

But, the fact is, they're only pieces of paper.

It takes smart people working smart to make them work.

It takes procedures that are clear, helpful, useful and, in the beginning, it takes a lot of cooperation and participation by the people who want to make it work.

THE COPY WORKSHOP TWO STEP

Following is something you might find helpful. It's a two-step plan.

First, a **Backgrounder**. It provides a document for collecting the information you need to make strategic decisions. It's fairly complete - maybe too complete.

You'll probably want to trim it down and modify it as you go.

Second, there is a **Communications Work Plan**. It's designed to accommodate many marketing communications needs - including advertising.

it includes a section for secondary audiences and secondary benefits, which may or may not be appropriate for your needs.

It also includes a place for "signing-off." This is probably one of the most critical parts of the process - getting people to agree on what they want to accomplish.

It's probably not the final document you'll use.

But it's a start.

Good luck.

BackGrounder

Client _____ Project _____

What's the Problem?

I. Marketing Background:

1. Current Marketplace Reality

- What's the current market situation?
- What are our problems/threats?
- What is making the competition successful?
- What's made us successful/unsuccessful to date?

2. Major Objectives & Measurements

- What do we want to achieve?
- What would indicate success?
- How might we measure that success?
- How might we measure the contribution of different communication elements?

3. Product Attributes, Features & Benefits.

- Attributes
- Features
- Benefits

4. Consumer Benefits & Values

- Consumer Benefits
- Values

II. Audience Background

5. Who is the target?

- Who is the primary audience?
- What do we know about them?
- What are the primary needs we will be meeting?
- How should we talk to them/not talk to them? (TONE)
- Are there any secondary audiences (including dealers and trade)?
- What is important to the secondary audience?

6. Situation - Before the Message

- What does our audience think/feel about us?
- Are there any barriers/obstacles to overcome?
- What do they think/feel about the competition/category?

7. Desired Result - After the Message

- What will they think/feel about us after the communication?
- What do we want them to do after the communication?

8. Reasons Why:

- Why will they change their mind?
- What are some of the real reasons?

III. Tactical Background:

9. How:

- How can we best reach the audience?
- What's the suggested medium?

10. When:

- What's the window of opportunity?
- Is there a deadline or key 'drop dead' dates?

11. Quantity (If materials):

- How many will we need to proceed?
- Are all the materials needed at once?

12. Longevity:

- How long will the program last?
- How long should the supply of materials last?

13. Mandatories:

IV Integrated Communications:

14. Integration:

- How will this project work with other elements of this program?
- How will this program work with other programs?

Approvals: Who must approve the Work Plan? _____

When? _____

Communication Work Plan

Client/Project _____

SUMMARY: *Briefly summarize your definition of the problem and the solution.*

Problem the Communication Must Solve

Primary Audience

Desired Behavior of Primary Audience

Main Message

Support/Reason Why (if any)

Secondary Benefits/Support (if any)

Secondary Audience (if any)

Message for Secondary Audience

Recommended Tactics

Mandatories

Agreements/Approvals:

Bibliography

Here are some books that you might find helpful.

Bendinger, Bruce

The Copy Workshop Workbook

Published by The Copy Workshop

ISBN 0-9621415-4-2

(To order direct: 312-871-1179)

Norins, Hanley

The Y&R Traveling Creative Workshop

Published by Prentice-Hall

ISBN 0-13-973116-4

(To order direct: 312-871-1179)

Ohmae, Kenichi

The Mind of the Strategist.

Business Planning for Competitive Advantage.

Published by Penguin Business Library

ISBN 0-1400-91289

Patti, Charles H & Moriarty, Sandra E.

The Making of Effective Advertising

Published by Prentice Hall

ISBN 0-13-547290-3

Wells, William D/DDB Needham Worldwide

Planning for R.O.I.

Effective Advertising Strategy

Published by Prentice-Hall

ISBN 0-13-679466-1

Wells, William D/DDB Needham Worldwide

Planning for R.O.I. Workbook

Published by Prentice-Hall

ISBN 0-13-679473-4

Disclaimer (The Small Print)

This section contains summaries of strategic approaches used by various advertising agencies and marketers at various times. Some have been slightly modified by the editors for reasons ranging from available space to editorial judgement as to clearer usage or phrasing. As advertising and marketing professionals move from company to company, a good deal of "cross-pollination" occurs and there are similarities in a number of these documents. In addition, these documents are updated regularly. Attributed examples may not represent "state of the art" thinking at the companies cited.

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