

► Present your recommendations in a compelling sales document

Developing a digital promotion plan involves coming up with a logical and creative solution to a problem or opportunity confronting a client. You then have to distill and organize all your ideas into a succinct and coherent presentation for the client. This usually involves writing a *proposal*. Although this outline focuses on a digital promotion plan, a similar regimen applies to proposals that incorporate traditional media.

The planning process itself involves analyzing a situation, understanding the client's goals and specifying clear communication objectives for the effort. Based on these decisions, planners then must make decisions about strategies to be employed – *what to say to whom through which media*. Tactical details then need to be considered: specific tasks to be completed, staffing, timetables and budget. Finally, a good plan specifies how to assess a program or campaign's success.

A proposal cogently summarizes each of these critical steps and demonstrates the soundness of the creative solution. Proposals enable clients to approve a *conceptual direction* and to authorize a *budget* for the project.

Good proposals are sparsely written, use plain language, and addressed to the client. In general, use third-person voice (avoid "you"). The written document represents the "official" recommendation, but most recommendations are delivered at client meetings where presenters explain the idea orally and answer questions. Presenters use Power Point, multimedia or online demonstrations to illustrate their ideas. The proposal thus serves as a *supporting document* that is *scanned* by the client and used to address particulars. Proposals most often follow an informal outline format -- with short narratives, bulleted lists, graphs and charts, and more detailed narratives only where necessary.

(Optional) EXECUTIVE SUMMARY / OVERVIEW

If a proposal is complex or lengthy (10 pages or more), provide a brief synopsis that *terse* summarizes the main idea and recommendation – what an executive needs to know or approve.

I. SITUATION ANALYSIS / INTRODUCTION

Begin by describing the problem or opportunity. Explain its implications, and identify possible consequences if no action were taken. Be sure to describe the client's current promotion activities, both offline and online. The situation analysis essentially sets up the rationale for your recommendation and plants important seeds in the mind of the client as he or she considers your recommendation. Focus on your rationale; outline your actual

proposal in the Recommendations sections that follow. *Your goal is to grab the client's attention and overcome complacency or inertia!*

In analyzing a situation, consider the organization's (or product's) inherent *strengths* and *weaknesses* as well as external *opportunities* and *threats* (SWOT analysis). Also consider factors that might encourage or inhibit implementation or your recommendation (force-field analysis). *A comprehensive inventory is unnecessary here – your proposal should be zero in on only the key concern(s).*

II. GOALS AND OBJECTIVES

Clearly set forth the outcomes to be attained. Summarize the **organization's goals** (desired outcomes) for the project and specific **communication objectives** (changes in behaviors necessary needed to achieve those outcomes). Separately list 1-4 organizational goals and communications objectives using simple statements. Follow the SMART formula illustrated in the examples below. Both goals and objectives should be specific, measurable, attainable, realistic, and achievable within a specified time frame.

Organization Goals (examples): *To increase sales by \$1 million by year-end. To increase market share from 22% to 28% by 2015. To become the most popular women's website in Colorado during 2016.*

Communication Objectives (examples): *To generate 20,000 visits to the web site during December. To increase the candidate's positive (attitude) ratings in the polls from 45% to 55% by 10 days before the election. To generate 6,000 sign-ups for the organization's new e-mail newsletter in May.*

III. ACTION RECOMMENDATIONS / STRATEGIES

Before launching a program, the organization must be ready. Make any needed recommendations for improving the organization's operations, current practices or policies, or branding of its products or services. The purpose is to assure maximum effectiveness of your effort. Sometimes these recommendations are better outlined orally or in a separate document because of their sensitive or confidential nature.

- If *major* changes are called for, it is usually necessary to obtain concurrence *prior* to presenting other elements of the plan because the communication strategies might involve communicating about those changes. Examples include improvements in product design or services delivery, or enhancements in systems or procedures for handling customer/user responses. Minor procedural changes can be incorporated into the communication strategy discussion.
- Other recommendations might include communications-related activities upon which the program is predicated. Thus approval and confirmation might be necessary *before* other details of the plan can be fully developed. Examples include recruiting a particular spokesperson or securing a particular date or venue for an event--critical choices upon which the entire program/campaign will be based.
- For new organizations, action recommendations might relate to corporate identity issues, such as the organization's name or graphics. In marketing programs,

recommendations might involve branding of a new product or service (name, logo, positioning relative to others in the category) or re-branding of an existing organization, product or service.

- In addition, identify any steps related to your digital promotion activities that must be in place *prior* to launching your proposed activities (and ought to be the responsibilities of others). Examples include: secure a user-friendly web address; hire a web site hosting service; confirm procedures for handling queries; retain outside firms to perform tasks that cannot be handled by the client (e.g. serving ads to third-party web sites); formulate standards related to design, corporate identity and editorial style/content; establish policies pertaining to the protection of user information (personally identifiable information) or to the acceptance/use of user-generated content.

Note: Action Recommendations/Strategies are separate from actually producing creative materials—these should be described in the following section.

If you think the organization is fully ready, include a simple statement such as “Based on our analysis, the organization appears to be fully prepared to implement the recommendations that follow.”

IV. COMMUNICATION RECOMMENDATION / STRATEGY

Overview. Summarize in one or two paragraphs *how* you intend to achieve the client’s desired goals and your communication objectives. Focus first on the “big picture” and then elaborate by providing a rationale and whatever additional details deemed necessary. Sell the idea—then provide details.

Examples of how to summarize your strategy might include:

- Build a presence for XYZ in cyberspace for the first time
- Tap social media to encourage current customers to share information with friends
- Showcase the (not-for-profit) organization’s good works using multimedia
- Create and promote an exciting online event (or contest)
- Foster a sense of community among employees
- Obtain exposure and endorsement of XYZ by online journalists and bloggers

Summaries of efforts incorporating traditional media might state:

- Generate nationwide publicity through use of a (named) spokesperson
- Build employee buy-in to the new benefits program through small group events and 3-month internal communications program
- Launch an employee education program about the new safety regulations using multimedia and on-site training programs with the theme “....”
- Distribute a series of attractive brochures to through medical offices, complemented by publicity in major consumer magazines, newspapers and broadcast outlets.
- Observe the organization’s 100th anniversary with a major kickoff event, supplemented by a year-long publicity campaign.

Note: These are all examples of *how* some outcome (organization goal) might be achieved and are *not* goals or communication objectives in themselves. The proposal can then go on to provide details.

In the course of explaining your strategy, address the following three key components in your strategy in a logical way that will make sense to the client. You might simply address these three components in the order listed below. Alternatively, focus on a particular component (such as the audience) and then address the other two components (such as messages or media) as they relate to that component.

Audiences. Identify key market segments, publics, constituents, stakeholder groups or other audiences to be reached. Be sure these groups are consistent with the stated goals and objectives. Prioritize groups by importance, and categorize groups together that can be addressed using similar communications activities. Possible classification schemes include (pick only the ones that might be appropriate—not all of them):

By role/relationship: Customer, employee, member, leader, investor, community member, government official

By demographics: Age, gender socio-economic status, ethnicity

By residence: Specific census tracts, zip codes, parts of town, city, region, etc.

By lifestyle: Special interest, personality type (such as risk-taker), sexual orientation, college student, retiree

By behavior: New prospect, regular customer, heavy user of a product or service, former customer, member of an at-risk population

By media use: Mobile vs. desktop user, smartphone vs. feature phone user.

Messages. Identify the *key messages* or *themes* to be communicated. Stated another way, what are the key “take-away” ideas people should remember? Certain key messages might apply to all audiences, while others might be specific to particular groups. For example, a key message (positioning) for a new service might be that it is *convenient, easy-to-use, low cost, recommended by experts, endorsed by a celebrity, and/or environmentally sound* – but not necessarily all of these.

In general, everything said in your campaign should *reinforce* and *repeat* that key idea and should be presented in a variety of imaginative ways (executions) that capture an audience’s attention. Important: Themes are not *slogans*, i.e. “catch phrases” used as continuity devices in advertising (e.g. McDonald’s “I’m lovin’ it.”).

Messages often focus on features/benefits, newsworthiness or usefulness of information.

- Marketers of new products and services often focus messages around how a product or service is *different* from others in a category (reflecting how it is *positioned*), the key *benefits* provided, and *features* that support differentiation or benefits claims. Importantly, an *advertising slogan* is merely a continuity device that supports the key message or theme. The “take-away” thoughts of audiences should be the same, whether the slogan is used or not.
- Messages in public relations and political communication often involve the *newsworthiness* of an organization, product, service, candidate or cause or what the message sponsor is doing to build/maintain/preserve a *relationship* with the audience.
- Messages in managerial communication, technical communication and information campaigns often focus on providing people with *facts* or *key information* needed to perform particular tasks effectively, to improve their

efficiency, to foster customer satisfaction, to promote healthy behaviors or to avoid risks.

Media. Identify the specific web or wireless media, tools or activities you plan to deploy. Be specific. Explain your rationale and details that might not be familiar to the client. Consider how web or mobile communication might need to be supplemented with traditional communication tools—public media, controlled media, events and one-on-one communication. (Few programs solely depend on digital media.)

V. TACTICS

Provide additional important details to help explain your plans. This section is most useful for your own planning purposes – to make sure you can accomplish your desired outcomes. The three components of tactics are: tasks, calendar and staffing.

Tasks. Identify all major tasks to be undertaken in order to determine staffing, timing and budget needs. A common approach is to list projects in chronological order of implementation — from first to last.

Calendar. Determine an *ideal time* to make contact with your audience, then work *backward* to determine deadlines for the distribution, production, approval, and creation of materials or messages. Alert clients to early milestone dates when their personal involvement will be critical to stay on schedule (copy approvals, etc.)

Staffing. Assign tasks to specific staff members or outside firms or services, as appropriate. Designating job responsibilities helps identify potential problems related to unassigned projects or overloaded staff.

Tactics sections in proposals vary widely. A secondary purpose of this section is to *reassure* clients that the team making the proposal has thought through the details and can accomplish its recommendation within time, staff or budget limitations. These are details not required for the client to approve the project in concept. Clients actually vary in terms of the amount of detail they want or need to know.

The simplest technique to summarize the various tactical details is to create a three-column chart. For highly complex programs, various other project planning tools can be employed (including project management computer programs).

*For the Class Project, pick one of the following two formats for a simple chart that combines these three tactical components. One focuses on the tasks, and one focuses on the timetable. Note: For all the examples provided in this section, the box is used merely to set off the example—and should *not* be included in your final proposal.*

Example: Organized by Task (Activity)

Tactics		
Implementation of the campaign will require the timely completion of key tasks. The following is the proposed calendar along with a summary of staffing responsibilities.		
Project A		
Task A1	Date	Person
Task A2	Date	Person
Task A3	Date	Person
Project B		
Task B1	Date	Person
	<i>Etc.</i>	

In the above example, substitute actual names for Project and use actual task names for Task A1, A2, etc. —eliminate the numbers.

Example: Organized by Date (Calendar)

Tactics		
The following is the proposed calendar for implementation of the proposal [campaign, project] based on a June 15 product launch:		
Week of May 1	Task	Person
	Task	Person
Week of May 8	Task	Person
	<i>Etc.</i>	

This alternative example focuses on key dates. You can include client responsibilities (such as approval of materials) in the calendar.

VI. EVALUATION

A professional proposal should address how results will be assessed. The effectiveness of a program or campaign should be primarily measured in terms of

- **whether stated *organizational goals* were actually attained.** These results are usually monitored and easily accessible from the client, based on reaching targeted *sales or revenues, activity levels, market share, or changes in market position.*
- **whether *communication objectives* were attained.** Measuring such behavioral changes often involves monitoring digital software analytics or investing in offline or online surveys and/or focus groups to measure *awareness, attitudes, behavioral intent or reported behaviors.*

At least 3 types of measures can be compiled from system analytics and/or from online research services:

Message exposure measures -- the number of communications distributed or the exposure obtained

Examples: website visits; unique visitors (net of duplications); new versus returning visitors; sources of traffic; page views; time spent with message; number of downloads; number of followers or friends; bounce rate (number of people who leave a venue after visiting only one page or without taking action)

Message response measures -- based upon user *interactivity* and actions taken by audience members using their device. Similar to exposure, user responses can suggest higher levels of user involvement or interest and intentions.

Examples: click-throughs to website landing pages or other destinations (such as clicks to call), followers or friends added; messages saved, deleted, forwarded or shared with others; replies to the sender or requests for information. Also messages rated favorably; topics or posts “Liked,” products “Wanted,” messages commented upon, bookmarked, tagged, or linked; files downloaded -- coupons, music, images or documents; orders/transactions prompted by promotional messages

Message use measures -- what is being repeated about the client, product, service or cause in websites, blogs, microblogs, forums, chats, wikis, and social networking and media sharing sites.

Examples: number of mentions; number and nature of retweets; venues where mentioned; sentiment (positive, neutral, or negative); passion (emotional fervor); influencers (identities of the most active commentators or intermediaries sharing information); timing and intensity; insights (actual comments or reactions).

Digital promotion programs also can rely on traditional campaign measures, including:

Message Production (outputs: number of messages distributed)

Message Exposure (typical calculated from circulation, readership, viewership, Listenership and other audience data available from media)

Awareness (levels of recognition, recall, comprehension measured in surveys)

Attitudes (positive dispositions toward the organization or offer, including behavioral intent to take targeted actions, also measures in surveys)

Actions (behaviors actually taken, based on observation of people, self-reports by target audience in surveys, or aggregated data compiled by client such as sales, store visits, queries, etc.

Success also can be measured based on *qualitative* assessments by clients, customers, third-party experts and others (especially when activity is contrasted with past or best practices). Financial measures might include *cost efficiency* (of one of medium versus another) and *return on investment* (net contribution to profitability).

For your class project, briefly summarize how you propose for your efforts to be assessed or how you will measure your activity. Focus on your client's goals and your communication objectives, but you may include several other reasonable measures that might of interest to your client or you. You can be quite brief, but should be specific.

Example of Evaluation Plan:

Evaluation

Assessment of these projects at the conclusion of the campaign will be focus on achievement of the stated goals and objectives and other commonly used measures:

Sales Activity – The increase in online sales for June will be compared to May to determine if the targeted 15% month-to-month increase was achieved.

Site Visitors – The number of unique new visitors to the website will be tallied and compared to the targeted 2,000 visits for the month.

Online Sign-Ups – The number of new e-newsletters subscriptions will be calculated.

Cost per sale – The total cost per new account will be calculated by dividing total expenditures on the promotion by the number of sales obtained.

In this example, sales activity was a stated goal and site visitors and online-sign-ups were stated objectives. Cost per sale was a supplementary assessment based on the sales activity proposed to determine the cost efficiency of the effort.

VII. BUDGET

As the last component, include a simple estimated budget carefully based on a detailed analysis of the activities required to execute the program/campaign. Two key components are:

- **Staff/agency labor cost** – compensation to be paid for performing the work. Compensation includes salaries, benefits costs, office occupancy and other fixed expenses related to supporting the employee. (Agencies and freelancers also include a provision for profit and calculate labor charges based on a resulting hourly rate.)
- **Direct costs** – Out-of-pocket expenses incurred in conducting the program. Examples include but are not limited to Web hosting/service bureau fees; professional services; production expenses for artwork, audio or video; travel and entertainment; paid advertising expenditures; research and subscriptions; and other fees. Such expenses can be charged directly to a client. Alternatively, many agencies and freelancers will pay charges as incurred and then bill clients for reimbursement (and might charge a “mark-up” fee for carrying costs and handling the billing – customarily 17.65%)

A good practice is also to include a *contingency* – a 10%-15% reserve or cushion that can be spent if required, but only as a result of unanticipated expenses.

[Note: Common billing methods for staffing include hourly charges as incurred, a flat monthly retainer billable in advance, or a retainer plus charges for actual hours. Direct expenses are often charged against an advance and billed as incurred.]

For purposes of the Class Project your budget can be very simple: Include your best estimate of the number of hours you will expend completing the projects outlined, then multiply that number by an hourly rate you (or your agency) might charge: \$15, \$20, \$25, \$50, \$75, \$100, etc. Then simply list any large expenditures that you can identify. The conventional format for a budget is composed of two columns that list a) the cost item and b) the corresponding dollar figure. Total the dollar figures at the bottom of the right column.

Example:

Budget	
The estimated cost for completing these projects [this campaign] is \$3,000, including staff time and direct out-of-pocket expenditures:	
Staff time (estimated 75 hours @ \$30/hour)	\$2,250
Expenditure 1	000
Expenditure 2	000
Expenditure 3	000
Expenditure 4	000
	<hr/>
	\$ 3,000

For purposes of this assignment, you are not expected to research actual out-of-pocket costs, but you may list 3-4 of the largest cost expenditures (if any) and plug in zeroes or a rough number, then total the amount. Your commentary can identify costs not covered or other budget details as appropriate.

In keeping with the conventions for presenting a budget include a \$ only for the top item and for the total. The figures in the right column should be right-justified, followed by a line and the total.