

THE CLIENT BRIEF¹

A best practice guide to briefing communications agencies

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MESSAGE FROM ICA, ACA AND AAPQ

The ICA, ACA and AAPQ agreed that this Best Practice booklet contains principles which are world class and should be made available to Canadian marketers and their communications agencies. The originators (see notes on copyright) want the widest possible distribution of the text, without alterations.

Accordingly, ICA and ACA have only added explanatory footnotes for Canadian practitioners.

Rupert Brendon, President & CEO
ICA

Ron Lund, President & CEO
ACA

Daniel Demers, Chairman AAPQ
President, Ogilvy Montreal

ACKNOWLEDGEMENTS

Whilst the writing of 'The Client Brief' has been a team effort, the major contribution of Chris Herd, Managing Director of Bates UK and member of the IPA Value of Advertising Committee, should be acknowledged.

Chris worked tirelessly to ensure that as wide a range of people's views as possible was sought on the subject of briefing agencies, and was assiduous in incorporating their points into the document. His diligence has produced a result which has received widespread endorsement and represents a significant contribution to industry best practice.

The demanding tasks of co-ordinating the final stages of corrections, proofreading, preparing for printing and delivering of both the printed product and the online document have been the responsibility of Jill Bentley, IPA Corporate Identity Manager, and we're thankful for her eye for quality and accuracy.

We are most appreciative of the contribution made by Street London in designing the finished booklet, establishing the look and feel for the whole series of best practice guides, and in sponsoring the production.

Debbie Morrison, ISBA Director of Membership Services, has been a great champion of the project. With Malcolm Earnshaw, ISBA's Director General's support, she has gathered many examples of her members' briefing formats, facilitated the quantitative research which was conducted amongst a significant sample of senior clients and ensured that the ISBA membership had ample opportunity to input into the process and into the drafts.

We are also grateful for the support provided by the two IPA Presidents in office during the period: initially Bruce Haines, Group Chief Executive of Leo Burnett and then Stephen Woodford, Chief Executive of WCRS.

Matthew Hooper, Chief Executive of Interfocus and President of the MCCA, and Graham Lancaster, Chairman of Euro RSCG Biss Lancaster and Chairman of the PRCA, together with the IPA, have committed their organisations to the project.

Through Scott Knox, Director General of the MCCA and Flora Hamilton, Director General of the PRCA, their respective memberships have also been fully involved in the research and development of these guidelines.

'The Client Brief' contains wise words from some senior industry figures and these endorsements of the benefits of more effective briefing are a valuable contribution for which we must thank Andrew Nebel, Barnardo's UK Director of Marketing & Communications, Alan Doyle, Volkswagen UK's Communications Manager, and Alan Bishop, Chief Executive of the COI.

Finally we must recognise the many contributions from agency practitioners across the spectrum of disciplines. They too have provided examples of their briefing formats and enlivened the process with useful insights and anecdotes on what goes wrong, and right, when clients brief their agencies.

Their candour, like that of the clients who participated, and their near unanimous agreement that there is plenty of scope for improvement, gives cause for optimism that the widespread adoption of these guidelines will provide clients with early wins in terms of 'right first time' agency solutions of an even higher quality and value.

HAMISH PRINGLE, IPA Director General

NOTES ON COPYRIGHT

There is copyright in this document and these intellectual property rights are fully reserved by ISBA the IPA, MCCA and PRCA, who have co-authored and produced this work.

No alteration may be made to the text of this document, nor may it be posted on any other website, apart from those of the authoring parties, without the specific written permission of the IPA, MCCA, PRCA and ISBA.

However, it's the intention of all these parties that 'The Client Brief' should gain as wide a distribution as possible and especially throughout the advertising, media, public relations and marketing communications worlds.

In particular, we wish it to be put in the hands of students and all new recruits to the marketing departments of companies who use agencies to develop and deploy communications campaigns. It may well be that more experienced marketers will also find the document a useful refresher on best practice and an aid to management of their teams in their use of agencies.

Thus there is no charge for accessing or downloading the document in its electronic format. The authors welcome approaches from other trade or professional bodies and representatives of educational and training organisations in the UK and around the world, who either wish to post the document on their own websites, or distribute it by other means to their memberships.

This web-based document is in the form of a downloadable and printable PDF, which can be accessed with Acrobat Reader software. If you do not have this software you can download it free of charge from the internet by clicking [here](#) and following the simple instructions provided.

USING THE DOCUMENT

PART 1

The first part of the document is simply the web version of the A5 12-page summary booklet 'The Client Brief', published in hard copy in July 2003. While stocks last, free copies of these booklets can be obtained from the originating trade bodies.

The only difference from the original is that this online version includes hypertext links from a contents list to the various sections of the summary, and also from its text to the more detailed exposition of the key points, which are contained in PART 2. These can be recognised easily as they are highlighted blue and underlined.

Thus readers who wish to discover more about any particular aspect of the briefing process can simply click-through to the relevant section. (To facilitate navigation, there is a return function which brings you back to the link point where you were before in the document).

PART 2

The second part of the document is more detailed. It seeks to give greater guidance and insight into the various sections set out in the summary.

Whilst such a guide can never be totally comprehensive, it's hoped that the content of this section will cover many of the situations that marketers and their brands find themselves in, and thus give useful help in formulating the brief to agencies.

PART 3

The third part contains short summaries of the trade bodies who developed these best practice guidelines.

PART 4

The fourth and final part contains a short bibliography and some links to other useful websites.

PART 1

THE CLIENT BRIEF²

A best practice guide to briefing communications agencies

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Joint industry guidelines for young marketing professionals in working effectively with agencies

Institute of Practitioners in Advertising
ISBA
Marketing Communication Consultants Association
Public Relations Consultants Association

² Reproduced in 2006 with permission of the organizations above. Edited footnotes by Association of Canadian Advertisers (ACA) and Institute of Communications and Advertising (ICA).

FOREWORD

“FORGET, JUST FOR A MINUTE, THAT YOU ARE BRIEFING AN AGENCY. INSTEAD, PRETEND YOU ARE STANDING ON THE BANK OF A RIVER ABOUT TO BUILD A BRIDGE.”

Around you are architects, builders, all sorts of different experts that you have hired to help you. They might all come from different specialist companies, they might all come from a single one-stop-bridge-shop. It really doesn't matter. All that matters is that you build the best and most effective bridge you can.

So what brief should you give them in order to get that perfect bridge?

How about **where it should start from?** Where are you standing right now? Where is 'point A'? They need to know that. That's not up for debate.

And what about **where it should finish?** Where's 'point B'? The destination. If I were the architect, that's the bit of information I'd want made pretty clear.

Finally, what about **how to build the bridge itself?**

Probably not.

Maybe you'd give them some ideas on what the bridge might look like, what vehicles will need to cross it, what size boats will need to go underneath it, how high the hand-rails should be, etc, etc. But you're not going to tell them how to build the bridge. That's their job. You're going to sit back and wait to see the drawings.

It's the same with briefing agencies. They need to know where you are now. And they need to know where you want to get to. What will success look like? And how will it be measured?

If every agency involved in your campaign shares that same information, aren't they likely to work better together to achieve the desired result?

So when you're writing an agency brief, think **“Where am I now?”** and **“Where do I need to get to?”** Make it crystal clear. And you'll find that most agencies will be pretty good at getting you there.

I think that's the single biggest thing we've learned from all of our research in preparing this guide. So I hope it sings out loud and clear as our single biggest recommendation.

Now, back to bridges.

The Millennium footbridge³. Wouldn't you just love to see the original client brief?

CHRIS HERD
IPA Value of Advertising Committee
(ICA is the Canadian counterpart of IPA in UK)

³ The first new pedestrian bridge to cross the Thames in Central London in a 100 years. Architecturally exciting, it proved to have technical problems that caused it to be nicknamed the Wobbly Bridge. (Ed)

INTRODUCTION

“THE BETTER THE BRIEF, THE BETTER AND MORE ACCURATE THE RESULTS.”

The aim of this new joint industry initiative is to provide you with best practice guidelines on how to brief communications agencies and make the most of their expertise.

There are universal pressures on all clients to work faster, cheaper, better, and increasingly your personal success will be connected to your marketing activity being more effective. Adopting these guidelines will positively impact upon this success.

In addition there's a growing requirement for clients to demonstrate that robust processes exist within their own operations. Formally adopting best practice in agency briefing will go a long way to satisfy this requirement.

The brief is the most important bit of information issued by a client to an agency. It's from the brief that everything else flows. Indeed written briefs are a point of reference that can be agreed at the outset and therefore, to some extent, form a contract between client and agency.

The better the brief, the better and more accurate the results. The more time, effort and information you input at the start, the greater the time savings throughout the process.

This document is designed for use with all types of communications agencies. We have included a simple list of the main headings in a good brief for easy reference and a short summary of what each section should contain. There is also a longer web-based document, which goes into more detail.

We have conducted research with over 100 clients and more than 100 agencies to quantify these views (you will see verbatim comments and figures from the research illustrated throughout the text). We have also considered many briefing templates developed by clients and agencies alike to distil the 'common ground' and we have discussed briefing techniques with many independent expert consultants to ensure that our guidance document is as reflective of current best practice as possible.

We want you to use this template to help your marketing teams become the best briefing practitioners possible. We want agencies to disseminate the guide far and wide amongst their client base. We want you to consider joint training with your agency. Together we can make a difference and truly improve effectiveness whilst limiting the wastage of time and money for all concerned.

I welcome your comments, suggestions and questions on this important topic and assure you that ISBA will continue to work with the IPA, MCCA and the PRCA to deliver first class information, training and services to enable advertisers to manage their agency relationships more and more effectively.

DEBBIE MORRISON
ISBA Director of Membership Services
(ACA is the Canadian counterpart of ISBA in UK)

WHY WRITE A BRIEF?

THERE ARE THREE COMPELLING REASONS WHY IT IS WORTH WRITING A BRIEF FOR EVERY PIECE OF WORK THAT YOU COMMISSION AN AGENCY TO DO:

1. It leads to better, more effective and measurable work
2. It saves time and money
3. It makes remuneration fairer

1. BETTER WORK

A brief is the most important piece of information issued by a client to an agency. It's from the brief that everything else flows. Therefore it's essential that every effort be taken to prepare the best possible documentation of what is required.

It's in the nature of creative thinkers that giving them the tightest of parameters will often stimulate the most inventive of responses – and 79% of clients and agencies agreed that: **“It is difficult to produce good creative work without a good brief”**.

The client brief can be considered the platform for a communications campaign. The better a company's corporate or brand position is defined and the more thoughtfully its key business issues are described, the more likely it is that strategic and creative thinkers in agencies will be able to apply their specialist skills to produce great solutions.

“The whole idea is to stimulate the creative imagination, not to restrict it. Ultimately you are buying creative ideas. Procurement people can sometimes write briefs as though they were buying copper piping or paperclips. But selling is an art. It's more like briefing an architect. We need agencies to feel inspired so they can do their best work.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

2. SAVING TIME AND MONEY

The biggest waste of agency resources is to put them through the process of developing a solution repeatedly without concrete direction. It wears on relationships and is costly in wasted staff time (on both sides).

“We need agencies to get more work right first time. That saves time and money. A proper written brief makes the process more efficient – that's good for clients and good for agencies.”

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

In our research 99% of agencies and 98% of clients agreed that: **“Sloppy briefing and moving goal posts wastes both time and money”**. A clear written brief can minimise this wastefulness and maximise the chances of a ‘right first time’ agency response to the client.

“The written brief instils a discipline on my team and the agency to be very clear about what the objectives and expected outcomes are.”

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

Both clients and agencies say that ‘time pressures’ are the main reason for inadequate client briefs. But in fact not writing a brief to save time is a false economy, as more often than not it leads to re-working. Worryingly, 75% of agencies and 55% of clients agreed that: **“The briefs that we work on are often changed once the project has started”**. Worse, 79% of agencies reported that: **“Clients often use the creative process to clarify their strategy”**, and even 35% of clients agreed with this. It's like using your first set of curtains merely to define how big your windows are!

3. FAIRER REMUNERATION

One of the criticisms that marketing people face from their colleagues in finance and in the boardroom in general is that they lack accountability for the very significant sums of money they spend.

The caricature of the flash and superficial marketing executive will only be dispelled by a more professional approach. Ensuring that briefs are written for every project from every agency is an essential place to start.

Over 90% of agencies and 84% of clients agree that: “**Payment by results is impossible without fully agreed business objectives**”. Given the increasing prevalence of a PBR component in so many remuneration agreements, this is another compelling reason for a proper written brief.

Clearly the scale of the project will dictate the depth and complexity of your brief – one for a major new brand launch will obviously be much more detailed than one for a small tactical advertisement within an existing campaign.

But, whatever the task, a written brief that includes ‘**objectives**’ and ‘**success criteria**’ is the foundation stone for accountability and demonstration of the effectiveness of advertising, media, PR, direct marketing, sales promotion and indeed all forms of commercial communications. And without the ability to demonstrate our effectiveness, none of us will receive the remuneration that we deserve.

IN REAL LIFE

WITH ANDREW NEBEL

Clients generally get the agencies they deserve! The best work flows from client/agency partnerships that are built on mutual respect, integrity and a joint humility of approach which allows the professional perspective of both parties to be recognised and respected.

In working together successfully, clients and agencies need to achieve the commercial equivalent of a ‘Vulcan mind meld’, which can only flow from clear, open and non-precious communications in both directions.

Establishing a clarity of purpose through the definition of objectives which are outcome focused and measurable is clearly at the heart of the briefing process. Clear briefs are not the only critical success factor in arriving at good advertising and marketing, but without this sound starting point you have little chance of success.

ANDREW NEBEL

Barnardo’s – UK Director of Marketing & Communications

THE PRINCIPLES BEHIND A GOOD BRIEF

THERE IS REMARKABLE CONSENSUS AMONGST CLIENTS AND AGENCIES ABOUT WHAT MAKES A GOOD BRIEF. THERE ARE THREE KEY AREAS:

1. Written briefs
2. Clarity of thinking
3. Clearly defined objectives

1. WRITTEN BRIEFS

Our research shows that 94% of clients and 98% of agencies believe: **“A combination of written and verbal briefing is the ideal”**. Both parties see enormous benefits in starting with a written document produced by the client, which is then analysed by the agency and debated between the two teams.

“We prefer a written brief because this forces the client to consider their request. The discipline of writing a brief ensures some rigour on their part. The opportunity to discuss this at a subsequent verbal briefing usually allows us to cover any inconsistencies and, if necessary, develop focus through mutual agreement.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

The process of developing, discussing and agreeing the brief in this manner in itself adds value. And if more than one agency is involved in developing the campaign (as is often the case with media and creative agencies) it is advisable to brief all parties together – with one written brief and one subsequent briefing meeting.

“By writing a brief we have focussed on what it is we are expecting from our activity and what we expect our agencies to contribute/come back with. By discussing this written brief, each party has the opportunity to build on the written brief, challenge it and buy into it. It assists clarity and helps build an effective team.”

(‘BRIEFING’ RESEARCH 2002: CLIENT SAMPLE)

A written brief is also vital in ensuring the ‘buy-in’ of other key people in your company. This buy-in is essential in order to avoid the significant waste of time and resources that can happen when senior executives – often outside the marketing department – challenge key assumptions in the brief, leading to belated changes in direction. Written briefs should have the buy-in of all interested parties before they are delivered to your agency.

Nowadays, when you may retain three, four or more agencies to work on different aspects of your organisation’s corporate or brand communications, the premium on convening a key meeting to enable all parties to debate and contribute to the brief has never been greater. Having people with advertising, media, direct marketing, public relations, sales promotion and other communications skills together in one room at the beginning of the project will add enormous value and set the shared agenda for the work ahead.

2. CLARITY OF THINKING

A good brief is not the longest or most detailed, it’s the one whose clarity and focus creates the platform for a great strategic leap, a blinding customer insight and an effective solution.

Briefs are called ‘briefs’ because they are meant to be brief. They are a summation of your thinking. Try to attach all relevant supporting information as appendices.

As Blaise Pascal put it in his Lettres Provinciales of 1657: **“I have only made this letter longer because I have not had the time to make it shorter”**. Too much information can fog the process. Relevance and context are more important than reams of data.

“The main difference between good briefs and bad briefs is that good briefs leave you with a clear understanding of what you are trying to do. Bad briefs drown you in contradictory information and objectives.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

The client brief should therefore be a concentration of your current thinking, it should contain key nuggets of information and it should focus on setting out the objectives of your product or service that commercial communications can play a key role in achieving.

This appeal for clarity and objectivity, however, is not an attempt to reduce your creativity. For instance, often your dramatisation of the brand’s situation and the key issues it faces can spark off great creative thinking. The tried and trusted ‘factory visit’ should not be forgotten and there may be other more innovative ways that you could light the creative fuse.

“Clients should not underestimate how much a good brief, written with real flair and delivered with belief, can help enthuse and inspire the agency.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

Remember that briefing your agency is a joint and dynamic process. Whilst this booklet encourages a formalised approach to briefing in order to create clarity, this should never be at the expense of additional, more dynamic and inspirational briefing methods.

3. CLEARLY DEFINED OBJECTIVES

“Ultimately the point of communications is to get people to do things. Which people? What things? You’ve got the basis of the brief right there. Everything else is detail.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

Start by making sure that your objectives are crystal clear. Use concrete business objectives rather than vague terms such as ‘to improve brand image’. (And remember, every objective starts with the word ‘to’...)

If your objective is indeed to improve your brand image, then go further. Explain the desired improvement that you want to achieve. From what to what? What will it do for your business? (eg so IFAs⁴ will recommend your brand, etc). What’s your business rationale for spending £xm to achieve this? Concrete business objectives rather than woolly intermediate objectives are essential.

“The clarity of the objectives is the most fundamental part of a good written brief. The single greatest frustration is when there isn’t a clear and credible problem to solve.”

(‘BRIEFING’ RESEARCH 2002: AGENCY SAMPLE)

Almost all agencies and 82% of clients believe that: **“Client briefs should focus on making sure the business problem is properly defined”**. Furthermore, 72% of agencies and 84% of clients say: **“All briefs should have effectiveness criteria and evaluation methodology written into them”**.

Since no remuneration agreement that contains a performance related element can be made to work without appropriate measures of performance, quantifiable objectives should always be set. So, clearly defining the objectives to establish the project’s ‘success criteria’ (what will success look like and how will it be measured?) is the number one principle of writing a good brief.

⁴ Independent Financial Advisers. (Ed)

IN REAL LIFE

WITH ALAN DOYLE

In the words of Bill Bernbach, “Our job is to simplify”.

The key to effective briefing is to provide a simple insight that can be dramatised memorably. Ensure that you know exactly what you want. Then tell the agency as clearly as possible.

(It also helps to have a seamless relationship with them stretching back over four decades, mutual understanding and respect, a fine brand and peerless products.)

Alan Doyle

Volkswagen UK – Communications Manager

WHAT A GOOD BRIEF SHOULD CONTAIN

THE KEY SECTION HEADINGS OF A BEST PRACTICE CLIENT BRIEF ARE AS FOLLOWS:

- | | |
|--|--|
| 1. Project management | 5. Who do we need to talk to? |
| 2. Where are we now? | 6. How will we know we've arrived? |
| 3. Where do we want to be? | 7. Practicalities |
| 4. What are we doing to get there? | 8. Approvals |

These headings and sections should be completed for every brief you give to an agency. Clearly the depth of detail within each section will vary according to circumstances: this week's tactical retail price offer will be heavy on the practicalities; the next major campaign for a brand intended to last for five years will be stronger on the strategic issues.

Generally your brief should focus on defining the 'two ends of the bridge': “**Where are we now?**” and “**Where do we want to be?**” Creating communications to build the 'bridge' for the brand to travel between these two points is the key role for any agency, and their response should be required in the context of the client marketing and campaign strategy set out clearly under “**What are we doing to get there?**” and “**Who do we need to talk to?**”

A crucial point is to be explicit as to the measures of the effectiveness of the exercise, ie “**How will we know we've arrived?**”

At either end of the brief there are the operational requirements of “**Project management**”, “**Practicalities**” and “**Approvals**”.

1. PROJECT MANAGEMENT

You should ensure that the basic facts of the project are provided. These will vary according to your internal systems, but the following are common bits of information that are required:

DATE; PROJECT NAME; PROJECT TYPE; PURCHASE ORDER; JOB NUMBER

COMPANY: PLC/GROUP COMPANY; OPERATING COMPANY/BRAND OWNER

BRAND: NAME/VARIANT

CLIENT TEAM: NAMES/TITLES AND CONTACT DETAILS

AGENCY/S: NAMES/TITLES AND CONTACT DETAILS

2. WHERE ARE WE NOW?

Describing the current position of the brand, its background and the key issues it faces defines the start point for the journey on which communications will take the brand.

The brief should try to contain the following information: product or service description (including key attributes and benefits); manufacturing or service delivery; distribution channels; market size (volume and value); customer usage data; the brand's positioning; its history of brand communications, competitive brands/products and their communications activity, etc.

3. WHERE DO WE WANT TO BE?

This section defines the desired destination of the journey on which successful communications will have taken you. The goal should be set in the context of the overall corporate business and marketing plan, as well as what will be achievable by this specific project on the proposed expenditure.

A single-minded and measurable objective is usually a pre-requisite for success. Typical objectives are to effect improvements in sales, usage, awareness, image, reputation, profitability, customer profile, shareholder value, and/or response levels – although there are many other possible objectives of communications. A quick glance at any selection of award winning papers from the IPA Effectiveness Awards⁵, the MCCA Best Awards or the PRCA FrontLine Awards will reveal that there are nearly as many valid objectives for communications campaigns as there are campaigns themselves!

4. WHAT ARE WE DOING TO GET THERE?

MARKETING STRATEGY:

It's unlikely that advertising or other communications will achieve the defined objective alone, so it's essential for the agencies involved in developing these communications to have a full understanding of the total marketing and communications strategy – and of the programmes that you have already put in place. It is also essential that this strategy is demonstrated to be in line with and in support of your overall corporate business plan.

CAMPAIGN STRATEGY:

The campaign that you are briefing will probably involve more than one medium or communications discipline – and hence more than one agency – all of whom will need to know your overall campaign strategy. This section should describe and define the campaign plan, as well as the specific advertising/media/PR/DM/SP/etc briefs within it. Think about what direction you can give to your agencies' creative briefs. And what inspiration you can give them. What is the role of each medium or discipline within the total campaign? And for each one, what is the key message? What brand/tonal values are required?

5. WHO DO WE NEED TO TALK TO?

All communications are designed to elicit some form of response from a particular group of people. These target groups should be defined and prioritised as accurately as possible via demographics, lifestyle, product usage, attitudes, etc.⁶

Equally important are the insights that you and your agencies already hold about these target groups that can be leveraged to create the desired reaction. Often your agency will conduct further research to generate

⁵ The CASSIES (Canadian Advertising Success Stories) follow the model set by the IPA Effectiveness Awards www.cassies.ca (Ed)

⁶ Media consumption is also an important consideration for targeting.

even greater understanding – and your existing insights will provide them with a useful and welcome platform to build on.

6. HOW WILL WE KNOW WE'VE ARRIVED?

You and your agencies need to know what success (or failure) will look like. Measures should be put in place to establish whether or not the campaign delivers against its desired objective. How will the campaign be measured? When will it be measured? Who will measure it? This is vital to the operation of PBR remuneration agreements.

Remember that most communications campaigns are steps along the path of a bigger journey. Progress towards the bigger and longer-term brand and corporate goals should also be measured.

7. PRACTICALITIES

Your agencies' responses to your brief will have many implementational consequences, so it's important that all the key practicalities for them to bear in mind are included in your brief. These fall into three main areas:

BUDGETS:

An upfront tackling of budget issues (and the anticipated results from different budget levels) will dramatically reduce the reworking of solutions – reducing total costs and improving integration across the campaign. Your approach to setting the budgets may vary from brief to brief. Ideally, you will know the budget from the outset, in which case it should be clearly stated and broken down into its component parts. Sometimes, however, 'scenario budgeting' will be required in order to give clear direction to the agency. For instance one or more hypothetical budgets might be supplied (ie what would your recommendation be on budgets of £x, £y and £z?). Alternatively, you might request the agency's recommended budget to achieve a set of given and measurable objectives.

TIMINGS:

What are the key delivery dates? What are the key payment dates? When should the key project milestones be set? What are the booking dates or deadlines for media? Should it consider the timings of other campaigns? Is there a sales conference whose deadline precedes the media copy date? How do you want the creative timings to run (eg tissue meetings)? What phases of pre-testing research are planned? What are the logistics of production?

OTHER CONSIDERATIONS:

Each communications discipline will have different practicalities that should be thought through before the agencies are put to work.

For creative briefs, are there any agreed media strategies and vice versa? Are there any background documents to append to the brief? What legal constraints are there in this market? It is vital legal and regulatory restrictions are identified and raised with agencies, particularly in relation to sensitive sectors such as financial products, alcohol and food and children. Ensure agencies are briefed on corporate codes of practice and ethics. Establish from the start that illegal activities such as fly posting are not part of the brief.⁷

8. APPROVALS

The final piece of detail needed in the brief is who has the authority to sign off the work that the agency produces. This person (or people) should also be the one(s) to sign off the brief before it is given to the agency and, preferably, to attend the resulting presentation.

⁷ In Canada sometimes referred to as "wild postings" which are both legitimate and legal if the provider has the permission from the permit holder of the space for advertising/promotional purposes.

IN REAL LIFE

WITH ALAN BISHOP

Arriving at the COI⁸ after a long history on the agency side at Saatchi & Saatchi, I've been forcibly reminded of how important a disciplined briefing process is, especially in the complex communications environment in which our clients in Government departments operate. Both in my private sector days and now at the COI, I find that working to a clearly written brief gets the right results: be clear on where you are now, where you want to be, and then employ the best agency people to get you there.

Alan Bishop
COI – Chief Executive

THE MAIN SECTIONS OF THE CLIENT BRIEF

START HERE

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BRIEF NOW

Rupert Brendon, President & CEO
ICA

Ron Lund, President & CEO
ACA

Daniel Demers, Chairman
AAPQ
President Ogilvy Montreal

⁸ www.coi.gov.uk “The Central Office of Information works with Whitehall departments and public bodies to produce information campaigns ... from health and education to benefits, rights and welfare. The organization combines expertise in marketing communications with an understanding of government systems and procurement policies.”

These are significant numbers of COI staff with private sector marcom expertise including the CEO. It is the repository all Government learning on marcom, regularly winning in the IPA Effectiveness Awards scheme. (Ed)

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INTRODUCTION

- **Anecdotal evidence of dissatisfaction with the briefing process**
- **Quantitative research amongst both clients and agencies confirms this and reveals very high degrees of agreement on the solutions**
- **90% of client and agency respondents believe that a combination of written and verbal briefing is the ideal**
- **But 30% of client briefs are verbal only, or written by agencies**
- **Perhaps £13bn of agency work on client communications expenditure is briefed in a less than ideal way**

Many agencies complain that the briefs they receive from clients are often inadequate for the purpose and missing key bits of information. For example, the key metrics by which the campaign might be deemed a success or failure are often completely missing. Rectifying this frequently requires considerable work by the agency in order to clarify exactly what the client's requirement is of them before work can start.

Many clients complain that individual agencies have a tendency to ignore the brief the marketing team provides and insist on writing their own, thus apparently duplicating effort and occasionally misinterpreting the client's intent. Sometimes this entails taking what the client perceives to be a perfectly reasonable briefing document, and putting it through a mysterious and often expensive 'black box' process in order to turn it into the agency's proprietary format.

Even where there is a client brief which the agency is happy to work to, it's rare to find one which is complete in the sense that it provides all the necessary market data or the full scope of the business objectives or allows for all the possible media channels that might be used. Equally rare is one which makes the criteria for success explicit, and thus details the metrics required to establish degrees of achievement.

Quantitative research was carried out in November 2002 to establish the scale of the problem. According to the study over 90% of both client and agency respondents believe that a combination of written and verbal briefing is the ideal manner in which to commission work from an agency.

However, in the same survey, the clients admitted that some 20% of all the briefs they issue to their agencies are either verbal only, or written by the agency.

Meanwhile the agency responses to the same question suggest that 20% are verbal only and 20% are written by them, as opposed to their clients.

Splitting the difference this means that perhaps 30% of all client briefs are either verbal only or written by their agencies on their behalf, and the figures are worse for briefs to media, public relations, design and sponsorship companies.

Given that the IPA *Bellwether* Report estimates the total annual expenditure on marketing communications to be £42bn, including production, this means that up to £13bn of client expenditure on brand communications is likely to be commissioned through agencies in a less than ideal manner.⁹

This is in stark contrast to areas such as IT where a request for a supplier response would routinely be set out in great detail in a written specification. No wonder client company Finance Directors have a generally poor impression of their colleagues in Marketing, according to the CIA MediaEdge/ IPA survey in 2000.

⁹ The ICA Survey of Marketing Budgets (conducted by NTC Research who do the IPA Bellwether Report) estimates the Canadian total client expenditure on marketing communications to be \$21,500 billion (excluding production). If a Canadian survey also revealed that 30% of brand communications is commissioned through agencies in a less than ideal manner, the Canadian number would be \$6,450 billion worth of briefs.

It's hard to believe that submissions for capital investment of this scale by Directors of Manufacturing or IT would be accepted by their Boards of Directors, if just presented verbally or via the vendor's documentation alone!

Given the increasing importance of the value of branded assets and corporate reputations to companies, and the essential role that advertising, media, public relations and other commercial communications have in creating, building and maintaining them, it is incumbent on marketers and their agencies to professionalise the briefing process to their mutual benefit.

From the research and discussions in the industry, there is clearly a requirement for very significant improvement in best practice. Thus the IPA, MCCA, and the PRCA and ISBA have worked together to produce this new set of joint industry best practice guidelines, which will improve the quality of client briefing of agencies. Given the overall profile of trade body members, what follows frequently uses brand marketing as illustration, but the principles of best practice in briefing apply just as strongly to all areas of corporate communications.¹⁰

The aim is to help clients provide their agencies with better quality data on which to base their proposals and so avoid repetition and wasting time. This should lead to a greater likelihood of 'right first time' responses by agencies, with higher standards of creativity and improved cost-efficiency on both sides.

¹⁰ ACA/ICA have also discussed the need for best practice documents, with the "The Client Brief" as a joint effort.

RECOMMENDED AGENCY BRIEFING PROCESS

These joint industry guidelines are focused on client briefing input as opposed to agency creative output.

Clearly the agency response in terms of strategies, ideas, plans and practical implementation are the desired outcome of the briefing process, but these deliverables are too complex (or the result of proprietary approaches or techniques) to be captured in a single set of joint industry best practice guidelines such as these.

Thus the concentration here is on helping marketing professionals to produce better quality briefs for their agencies, on the argument, familiar in the IT industry, that 'rubbish in = rubbish out'. Within this area of focus, particular emphasis is put upon defining the current status of the product or service brand, its market and competitive context, the key problem it faces and the overall business objective for the communications to help achieve.

From the outset it's worth noting that while many examples of both client and agency briefing formats were considered and their contents used as valuable inputs to this guide, it was decided by the participating trade bodies not to produce a standard briefing template for the industry in the shape of a standard pre-printed form.

There were three main reasons for this. First, because each individual client company has its own culture and 'way of doing things around here' and we did not think it appropriate to try and impose a 'one size fits all' format on them.

Second, there are many who believe that the pre-printed form, with predetermined allocation of space to particular elements of the brief, can lead to a form-filling mentality which militates against real thinking about the issues facing the corporate, service or product brand.

Third, while it's strongly recommended that there should be both a written and verbal brief for every agency assignment, it's clear that a leaflet, a website, a tactical press ad, an event or a TV commercial will all have very different emphases and information content. Therefore the completion of the individual sections of the client briefs for them will take up widely varying numbers of words, rendering a standard template impractical.

So instead 'The Client Brief' proposes eight main headings as the basis for structuring the best possible agency brief. These main headings can and do have sub-sections, and these in turn can be adapted and tailor-made to specific situations and circumstances.

Thus we hope that clients, and indeed their agencies, will see these section headings as a valuable guide to thinking, and structure their briefs using them as a framework rather than a straightjacket.

In summary, the client brief should define the two ends of a bridge: "Where are we now", and "Where do we want to be?" Creating communications to build the 'bridge' for the brand is the prime agency role. The client brief can thus be considered the platform for a communications campaign.

When considering the nature of that platform it's important to maintain a sense of perspective. For an annual brand campaign, or in searching for a new agency, the brief still needs to be focused, but it might well contain a wealth of supporting information and appendices.

However next Saturday's tactical 10 x 2 mono press ad might be very much shorter and contained in a simple e-mail.

In the same way a media brief might differ significantly from one for direct marketing, public relations, sales promotion or sponsorship. But the **principles** underlying each remain the same:

1. Write it down
2. Make it clear and simple

3. Focus on clearly defined, measurable objectives

Thus the focus should be on producing a good brief, which should be delivered both in written and verbal form. This does not mean writing something the length of *War and Peace*, or providing a kitchen-sink-like box full of research reports and miscellaneous documents.

The emphasis should be on clarity and a succinct summation of the brand's current position and where it wants to get to. Producing the brief should entail using the eight key headings and sections set out in the summary, and these are elaborated in more detail below.

Good briefing of agencies is an iterative activity involving creative thinking and significant value can be added in the process. Once the written brief has been developed by the client team, it should be sent to the agency, or agencies, who are being commissioned to carry out the work, in advance of a discussion of it as a draft.

Ideally this discussion should be in the form of a face-to-face meeting with representatives of all the agencies involved.¹¹ This is very important in the case of a communications brief surrounding a major launch, re-launch or other significant event in the life of the corporate, service or product brand.

It can be logistically difficult to bring all parties together, especially when there may well be branding, design, media, creative, direct, public relations, sales promotion, web, or even more agencies working together on the brand. However, clients and their agencies who do make this effort and take the time to convene a project team briefing meeting, reap the rewards in terms of greater input to their brief, better co-ordination of thinking, improved working relationships and more thoroughly integrated communications campaigns.

Clearly it may not always be practical or cost-effective to hold a physical meeting, for example if client and agency are geographically distant and/or the brief is for work within the context of a well-established and continuing campaign, or of a relatively simple tactical nature. In these cases modern communications technologies such as telephone or video conferencing can provide the next best thing and create a forum for the necessary verbal debate on the draft brief.

In preparing for the meeting the agency people should have analysed the client's draft brief in detail and be ready to offer their critique of it and, if required, have constructive suggestions as to how it might be improved.

Although good agencies are not usually backward in coming forward, some are more hesitant than others in commenting on their client's work, and if need be the client should actively encourage them to debate the key points of the written brief and thus to add value to it.

Clients should also consider other ways of communicating the nature of their brief, in addition to the written document and the verbal briefing. This is especially true on the occasion of a new product launch, a major new campaign development, or in searching for a new agency. Sometimes a dramatisation of the brand's situation and the key issues it faces can spark off great creative thinking.

For example, it was during an agency pitch briefing and factory visit that people from Bartle Bogle Hegarty saw the overhead sign saying 'Vorsprung durch technic'. In a flash of inspiration they realised that this worker exhortation, when read in the UK context, captured the essence of the desired re-positioning of the car in question as 'German engineered'. The factory slogan subsequently became the winning strap-line for the Audi brand and the basis of its highly successful and long-running campaign.

¹¹ Clients are recommended to have remuneration models in place with all stakeholder agencies to ensure the outcome of the communications optimizes results.

THE NEW STRUCTURE FOR BRIEFS

- **Similarity between existing client and agency briefing templates**
- **Blurring of lines between the client and agency inputs to the brief**
- **On too many occasions agencies brief themselves**
- **Eight key headings have emerged from the joint industry project**

One of the many interesting things revealed by the background research for the joint industry briefing project was the similarity between the existing briefing formats or templates used by both agencies and clients, and the good level of agreement on the main headings and topic areas that a professional brief should cover.

It was also noteworthy that most clients have picked up their approach to writing briefs in an unstructured and eclectic manner, through trial and error, advice and guidance from colleagues, and to some degree from agency guidelines and training courses.

It seems very plausible that the commonality of approach is largely attributable to people handing down inherited formats, which have probably originated from relatively few original sources quite some years ago, and spread throughout the industry by the circulation of personnel in both agencies and clients.

Through the evolutionary process these formats evidently have tended to converge rather than diverge, although the headings within them have become marginally more sophisticated, and have changed a little over time.

For example the concept of the 'desired response' was more generally introduced some time in the 80s in recognition of the point, now taken as read, but seen as a key insight at the time, that communication is a two-way process and thus having a 'proposition' alone implied a monologue rather than a dialogue.

However, in overall terms the format of briefs and the headings they contain have remained substantively the same for about 40 years, and they tend to feature a series of sections, which do have a reasonably logical sequence, but can often lead to confusion as to where the client's responsibility for briefing content ends and the agency's response begins.

There is also an issue with language in that the agency response to a client brief may well be couched in the same terminology. For example, the client may state the brand positioning, brand proposition and desired response in their brief and the agency may do the same in their reply.

This problem is exacerbated by the fact that, as indicated by the quantitative survey, a significant proportion of briefs to agencies are actually written by the agencies themselves. Clients admit to this on 9% of occasions, but agencies claim it's more like 20%. Splitting the difference this still means 14% of briefs are self-administered!

Agencies may take pride in doing this, and clients may find it a service benefit, but the opportunities for problems to arise are obvious.

This joint industry briefing project has given us the opportunity to go back to first principles and re-think on an a priori basis what briefs should be about, what they should contain, and most importantly the underlying philosophy behind the approach to writing them.

As with many philosophical investigations the journey can appear circular with the destination looking rather like the starting point, and this is true of this briefing project if one just looks at the headings and content of the proposed approach.

However, we believe that dividing the key headings up into eight major sections, which have a clear connecting logic, is a significant improvement and will enable both clients and agencies to be clearer about the roles of the different parts of the brief and their respective responsibilities in contributing to its content.

THE EIGHT KEY SECTION HEADINGS

1. PROJECT MANAGEMENT

2. WHERE ARE WE NOW?

3. WHERE DO WE WANT TO BE?

4. WHAT ARE WE DOING TO GET THERE?

5. WHO DO WE NEED TO TALK TO?

6. HOW WILL WE KNOW WE'VE ARRIVED?

7. PRACTICALITIES

8. APPROVALS

1. PROJECT MANAGEMENT

- **Implementation of a brief smoothed by efficient administration**
- **Budgetary control improved by proper allocation of job numbers**
- **Communication between agency/s and client/s enhanced by inclusion of full contact details**

The client brief should get off on the right foot by documenting accurately all the administrative and operational details.

These project management elements will include the 'boring but important' things such as purchase order numbers or other accounting system codes, the specifics of the brand being worked on and the contact details of the agencies involved.

Some client companies have strong disciplines in terms of allocating purchase order numbers and will not accept agency invoices which do not refer to these authorizations. This discipline is a welcome one and protects both parties as they embark on a project.

The administrative details will vary according to the individual client company's internal systems, but the following are common pieces of information that are required:

DATE

PROJECT NAME

PROJECT TYPE

JOB NUMBER AND/OR PURCHASE ORDER

COMPANY: PLC/GROUP COMPANY/OPERATING COMPANY/BRAND OWNER

BRAND: NAME/VARIANT

CLIENT TEAM: NAMES/TITLES AND CONTACT DETAILS

AGENCY TEAM/S: NAMES/TITLES AND CONTACT DETAILS

2. "WHERE ARE WE NOW?"

- **One of the two key pillars of the client brief**
- **Defines the start point for the journey on which communications will take the brand**
- **Current quantitative sales, market and customer data is vital**
- **For clients in different situations the amount of data available can vary enormously**
- **But nearly all companies have more information about their brands and their customers than they realise**
- **It's worth the extra effort to extract this valuable data**

It's hard to find an example of an agency brief, which does not have a section called 'Background' and clearly it is an essential part of the client briefing document.

However, in order to prevent it becoming an indiscriminate dumping ground for all known information about the product or service brand, perhaps it's more useful to think of this section in terms of clarifying the company or brand's current position by answering the question "Where are we now?" and implicitly, explaining how it got there.

The pen portrait should include as much of the following key information as possible, adapted to particular markets. Producing this for the first time may be demanding, but once completed is invaluable and should be a standard, regularly updated rubric in the brand book. Fuller details may be added in the appendix to the brief.

Typically much of the necessary market information, often of a quantitative nature, will be provided by syndicated distribution and sales data, customer usage and attitude studies, and communications tracking studies produced by the major market research companies.

This data can be relatively expensive to buy, but there are alternatives: commercially produced market reports are commonly available at much lower cost; ad hoc surveys can be commissioned; competitive companies can pool sales and other data on an informal basis.

Qualitative research or individual interviews can also be very useful and if professionally done, can build up a representative, if not quantitative picture of a market.

In short client companies, no matter how small, cannot really afford not to have market information of some sort and this should be included in the brief.

The main heading of "Where are we now" can be broken down into a number of sub-sections in order to structure the available information, and the following gives a reasonably comprehensive list of possible content.

However, client authors should remind themselves that the brief should be just that, brief, and the temptation to dump all known facts about the corporate, service or product brand into the document should be avoided at all costs.

The sub-headings that can often be used in answering the question "Where are we now" are as follows:

CORE PRODUCT OR SERVICE DESCRIPTION

- Name, including corporate owner, manufacturer or 'house' name, brand and variant names
- History – new/old/how developed and stage in life cycle
- Physical appearance, ideally presented photographically
- Packaging, ideally presented photographically
- Description, including variants
- Properties of a practical or functional nature
- Cost structure, including pricing, margin and profitability

MANUFACTURING OR SERVICE DELIVERY

- Where manufactured (product) or located (service)
- Production capacity (product) or customer handling capacity (service)
- Availability – present/future
- Quality control measures and trends
- Actual or potential product formulation or service delivery changes

DISTRIBUTION CHANNELS

- How sold – bulk/individual packs/one-off/subscription/membership, etc.
- Where sold: if more than one market, relative importance
- How distributed – online/wholesale/retail/direct

- Selling arrangements, strengths and attitudes of sales force, distributors or franchisees
- History of the brand's communications campaigns

MARKET CONTEXT

- Market size in volume and value
- Sales per market, if more than one
- Regional breakdown
- Seasonal variations
- Market trends and segments
- Brand sales history and trends
- Direct competitors' brand shares and trends
- Similar data on related or overlapping markets, which may affect the defined market and its brands

USAGE AND ATTITUDES

- Advantages and disadvantages, relative to competitors, ideally based on comparative objective tests
- How used: penetration, frequency, volume or weight of usage, etc.
- Usage occasion: time of year/month/week/day
- Perceived attributes of brand and its competitors
- Customer brand portfolio/s and brand share amongst brand users
- Important variations by customer type

BRAND POSITIONING

- Where the brand sits in the market and its competitive set, based on a combination of qualitative and quantitative research
- Presented as a 'brand map' of relative market positionings if possible
- For example its position in price terms: low/average/high or in image terms: young/old: traditional/fashionable, etc.

BRAND COMMUNICATIONS

- Brand media history and plans (with budgets) and examples of communications campaigns in all media, with show reels etc.
- Competitors communications spending history
- Competitors communication themes and 'copy platforms'
- What has the brand learned from previous campaigns?
- Evidence of effects of communications in market (see IPA Effectiveness Case History dataBANK on www.warc.com)¹²

KEY ISSUES FACING THE BRAND

- What has prompted this communications activity?
- Key issues facing the market or sectors within it: e.g. legal, environmental, consumerist, medical, political, ethical, economic, social and technological
- Key issues facing the brand: any of the above, or other such as loss of share, declining reputation, missing variant, etc.
- Key issues facing competitors: as above, or particular to them
- These could be exemplified by a SWOT analysis or a Boston Matrix¹³

¹² www.cassies.ca/case_library (Ed)

¹³ www.market.modelling.co.uk. Boston Matrix takes its name from the Boston Consulting Group in the 1970's. Based on the Product Life Cycle concept the Matrix has stood the test of time. (Ed)

3. “WHERE DO WE WANT TO BE?”

- **The second of the two key pillars of the client brief**
- **Defines the desired end destination of the journey on which communications will have taken the brand**
- **This goal should be set in the realm of the achievable and in the context of the overall corporate business and marketing plan**
- **It should be single-minded, and measurable**

Close your eyes. Now imagine a time in the future when the campaign you are about to brief in has been completed and implemented. How will you know that it has been successful? What will success look like and feel like? What will have **changed**? All communications are designed to get some kind of **response**. If you can describe these outcomes clearly you have the basis of a great brief.

Of course there is rarely a communications brief which does not include an objective, but too often it will be unrealistic or one set by marketers out of context with what the rest of the business is seeking to achieve, or what experience has shown is possible for the proposed budget in the market in question.

Most brand owners have many objectives for their business and find it very hard to confine themselves to concentrating on the single most important thing for their brand to achieve, and then asking their communications agencies to do the same.

Ideally there should be one single, quantifiable objective, which defines the destination for the brand and which communications can credibly help it reach. In the era of almost overwhelming media ‘clutter’ and finely tuned selective perception by customers, single-mindedness is usually a pre-requisite for success.

But frequently there will either be more than one or even several objectives. For example a common compromise is to put forward both primary and secondary objectives as in: ‘Primary objective is to attract 5% new users. Secondary objective is to retain existing users.’ As is so often the case, attempting to do both could well be unrealistic and may even be self-defeating.

On a more basic level, there is sometimes confusion between an ‘Objective’ and a ‘Strategy’. A simple rule of thumb is that an objective should be able to be described with a sentence beginning with the word ‘To’, as in:

Objective: ‘To increase brand share by 5%’.

Whereas a ‘strategy’ should be able to be described with a sentence beginning with the word ‘By’, as in:

Strategy: ‘By introducing a new low fat variety’.

(The ‘strategy’ bit comes later, in the section called “What are we doing to get there?”)

Clearly the objective for a product or service brand will be a function of the ‘Background’ or more usefully ‘Where the brand is now’, and specifically where it is in its lifespan.

Here follow some of the most common examples of objectives for a brand communications campaign. It is not proposed that every brief should contain all of these, far from it, but they are put forward to stimulate thought and help clarify what the business needs of the brand truly are. You will notice that every one of them is a measurable objective.

‘BRAND SALES’

- To achieve +x% £ sales in year one/two/three etc
- To achieve +x% volume sales in year one/two/three etc
- To maintain the brand’s sales of x in year one/two/three etc
- To increase/maintain brand share at x% by value/volume in year one/two/three etc

'BRAND USAGE'

- To attract X,000 new users or trialists
- To increase the frequency of purchase or weight of usage by existing users by x%

'BRAND FAME'

- To increase spontaneous brand awareness by x%
- To increase prompted brand awareness by x%
- To increase total brand awareness (spontaneous and prompted) by x%

'BRAND REPUTATION'

- To increase the brand's reputation for value/quality/reliability/etc by x%

'BRAND PROFITABILITY'

- To increase the price by x%, whilst maintaining profitable volume
- To increase volume by x% without reducing profitability
- To increase customer acquisition by x at the same or reduced cost per account
- To increase the lifetime value of customers by £x
- To reduce the rate of membership loss or customer 'attrition' by x%
- To increase the value of a retail 'shopping basket' by £x

'BRAND FRANCHISE'

- To reduce the average age of the customer profile by x%
- To move the socio-demographic profile up/down market
- To increase heavy/average/light users by x%
- To increase male/female users by x%
- To increase users from defined ethnic groups by x%
- To increase users from defined geographical areas by x%
- To increase users from defined trade or distribution channels by x%

'BRAND RESPONSE'

- To increase the response rate to direct marketing activities by x%
- To improve the quality of brand response by x% on all KPIs¹⁴
- To increase retail footfall by x%
- To increase cross-selling by x%

4. "WHAT ARE WE DOING TO GET THERE?"

- **Advertising and communications rarely act in isolation**
- **What are the key elements of the brand's marketing strategy?**
- **What are the key elements of the communications strategy?**
- **Are these strategies in line with the overall corporate business plan?**

The client brief must now answer the question "What are we already doing to get there?" and give the agency or agencies who are being asked to respond to the brief this vital information.

Agencies need a full knowledge of the client's business and marketing strategy, and indeed a good understanding of the overall corporate business plan which it feeds into.

And agencies need to know what elements of the communications are already planned to ensure synergy across the entire campaign.

¹⁴ Key Performance Indicators (Ed)

Only then can agencies ensure that the communications solutions they propose can work as effectively as possible in harness with other key factors such as product, pricing, and distribution, to name but three.

It's a mistake to believe that branding is just a function of advertising and communications and the personality it creates. Brands are promises, which exist in the minds of people, and these promises are kept, or broken, with every interaction, direct or indirect between a brand and its customer.

Thus a durable brand has to perform consistently well in all its key dimensions and this includes its all-important functional performance. Great communications will not sustain a brand in the absence of good, and ideally excellent, delivery in use.

Clients should therefore spend much of their time reassessing their brand in terms of its rational or functional attributes, as well as its emotional and psychological ones, and increasingly its political and ethical aspects too. This, written down in the form of a marketing strategy summary, is a vital piece of information within a client's brief.

Creating communications to build the 'bridge' for the brand to travel between where it is now and where it wants to be is the key role for the agency, but their response must be framed in the context of what the rest of the client's marketing mix is contributing to achieving the agreed objective.

Increasingly brands have to take a holistic approach and ensure that all aspects of their image, values and 'body language' are aligned so that their employees, customers and all other key stakeholders are engaged in a consistent and mutually reinforcing manner.

It's no use spending millions on advertising and direct marketing to drive customer response and then channel it into the 'helpline hell' of the average UK call centre.

Similarly, it's pointless embarking on a communications programme designed to build premium brand values if at the same time the sales force is negotiating a succession of uncoordinated deep price cut retail promotions at the bottom end of the trade.

Thus the client marketing team need to be clear about how their whole brand strategy fits together and on the role of advertising and communications within it.

For the purposes of writing the agency brief, the client need only include the key elements of the marketing and communications strategy which will directly impact on the achieving of the brand objective, but many agencies would appreciate the opportunity to read the complete marketing and communication plan as an appendix to the brief.

If the marketing strategy is already under way, and all or part of a communications programme is in place, two further questions should be considered within this section of the brief:

1. What elements of the proposed campaign are already in place and how should the response to this new brief relate to it?
2. What guidance can be given to the agency as to the most appropriate solution/s to the brief in this context?

Some key summary marketing strategies are given below, as examples only – there are many others, which will come out of the particular circumstances of a brand and its marketplace. These strategies should not be confused with the creative communications strategy, which is a key part of the agency response to the client brief.

The marketing strategy is the route to achieving the stated objective and a crucial part of building the 'bridge' from where the brand is now to where it wants to be in the future.

For example, one or other, or a combination of, the following marketing strategies might achieve the brand objective:

'BRAND ARCHITECTURE'

- By launching a new brand
- By launching a new variant, model or line extension
- By rationalising the range and focusing on the core elements
- By opening a new outlet, adding a new route
- By introducing a sub-brand
- By re-launching or re-positioning the brand (which might involve re-naming, or re-branding and/or re-packaging)

'BRAND PROPOSITION'

- By improving the product or service formulation
- By adding new ingredients, new technologies or other added value elements
- By improving its stance on social/environmental/ethical/political issues
- By securing key third-party/official endorsements/sponsorships
- By 'bundling' the brand with another in the portfolio

'BRAND PRICING'

- By increasing/maintaining/reducing the brand's price
- By increasing/maintaining/decreasing the amount spent on trade incentives and price promotions and loyalty or CRM programmes.

'BRAND DISTRIBUTION'

- By opening up additional channels of distribution, or reducing them
- By partnering with another brand or third party
- By franchising the brand in new marketplaces

'BRAND M&A'

- By buying a key competitor
- By selling to a key competitor

And of course brand communications in all their diverse forms including packaging, advertising, public relations, direct marketing and digital media are one of the most powerful tools in the marketing mix:

'BRAND COMMUNICATIONS'

- By increasing/maintaining/decreasing the brand's advertising and communications 'share of voice' versus competition
- By maintaining/evolving/renewing the brand's current communications strategy

5. "WHO DO WE NEED TO TALK TO?"

- **Crucial to be clear with whom the brand needs a dialogue**
- **Qualitative and quantitative research is key to understanding**
- **Valuable customers, existing or potential, must be identified**
- **The richer and more vivid the description the easier it is to construct an effective brand conversation**

One of the pithiest quotes from the agency sample in the quantitative research that was carried out said: "Ultimately the point of communications is to get people to do things. Which people? What things? You've got the basis of the brief right there. Everything else is detail."

So defining the audience is crucial, but whilst an important part of agency stock in trade is identifying and defining in great detail the people with whom the brand needs its dialogue, clients should also have a view on their target audience.

Thus their written brief should address the question of “Who do we need to talk to?” and put forward a definition, which can be interrogated, challenged, revised or agreed with the agency or agencies involved during the verbal briefing process.

There are many ways of describing the sort of people with whom the brand needs to communicate and it can be very helpful to go beyond the numerical and statistical definitions. Bringing the brand's current or potential customers to life by the use of ‘pen portraits’ can be much more stimulating for the creative thinkers who work in agencies.

In arriving at this description clients and agencies can make good use of market research of both a qualitative and quantitative nature. This can either be of a proprietary nature and commissioned privately, or it may be syndicated or commercially provided. There is a wealth of such information and no brand should be without it.

The qualitative research may be derived from group discussions or ‘focus groups’, from individual interviews or sometimes paired interviews with partners, or parent and child. The quantitative data may be from a continuous panel, a regular sample or ad hoc surveys.

Interpreting this data is a skill in itself and being aware of the limitations of market research as well as its potential for insights is vital. As has often been shown in the arena of political opinion polls, people don't always do what they've told an interviewer on the street corner they're going to.

Having a perspective on the available market research is essential, but usually it comes down to being crystal clear about who the brand's customers are, or could be.

Very often Pareto's Principle or the 80:20 rule does apply, and it's vitally important to confirm whether or not it is true for the brand that is the subject of the client's brief. Since it usually is, looking after the existing 20% of people who deliver such a significant proportion of the business, and finding others like them is the top priority, and communicating with them effectively is one of the main ways of doing this.

But many markets have complex distribution chains, and identifying the points in the buying process at which brand communications can have most impact can be crucial to success. The end users may not be as influential on brand fortunes as the professional advisors in the chain.

It's likely that you, as the client, will have a much better understanding of these complexities than the agencies employed on the brand's behalf, so it's very worthwhile describing the complete purchasing process in the brief, especially if it involves intermediaries.

All in all, the richer and more vivid the description of the current or potential customer, the easier it is to construct the communications conversation between them and the brand.

The following are some of the commoner ways of defining target audiences. Again, by no means all of these should be used in any one client brief – they are simply examples designed to provoke thought and a thorough examination of the company or brand's true audience.

INTERMEDIARIES

- Wholesalers
- Retailers
- Agents
- Representatives
- Brokers
- Franchisees
- Professional advisors
- Opinion formers

CUSTOMERS

New
Current
Lapsed

USER TYPES

Light, medium, heavy
Infrequent, occasional, frequent
Non-user, promiscuous, loyal

DEMOGRAPHICS

Gender
Age
Social class
Employment status
Marital status
Children/no children
Ethnicity

LIFESTYLE

For example:

- People who are keen on value for money
- People who like to try new products
- People who tend to buy branded goods
- People who tend to prefer own brand or private label
- People who support brands associated with charities or good causes

The Target Group Index or TGI (www.bmrb-tgi.co.uk)¹⁵ is a long-standing continuous market research survey with an annual sample of approximately 25,000 interviews with people aged 15-plus. It covers usage of over 4,000 brands in 500 product areas, and also the media habits of those consumers, so it is a powerful analytical tool in identifying marketing and media opportunities.

The TGI questionnaire also carries a battery of over 250 statements which are specially designed to measure the values and opinions held by respondents in respect of many interesting areas including those such as health, holidays, media, money and new products.

This richness of data can be cross-analysed to produce sophisticated descriptions of customers and their numerical importance. For example a TGI special analysis could reveal the numbers of new car buyers who spend more than £1,000 a year using a credit card and who are interested in new products.

GEODEMOGRAPHICS

For example:

- People who live in up-market residential neighbourhoods
- People who live in areas with large numbers of people of non-British origin
- People who live in areas with relatively high crime rates

¹⁵ Canadian equivalent is the Print Measurement Bureau (PMB) Product Usage Survey. www.pmb.ca

As provided by research companies such as CACI (www.caci.co.uk)¹⁶ and their ACORN classification codes which segment British residential post codes into demographic and lifestyle segments.

www.upmystreet.co.uk¹⁷ uses ACORN data to profile residential neighbourhoods and the Office for National Statistics has launched a website, www.neighbourhood.statistics.gov.uk¹⁸, which enables users to find details on areas in terms of standard demographics but also much more information on other aspects such as health, housing, and crime.

TECHNOGRAPHICS

For example:

- People who are early adopters of new technologies
- People who live in homes with multi-channel TV

As provided by research companies such as Forrester and their Techographics Benchmark, which provides information on consumer technology ownership, usage behaviour and attitudes as well as their demographics.

DATABASE SEGMENT

Non-responders

Responders

Buyers

Recent buyers

Buyers on promotion

As provided by list broking companies such as Experian, Claritas and Swetenhams¹⁹. These organisations can provide 'data mining' of an increasing sophistication and as customers increasingly interact with brands the potential for genuine one-to-one communication gets closer every day.

6. "HOW WILL WE KNOW WE'VE ARRIVED?"

- **Client and agency need to know what success (or failure) looks like**
- **This means having an agreed objective, which seems achievable via the marketing strategy, and on the proposed expenditure in the market context**
- **Measures must be in place to see whether or not the marketing strategy and the campaign delivers the desired result**

In defining their brand's 'now' and its 'future', the client is setting an objective and targets for marketing activity and communications within it.

Clearly these targets need to be feasible – so often unachievable objectives are set, which any examination of the precedents set in the brand's marketplace or experience would reveal.

It's crucial that realistic expectations are set at the outset, including plausible roles for advertising and communications and by the same token these targets or objectives need to be measurable so that the client/agency team can know whether they have achieved success or suffered failure.

Thus the client brief, and later on the agency, has to answer the question "How will we know we've arrived?" and in so doing establish the metrics that will be required in order to assess the future success, or failure, of the total marketing campaign and the specific role of communications within it.

¹⁶ }

¹⁷ } Examples are Canadian Environics and Alymetrics Inc.; Generation 5

¹⁸ }

¹⁹ List Broker examples: Data Mining; Kenna Group; Boire Filler; Emma Warrilow and Assoc.

These metrics must be agreed with the agency, particularly if there's to be a Payment by Results (PBR) component to their remuneration and they need to be put in position at the outset. Itemising these in the client brief is a surer way to guarantee this happens.

All these measures of effectiveness will naturally be aligned with the agreed objective for the brand and there are many metrics, which can be used. Some are freely available and some have to be paid for, so it's important to include an allowance for these key data in the overall budget.

Ex-factory sales, retail sales, response rates, conversion rates, awareness levels, usage rates, intermediary, customer and stakeholder attitudes, changes in reputation, customer profile, and customer profitability are amongst the most common metrics used.

Setting up 'pre' and 'post' assessments of a campaign in terms of brand awareness or customer usage and attitudes are very useful intermediary measures, which can be used to demonstrate effectiveness. Market research companies such as Millward Brown, Hall & Partners and HPI all specialise in these kinds of tracking studies.

Other 'pre' and 'post' measures are also available from the basic ex-factory sales figures to visitors to a website.

In an ideal world client and agency should establish a 'control' region in which either the campaign is not exposed at all, or with a measurably different weight of expenditure behind it.

Inspection of the IPA Effectiveness Case History dataBANK on www.warc.com²⁰, or papers which have won at the MCCA Best Awards or the PRCA FrontLine Awards, reveals these and many others in use in demonstrating the contribution of advertising and communications to business success.

John Philip Jones, Colin McDonald and many others have written about the benefits of using single source data in evaluating the effectiveness of advertising. Single-source data is just what it says: companies such as Nielsen in Germany gather information on a customer viewing habits **and** his or her purchasing behaviour. AGB in the UK has 'fused' their Superpanel customer shopping data with BARB TV ratings to achieve indirect single-source data. In either case the inter-relationships between exposure to advertising and buying behaviour can be examined in detail²¹.

This data is expensive and tends to be limited to fast moving consumer goods (fmcg) and focuses on TV advertising, so is not relevant to many clients at present, however there is considerable interest in it and we can expect to see further developments in future. See Colin McDonald's article 'Monitoring Advertising Performance' published in *Admap* in 1997 and available via www.warc.com for a review which includes a summary of single-source data.

As Tim Ambler showed in his book, *Marketing and the Bottom Line*, client companies currently spend nine times as much resources measuring revenues as opposed to where they come from. An improved briefing process, containing clearly defined objectives and measures should change this ratio for the better.

²⁰ [see www.cassies.ca/case_library](http://www.cassies.ca/case_library)

²¹ - Canadian Media Directors' Council created the Unity Project to ensure that Canadian media audience measurement organizations adhered to comparable reporting standards.

Perhaps more ambitiously, the Unity Project has tackled the duplication of product usage data that confuses and frustrates communication planners in Canada. Using sophisticated data fusion techniques, the Unity Project has examined the feasibility of combining a variety of media audience and product usage data sources in one overall database.

Spearheaded by Hugh Dow, President of M2 Universal, the Unity Project is in its final stages of analysis. Nearly five years of analysis and investigation should be concluded by the Summer of 2006. This will pave the way for a new era in multi-channel communication planning based upon industry accepted standards.

7. PRACTICALITIES

- **Has the media strategy been agreed and if so what are the media dimensions in terms of space size or spot length, colour or b/w?**
- **What is the budget for media, production, research or other activities?**
- **What are the timing implications? What phases of pre-testing research are planned? What are the logistics and therefore timescales for production? Is there a sales conference whose deadline precedes the media copy date?**
- **What legal constraints are there in this market?**
- **Does the brand or corporate identity have guidelines or other mandates?**
- **Are there 'softer' but nevertheless important constraints or considerations, which might affect the agency's work?**
- **How might the new communications activity impact on other key company stakeholders, such as investors, employees, industry regulators, NGOs, etc?**

Your agencies' responses to your brief will have many implementational consequences, so it's important that all the key practicalities for them to bear in mind are included in your brief. These fall into the following areas, namely requirement, budget, timings, mandates and other constraints and considerations.

REQUIREMENT

In these days of 'media neutrality', the separation of media from creative agencies and the segmentation of the industry into specialist niches, it is crucial that the brief makes it clear what the deliverables are, which agency is responsible for what and details all the practicalities surrounding the project.

If there is already a comprehensive media strategy and plan, then the brief must say so, and provide the relevant technical information. If the brief is to a media agency, then it should make it clear whether or not existing creative work is to be used, so that the parameters for media choice are informed. Different media have every different content requirements and timescales, so it's essential to involve media thinking right from the outset.

Nowadays it's normal for at least four different media to be deployed in the campaigns described in winning IPA Effectiveness Awards cases, and using this number of media has real financial and logistical implications.

BUDGET

Clearly the amount of money available for investment in the brand is crucial and setting the appropriate budget level is a subject in its own right. Please see '[The Guide](#)' for reference. Other reference works on this topic are listed in PART 4.

An upfront tackling of budget issues (and the anticipated results from different budget levels) will dramatically reduce the reworking of solutions – reducing total costs and improving integration across the campaign.

Your approach to setting the budgets may vary from brief to brief, but both client and agency need to be confident, based on their expertise and past experience that the proposed expenditure is likely to be able to achieve the brand objective.

Sometimes, however, 'scenario budgeting' will be required in order to give clear direction to the agency. For instance one or more hypothetical budgets might be supplied (ie what would your recommendation be on budgets of £x, £y and £z?). This is an essential process to go through in establishing test markets or 'control' regions where different expenditure levels are being evaluated in terms of effectiveness.

Alternatively, you might request the agency's recommended budget to achieve a set of given and measurable objectives.

It's very useful for the brief to contain the complete brand budget and for agencies to understand the allocation of funds across its component parts. For example, quite often client companies will spend very large sums of money on trade or customer promotions without knowing whether or not they are truly cost-effective.

Clients may also be in ignorance of the academic work on this area, which shows how often these activities damage profitability in the long run, when implemented unprofessionally or in isolation from the rest of the brand campaign. In this context see John Phillip Jones' book *When Ads Work*.

Agencies familiar with these studies should be able to work with their clients to develop integrated campaigns which avoid this trap.

At the very least the budget section of the brief should show the allocation for media, production and research, plus a reserve for any other elements which may emerge during the development process.

TIMING

There are lots of questions that need to be answered on timing, but sadly too often they're not, until it's too late!

What are the key delivery dates? What are the key payment dates? When should the key project milestones be set? What are the booking dates or deadlines for media? Should the timings of other campaigns for other brands within the company portfolio be taken into account? Is there a sales conference whose deadline precedes the media copy date, and which is therefore more important?

How do you want the creative timings to run? Are there to be interim reviews of work in progress or tissue meetings? What phases of pre-testing research are planned? What are the logistics of production?

Scheduling an agency development is difficult. The practical parts of the process such as research and production can be defined pretty well, but the creative element is much more problematical. A great idea can come in 20 minutes, often because its author has had 20 years' of practice!

Some briefs can be turned around overnight, some in a week, whilst others may take two years overall. Thus there can be no hard and fast rules, much as many people would like them.

Inevitably 'rules of thumb' have evolved and continue to do so with each technological advance: in the early 1980s, before the widespread use of the fax machine, let alone computers, the idea of showing a layout to a client by any other means than in person would have been inconceivable.

However these 'rules of thumb' are usually particular to a market, or a medium, and there are too many of them to include in a set of guidelines such as these.

The best practice is to spend adequate time thinking through all the developmental stages implied by a given brief and to build in adequate time for the agency to deliver a professional response.

These are some of the common phases and key dates involved in a big project:

- Initial written brief received
- Initial verbal briefing
- First presentation
- Second presentation
- Research dates: pre/post/tracking (if applicable)
- Final approval for production
- Obtain cost estimates and outline production schedules (if applicable)
- Production (if applicable)
- Presentation of work
- Client top management sign-off
- Sales conference or other internal deadline

- In-media date/'live' date

MANDATORIES

It's nearly always the case that a brand or marketplace has its foibles, peculiarities, or legalities and once an agency has become familiar with them, there is usually no problem taking them into account.

However, in the case of a new agency, it is essential that these 'mandatories' be documented in the brief. There is also a strong argument for including them in **all** briefs, even to an existing agency in a long-term relationship, because there are always new people coming on-stream and taking a 'belt and braces' approach costs little and can save a lot.

It's worth noting that there is a rationalist tendency for these 'mandatories' to accrete around the brand over time, and it's healthy for them to be challenged every so often. Frustratingly for incumbent agencies it can be a new business pitch, won by a rival, which signals the killing of a key sacred cow mandatory which had been a barrier to creativity.

Examples of common 'mandatories' are:

- Corporate or brand identity guidelines, sometimes set out in manual
- Campaign theme, brand 'icon', spokesperson, or copy lines, which must be used
- Legal copy which must be used
- Legal constraints
- Special notes in the CAP²² Codes (the Codes of Advertising, Sales Promotion and Direct Marketing)
- Special guidance notes from the BACC²³ or the RACC²⁴ in respect of the ITC/BSC

There are certain market areas such as alcohol, cars and increasingly, food, where there is very close scrutiny from politicians, NGOs, regulators and journalists. Some of these sectors, eg alcohol, have produced their own codes, in this case managed by The Portman Group²⁵. It is essential that marketers and their agencies are fully aware of all these self-regulatory and regulatory codes. Over and above the letter of these codes there is of course the spirit of their interpretation, and in these potentially controversial areas it's very important for the client brief to be as explicit as possible as to the company's own position and where the lines are drawn. There are also sensitivities surrounding advertising to children which need to be taken into account. Increasingly, brand owners operating in these sensitive sectors have their own internal codes of practice and guidelines which must be communicated to agencies.

CONSTRAINTS AND CONSIDERATIONS

Sometimes there are 'softer' but nevertheless important constraints or considerations, which might affect the agency's work. Has the client tried and researched certain creative routes, which looked promising but turned out to be cul-de-sacs? Is there a new product development coming on-stream in the medium term, which could prohibit particular approaches? Does the Chairman or the Chairman's husband have a thing about 'yellow'?!

Better to know now, rather than later...

²² Commit to adherence to the provisions of the Canadian Code of Advertising Standards, www.adstandards.com

²³ } Adherence to all pertinent laws and regulations and codes including the Competition Act affecting advertising

²⁴ } eg. Food and Drug Acts and Regulations, CRTC code for broadcast advertising of alcoholic beverages, the broadcast code for advertising to Children as examples

²⁵ Example, there is no equivalent in Canada but an example would be Brewers of Canada, Advertising Standards Canada Codes & Guidelines, etc.

8. APPROVALS

- **Who has authority for this brief?**
- **Ensure that all key stakeholders have buy-in**
- **The client who briefs in should also sign off**

For most of the time the 'Approvals' section of a client briefing document is uncontroversial. It's simply a question of listing the key people responsible for the project at the client company, with an indication of their roles or titles and which individual has ultimate 'sign-off'.

A problem can arise in situations such as the origination of a new campaign through an existing agency, or in the process of appointing a new one through a search process. See 'The Guide'.

In these cases, whilst it may seem to the Marketing Director that he or she has the authority for the project, in fact it turns out that the Managing Director or the CEO takes a close interest and has the final say-so.

It's important for both the client and agency teams to be clear on this point in order to avoid unnecessary waste of time and money. In bottoming out the authority issue it usually also ensures that the views of the key opinion-formers or decision-makers outside the Marketing Department are taken into account in the drafting of the brief.

The ideal is that the same client who drafts the brief, attends the verbal briefing meeting and subsequently agrees the final brief with the agency or agencies involved, should also be the client who approves the work that results from the development process.

Over and over again having a clearly identifiable 'brand author' on the client side who retains ownership of both the brief and the response to it, creates a dynamic and productive relationship with agencies and gets outstanding brand building work as a result.

PART 3

ABOUT THE CO-SIGNATORIES:



Institute of Practitioners in Advertising

The IPA is the industry trade body and professional institute for agencies in the UK's advertising, media and marketing communications business. The IPA has over 221 corporate members and serves over 14,000 of their employees. As a trade body it represents agency interests to Government departments, unions, media owners and suppliers. As a professional institute, the IPA develops best practice guidelines and sets operational standards for the industry through our advisory, training, awards and information services.

www.ipa.co.uk



The Voice of British Advertisers

ISBA is the single body representing the interests of UK advertisers in all areas of marketing communications, including TV and other media advertising, interactive, direct marketing, sponsorship and sales promotion. ISBA has around 300 member companies, operating in all sectors of the business to consumer economy, whose total spend on marketing communications is in excess of £8billion per annum.

www.isba.org.uk



The MCCA represents over 50 of the leading agency practitioners in the UK, offering the best in marketing communications. Services include: The Portfolio Service, Talent Pool, graduate recruitment, training and much more. www.mcca.org.uk



The PRCA represents 70% of the UK public relations consultancy sector with 120 member companies. All members are bound by a code of conduct and have to pass the Consultancy Management Standard (CMS), a quality mark that is externally assessed. www.prca.org.uk

PART 4

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Adam Jolly, *Managing Corporate Reputations*, 2001
Marco Rimini, *Advertising Works 12*, 2003
Leslie Butterfield, *AdValue*, 2003
Jeremy Bullmore, *More Bullmore*, 2003

WARC (World Advertising Research Centre) www.warc.com
See thinkBANK for further publication reviews at www.ipa.co.uk

MARKET RESEARCH AGENCIES

BMRA (British Market Research Association) www.bmra.org.uk
Millward Brown www.millwardbrown.co.uk
Hall & Partners www.hall-and-partners.com
HPI www.hpiresearch.com
Target Group Index or TGI www.bmrb-tgi.co.uk
CACI ACORN www.caci.co.uk
Upmystreet www.upmystreet.co.uk
Office for National Statistics www.neighbourhood.statistics.gov.uk
Forrester Research www.forrester.com