

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 through to delivery, a good roadmap can help prevent unnecessary stops and starts. For all but the most templated marketing communications, consider developing 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, briefing a project can help get your work sold internally and result in a better 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 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? (For example: "A one-step way to improve your portfolio's diversification.")
- Key Message(s) -- 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?
- Special Considerations -- Are there any constraints or sensitivities related to corporate brand positioning, industry headlines or channel conflict?
- Creative -- Consider identifying one or two themes as potential creative launching points. For example -- "Slow and Steady Wins the Race" (shopworn, yes, but you get the idea).

Last, But Not Least

And finally, as part of the brief specify . . . deliverables. While one or more proposed deliverables likely sparked the briefing process, consider putting off pinpointing your exact "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 complementary web, sales force and internal communications.

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.

