

The background of the entire page is a photograph of a port with several large cranes and ships. Overlaid on this is a large, semi-transparent image of a pair of glasses, with the lenses framing the title text.

Strategy and planning for effective marketing

A practical guide to how strategy
and planning supports work
that works.

by Mark Iremonger

nucco.co.uk

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An introduction to **strategy** and **communications** planning

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During this remarkable time of digital transformation, Mark has led agency strategy for brands including P&G, Allianz, Lloyds Banking Group, Kraft, Royal Mail, J&J, Compare the Market, Barclays Group, Visit Wales, Aviva and UBS.

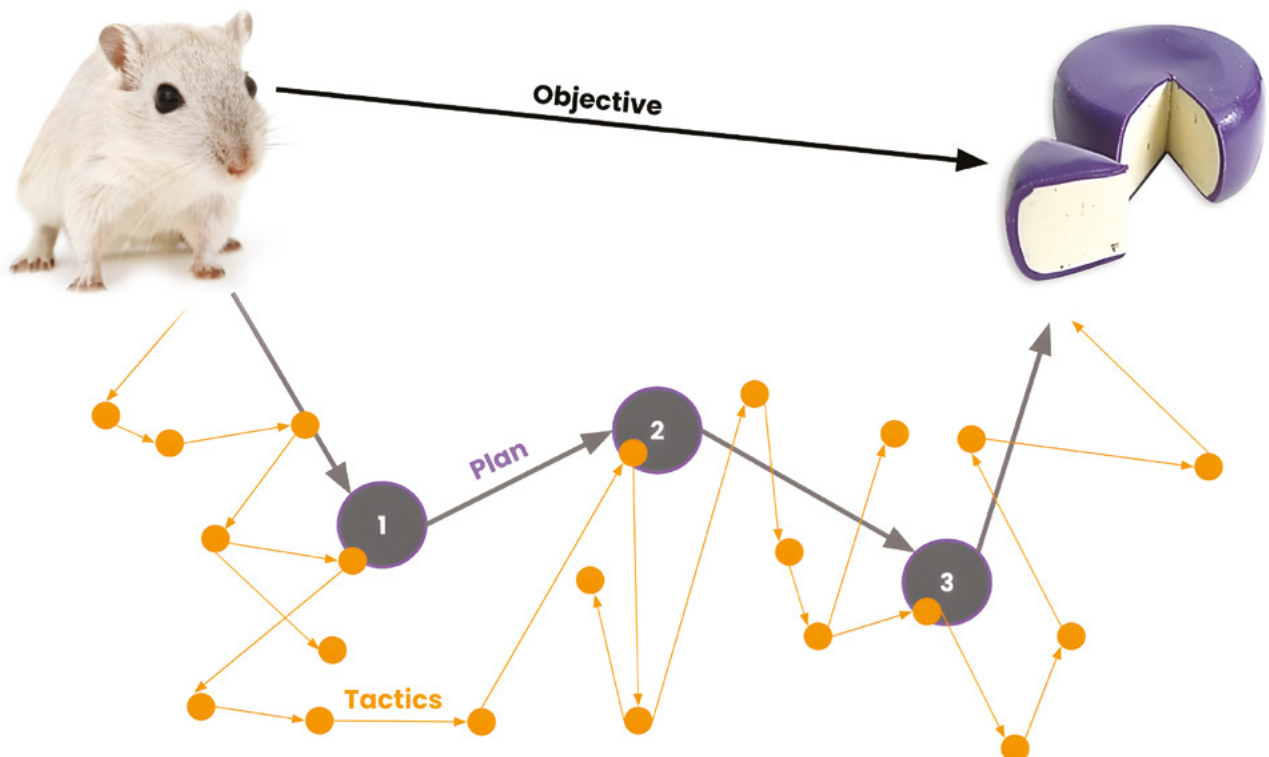
He has been the agency strategic lead for P&G, Allianz, Lloyds Banking Group, Royal Mail, J&J, Aviva and UBS.

Mark has been a member of the British Council's Creative Industries Advisory Panel, a Vice Chair of BIMA, a member of D&AD, and a board member of Wired Sussex, which promotes digital creativity, innovation and growth.



"Plans are worthless, but planning is everything."

– Dwight D. Eisenhower

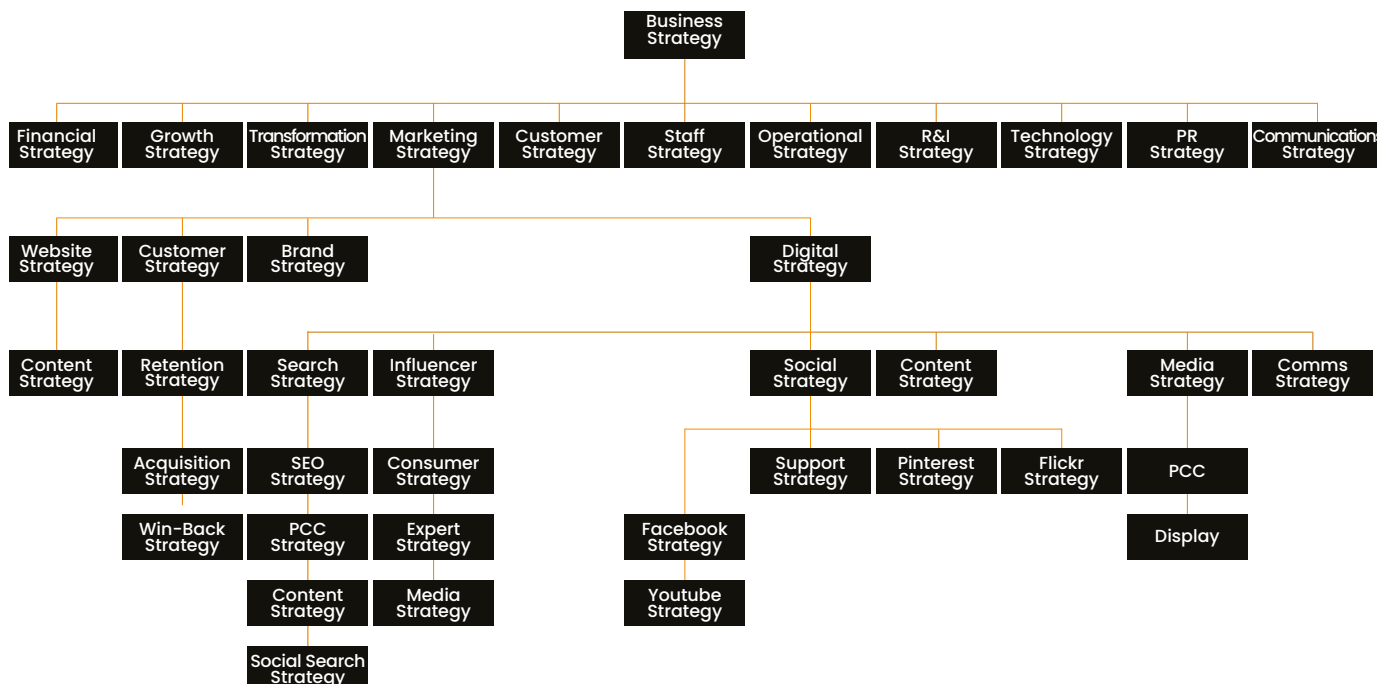


An introduction to
strategy and
communications
planning

First principles

This chapter lays out the broad principles and a simple step-by-step approach that takes you from a 'client brief' to an 'internal brief'. You can use the brief with an agency or internal team tasked with solving a communications problem.

Strategy is an overused word in the marketer's lexicon. It's a generalist. Like the term 'digital', it has to cover so much ground that it quickly means nothing and everything simultaneously.



Straaaaaa-taaaaaaa-geeeeeee-tastic. This chart dramatises how many different types of strategy might exist between a brand and a digital performance marketing agency - the point being it is open-ended.

"People bandy the word strategy about like it's a thing, when it's an approach with outputs. You need to recognise this from the get-go if you want to 'do' strategy."

So what is a 'strategy'?

Well, it's the output of applying a strategic approach. The 'gold standard' definition we use demands three things:

1

A clearly stated
objective

2

A plan to achieve the
stated objective

3

A validation method to
confirm its completion

This simple definition is what we use to assess the veracity of anything with the word 'strategy' stuck on it. Anyone delivering on the above can rightly claim to be a strategist.

What's the difference between a plan and a strategy?

A plan aims to get you from A to B.

It's an essential part of a strategy and (in marketing) typically accounts for 90% of the work. But a plan should not happen without an agreed definition of objective and validation method.

The difference between a plan and a strategy is that the strategy defines why you are going to B and how you will know when you've got there. Whereas a plan just shows you the way.

So now we have a definition for strategy and have made a distinction from a plan, it's time to dig deeper into the basics of what many people

in marketing **call 'strategy' but often mean 'communications planning'**. If they don't mean communications planning, then they probably mean **media planning** which is all about how to maximise a return on paid media spend and is not in the scope of this guide.

"The role of the strategist is to give everyone the confidence that they are on the right bus, know where it is going and when it will get there."

So what is communications planning?

A helpful definition is '**doing the legwork to maximise the effectiveness of a communication task**', so depending on your planning, it can encompass many different things.

Most creative services businesses concerned with communication typically follow a variation on a simple four-step process which are:

1. Brief and discovery

Refining and understanding a client brief (the problem, challenge or opportunity) and collecting and absorbing what existing information clients have that might be relevant.

2. Strategy and planning

Doing the leg work to maximise the effectiveness of the communication

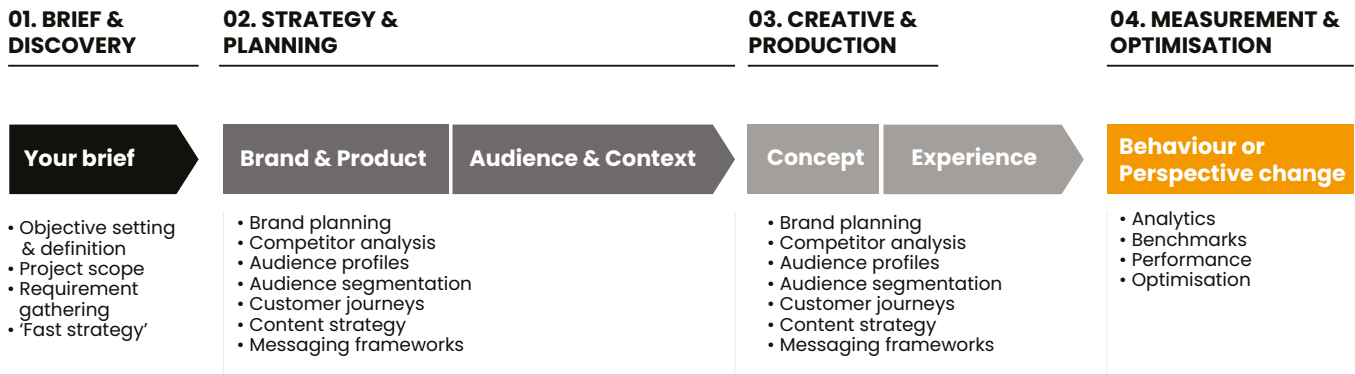
3. Creative and production

Creating actual customer-facing ideas and experiences

4. Measurement and optimisation

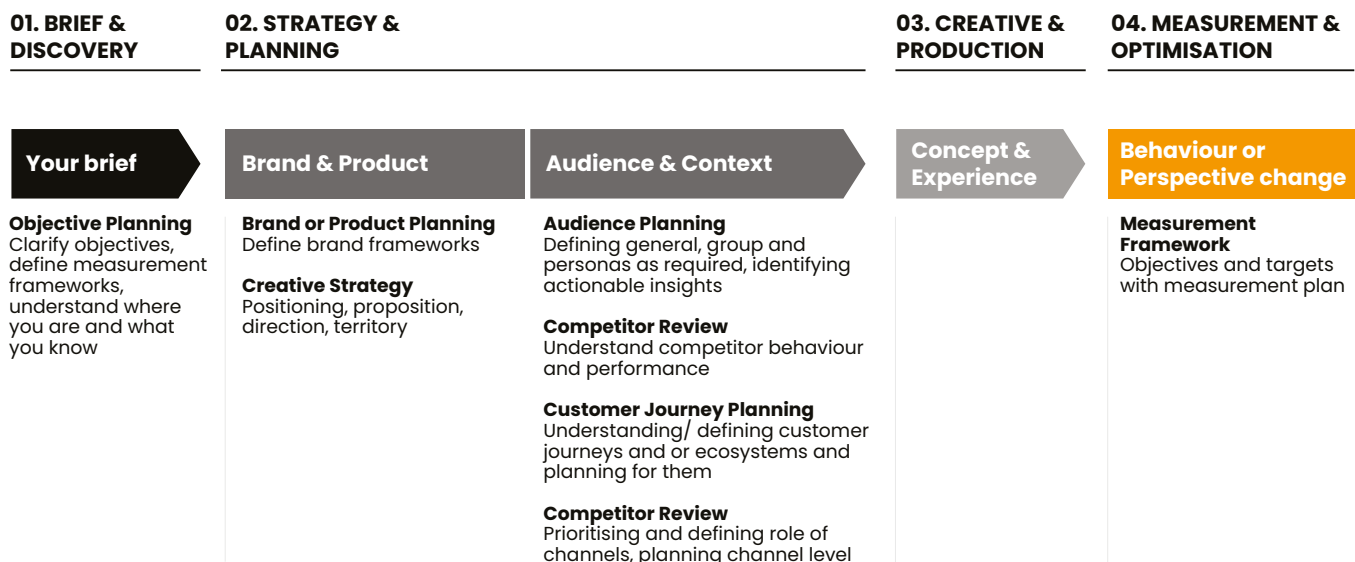
Understanding what is and is not working and making things better

At Nucco, we break this out like this:

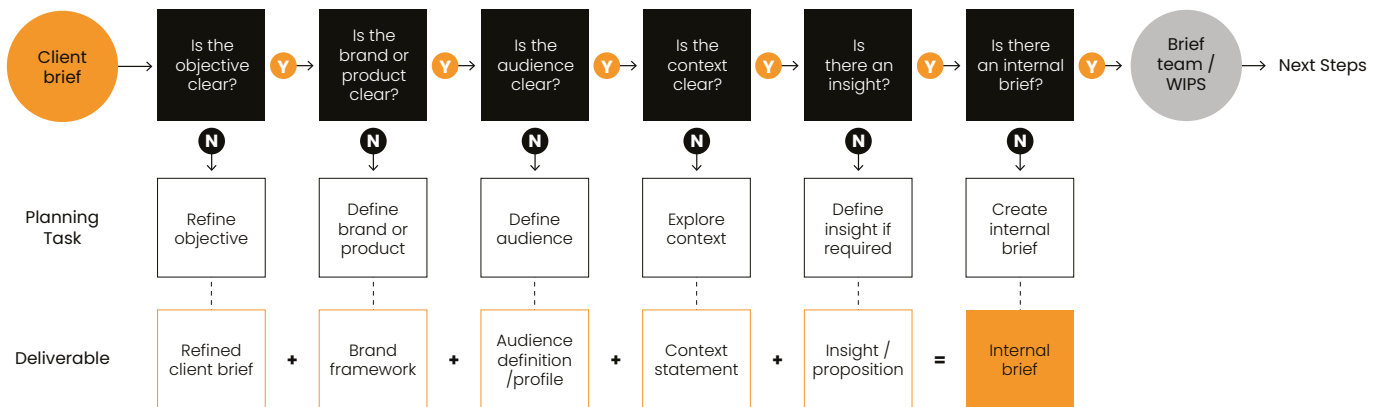


Despite the labels above, strategy and planning have a role across four stages. It is stages 1 & 2, and 4 where we do the heavy lifting. Stage 3 benefits from a light touch to keep creative thinking on track (as defined by the internal brief from stages 1 & 2).

The key strategic deliverables from the different stages are:



And the key steps to 'make it beautifully simple' at Nuccio:



The six key questions to tackle are:

1. Is the objective clear?

2. Is the brand or product clear?

3. Is the audience clear?

4. Is the context clear?

5. Is there an insight?

6. Is there an internal brief?

In the following chapters, we will look at how to tackle these questions in detail and share examples of frameworks and methods we use. We will then look at how they come together in an internal brief and then some of the broader points on how a project's strategy lead or planner can help a team get to great work.

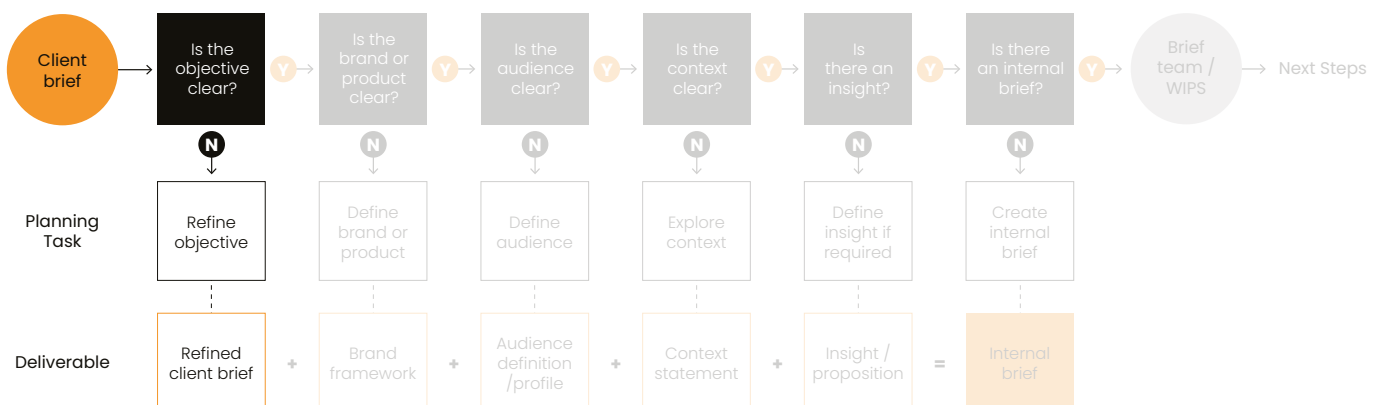
If you stay the course, it will become a valuable reference you can use to inform your communications planning.

An introduction to strategy and communications planning

Is the objective clear?

Are you sure you know what you're doing?

In this chapter, we will look at objectives. The first question to ask yourself when looking at a new brief is: **Is the objective clear?**



A communications brief will inevitably have a shopping list of objectives. I've learned it can be a thankless task to strip this right back, but that is what we must do, and it is never easy.

Businesses always have overlapping and conflicting needs when it comes to communications. Decoding a longlist word salad of jargon to clarify the brief's core is an essential first step.

Typical briefs include lines like:

- | | |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| • Raise awareness of... | Or... |
| • Engage our customers in... | A campaign that includes: X for Y on Z , |
| • A new proposition for... | where |
| • Drive traffic to... | X can = strategy, proposition, insight, concept, user/customer journeys, WOW!, digital assets, video, animation, content, creative |
| • Deliver sales of... | Y can = customers, products, services, brand |
| • Increase web sales... | Z can = display, social, TV, OOH, our website, our social channels, owned channels, paid media |
| • Increase share of voice... | |

Here's an extract from a communications brief received from a global business.

- | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|
| • We want to inspire the public to get behind SECTOR SPECIFIC issues. | • Position BRAND as a leading provider of PRODUCT |
| • Reflect the organisation today, including our leading strengths across our capabilities, as well as our evolving positioning in SECTOR | • Build awareness and increase visibility for PRODUCT in core markets |
| • Speak more effectively to our rapidly-expanding X CUSTOMER, as well as our strong Y heritage | |
| • Bring to the forefront BRAND'S leading capabilities and innovation in SERVICE, as well as our ability and commitment as a large-scale PRODUCT PRODUCER to drive real change through stewardship and engagement | |

“The biggest impact you can have on a brief is to strip a ‘shopping list’ of objectives back to its basics. Easy to say, hard to do.”

The idea of one simple, clearly stated, measurable objective is essential to creating ‘work that works’. Hence, this is an exercise in clarification and compromise.

It is worth tackling this through three steps:

1

Orientation

2

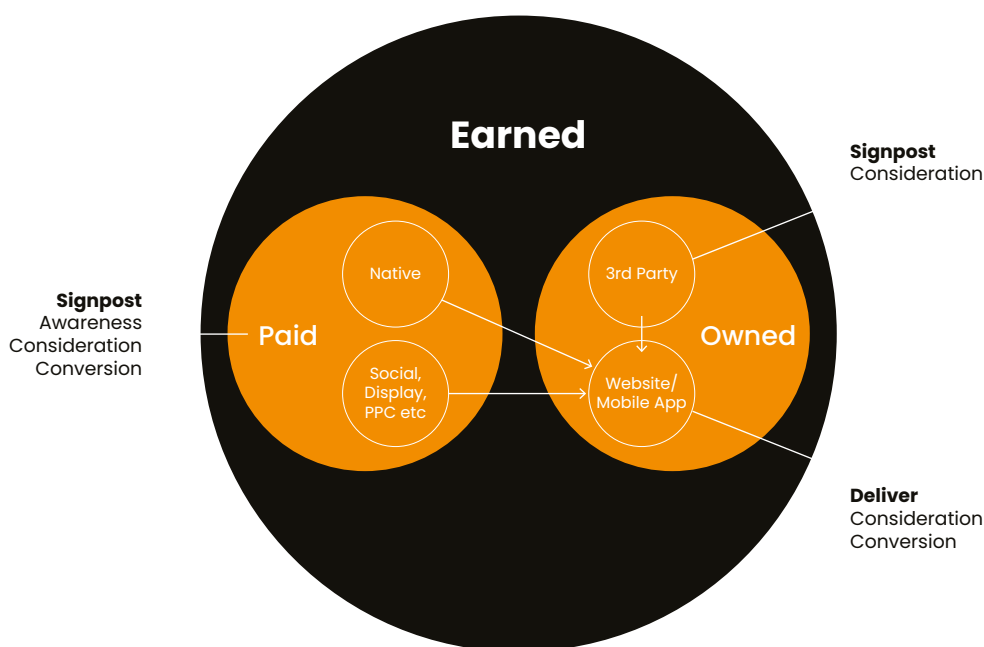
Prioritise and explore

3

Definition

1 Orientation

First, you must establish a shared understanding of the digital landscape and where your campaign will likely live. The most straightforward approach is to use the well-established **paid, owned** and **earned** model.



Paid

Paid is any media you pay for. It includes paid social (ads on social media platforms like Facebook, LinkedIn and TikTok), display (banners on ad networks like Google's Display Network (GDN)) and paid search (often called PPC or SEM). There are lots of paid media platforms and options. Native refers to ads closely integrated into a platform's editorial content. Sometimes they do not support an overt 'next step' in a digital journey. Paid media works across the marketing funnel and is weighted to the top, awareness and bottom; conversion (mainly via paid search and product ads).

Owned

Owned is anything a business or brand has direct control over. So their social accounts, website, mobile apps, and email are all 'owned', where we want customers to encounter 'depth' content and experiences, allowing people to dig deeper into subject areas.

Earned

Earned is exposure or reach through word of mouth. Traditionally, in pubs and cafes, these days, the focus is social media. 'Earned' should be treated as a bonus outcome, so if you have a client expecting you to 'create something viral' or 'blow the doors off social media' you need to step in with expectation management and look for the actual objective you need to achieve.

The ideal is to plan work that relies on something other than earned spread. If your campaign is good, resonates with your audience or is useful or entertaining to them, it is more likely to be shared.

Now that you have a basic orientation of the landscape you are operating in, you can consider what the brief asks you to do.

2 Prioritise and explore

Start by bucketing the high-level objective. Is awareness really about 'front of mind' or is the client using it as a proxy for driving traffic to a website, and is that a proxy for increasing sales? It can be helpful to think about this through a marketing funnel.

Marketing Funnel	Example Channels	Example Nucco Services
Awareness Increasing reach, being front of mind, reinforcing brand, creating or changing perception, often called 'brand marketing'	Digital paid media (all) Social (owned, earned) Broadcast Physical event/venue	Digital Advertising & Branded Content Strategy & creative concepts for reach and cut-through, digital campaigns, branded content. E.g. 'hero' films, content series, cutdowns for promotion
Consideration Deepening engagement, finding out more, sometimes called as 'demand generation'	On site or platform (owned) Digital Paid media (selective) Email/sales	Depth Campaigns & Content e.g. Creative, useful content, case studies, expert podcasts, benefit and product led content
Conversion Taking specific action to achieve a brief, sometimes called 'demand conversion', also 'performance marketing'	Digital paid media (display, social), retargeting Paid/organic search 121 Sales	
Retention Retaining customers, reducing cost to serve customers or increasing value of customers	On site Email/sales Social (owned)	Support Content e.g. Explainer videos, How to's...

Often (particularly in digital briefs), the answer is 'through the funnel'.

What I mean by this is that clients need to raise awareness, increase traffic, and create conversion events all at once, so it is the strategist's job to prioritise and define these. If you are dealing with a multi-part campaign with separate objectives, consider planning and briefing them separately.

"When exploring a brief, the most important question to answer is 'why?'"

Start by clarifying which part of the brief is most important. In the client brief below, I have grouped the different parts of the client brief by position in the funnel.

TOP

- We want to inspire the public to get behind SECTOR SPECIFIC issues.
- Reflect the organisation today, including our leading strengths across our capabilities, as well as our evolving positioning in SECTOR
- Speak more effectively to our rapidly-expanding X CUSTOMER, as well as our strong Y heritage
- Bring to the forefront BRAND'S leading capabilities and innovation in SERVICE, as well as our ability and commitment as a large-scale PRODUCT PRODUCER to drive real change through stewardship and engagement
- Position BRAND as a leading provider of PRODUCT
- Build awareness and increase visibility for PRODUCT in core markets

MIDDLE

Nothing

BOTTOM

Nothing

This looks like it is a top-of-the-funnel awareness campaign, right?

Well, it turned out it was not. When you first explore a brief, the most important question is **why?** With this brief, it became clear that the client needed to drive traffic to their website and get visitors to share contact information so they could be passed to the sales team as a lead. In fact, it is a conversion brief with a data capture objective.

Consideration and Conversion

First off, explore if there is a specific event your client is trying to trigger.

Online this is most likely to be data capture (user hand raises by sharing information), downloads (e.g. a white paper or PDF), or transacts (purchases online).

Once you have established this, you can start to explore what success looks like, for example, X downloads, +10% incremental sales etc. This allows you to start attaching value to the work you propose. It sounds simple but gets complicated quickly, and the strategist's job is to make it as simple as possible.

Without getting dragged down a rabbit hole of metrics here, there are perhaps six Consideration and Conversion KPIs (Key Performance Indicators) to consider: Traffic, Dwell time, Bounce Rate, Downloads, Transactions, Registrations or possibly CPC (glossary in the appendix).

“If you just want to ‘drive traffic’ as your key measure of success, the simple way would be to give away a luxury car in a free prize draw on your website. This would certainly drive traffic, but not quality. As the strategist, you need to push for a better KPI.”

Awareness

This should equate directly to being ‘front of mind’.

In marketing terms, this is the ‘top of the funnel’. Broadcast TV has dominated this for decades, although we now see more awareness activity in digital like YouTube, Facebook and TikTok etc.

Many businesses do not have a framework to measure brand awareness. They tend to use models that benchmark over time and track broad trends. They are often enterprise-level solutions for consumer brands that spend on broadcast media. While useful to CMOs, they don't help you measure the effectiveness or success of your brief.

You must be aware of some KPIs as part of a top-of-the-funnel campaign. Many reflect how well a media planning and buying agency has performed rather than how effective your creative campaign is.

Media planning and buying efficiency KPIs include: Visibility/Viewability, impressions, CPC; Cost Per Click, CTR: Click Through Rate, CPM: Cost per Mille and ROAS: Return on Advertising Spend.

A challenge with many of these is that if you spend more, you achieve more, so the focus shifts to the ‘efficiency of spend’, e.g. how many Xs happen for Y amount of cash spent on paid media, rather than the effectiveness of the work.

If you are tackling a brief about awareness, clients and agency people often look to ‘traffic’ as a measure of success. Technically, this is wrong because it requires action on the audience's behalf (e.g., click-through, etc.). Where you can, avoid this as it takes your eye off what is essential in an awareness brief.

The following three metrics have much more potential to measure awareness:

- Comparison to benchmarks for similar sectors and media formats.
- ROI: Return on Investment – generally includes the creative and production costs of the campaign to reflect a ‘real world return’ on dollars spent by a business
- SOV: Share of Voice – can be a useful measure, for example, by tracking share of search around particular keywords

It can often be helpful to introduce an ‘Index’ score that can combine other metrics to track performance over time of your campaign.

Once you have prioritised objectives and explored how to measure them, you can define them.

3 Definition

Once you better understand the landscape the brief operates in, **you've asked 'why?' a lot** and thought about the marketing funnel, priorities and KPIs you need to get it on a single page.

For example:

ORIGINAL CLIENT BRIEF OBJECTIVES

- We want to inspire the public to get behind SECTOR SPECIFIC issues.
- Reflect the organisation today, including our leading strengths across our capabilities, as well as our evolving positioning in SECTOR
- Speak more effectively to our rapidly-expanding CUSTOMER X, as well as our strong Y heritage
- Bring to the forefront WIDGET'S leading capabilities and innovation in SERVICE, as well as our ability and commitment as a large-scale PRODUCT PRODUCER to drive real change through stewardship and engagement
- Position BRAND as a leading provider of PRODUCT
- Build awareness and increase visibility for PRODUCT in core markets

Rewrites:

A CLEAR OBJECTIVE – APPROACH NUMBER ONE – CONVERSION

This version recognises that the brief is about sales leads.

PRIMARY OBJECTIVE

Create qualified leads for PRODUCT

WHAT SUCCESS LOOKS LIKE (VALIDATION METHOD): Contact requests via the website form here: www.brand.com/product/contact

SECONDARY OBJECTIVES

Reach and engagement with CUSTOMER X about PRODUCT

SCOPE

This is a full-funnel digital marketing brief using paid media supported by owned channels using content on the brand website and social media to increase contact requests on an existing page outside scope.

If the sales process was essentially offline, this could easily be an awareness brief which would look more like this:

A CLEAR OBJECTIVE – APPROACH NUMBER TWO – AWARENESS

PRIMARY OBJECTIVE

Increase reach of BRAND PRODUCT to CUSTOMER X

WHAT SUCCESS LOOKS LIKE (VALIDATION METHOD): Outperform industry benchmarks for paid media

SECONDARY OBJECTIVES

Traffic to website

SCOPE

This is a digital paid media awareness campaign.

You can see how these different objective statements would lead to very different campaigns and work, even though they are based on exactly the same client brief.

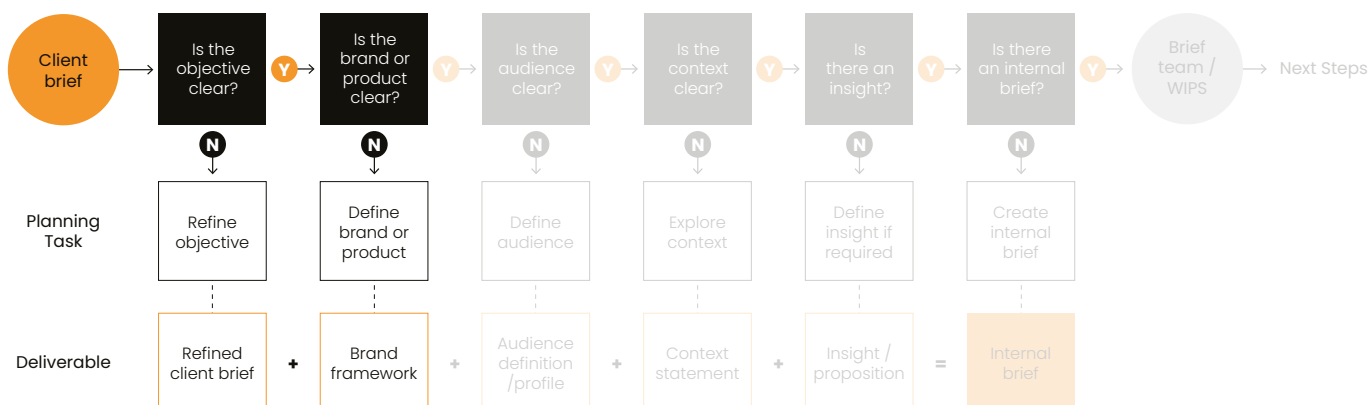
It can be useful to 'nest' objectives, which means prioritising them based on 'to achieve x, we need to achieve y'. In the example above, we need to have more people hear about our client's brand to create the required contact requests. This means raising awareness is required (a secondary objective) to create traffic to engage with content (a secondary objective) that we hope will create a conversion (primary objective).

Once you have made your objective as clear as possible, you can get on to the rewarding parts of strategy and planning: dig into understanding the brand or product, the audience and planning customer journeys.

An introduction to strategy and communications planning

Is the brand or product clear?

In this chapter, we will take a look at brand and product. Once you have clarified your objective, you need to define what your campaign is selling.



Brand and product frameworks

This information needs to come from your client. As a planner, your job is generally an exercise in clarification and organisation. Start by building a framework, and take the time to block one out from the information your client supplies or from their publicly available content, e.g. their website.

Brand and product frameworks come in many styles. There is no perfect one. The following are examples you can use as a starting point.

Final framework



The main elements of a framework are:

Brand or name: As it says on the tin, if the brief includes developing and name/logo/brand, then leave this blank and complete the rest of the exercise, the framework becomes the key element of briefing creative.

What it is: Summarise **what the brand or product is** in its simplest form as a statement of fact. For example, here's a fictional start-up financial services company called Ruber. It is 'A member-based financial services business that offers low-cost loans to individuals'.

Vision or higher purpose: An expression of **the brand or product's ultimate reason for existing**, expressed through the end benefit.

Continuing the Ruber example, the vision might be to 'Help people achieve their ambitions' through access to fair financial services. These statements work best if you can add the words

'[BRAND/PRODUCT] exists to...' at the front to make an active statement.

Positioning: It can be useful to consider including a statement about where in a market the brand/product sits or how it is represented to a particular audience. In terms of keeping things simple, if you can integrate this into 'what it is' it helps keep things simple.

Mission: When looking at a brand, rather than a product, It can be helpful to define a statement about **how the business achieves its vision**. This could be 'Harnesses community power to provide fair funding' for Ruber.

Headline benefit, value or proposition: A proposition should be expressed as a benefit to the audience directed at. So, for example, it could be 'achieve your ambitions with fair finance from XXX'

Supporting features, traits or RTBs: RTB stands for 'Reason to Believe', which can also be considered features. What are **the key elements of the business or product that make it unique**, define it or are central to the offer. Ruber examples might include 'Community Funded', 'Responsive Customer Service', 'Community Backed' etc.

Clients can often gravitate towards generic features like 'Innovative' and 'Service Focused' or aspirational ones that speak more to what they would like the brand to be, your job is to push back against these to unearth the real features that define the brand or product.

Four or five features give you more flexibility in concept development and messaging. Only include features that are supported by a solid explanation or evidence statement. Keep features down to a single digit number, if you find

there are only three, but they are a 'real three', this is better than a long list because it will guide creative concept development and messaging.

Feature explanation or evidence: This is a longer expression of why the brand can claim the RTBs. If 'Innovation' is a feature, it might need to be backed by a statement like 'Rubo invests x8 times more in product innovation than its industry benchmark and has a dedicated team that collaborates with members to develop our product'. You do not have a credible feature if you cannot make a solid evidence statement.

Benefit or explanation, e.g. 'Which means':

A concise description of the feature's benefit to your audience. It can be helpful to think of short and long-form versions. This is a key part of simplifying the brand or product to identify the most important aspects of a brand.

When you combine these, you should end up with a framework that resembles the redacted one below:

Name						
What the XXX is						
The YYY vision						
The value for YYY partners						
Headline benefit						
Supporting feature						
This offers YYY clients						
Which means						
Allowing YYY clients to						

Here are two examples of how features can be laid out in the framework.

Supporting feature	Recognition
This offers you (short)	Corporate and personal recognition.
This offers you (long)	Be recognised as a market and business leader in applying XXX technologies to transform business.
Which means	Internal and industry recognition and an improved recruiter brand.

Feature (short)	Trusted Platform
Feature (Long)	Founded in 1965 with loyal clients worldwide, XXX can be trusted to be there.
Customer benefit of feature	Your money is safe.

When you combine these, you should end up with a framework that resembles the redacted ones above.

Also keep in mind:

Avoid embellishment. Clients often react to brand or product frameworks as if it contains customer-facing words. This is not the case at all, the framework is structural. It is a foundation for creativity that will lead to customer-facing ideas and words. Try to focus on the big picture of themes in the framework.

Active brevity. Keep the language in the active tense. Avoid using 'ing' words. Cut out any superlatives and be merciless with words, prune everything not essential to meaning. Don't allow weasel words like 'more than' or 'truly', stick to facts and data.

Keep it simple. Client briefs and the shared information that accompany them can be overwhelming. The framework's purpose is to define and organise the most important elements, not to be comprehensive. Behind every high-level framework, there is usually a ton of additional/supporting information.

Get it signed off. Ensure your client buys into and signs off on the framework, as it will become a vital planning tool as the project progresses.

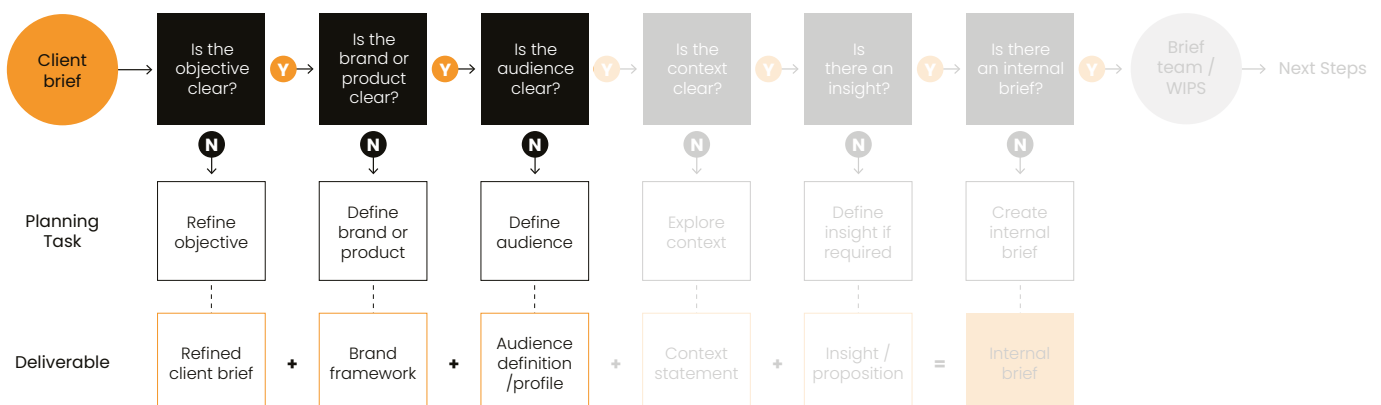
As the project progresses, the brand or product framework will become a key document that can be used as a reference point for creative development and planning messaging frameworks.

Once you have your framework in place, you can take the next step: understand the audience you are communicating with.

An introduction to strategy and communications planning

Is the audience clear?

This chapter explains how to tackle
and define audiences.



Do you know your audience?

The number of times I've been briefed on an audience as a collection of demographic data is uncountable. While this is useful information, a structured approach that considers all audiences from macro to micro is ideal.

'Female mum, over 30, time poor' is not enough to go on, to change behaviour or perspective. Demographics have an important role but are not enough to develop effective communications.



Male
Born in 1948
→ Raised in the UK ←
Married twice
Lives in a castle
Wealthy and famous

There are three categories of 'audience' to consider, laid out in the right-hand column below:

Marketing Funnel	Example Channels	Example Nucco Services	Audience Category
Awareness Increasing reach, being front of mind, reinforcing brand, creating or changing perception, often called 'brand marketing'	Digital paid media (all) Social (owned, earned) Broadcast Physical event/venue	Digital Advertising & Branded Content Strategy & creative concepts for reach and cut-through, digital campaigns, branded content. E.g. 'hero' films, content series, cutdowns for promotion	General A broad group that is likely to include various target segments used for awareness and reach Target A defined audience group that can be addressed directly through profile and insight Persona Individual 'pen portraits' based on behaviours and motivations, there might be several personas within one target group
Consideration Deepening engagement, finding out more, sometimes called as 'demand generation'	On site or platform (owned) Digital Paid media (selective) Email/sales	Depth Campaigns & Content e.g. Creative, useful content, case studies, expert podcasts, benefit and product led content	
Conversion Taking specific action to achieve a brief, sometimes called 'demand conversion', also 'performance marketing'	Digital paid media (display, social), retargeting Paid/organic search 121 Sales		
Retention Retaining customers, reducing cost to serve customers or increasing value of customers	On site Email/sales Social (owned)	Support Content e.g Explainer videos, How to's...	

1 General audience

Start by blocking out general audiences. These should represent all audiences important to the business, not just focus on customers. This ensures you include all key audiences critical to achieving your objective when considering your campaign to change behaviour or perspective. Typically, this covers lobby groups, NGOs, Trade press, government bodies, investors, etc.

The example below is an extract of audience groups that focus on tech/durable businesses and influencers.

General	Audience Group	Goals
Tech & Durable Businesses	Leadership (C-Suite)	<ul style="list-style-type: none"> • Easy visibility • Accelerated decision making • Operate at speed for increased revenue and profit • Sustainable growth
	Product	<ul style="list-style-type: none"> • Concise view on the best performing products and features • Right markets, at the right time and the right price.
	Consumer & Business Insight	<ul style="list-style-type: none"> • All the data in one place • Easily segment to get the important data to find the next big trend.
	Marketing & Brand	<ul style="list-style-type: none"> • Drive marketing activities in the most ROI efficient way • Know how activities translate into sales revenue/ how investment is performing.
	Sales Team	<ul style="list-style-type: none"> • Understand performance in channels, geographical markets, pricing, versus the competition • Have a concise view of how or where to grow market share.
Influencers/Other	Trade Press	<ul style="list-style-type: none"> • First to hear relevant stories • Have an informed point of view • Trends and innovations
	Consultants	<ul style="list-style-type: none"> • Access to best most up to date information

2 Target audiences

A target audience is a defined subset of an audience group that you can engage with more targeted creative, messaging and media, and where you can apply different insights and propositions (covered in E6).

In the example below, for a high-street pawn broker, we are looking at five audiences using the same service for different reasons. These audiences can be targeted in different paid media channels using different creative and messaging.

Target Audience	Description	Motivation	Comments
Magpies	Found things for 'free' money.	Opportunist treat	E.g. something you don't care about turned into an experience or a thing you do
Upgraders	Trade ins and upgrades.	Trade-ups	E.g. better technology
Affluent Cashflow Crashers	Crisis moments when other lines of credit are not available. Perhaps prompted by a life event.	Short term fixes when other options not available	Replacing a washing machine or getting your car fixed when your credit cards are maxed out...
Cash Strapped Strugglers	Strugglers meeting day-to-day costs.	Cash to live	Pawning and selling might be the same as there is little hope of situation changing
Young Carefree	Pawn something to fund a night out.	Cash to party	No responsibility PayDay loans are dangerous Weekend 'crisis' or genuine crisis

Here's an example of a typical, defined target audience, complete with a developed insight and proposition (see E6), that is ready for briefing:

Meet the 'Corporate Risers'

- They are ambitious professionals who want to succeed in their careers
- They must be willing to **personally invest** in themselves and their careers, or **make a case to their employer**

Also

- They work in future-focused global **Blue Chip** and **Fortune 500** organisations in the **US or UK**
- **Senior Managers, Directors** and **Heads of Depts** who want to improve their performance
- Likely to be in their **30's or 40's**
- Likely to have a **Bachelor's degree** or above, and perhaps be **interested in an MBA**, or **recently changed role**

Insight:

The corporate risers feel they are held back by the 'interference' of work and life. If they could just find a way to cut through they would be the 'c-suite of the future'.

Proposition:

Be the c-suite of the future



3 Personas

Personas are useful for imagining an individual (or archetype), for example, different kinds of customers or website visitors defined by a need for planning sales and customer journeys. Personas can also help to paint a richer picture of different types of customers that might fit within a target audience.

Once you have organised your audiences into groups, segments or personas, you should consider whether any specific external factors influence a business communicating with them on a particular subject matter. This is where we consider the context.

Affluent Southern Explorers (W1's)

Profile

Most affluent segment
Wide age range (average age 45)
Professionals
Confident / discerning
High achievers
Midlands and South UK (6% London)

Lifestyle

Not materialistic
Time / freedom for self
Authentic experiences
Broaden minds
Build knowledge
Environmental / green

Holiday motivations

Travel important to lives
UK and abroad
Take longer breaks
Explore local culture
New and familiar
Get off beaten track

Relationship to Scotland

Warm - currently take holidays and short breaks in Scotland
Geographically distant but strong connection

Interests / activities

Walking
Wildlife, nature
Culture, golf, good food and drink
Local events and festivals

Accommodation

More individual B&B's / genuine hotels / self catering: friends / family
Medium quality (but some also like high quality)

Scottish experience

Authentic
Inspiring
New

Media habits

Internet: High usage, functional purpose (e.g. news, banking), 60% go online everyday. Some active participation (download music etc)
TV: Current Affairs, Arts and Culture, Drama and Entertainment, 2-3 hours a day
Press: Quality News, 3-4 times a week
Radio: Classic FM, Radio 4, 1.5 hours a day

Affluent Southern Explorers (W1's) (continued)

A day in the life of Sam (W1)

7:30 Sam wakes up to Smooth Radio, makes some Fairtrade coffee for David and herself and gets dressed into her good quality suit that she bought at John Lewis a few weeks ago. They head off to their respective jobs (David is an solicitor in Guildford whilst Sam works as a marketing manager in central London). She heads to the underground, buying a Telegraph and a bagel from Marks and Spencer's Simply Food on the way. On the underground, she flicks through the Metro.

12:30 Sam heads to the local deli for lunch, which she eats in the office while catching up with the news online on the BBC as well as reading through some

e-newsletters she has received from Jamie Oliver and VisitScotland. She surfs the net for holiday ideas and searches airline websites and TripAdvisor for good deals and advice. They are thinking about a trip to South Africa in the summer and they are keen to get an idea of costs and flight options.

17:30 After work and heading back to their home near Guildford, she meets David and friends at a local wine bar, and then move on to get dinner at a good quality seafood restaurant nearby. It's a good chance to have some great food and catch up with friends they haven't seen in a while.

21:00 David and Sam log into the BBC iPlayer and watch the final of Masterchef which they missed last week - before phoning her parents to confirm final details for the weekend when they are all heading up to St Andrews for a golfing weekend to celebrate her parent's 40th wedding anniversary. Sam studied at Edinburgh University and Scotland has great memories for her and her family.

22:30 After watching the last part of the BBC News, they retire to bed where Sam tinkers with the Telegraph Crossword and David reads the latest edition of Bunkered, hoping for some tips for the weekend's golf!

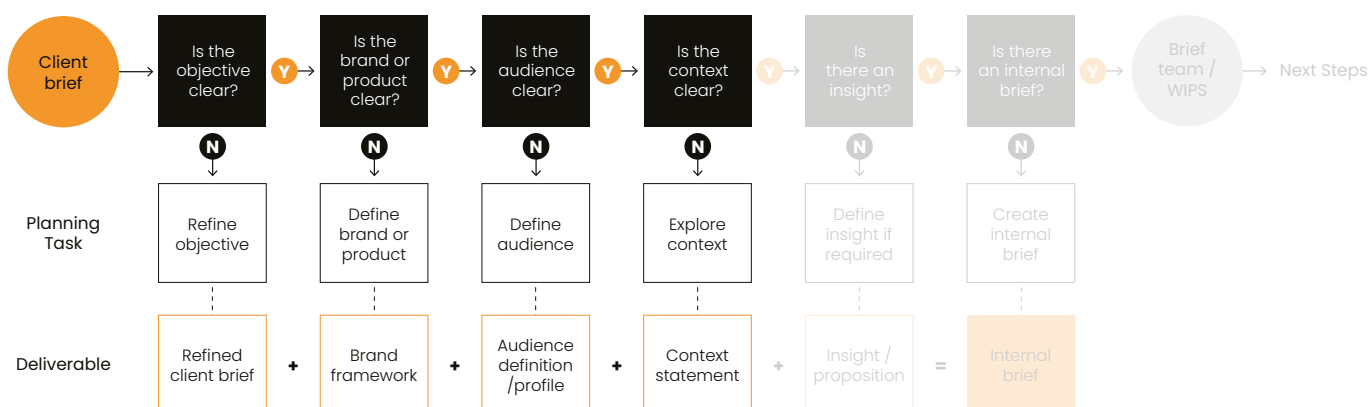
Sam - at a glance



An introduction to strategy and communications planning

Is the context clear?

Context provides essential information about the audience, environment, and circumstances that shape the meaning and impact of your campaign.



Is the context clear?

There are plenty of circumstances where context will not be relevant. However it is valuable to sense check this on your briefs.

If you work for a water company in the UK in 2023, it is impossible to ignore negative consumer perceptions of the category and changing attitudes towards the environment.

Another good example in the UK is the 'big six' consumer energy companies, where customer service is universally recognised by consumers as terrible, in a 'they're all as bad as each other way'. Knowledge of this attitude is essential when planning campaigns and message priorities in the category.

Not considering context has led to massive backfires and unintended consequences of marketing communications. Consider the track record of carbon fuel businesses like Shell over the past decade and their attempts to frame a positive environmental narrative against a wall of consumer mistrust that leads to unwelcome accusations of green-washing that completely undermine the campaign's original objective (try googling 'Shell green ad' if you'd like to explore this subject more).

Considering different contexts helps you tailor your communications to make it more effective and avoid elephant traps. We look at five areas as part of checking context:

Societal – Are there narratives relevant to your audience and objective?

Market – What's going on? What is your client's position?

Competitor – What are your brand's competitors doing that you should consider?

Consumer – Are there sentiments amongst your audience group?

Channel – Are there particular channels you need to consider for your audience?

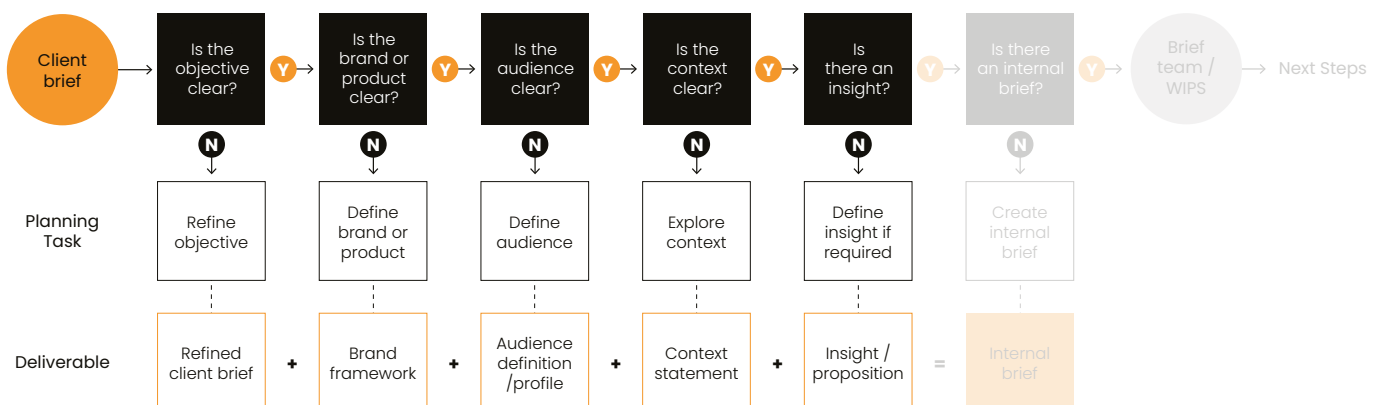
Once you're confident in the context surrounding your campaign you can develop an insight.

The main reason to consider context is to make sure there are no elephants in the room and to avoid elephant traps on your way.

An introduction to strategy and communications planning

Is there an insight?

In this chapter we explore what an insight is
and how to build it into a proposition.



Insights and propositions

Once you have got to an audience definition and have considered the context they are in, it is time to consider insights and propositions.

What an insight is and why it matters

An insight is an essential part of planning marketing communications that require creative concepts and messaging. Depending on the type of agency or marketing team you are in, it is likely that recognising insights and understanding how to work with them to develop communications will be one of your most valuable skills as a strategist.

The insight bridges supplier and business, consumer and brand, customer and product.

Identifying an insight to work with is the most important part of the creative development process that unlocks the construction of a proposition.

An 'insight' is knowledge of an audience group or segment that allows you to connect to that audience. While it is easy to identify truths about a particular audience, finding a specific truth that can be applied to a particular brand to achieve a communication outcome is harder.

People often talk about 'actionable insights' to emphasise this distinction. It may well be an insight that people want to get outdoors into nature more, but this may not be 'actionable' if the communication objective is to drive TV subscriptions.



Recognising insights and understanding how to work with them to develop a proposition is a mission-critical skill for a marketing strategist.

Insights and propositions

The gold standard definition we work with at Nucco is ‘a human truth that can be applied to a brand to create value’.

Here’s an example of an attitudinal segment of a consumer investor audience we call Leisure Investors that was used for a trading platform launch:

Leisure Investors: This group enjoy the participation and community of investment – they enjoy the risks and process, investing discretionary amounts of money so the odds are not too high for them when they lose. The pleasure is as much in the process as the outcome because it is as much a past-time or form of entertainment as it is an investment.

THE INSIGHT FOR THIS AUDIENCE IS:

“In The Game”

Leisure Investors enjoy ‘being part of the trading scene’, they are ‘in the game’. Investing is as much about the experience as it is about the money.

The human touch is key to them because it is what puts them ‘in the game’ not just dabbling with trading shares on a platform.

This insight into how Leisure Investors allow us to go on to develop creative concepts and messaging. Once you have an insight you can build out a proposition.

The proposition

The proposition is applying the insight as a benefit to the audience. It can be confused with a strap line or campaign line, and sometime it might become that, but it is essentially a more prosaic statement that leverages the insight to the communications problem, using other elements from the brand framework.

So for example with the insight ‘In the game’ the proposition could be:

***“Gives you the team (and tools)
to elevate your trading.”***

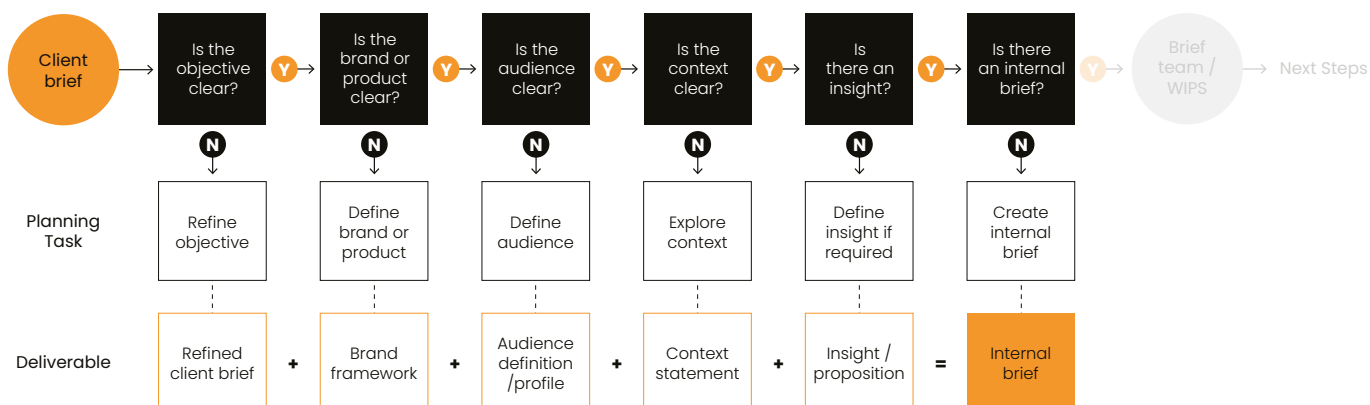
This proposition becomes the launch pad for creative development. Making the insight and proposition as simple as possible gives creatives the best shot at producing great work.

An introduction to strategy and communications planning

Is there an internal brief?

“When forced to work within a strict framework, the imagination is taxed to its utmost – and will produce its richest ideas. Given total freedom, the work is likely to sprawl.”

– TS Eliot

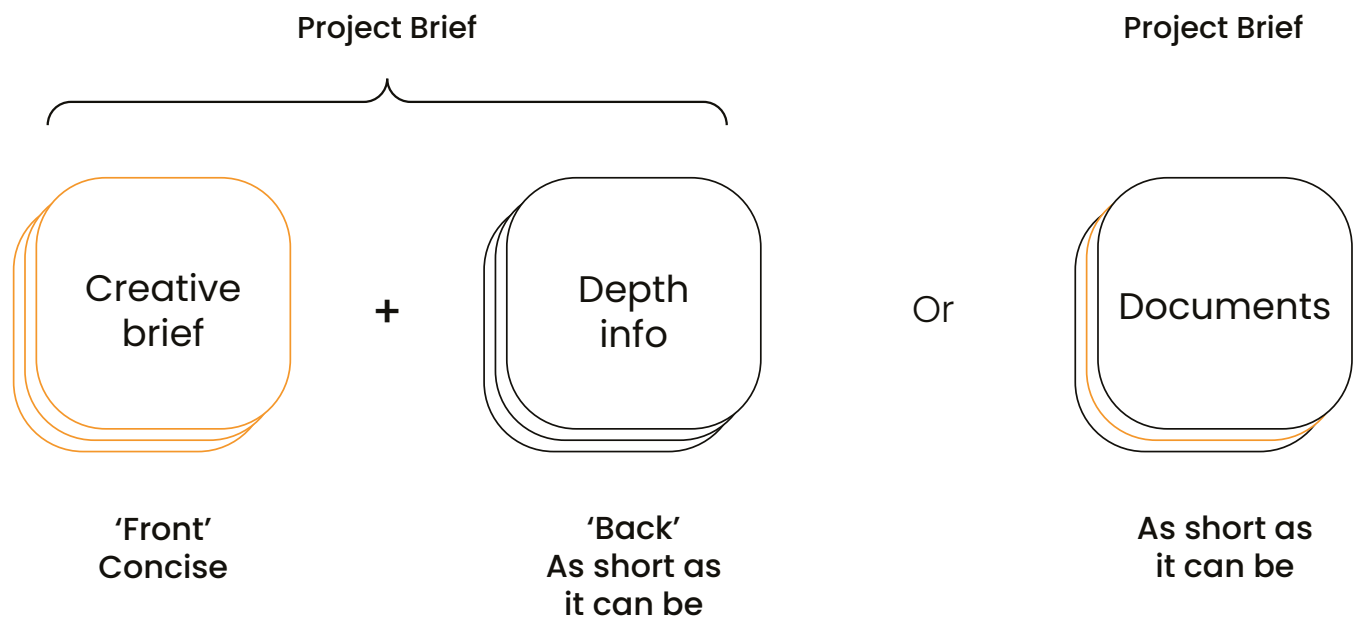


Why should we write an internal brief?

It is often necessary to write an internal creative brief. Client briefs, by their nature, include too much or not enough information. They also invariably speak from the business, not the audience's perspective, and are not focused enough on what we need to do to persuade perspective change.

Templates can be useful, but a 'horses for courses' approach invariably produces the best outcomes.

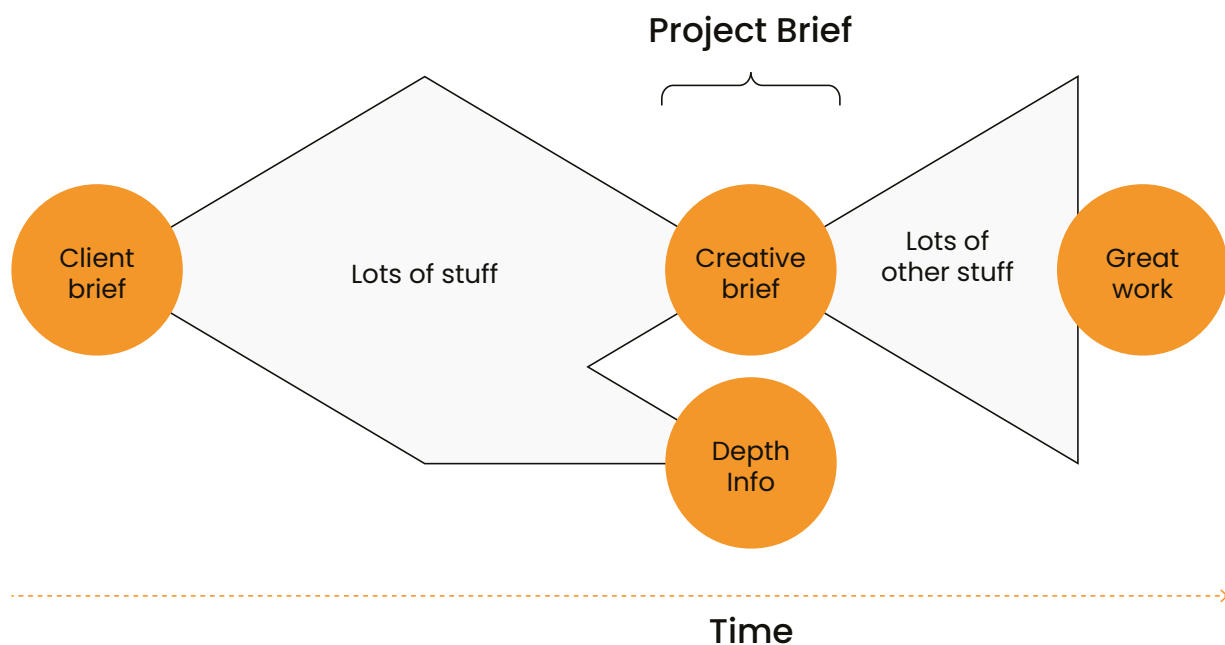
There isn't a single format for a brief, we typically consider three types:



The creative brief

The most important thing from a creative perspective should be the creative brief, which should encapsulate the insight and proposition alongside other need-to-know information that feeds into a campaign.

When necessary, we also produce a 'depth info' document. The purpose of this is to keep the core creative brief simple. We also produce production briefs for projects that do not require conceptual creative development. It is useful to think of writing a brief as an exercise in reduction. Whenever a client brief enters an agency, it generates a lot of noise, information and activity. One role of the strategist is to absorb and sift this to create a simple launchpad for creativity.

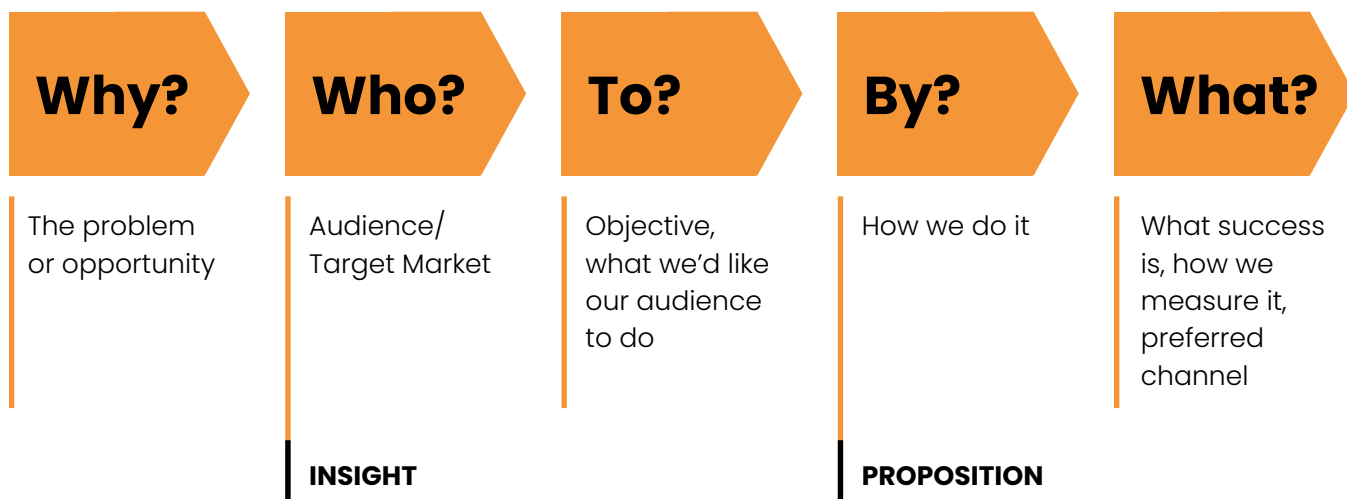


Central to the internal creative brief will be the insight/proposition, alongside the information people need, on ideally no more one or two sides of A4, to develop creative ideas. Everything else goes in 'depth info' if required.

**Keep David Ogilvy
in mind: "Give me
the freedom of
a tight brief".**

Writing the brief

A common format to think about when writing briefs is:



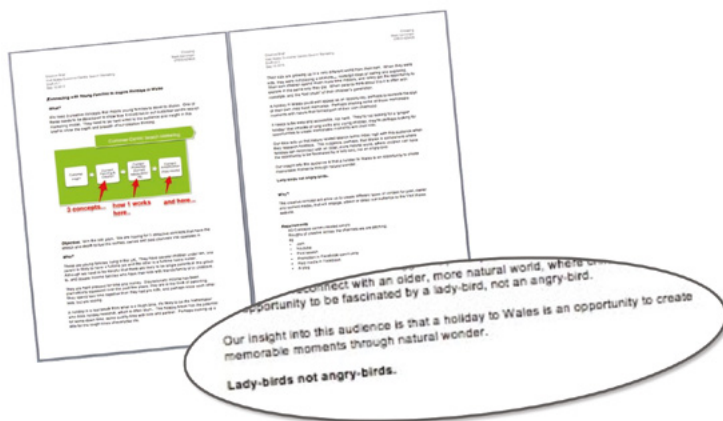
Insight

It can really help to summarise the insight in a way that is internally memorable, in this example, the insight that parents have a nostalgic want to create memorable moments for their children through natural wonder was summarised as 'Lady-birds not angry-birds'.

Inspiration

Alongside the creative brief, you should consider as part of a creative briefing thinking about inspiration content, that might be competitors or other sectors that are working in a similar territory. Cannes Lions can be a useful resource for researching award-winning work.

Once your brief is in place, you are ready to brief creative, and then switch to a shepherding mode of keeping agency and client on board and aligned with your brief.

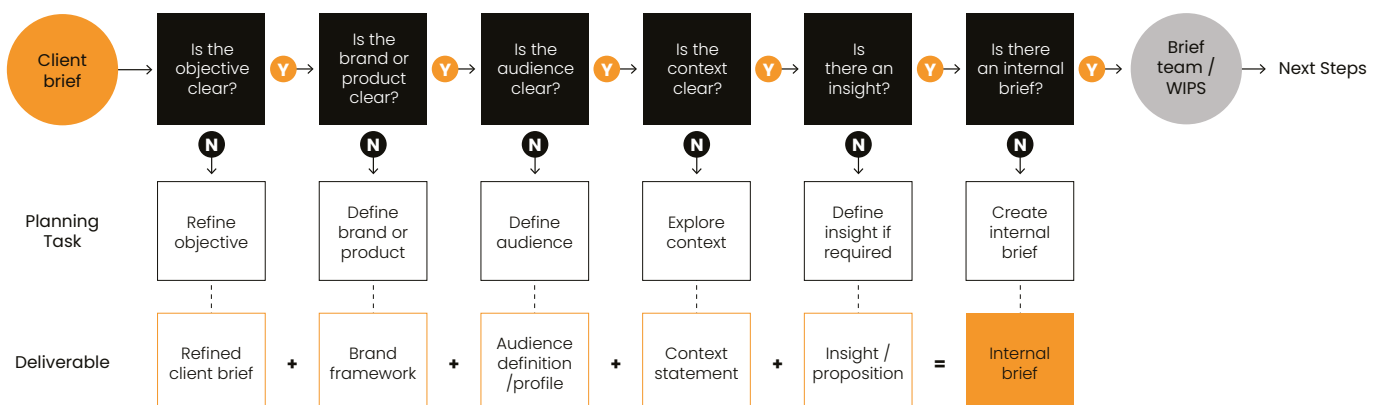


**Once you have
completed your brief
it is time to switch to
'shepherd mode'.**

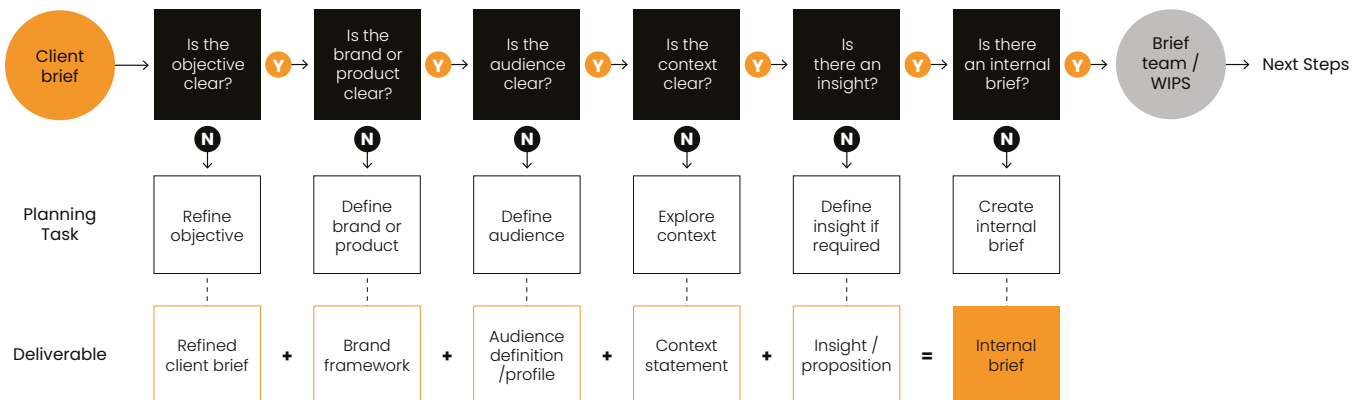
An introduction to strategy and communications planning

Summary

So that's it. If you've worked your communication problem through the framework below you should be in a great place to have a clear view of what you need to say to who, and have done all the groundwork to navigate your client, and agency team to producing great, effective marketing communications.



Summary



In summary, you should have:

1. Defined the brief

Keep it simple, with ideally one priority objective.

2. Defined brand or product

Defining the essential aspects relevant to the brief.

3. Defined audience

Be clear about who you are persuading.

4. Considered context

Understood the context within which your communications might interact with.

5. Identified an insight

And built it out into a proposition.

6. Written a brief

That is a launchpad to develop creative work.

We hope this guide has been useful and contributes to you working better with agencies, or becoming a better planner. The next challenge is giving the teams the freedom and bumper rails to get to that effective work.

Appendix and Glossary

Consideration and Conversion KPIs

1. Traffic – triggered by a request to (a proxy for people) open a website destination. There are various ways to measure this, from ‘sessions’ that record browser instances to ‘unique visitors’ that require cookies etc.
2. Dwell time – how long a browser is left open on a page, not an exact science but used as a proxy for whether people are engaging with content. If you have an article like this one, you should see if people take the time to read it.
3. Bounce Rate – browsers (people proxy) who arrive at a page and then quickly leave. This is often seen as one to improve by reducing its value, encouraging people to explore other pages on your website, or investing time in your content.
4. Downloads – has something been downloaded
5. Transactions – has a defined transaction happened – for example, did someone click a ‘buy now’, or did a but now successfully complete purchase etc.
6. Registrations – successful data collection
7. CPC. Cost per Click – the campaign cost divided by the number of conversions. This can be a basic form of ROI if a business is paying attention to its ‘break-even numbers’. For example, there may be a response rate of only 100 people from 1,000 emails, but this could be a great result if they are high-value responses.

Awareness KPIs

8. Visibility/Viewability – how viewable an ad is (eg is it likely to have been seen on a webpage).
9. Impressions – Number of times an ad is served.
10. CPC. Cost Per Click – total media spend divided by the number of clicks; this is another consideration metric but can be a proxy for how well an individual execution or media placement is working compared to others that have a CTA (Call To Action).
11. CTR. Click Through Rate – is another consideration metric, not an awareness one. Steer clients away from this as a measure of success in awareness campaigns unless there is a clear CTA and customer journey.
12. CPM. Cost per Mille – the price of media based on buying one thousand 1,000 placements (mille in French, not Million in English!).
13. ROAS. Return on Advertising Spend – just looked at through the lens of the cost of the media spend rather than the total cost of the campaign.
14. ROI. Return on Investment – generally includes the creative and production costs of the campaign to reflect a ‘real world return’ on pounds spent by a business.
15. SOV. Share of Voice – can be useful, for example, by tracking share of search around particular keywords.

APPENDIX – Strategy In Action

UBS Asset Management

How strategy and communications planning challenged the perception of UBS AM in amongst professional investors.

While UBS has high awareness as a global financial services brand, they are less well-known for their sustainable investment solutions, despite being an innovative, early adopter with over 20 years of experience in sustainable investment solutions. With this in mind, they asked us to change the perception of UBS AM across 21 markets, to professional and institutional investors.

The strategic challenge was immense, from stripping back the long-list of objectives, through segmenting their audience to unpicking the key messages that might resonate with this audience. A fundamental insight is that within the diversity of the audience, there is a wide variance of investment maturity towards ESG investments.

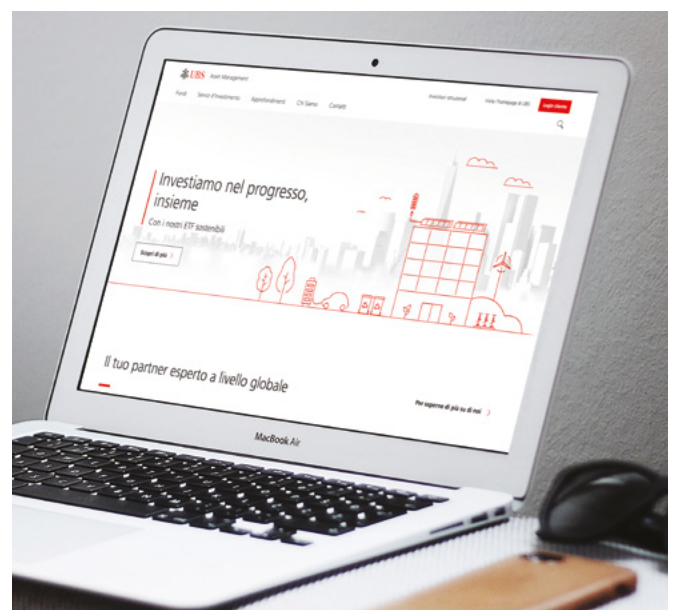


We developed a “through the funnel” creative campaign that worked from high level awareness with a single unifying creative concept of “Investing in Progress”, to content for the different needs of our segments – ranging from high-level brand films, through white papers and even edutainment with ‘next level’ expertise.

The campaign included circa 65 messages and executions for paid media, alongside podcasts, video content, and design support for UBS internal content teams.

The campaign smashed expectations, with paid executions significantly outperforming comparative financial sector campaigns. With CTR’s 2.5 times benchmark, alongside category-leading viewability scores.

Independent qualitative research summarised the creative as **“The sense of UBS as an agency of change – as central to the solutions to global problems – committed to progress and to building brighter futures – and was widely recognised and appreciated.”**



APPENDIX – Strategy In Action

Performance Consultants International

Delivering growth for a world-leading performance coaching and training organisation

Performance Consultants International (PCI) is one of the world's leading performance coaching and training organisations. With decades of experience, they own the intellectual property rights for some of the most famous performance coaching programs – The Grow Model and The Inner Game.

With a desire to accelerate growth in the UK and US, they asked us to create a lead generation campaign to support their growth. To help them achieve their ambition, we planned a new digital test-and-learn customer experience beginning with awareness-raising social advertising through to conversion on their website.

This included:

- Redefining the strategic brand proposition
- Competitor and customer research
- Media strategy and segmented audience planning
- A paid social acquisition campaign
- An optimised website experience



Strategy and communications planning guide

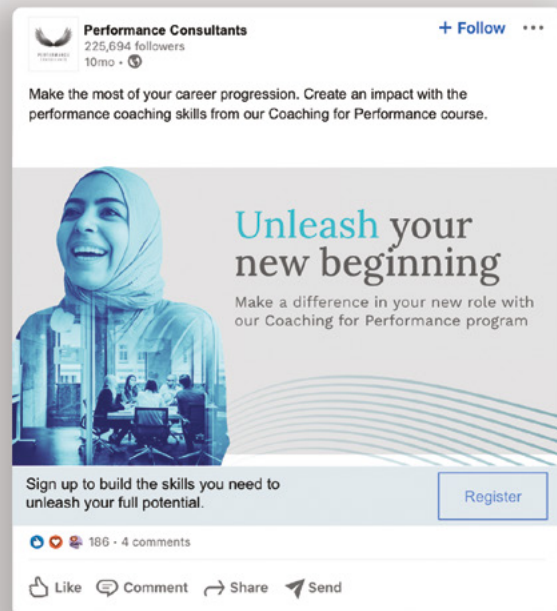
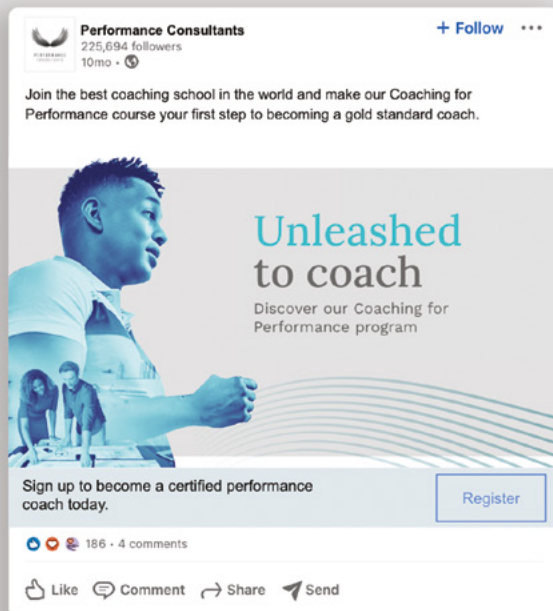
We developed the conceptual territory of 'Live Your Purpose', as a launchpad for the ad campaign, which was built from our research and placed into a matrix of 16 different creative executions across different ad formats and CTAs that led to 32 executions.

The results were beyond expectations. Delivering lead generation at 138% above target and a click-through rate 145% above expectation.

Ultimately delivering real performance for the masters of performance coaching.

"Thank you for all the work and experience that has gone into this. The way I see things, it is priceless especially as we move it forward into action."

David Brown, CEO, Performance Consultants International





About Nucco

We are communication experts that change behaviour and perspectives.

Part of UNIT9, we are powered by one of the world's leading creative, digital and content production groups. We use insight-led creative to create digital campaigns and content for advertising, marketing and internal communications. If you'd like to find out how Nucco can help you, please get in touch [here](#)

Find out more about Nucco [here](#)