

A “BRIEF” REFRESHER FOR BUSY INVESTMENT MARKETEERS

Does this sound at all familiar? "We need a piece on the Retirement Portfolios Account -- can we get it delivered by month-end?"

A Project Brief: Don't Leave Home Without One

Whether you're driving over the holidays or trying to steer a marketing piece from conception through to delivery, a good roadmap can help prevent unnecessary stops and starts. For all but the most templated marketing communications, it makes sense to develop a roadmap in the form of a Project Brief before you "head out the door" - no matter how big the rush. Sometimes neglected in the press of daily business, taking the time upfront to fully brief a project can save time overall and result in a better work product, delivered more quickly.

Certain elements of the brief are obvious: product, budget, timing, etc. Some variables may seem obvious but will benefit from careful definition. And other factors may be at risk of being overlooked entirely. Here's a quick refresher on some of the issues to consider as part of the briefing process --

Key Brief Elements

- Audience(s) -- Client or Prospect? Investor or Advisor? Retail or High Net Worth? Are there Primary and Secondary audiences?
- Objective -- A few possibilities are: Drive inquiries from and sales to prospects; Drive sales to existing customers; Retain existing accounts; Education/Relationship Management; Service Recovery.
- Value Proposition -- In the broad sense, what is being offered and why will it be found distinctive or otherwise of interest to the target audience? It's OK if this is written in terms that are significant primarily to an internal audience.
- Key Message -- In 2-4 sentences, how will you describe to the target audience the offer or value being added? Note: It's not OK if this sounds like corporate-speak.
- Principal Support -- What can you specifically identify that backs up your key message? Facts, data, ratings, rankings, awards, testimonials.
- Voice -- Given audience and objective, what should be the tone? Motivational? Matter of fact? Sophisticated? Apologetic?
- Themes -- If it can be done without squeezing all the juice out of the creative process, consider identifying a theme or two as potential launching points. For example -- "Slow and Steady Wins the Race" (shopworn, yes, but you get the idea).
- Special Considerations -- Are there any constraints or sensitivities related to, for example, corporate positioning, industry headlines or channel conflict?

Last, But Not Least

And finally, as part of the briefing process specify . . . Deliverables. While one or more proposed deliverables likely sparked the briefing process, consider putting off pinpointing your "destination" until after passing the above-listed road markers. For a print piece, defining the deliverable means spelling out such things as proposed dimensions, number of panels, use of custom vs. stock images, the delivery mechanism, any necessary carrier, etc. Also -- to keep last minute scrambling at a tolerable level, now is the time to identify any desired web and field versions.

By taking the time to develop -- and communicate internally -- a detailed Project Brief, you'll have an agreed upon destination and a roadmap for getting there.

