



HOW TO WRITE A CREATIVE AND MARKETING RESEARCH BRIEF FOR SOCIAL MARKETING

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CREATIVE BRIEF

The creative brief is one of the most important elements in implementing a social marketing campaign. A creative brief is like a road map. A good brief leads to imaginative and persuasive communications. A bad brief starts you off in the wrong direction. If you are thinking that you don't have time to write a brief... remember that working from verbal input, without a written brief, is how public sector and nonprofit organizations waste time and money.

Finding the best way to express anything creatively starts better when all players are involved and agreed on the strategic direction of the social marketing campaign. The creative brief is a working document; it is by and large a process most good organizations will use to ensure that their creative contractor and they are agreed on the direction the creative work should take.

There are number of ways to look at The Creative Brief, but largely it is a conversation between you and your creative agency or internal creative department that ensures the right flow of aspirations and intentions, and the desired end result is achieved.

To stimulate the discussions necessary to ensure the creative work being commissioned for your social marketing campaign there are 3 key things your creative team needs to know: who are we talking to? What do we want them to do? And why should they do it?

The "Who" tells everything about the target audience the work is aimed, the "What" is the action that this target audience is required to take and the "Why" gives reason for the "Who" to do the "What." These may be simple questions initially but if each is given sufficient time and both parties are clear to each other about the answers, a better brief and therefore better and more effective creative work will result.

By completing the creative brief you will ensure communications will be **meaningful** i.e. benefits that make product desirable, **believable** i.e. product will deliver on promised benefits and **distinctive** i.e. how desired behaviour is better choice than competing behaviours

CREATIVE BRIEF TEMPLATE

Creative Brief adapted from: Social Marketing “Influencing Behaviours for Good” (Third Edition)

Kotler and Lee pp...269-271

Key Message:

Brief statement that summarizes the bottom-line message.

Should include the behaviour you are trying to influence.

Target Audience:

Provide demographic, geographic and if possible psychographic profiles.

Current knowledge and beliefs and behaviours relative to desired behaviour as well as competing ones.

Describes targets current “stage of change” and any other information from your analysis.

Objectives:

What do you want your target audience to know (think), what do you want your target audience to believe (feel), and what do you want your target audience to do?

Positioning Statement:

The product positioning statement established in your social marketing plan.

Benefits to Promise:

Key benefits audience hopes they will receive from adopting behaviour, identified in the core product. The primary benefit may be expressed in terms of the cost that the audience can avoid by adopting the desired behaviour (e.g. stiff penalties for drinking and driving, the cost of buying cigarettes etc.)

Support for the Promise:

Brief list of additional benefits and highlights from product, price, place strategies established in the process Highlight those that would most help convince the target audience that they can perform desired behaviour, that benefits are likely, and that they exceed perceived costs

Openings:

Times, places and situations when audience is most attentive and able to act on the message. Some of the input comes from section on barriers and benefits. Additional information may come from secondary research on audience(s) lifestyle and media habits (watching TV, listening to radio, surfing the internet and interacting with friends and families.

For more information on how to work with a creative supplier see Golden Rules for [Getting Great Work from a Design Agency](http://www.marketingprofs.com/5/enderle1.asp) <http://www.marketingprofs.com/5/enderle1.asp>.

MARKETING RESEARCH BRIEF

Research is a key element for every component of the social marketing process. In many instances it is usually contracted out to a marketing research company. However in some cases the research is done internally. In any case to get the information you want from the research you are conducting it is critical that you prepare a Marketing Research Brief.

Writing a Marketing Research Brief is an essential first step in any market research exercise. It will help those doing the research develop a relevant and appropriate research study. The very act of writing a brief enables the social marketer to prioritize the objectives and planned outcomes of the research. The more time spent planning the research, the better the outcomes will be.

Ultimately, it helps you clarify your objectives and prioritize what you want from the research. The brief helps the researcher come up with the most appropriate research solution, and to give you the best “bang for the buck” for your research budget.

The starting point is always the social marketing objectives. Involving relevant organizations and or partners involved in the campaign at the outset will save time by ensuring all key objectives are included in the brief. The more focused the objectives, the more focused the result! An overview of the key relevant issues to the project, and details of recent studies provides valuable background. One of the most useful pieces of background information is accurate information on the size and structure of the target audience.

Social Marketing objectives should be summarized separately from research objectives.

You may have a preferred methodology, or if you are working with a contractor it is important that they provide you with several alternative options costed in their proposal (for example alternative options of conducting focus groups and individual depth interviews).

The time required to conduct research is largely driven by the scale of the exercise, (e.g. number of interviews) and (b) type of data collection (e.g. face to face interviews will take longer than online surveys). Hard-to-reach audiences will have a much greater impact on the length of time to conduct interviews. If the research needs to be conducted within a limited time frame, or there is a key reporting date to be met, including this information upfront will have a significant impact on the type and scale of research methodology. Interim results can always be presented against a series of key milestones.

MARKETING RESEARCH BRIEF TEMPLATE

Always start the process with a review of secondary research. Undoubtedly information gaps will probably be identified. It is helpful to have an overall research and evaluation plan. This is usually developed as one part of your overall social marketing strategy. You will need to decide if you need to start off with quantitative or qualitative research to find out what might motivate your audience to change their behaviour.

Your brief provides a context for the researcher. They need to know where the research fits within your overall social marketing strategy. It is really helpful for the researcher to know why you wish to undertake the research and how it will be used. If there has been previous research done provide information about what has been done to date. If there are any particular political imperatives it may be helpful to let the researcher know as well

A great **Marketing Research Brief** possesses clarity, displays depth of thought and most importantly, provides direction.

The following headings are the areas you should cover in your brief.

Background: (short overview of the social marketing campaign and how the research you will be conducting will support the campaign)

Social marketing objectives: Outline here the overall objectives of your social marketing strategy i.e. what you wish to achieve with your target group(s). Include Knowledge, Belief and Behaviour objectives.-

Research objectives:

Specify exactly what it is that you want to achieve from this research. Try to be as specific as you can.

Research audience:

You should have a general idea of who you are trying to reach, i.e. who are your target segments. You should outline what target group or groups you want to find out more about. Be as specific as you can. Indicate your priorities in case there is not enough budget to cover all groups.

You can define your target group(s) demographically, geographically or attitudinally (psychographics).

Information on target audiences

It is important that you let the researcher know of any information about your target group that you already have available. It may be from previous research that you have commissioned or from another source or it may come from the analysis of secondary research analysis you conducted. This will help the researcher identify the information gaps.

Checklist of key discoveries you are hoping to find out from the research. Please check the appropriate boxes below.

Check off those that are relevant to your study

- To better understand current behaviour, knowledge, attitudes, perceptions and values of target audiences
- Knowledge gaps i.e. facts that could motivate the target audience to change attitudes and behaviour. E.g. benefits of the proposed behaviour and what tools they can access to help them with behaviour change.
- Better understanding of competing barriers and benefits? e.g barriers that discourage target audiences from adopting the desired behaviour and how you can help the target audience overcome barriers to behaviour change
- Which target segment(s) is most ready, willing and able to change their behaviour i.e. which segments are more likely to respond to a social marketing campaign 'best'? (low hanging fruit)
- What the target audience believes are the most efficient marketing communications tactics/channels that can be used to get the social marketing message across to them.
- Place i.e. where and when the target market perform the desired behaviour
- Pricing issues particularly non-monetary costs :
 - Time
 - Psychological risks
 - Physical discomfort
 - Loss of pleasures
- Other

WORKING WITH RESEARCH CONTRACTORS

- **Research methodology**

The researcher would usually make a recommendation on what methodology is most appropriate to meet your marketing research needs. However you may already have an idea of the sort of information you are after e.g. qualitative rather than quantitative. If so let them know. (Remember to ask them to provide the rationale for their recommended methodology.)

- **Timelines, milestones and deliverables**

Outline critical deadlines that you expect the researcher to meet. Deadlines might include: research proposal received; draft questionnaire completed; field work begun and/or completed; top-line results reported; final report received and presented. Be realistic. You are more likely to get good work if you have reasonable expectations in terms of timing. *(Along with your timings be specific about your milestones. Some people are happy just to leave the researcher alone until they have a final report to deliver; others prefer to be part of (and approve) every step of the process. Making this clear from the outset will ensure a productive relationship.)*

Be clear about deliverables. Do you want the researcher to do a verbal presentation of the research report? How many copies of key documents do you want? Do you want them to include all the tables in the report or just summarize the key results? Do you need an easy-read version of the final report to put on your website?

- **Budget**

It is helpful to let the researcher know what kind of budget you have available as this affects what sort of research design is feasible.

- **Marketing Research selection criteria**

If your research is going to be contracted out to more than one company (i.e. it is a competitive bidding situation) it is good form to give everyone an idea of when and how you want their proposal to be presented; what criteria their proposals will be judged on and when the decision will be made.

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