



STRATEGIC PLANNING CHEATS

- A Handbook for Young Planners -

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LEVEL 1

JOB ROLE



STRATEGIC PLANNER?

“When you have eliminated the impossible, whatever remains, however improbable, must be the truth.”

Sherlock Holmes



YOU'RE NOT ...

Additional account managers

Researchers

Digital media planners

Copywriters

Translators...



YOU'RE NOT ...

Additional account managers,

YOU ARE ...

client facing. You present your thinking to clients directly and also provide them with strategic marketing counsel.



YOU'RE NOT ...

Researchers

YOU ARE ...

using research and also collecting insights yourselves from time to time. You conduct qualitative research to reveal compelling consumer truths. You analyse research results to develop strategies for brand campaigns and new business pitches.



YOU'RE NOT ...

Digital media planners

YOU ARE ...

offering advertising thinking regardless of media channels. You help clients define their brand's vision for the digital as well as non-digital space. You develop experience strategies that can come to life in any platform relevant to the target audience.



YOU'RE NOT ...

Copywriters, translators, etc.

YOU ARE ...

brand planners. You define positioning of brands, write creative briefs and work closely with creative teams to deliver inspiring and effective results.

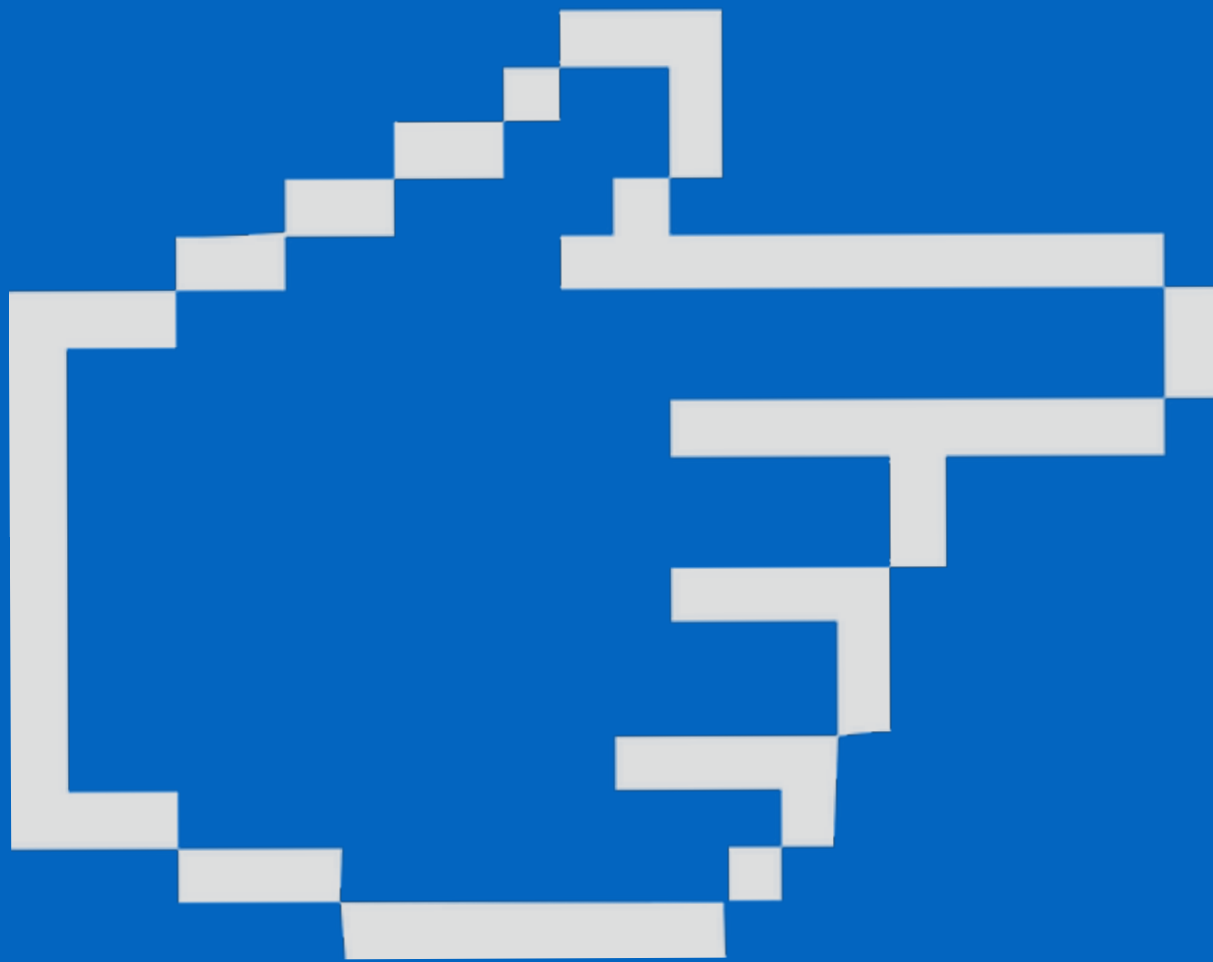




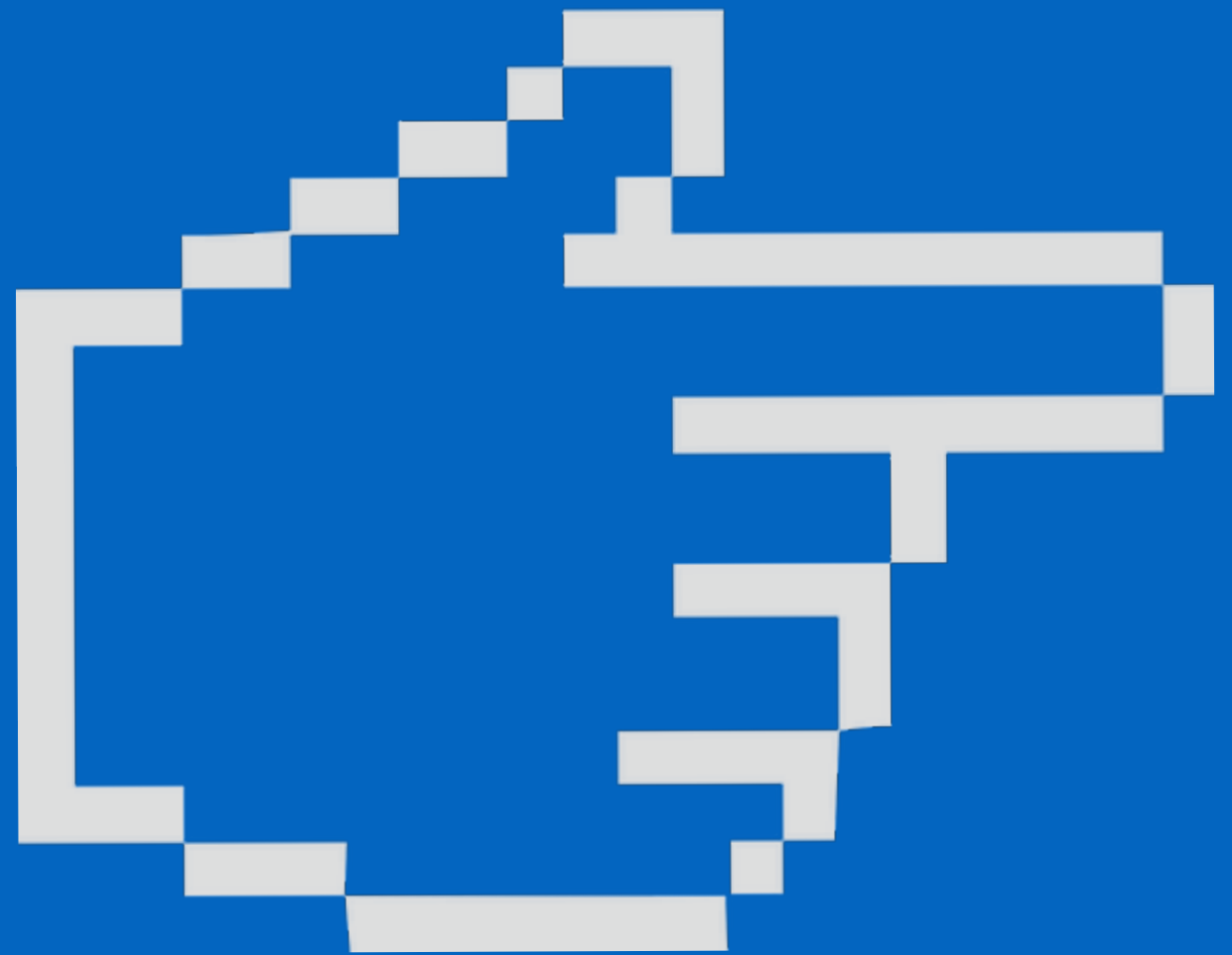
LEVEL 2

WORK PROCESS

PRE-CREATIVE
BRIEFING



POST-CREATIVE
BRIEFING



PRE-CREATIVE

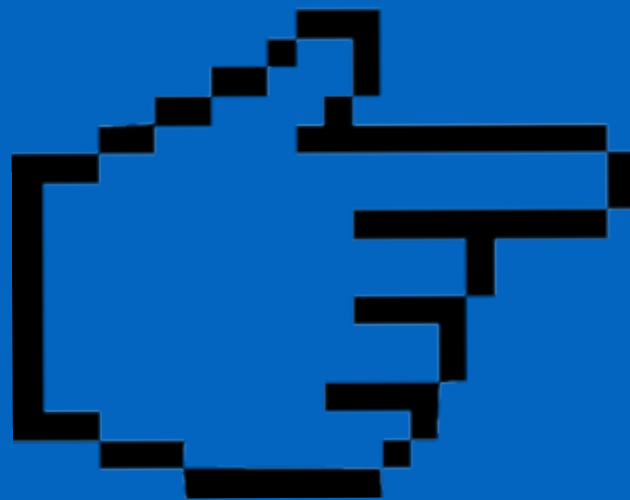
BRIEFING

Client Brief

Research

Creative Brief Writing

Creative Briefing



PRE-CREATIVE BRIEFING

Client Brief

Research

Creative Brief Writing

Creative Briefing



The client provides you with a brief, which explains the business background, the marketing objective, the campaign objective, the target audience, success metrics, budget, deliverables and timings.

PRE-CREATIVE BRIEFING

Client Brief

Research

Creative Brief Writing

Creative Briefing



You actively and/or passively go through consumer research and review & analyse the results, you do desk research regarding the market context and competition, study the brand and finally make sense out of it all, so you won't have to bore the creatives with tons of graphs and tables later on.

PRE-CREATIVE

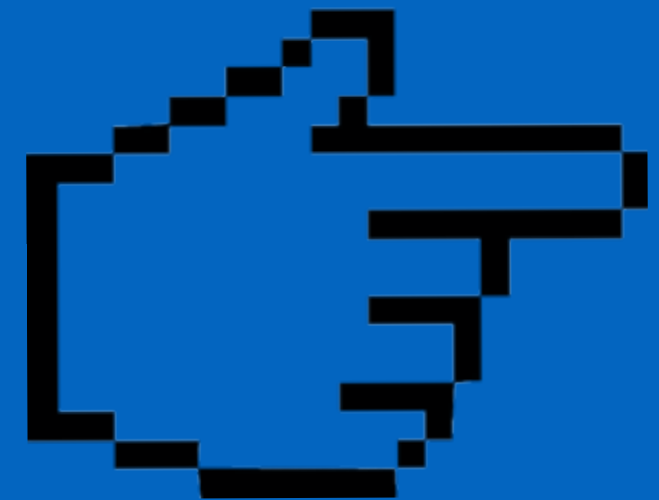
BRIEFING

Client Brief

Research

Creative Brief Writing

Creative Briefing



You structure all of your learnings and edit them into a creative brief, which is creative and brief.

PRE-CREATIVE

BRIEFING

Client Brief

Research

Creative Brief Writing

Creative Briefing



You don't just hand over a document to the creatives, you inspire them.

POST-CREATIVE

BRIEFING

**Creative
Review**



**Presentation
Preparation**



**Client
Presentation**



**Campaign
Implementation**



**Case Study
Writing**



POST-CREATIVE

BRIEFING

**Creative
Review**

**Presentation
Preparation**

**Client
Presentation**

**Campaign
Implementation**

**Case Study
Writing**



You assess whether ideas are on brief and if they really matter to the consumer. You provide constructive feedback and collaboratively figure out how to make things work rather than constantly look for reasons why things won't work.

POST-CREATIVE

BRIEFING

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



Based on the nature of the presentation, you put together a few simple slides that explain the strategic thinking behind the ideas. Your slides directly build up to the creative, preparing the stage for the big idea.

POST-CREATIVE

BRIEFING

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



You recap the brief/assignment and briefly explain the strategic thinking in a way that is interesting and creates anticipation for the creative presentation.

POST-CREATIVE

BRIEFING

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



You provide counsel and feedback to creatives, media planners and producers when needed.

POST-CREATIVE

BRIEFING

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



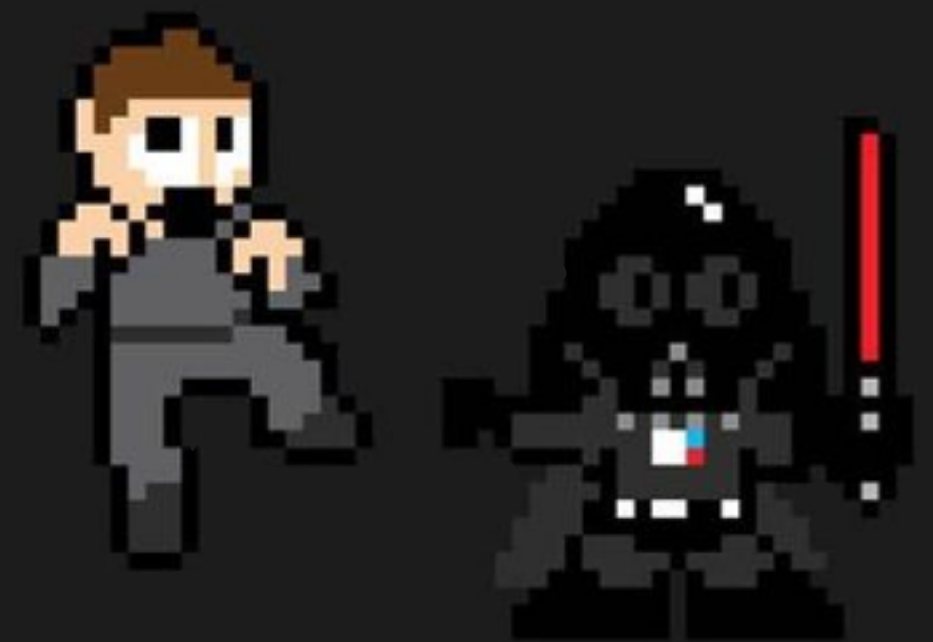
You keep track of campaign results, organise the data and put everything into a written effectiveness case study.



EVERYBODY'S HAPPY
AND YOU'VE ACHIEVED
WORLD PEACE ...

IT'S NOT A
PERFECT
WORLD ...

Whatever can go wrong,
will go wrong.



HOW THINGS GO WRONG

Client Brief



Research



Creative Brief Writing



Creative Briefing



The client brief lacks focus, does not specify a clear communication objective and gives no indication on how success will be measured.

HOW THINGS GO WRONG

Client Brief

Research

Creative Brief Writing

Creative Briefing



No consumer research has been conducted at any point and other data available dates back to the stone age. Also, there is no time and/or budget for a new research initiative.

HOW THINGS GO WRONG

Client Brief

Research

Creative Brief Writing

Creative Briefing



The brief is written without getting other people's inputs/opinions and every piece of information included is only based on assumptions.

HOW THINGS GO WRONG

Client Brief

Research

Creative Brief Writing

Creative Briefing



The creatives feel uninspired and cannot use the strategic direction.

HOW THINGS GO WRONG

**Creative
Review**

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



A simple review turns into a ten-hour meeting where everybody involved forcefully tries to come up with reasons why the ideas won't work.

HOW THINGS GO WRONG

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



Nobody coordinates; strategy, creative and media are not interlinked, the deck is a 600 slides Powerpoint monster with different layouts and various fonts.

HOW THINGS GO WRONG

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



The intro part of the presentation turns into an hour-long credentials pitch, followed by an hour-long recap of the client brief.

By the time the creatives present, the client has achieved a new high-score in Candy Crush.

HOW THINGS GO WRONG

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



You sit back, do nothing and completely have no interest in how the campaign gets executed.

HOW THINGS GO WRONG

Creative
Review

Presentation
Preparation

Client
Presentation

Campaign
Implementation

Case Study
Writing



The data you've received has nothing to do with the initial objectives and KPIs of the campaign. Confidentiality policies don't allow the client to share sales data with you.

SO HERE ARE A FEW
CHEATS FOR WHEN
THINGS DO GO WRONG ...





LEVEL 3

CHEATS

GETTING BETTER CLIENT BRIEFS

Sometimes, it's as simple as picking up the phone and asking the right questions. Sometimes, it takes a little more...





CO-CREATION

DOES THE TRICK

In case the client has dozens of different messages that need to be communicated to dozens of targets and sub-targets, which all should lead to increase of sales and record levels of brand awareness, get all key decision makers in a room and guide them through a prioritisation process...

CO-CREATION TEMPLATE

Macro Audit



Prioritisation



Issues/
Opportunities



Recommendations



Before the actual workshop session, you study the client's business objectives, evaluate current brand assets and inspect the market situation through secondary research. Ideally, at this stage, you'll already will have gathered some consumer insights.

CO-CREATION TEMPLATE

Macro Audit



Prioritisation



Issues/
Opportunities



Recommendations



In a collaborative session with the client, you go through a structured prioritisation process. Based on the macro audit learnings, you prioritise market segments and communication targets.

CO-CREATION TEMPLATE

Macro Audit



Prioritisation



Issues/
Opportunities



Recommendations



Based on the market and target prioritisation, you rank issues to overcome/opportunities to leverage, which will help you in achieving a clear communication objective. Ideally, you'll have a set of issues/opportunities prepared to choose from (research outcomes).

CO-CREATION TEMPLATE

Macro Audit



Prioritisation



Issues/
Opportunities



Recommendations



You edit all of the workshop outcomes into a simple, straight-forward recommendations document, which basically equals a focused client brief.



QUICK & DIRTY INSIGHTS

Nothing beats diligence and time when it comes to uncovering interesting and compelling consumer truths...

... EXCEPT
MAYBE
REALITY

Here are some tips and tricks that can come in handy, when you've been given a ridiculous deadline to come up with an insights-founded strategy.





OBSERVATION

Simple observation is a qualitative research method in which the researcher is recording what human beings do in certain settings, not what they say.



CASE

For MLA, we spent 3 hours in a hypermarket, next to the meat section and 2 hours in a Korean BBQ restaurant. Through simple observation, we gathered interesting initial insights, such as men being more likely to buy packed meat or older female shoppers being more likely to consult with the butcher.

ACCOMPANIED TRIPS

Accompanied trips are a qualitative observational method during which a researcher is given permission to accompany an individual through the process under investigation and asks questions at different points in time. With consensus of the participant, the process can be documented by video or photography.



CASE

For Gatorade we needed quick insights regarding female exercisers. We accompanied a girl in her 20s to the gym, observed her training routine and asked questions in between. We identified following consumer tension:

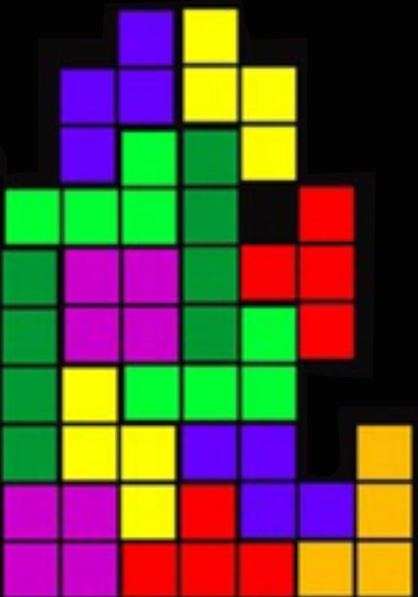
'If I'm not alone in the gym, I never push my self to the fullest because I still worry about sweat marks.'

Based on that insight, we proposed a strategy evolving around 'It's ok to sweat'.



'QUICK' SOCIAL INSIGHTS

Another way to reveal 'quick' insights is through Naver search analysis. The process is rather simple yet a little time consuming...



NAVER INSIGHTS

Coding Categories &
Keyword Definition

Search

Coding

Analysis



Based on the nature of your project, you define coding categories to organise conversations under certain themes. Based on these categories, you define key words and key word combinations that will yield insights regarding how consumers talk about your brand in the social space (e.g. brand name, competitor names, in combination with certain brand attributes etc.)

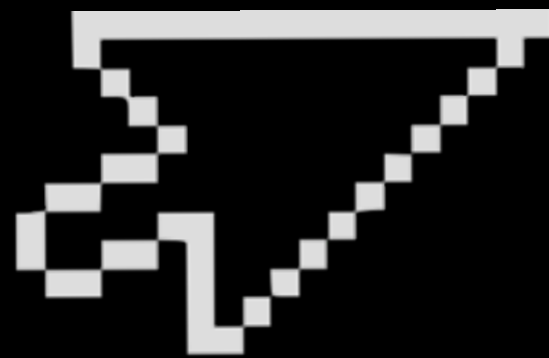
NAVER INSIGHTS

Coding Categories &
Keyword Definition

Search

Coding

Analysis



Define a timeframe (can vary on total volume; rule of thumb: last 3 months) for the search and specify the platforms (Blog, Knowledge, Cafe) you want to analyse, via Naver Search settings.

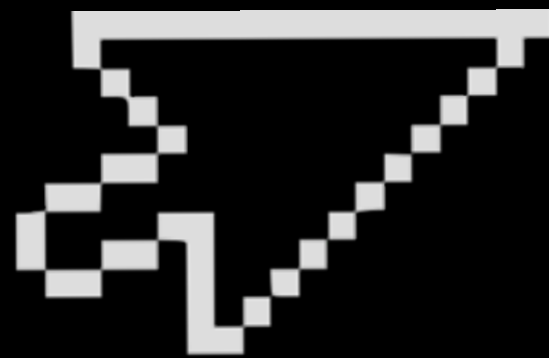
NAVER INSIGHTS

Coding Categories &
Keyword Definition

Search

Coding

Analysis



You take a sample of 100 conversations. Make sure they are not junk and then code them against the categories you've defined in step 1.

NAVER INSIGHTS

Coding Categories &
Keyword Definition

Search

Coding

Analysis



Using Excel, you create descriptive graphs showing total share of voice (according to brands), total volumes per platform, sentiment (positive, neutral, negative), conversation spikes and other quantitative findings based on your initial coding categories.

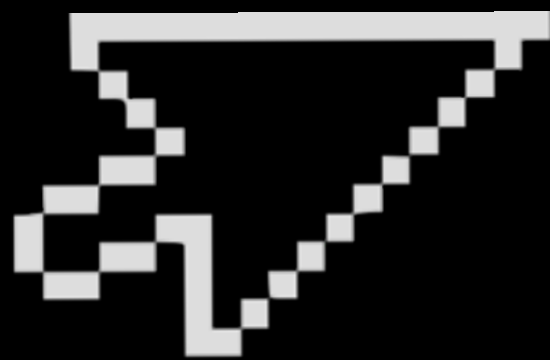
NAVER INSIGHTS

Coding Categories &
Keyword Definition

Search

Coding

Analysis



You then further dig into the themes and show qualitative examples of conversations that represent the category/theme.

INSPIRING THE CREATIVES

The brief is an ad to influence the creative team.

John Steel



INSPIRING THE CREATIVES

Look at the creative brief as collaborative process.

Involve the creatives in your thinking early on, ask them questions and let them tell you what they would like to know about the target audience etc.



INSPIRING THE CREATIVES

Don't think of the creative briefing as an official or dry meeting.

Think of it as an inspiring information session.

Get out of the office, bring the consumer to life.

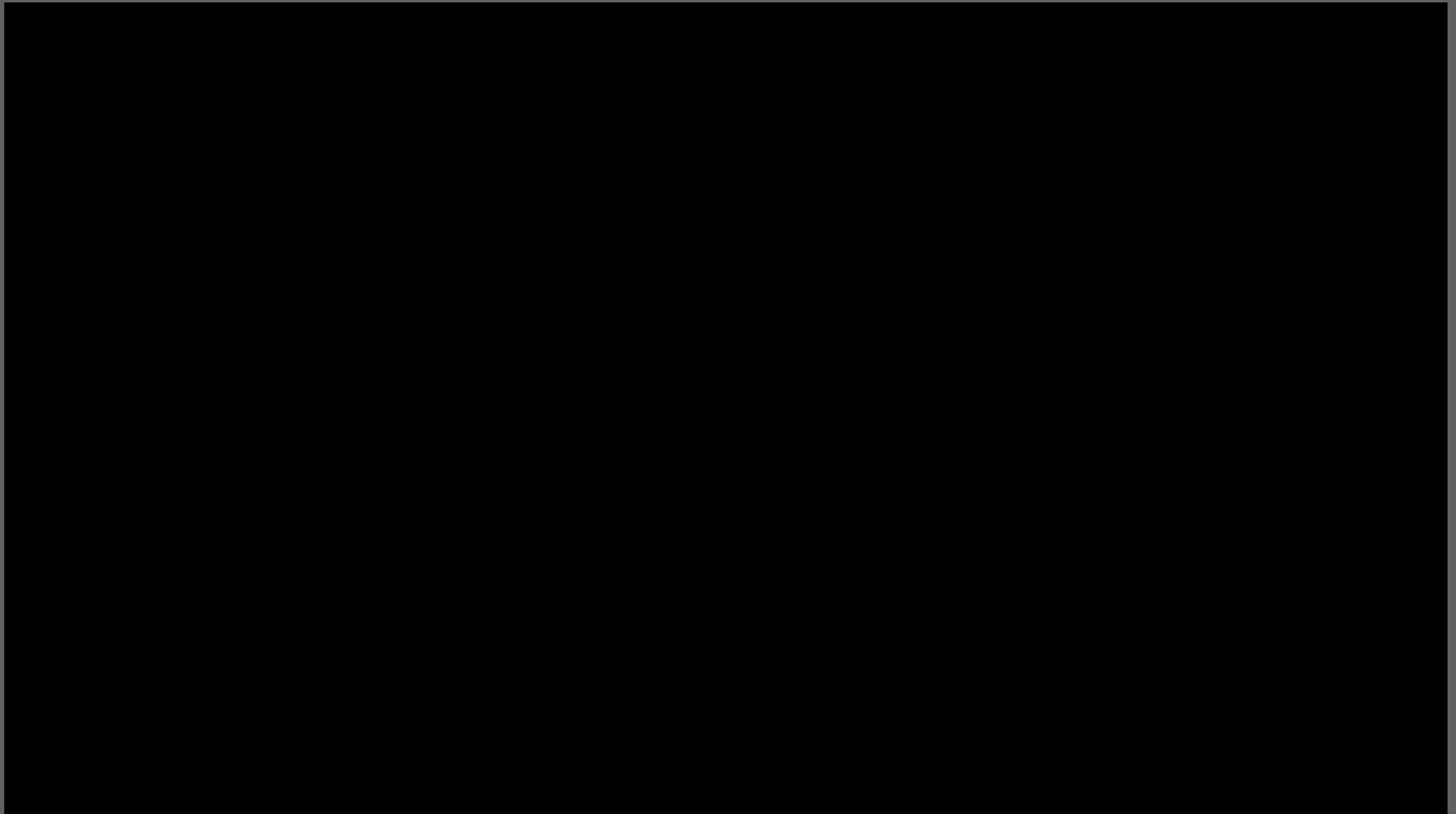


INSPIRING THE CREATIVES

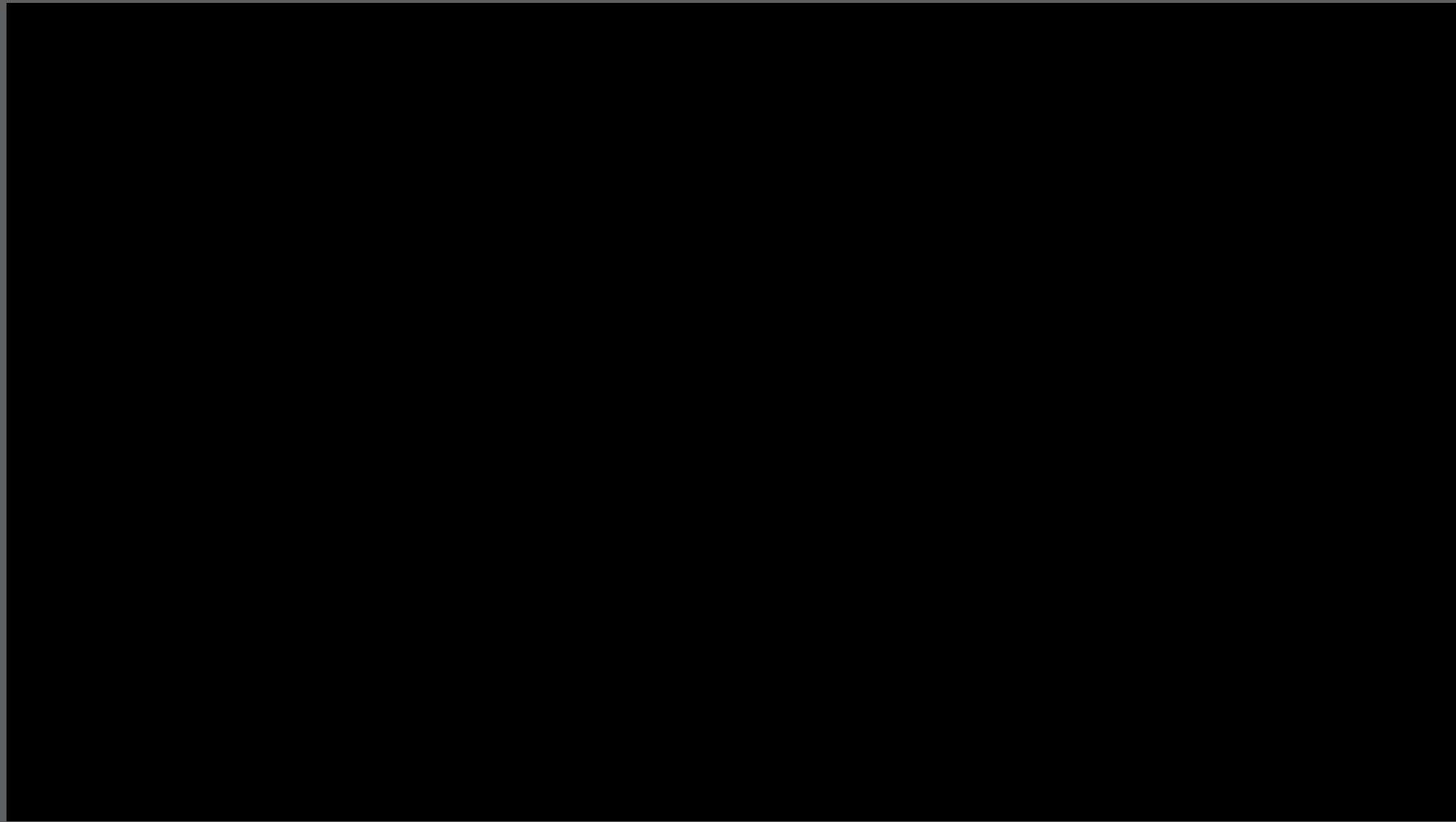
The brief itself does not always have to be a document.
Sometimes a creative brief film can help inspire the creatives...



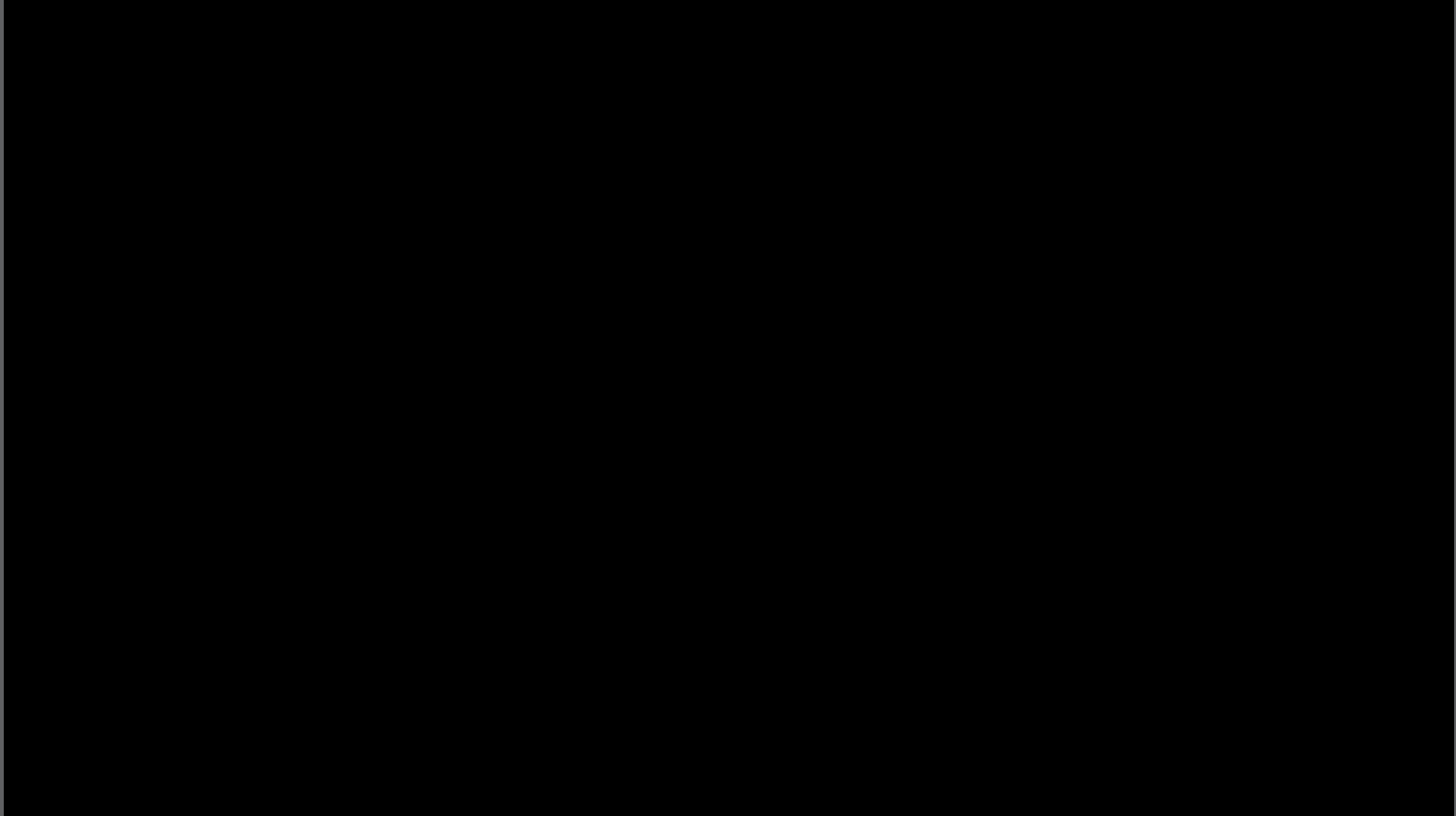
CAMPAIGN TONE & MANNER



BRINGING THE TARGET TO LIFE

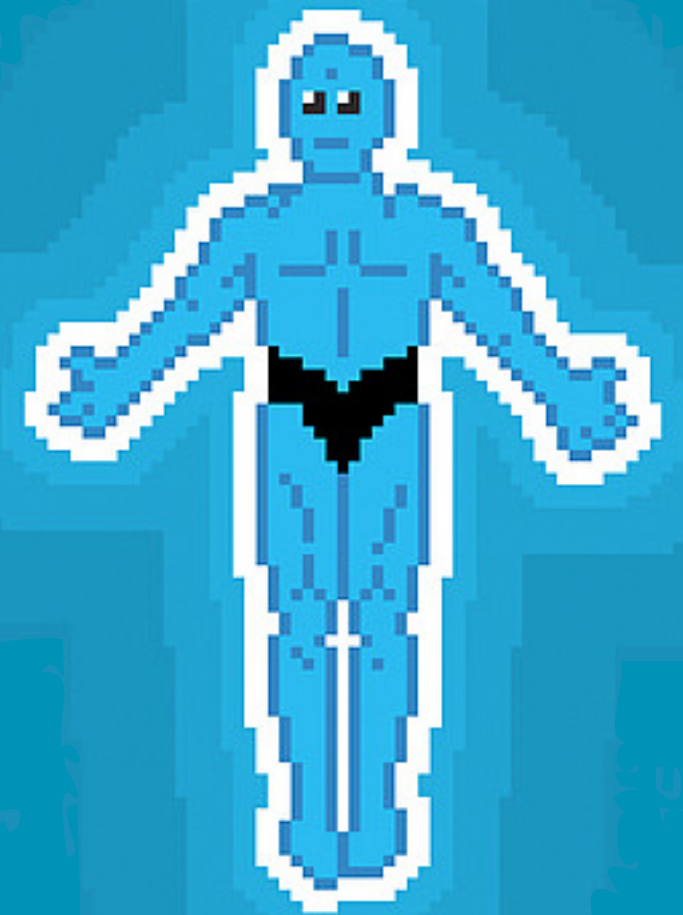


BRAND POSITIONING



PRESENTING TO CLIENTS

A presentation to the client (esp. a pitch) is not a lecture. Don't repeat facts and stats the client knows anyways, don't over-explain...bottom line, don't be boring.

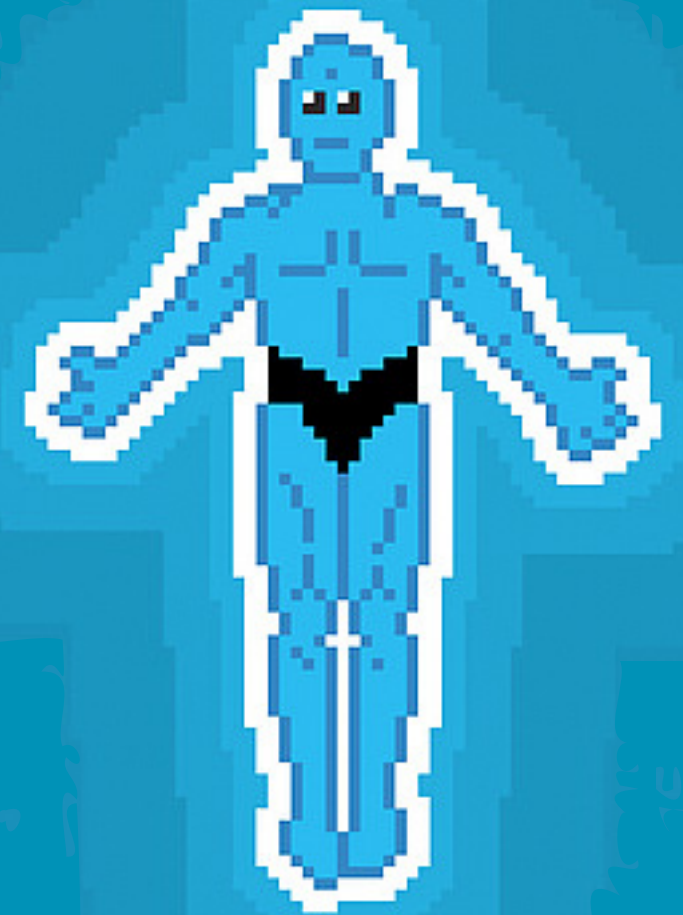


PRESENTING TO CLIENTS

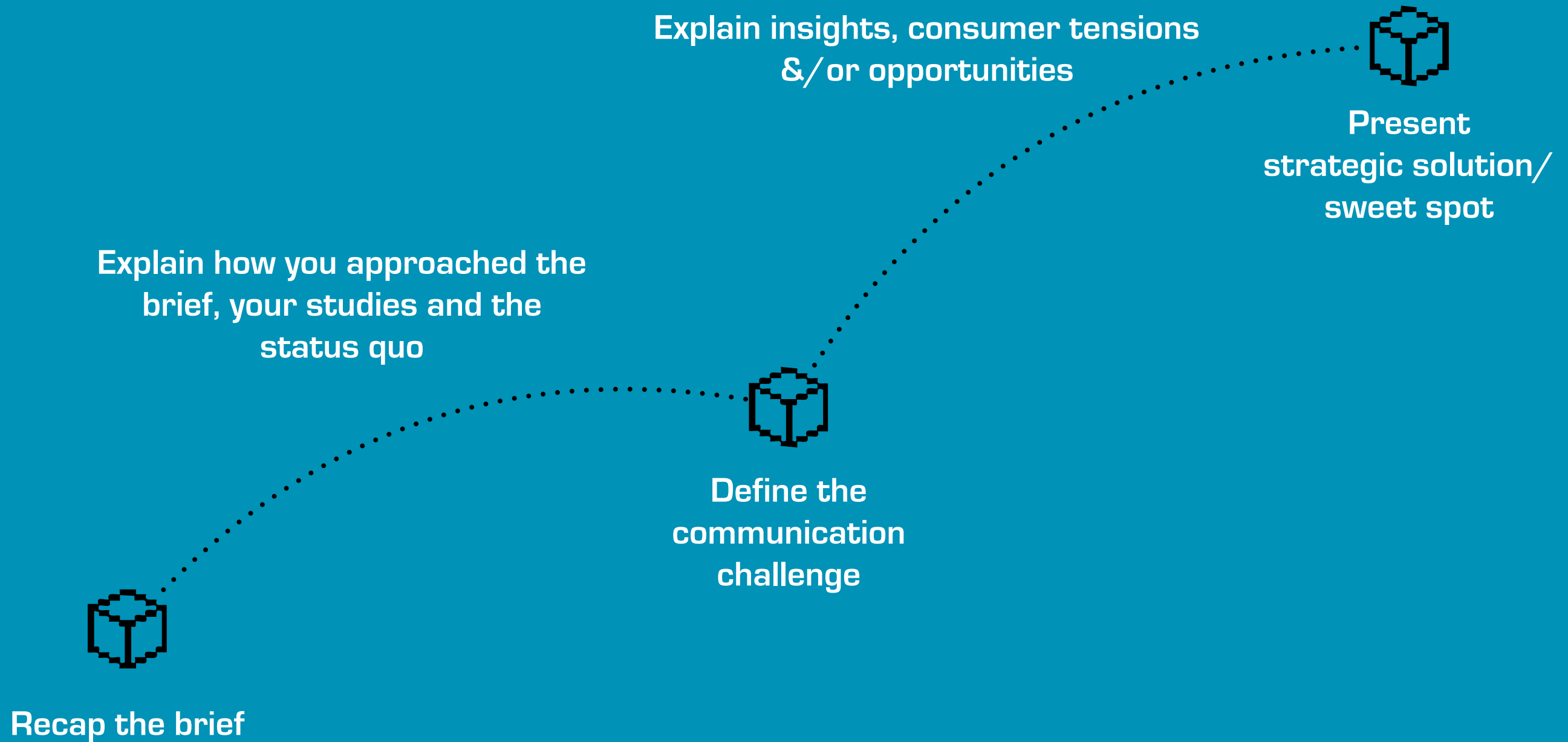
Avoid death by Powerpoint.

Make sure every slide has a point;
if not, get rid of it.

Understand your audience and
tailor your presentation style to
them.



PRESENTATION FLOW



WRITING THE CASE STUDY

Answer the question

Know your judging audience

Avoid jargon

Tell a simple story

Grab attention at the beginning

Source: Warc Case Study Workshop (2013)



IN 50 WORDS

“Levi’s Korea transformed itself from a brand caught in between luxury and fast-fashion to a brand that re-invented the local perception of style. It escaped the ever changing, celebrity-endorsed clutter of the category and drove sales and consumer advocacy by stretching the limits of what is seen as personal expression.”



WHAT THE JUDGES SEE ...



Author(s): Paul Rees-Jones
Source: The Communications Council
Issue: Silver, Australian Effie Awards, 2011

How NAB's 'break-up' changed banking in a single year

Advertiser: NAB
Author: Paul Rees-Jones
Total Campaign Expenditure: \$5-10 million

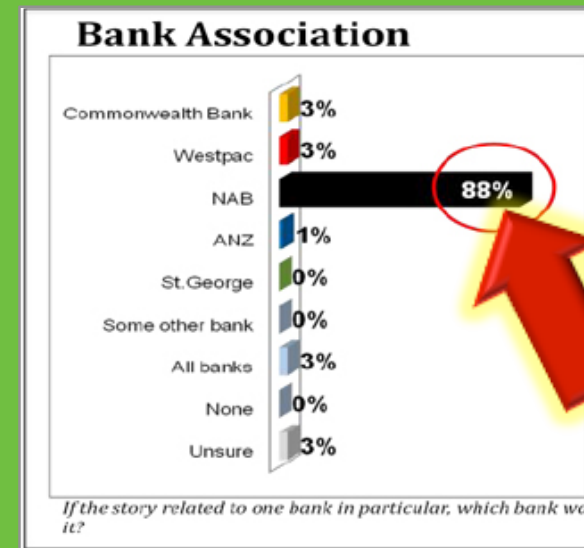
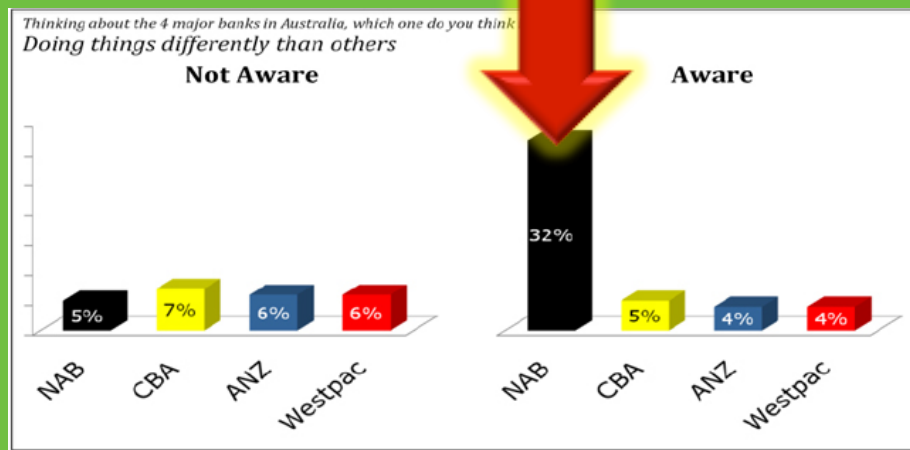
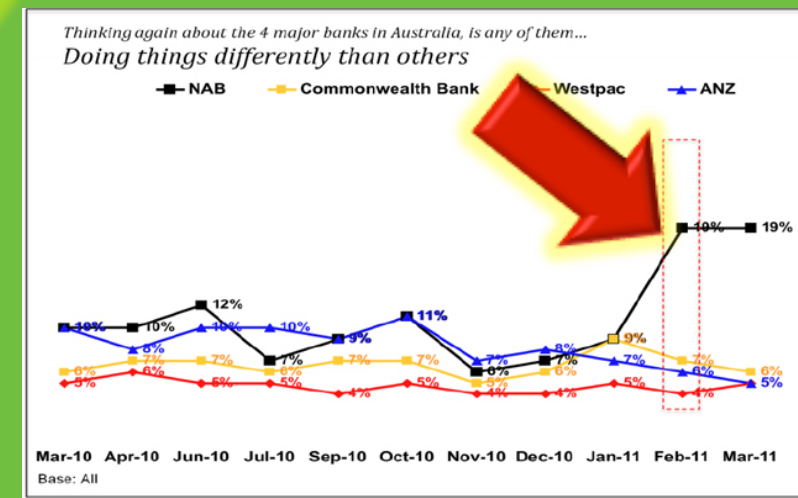
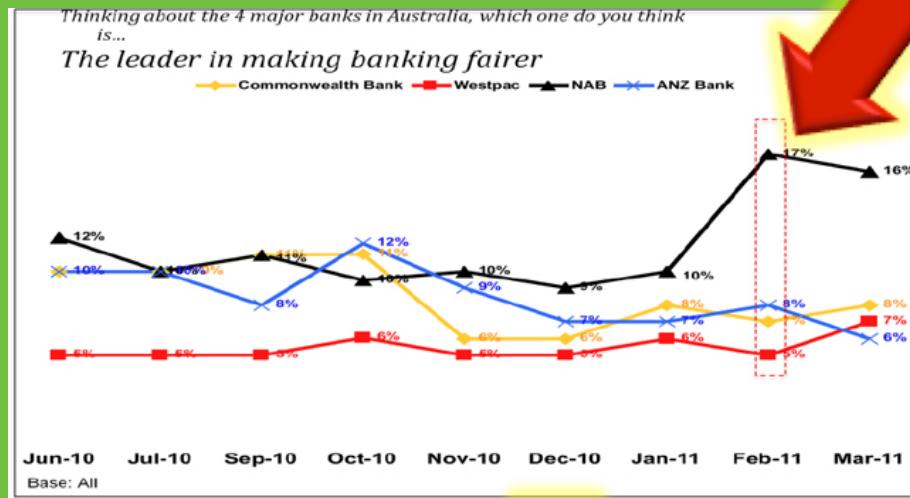
STRATEGIC COMMUNICATIONS CHALLENGE

Australians have always believed their four biggest banks, Commonwealth Bank, Westpac, ANZ and NAB, work together fixing fees and eliminating competition. This perceived collusion goes to the heart of the well-worn catchcry "All banks are bastards" or at the very least seeing them as out of touch and arrogant. NAB, like the other banks, needed to address this perception. Unlike their competitors, NAB decided to do so by challenging the status quo.

In July 2009 NAB introduced its Fair Value agenda based on a belief that the relationship people had with their banks needed to change, for the better. At the heart of this agenda was a defining value of *doing the right thing* introduced by Cameron Clyne, Group CEO National Australia Bank. In the post-GFC world, he believed the most competitive stance a bank could take would be one of reputation management, especially when it came to NAB's retail division.

WHAT THE

JUDGES SEE





LEVEL 4

HELPFUL RESOURCES

PLANNING

Planning tools & hacks:

<http://plannersdilemma.misentropy.com/>

Planning Wiki:

<http://plannersphere.pbworks.com/w/page/17146375/FrontPage>

Junior Strategy:

<http://www.juniorstrategy.com/>



Ados

Bud Caddell (Digital Strategist):
<http://whatconsumesme.com/>

Gerald Hensel (Digital Strategist):
<http://davidavai.com/>

Julian Cole (Comms Planner)
<http://adspace-pioneers.blogspot.kr/>

Rich Siegel (Creative Director):
<http://roundseventeen.blogspot.de/>

Murat Mutlu (Designer):
<http://www.mobileinc.co.uk/>

