

This is a cover page for the M Phil dissertation detailed below and should not be included in the bound copies of the dissertation

**INTERPRETATION OF CAMPAIGN BRIEFS BETWEEN SOUTH AFRICAN
FINANCIAL SERVICES COMPANIES AND ADVERTISING AGENCIES**

By Esta Calitz 87485789

Submitted in fulfilment of the requirements for the degree MPhil in Communication Management, University of Pretoria

INTERPRETATION OF CAMPAIGN BRIEFS BETWEEN SOUTH AFRICAN FINANCIAL SERVICES COMPANIES AND ADVERTISING AGENCIES

By
Esta Calitz
87485789

Submitted in fulfilment of the requirements for the degree
MPhil in Communication Management

in the

FACULTY OF ECONOMIC AND MANAGEMENT SCIENCES

at the

UNIVERSITY OF PRETORIA

Supervisor:
Prof. R. Rensburg

Date of submission:

2016-08-31

Abstract

INTERPRETATION OF CAMPAIGN BRIEFS BETWEEN SOUTH AFRICAN FINANCIAL SERVICES COMPANIES AND ADVERTISING AGENCIES

Financial services companies need to create awareness around their value offering of intangible services in the market and use advertising campaigns to achieve this awareness and subsequent sales. The study looks at the starting point in the creation of an advertising campaign i.e. the briefing process between the financial services company and the advertising agency. In this process people from different disciplines and different environments communicate and interact with one another, providing opportunities for misunderstanding and misinterpretation.

The brief is taken as the illustrative point in the interaction between the two parties and is posed as the epitome of all communication between these two. By evaluating the communication process the study looks at gaps and provides suggestions on how to best manage this interaction as concluded from insights provided by data acquired through a mixed method incorporating quantitative online surveys and qualitative one-on-one interviews with employees from both the financial services company and the advertising agency.

The study furthermore looks at the briefing template as the formal document and “contract” between the financial service company and the advertising agency and proposes the structure and required content for such a brief. The potential pitfalls in each of the proposed sections of the briefing template are investigated in terms of the Service Quality Gap Model; thus leading to a recommended protocol – a briefing template along with the management thereof by the financial services company – which is the way forward as proposed in the study.

Key Concepts

financial services; advertising agencies; advertisements; advertising campaign; communication gap; creative brief; advertising brief template; advertising brief approach; advertising campaign process

Acknowledgements

I wish to extend my sincere gratitude to the following people for their contribution to this research script.

My supervisor, Professor Ronel Rensburg, for encouraging me to complete the study.

My family and friends, especially Laubscher, Tobi and Celia Calitz, for their patience and belief in me.

Harry Swart, for conducting the data analysis, proofreading, advising and debating the topic as well as mentoring and encouraging me.

Thank you to all the staff at the Faculty Library for Economic and Management Sciences that assisted me, as well as Samantha Rabie, Susan Engelbrecht, Erna de Villiers, and Tilana Knafo, for your support throughout the study.



**DEPARTMENT OF MARKETING AND
COMMUNICATION MANAGEMENT**



Declaration Regarding Plagiarism

The Department of Marketing and Communication Management emphasises integrity and ethical behaviour with regard to the preparation of all written assignments.

Although the lecturer will provide you with information regarding reference techniques, as well as ways to avoid plagiarism, you also have a responsibility to fulfil in this regard. Should you at any time feel unsure about the requirements, you must consult the lecturer concerned before submitting an assignment.

You are guilty of plagiarism when you extract information from a book, article, web page or any other information source without acknowledging the source and pretend that it is your own work. This doesn't only apply to cases where you quote verbatim, but also when you present someone else's work in a somewhat amended (paraphrased) format or when you use someone else's arguments or ideas without the necessary acknowledgement. You are also guilty of plagiarism if you copy and paste information directly from an electronic source (e.g., a web site, e-mail message, electronic journal article, or CD ROM), even if you acknowledge the source.

You are not allowed to submit another student's previous work as your own. You are furthermore not allowed to let anyone copy or use your work with the intention of presenting it as his/her own.

Students who are guilty of plagiarism will forfeit all credits for the work concerned. In addition, the matter will be referred to the Committee for Discipline (Students) for a ruling. Plagiarism is considered a serious violation of the University's regulations and may lead to your suspension from the University. The University's policy regarding plagiarism is available on the Internet at

<http://upetd.up.ac.za/authors/create/plagiarism/students.htm>

For the period that you are a student at the Department of Marketing and Communication Management, the following declaration must accompany **all** written work that is submitted for evaluation. No written work will be accepted unless the declaration has been completed and is included in the particular assignment.

I (full names & surname):	Esta Calitz
Student number:	87485789

Declare the following:

1. I understand what plagiarism entails and am aware of the University's policy in this regard.
2. I declare that this assignment is my own, original work. Where someone else's work was used (whether from a printed source, the Internet or any other source) due acknowledgement was given and reference was made according to departmental requirements.
3. I did not copy and paste any information directly from an electronic source (e.g., a web page, electronic journal article or CD ROM) into this document.
4. I did not make use of another student's previous work and submitted it as my own.
5. I did not allow and will not allow anyone to copy my work with the intention of presenting it as his/her own work.

Esta Calitz

Signature

31 August 2016

Date

TABLE OF CONTENTS

CHAPTER 1: INTRODUCTION	1
1.1 BACKGROUND.....	1
1.2 PROBLEM STATEMENT	5
1.3 PURPOSE STATEMENT	6
1.4 RESEARCH OBJECTIVES	6
1.5 IMPORTANCE OF THE STUDY	7
1.6 DELIMITATIONS	7
1.7 ASSUMPTIONS	8
1.8 CONTRIBUTION OF THIS STUDY	8
1.8.1 Theoretical.....	8
1.8.2 Research methodology.....	9
1.8.3 Practice	9
1.9 DEFINITION OF KEY TERMS.....	9
1.10 OUTLINE OF CHAPTERS IN THE DISSERTATION	11
CHAPTER 2: AN EXPLORATORY LITERATURE REVIEW	12
2.1 CONTEXTUAL DESCRIPTION OF FINANCIAL SERVICES	13
2.1.1 Introduction.....	13
2.1.2 Financial services	13
2.1.3 The importance of branding.....	19
2.1.4 The South African context	25
2.1.5 Conclusions on financial services companies	26
2.2 A CONTEXTUAL DESCRIPTION OF ADVERTISING AGENCIES	27
2.2.1 Introduction.....	27
2.2.2 The advertising agency environment.....	27

2.2.3	Conclusions on advertising agencies	35
2.3	ADVERTISING CAMPAIGNS.....	35
2.3.1	Introduction.....	35
2.3.2	What is an advertising campaign?.....	35
2.3.3	Difference between services and product advertising	42
2.3.4	Conclusion on advertising campaigns	47
2.4	CAMPAIGN BRIEFS	48
2.4.1	Introduction.....	48
2.4.2	Campaign brief, a formal method of communication	48
2.4.3	Communication between an advertising agency and a financial services company.....	53
2.4.4	The eight elements towards advertising campaign success.....	54
2.4.5	Conclusion about campaign briefs	62
2.5	SYNTHESIS OF KEY THEMES EMERGING FROM THE EXPLORATORY LITERATURE REVIEW	62
CHAPTER 3: RESEARCH METHODOLOGY		65
3.1	INTRODUCTION	65
3.2	RESEARCH METHODOLOGY	68
3.2.1	Introductory comments.....	68
3.2.2	Basic constructs guiding research approaches	68
3.2.3	Data collection strategy	72
3.3	EXPERIMENTAL DESIGN	74
3.4	RESEARCH METHODS.....	77
3.5	DATA COLLECTION	78
3.5.1	Target respondent groups	78
3.5.2	The data collection instruments.....	80

3.5.3	Process of conducting the research	81
3.5.4	Project phases and timeframes	82
3.6	THE TOOLSET USED FOR THE INTEGRATIVE ANALYSIS OF THE RESPECTIVE DATA SETS	83
3.6.1	The Services Industry Gap Model	85
3.6.2	Statistical tools used to establish statistical significance and the gap between the parties	86
3.6.3	Using Open Text Analysis to create a strategic framework	87
3.7	LIMITATIONS OF THIS RESEARCH DESIGN	92
3.7.1	Introductory comments	92
3.7.2	The financial services sector as a sub-set of the services industry	92
3.7.3	Potential implications of using a mixed-method research approach.....	93
3.7.4	The participant profile.....	93
3.7.5	The portfolio of areas probed in the data collection phase	94
3.7.6	The communication gap between financial services and advertising professionals.	94
3.7.7	The intellectual property dilemma.....	95
3.7.8	Synthesis.....	97
CHAPTER 4: ANALYSIS OF SURVEY AND INTERVIEW RESULTS FOR A FINANCIAL SERVICES ADVERTISING CAMPAIGN BRIEF		99
4.1	INTRODUCTION	99
4.2	DATA ANALYSIS	100
4.3	RESULTS OF THE ONLINE SURVEY.....	101
4.3.1	Introductory comments	101
4.3.2	Qualitative assessment of survey results	101
4.3.3	Quantitative assessment of survey results	105
4.3.4	Summary of online survey results	109

4.4	RESULTS OF THE ONE-ON-ONE INTERVIEWS	110
4.4.1	Introductory comments	110
4.4.2	Qualitative assessment of interviews	110
4.4.3	Quantitative assessment of Interviews	143
4.4.4	Summary of one-on-one interview results	149
4.5	COMBINING THE QUANTITATIVE SURVEY AND INTERVIEW RESULTS ...	149
4.6	CONCLUDING REMARKS ABOUT THE SURVEY AND INTERVIEW RESULTS.....	156
CHAPTER 5: ESTABLISHING A FRAMEWORK FOR A BRIEFING PROCESS AND TEMPLATE		157
5.1	INTRODUCTORY COMMENTS.....	157
5.2	OVERVIEW OF FINDINGS FROM THE LITERATURE	158
5.3	OVERVIEW OF FINDINGS FROM THE SURVEY AND INTERVIEWS.....	160
5.4	DEVELOPING A CAMPAIGN BRIEF PROTOCOL	161
5.4.1	General introduction	161
5.4.2	Developing the content of the campaign brief	161
5.4.3	Campaign brief process as informed by study findings	162
5.4.4	The campaign brief/process matrix	166
5.5	THE CAMPAIGN BRIEF PROTOCOL.....	171
5.5.1	Introduction.....	171
5.5.2	Step # 01: Choosing a destination.....	171
5.5.3	Step # 02: The route map.....	174
5.5.4	Step # 03: Planning the trip	176
5.5.5	Step # 04: Travel companions.....	179
5.5.6	Step # 05: Success criteria.....	182
5.5.7	Step # 06: Managing for success	184

5.5.8	Step # 07: Implementing the journey plan	187
5.5.9	Step # 08: Dealing with hitch-hikers	191
5.5.10	Step # 09: Attending to breakdowns.....	193
5.5.11	Step # 10: We have arrived!	196
5.6	CONCLUDING REMARKS.....	199
CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS: INTRODUCING A FRAMEWORK FOR A BRIEFING PROCESS AND TEMPLATE.....		200
6.1	SETTING THE SCENE	200
6.2	CONCLUSIONS	202
6.3	RECOMMENDATIONS	205
LIST OF REFERENCES.....		206
LIST OF APPENDICES.....		223

LIST OF FIGURES

Figure 1:	A view of the interaction between the financial services company, the advertising agency and the customer	4
Figure 2:	Focusing on financial services as a commodity in the lives of customers, and the suppliers or creators of this commodity, the financial services company ..	14
Figure 3:	Do customers perceive goods differently than services?	17
Figure 4:	Branding as the most important element in distinguishing the offering of the financial services company	21
Figure 5:	Model to illustrate the importance of incorporating both brand awareness and brand meaning to build brand equity	22
Figure 6:	Service brand verdict model	23
Figure 7:	The role of the advertising agency in the creation of an advertising campaign	28
Figure 8:	The symbiotic relationship between the financial services company and the advertising agency	29
Figure 9:	Determinants of overall satisfaction	30
Figure 10:	Advertising campaigns to the customer	36
Figure 11:	The new communications paradigm	40
Figure 12:	Introducing the campaign brief into the communication mix to customers	48
Figure 13:	The two diagrams explaining the rationale, approach and assessment in the literature review	63
Figure 14:	Visual view of emerging concepts	64
Figure 15:	A Framework for research	67
Figure 16:	Experimental design value chain	76
Figure 17:	The Services Industry Gap Model	86
Figure 18:	Diagnostic filtering is a key element of the open response technology called Diagnostic Overview of Leadership, Operations and Strategy	90
Figure 19:	Storyline of communication between a financial services company and an advertising agency as summarised in the briefing template	100

Figure 20: Quantitative analysis of perceived relative importance of the five themes as assessed by the two parties to the engagement team	146
Figure 21: Visual comparison of the concepts driving Advertising Agencies and Financial Services Organisations in the Engagements	147
Figure 24: Schematic representation of a matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance	151
Figure 25: Quantitative analysis of interview results in matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance	153
Figure 26: Quantitative analysis of Interview Results in Matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance against zones of statistical significance	154
Figure 27: Process of developing themes from the text analysis outputs	158
Figure 28: Visual representation of the Key Leverage Areas impacting the Advertising Brief Engagement	164
Figure 29: Cross-sectional point that defines “Choosing the destination”	172
Figure 30: Cross-sectional point that defines “The route map”	174
Figure 31: Cross-sectional point that defines “Planning the trip”	176
Figure 32: Cross-sectional point that defines “Travel companions”	180
Figure 33: Cross-sectional point that defines “Success criteria	183
Figure 34: Cross-sectional point that defines ‘Managing for success’	185
Figure 35: Cross-sectional point that defines “Implementing the journey plan”	188
Figure 36: Cross-sectional point that defines “Dealing with hitch-hikers”	191
Figure 37: Cross-sectional point that defines “Attending to breakdowns”	194
Figure 38: Cross-sectional point that defines “We have arrived!”	196
Figure 39: Overview of the ten steps in the campaign brief protocol.....	204

LIST OF TABLES

Table 1:	Key concepts used in the study about financial services company and its advertising ..	9
Table 2:	The connection between service quality and relationship quality	33
Table 3:	The strategic intent or purpose behind an advertising brief analysis and definition of campaign brief	49
Table 4:	Comparison of claims in the literature for the respective mental states and the positives for this study	71
Table 5:	Development and utilisation of research components	77
Table 6:	Updated schematic representation of study discussion - in the communication process during a campaign brief for an advertising campaign	101
Table 7:	Comparison between the results from the online surveys sent to financial services company marketing employees and advertising agency employees	102
Table 8:	Comparisons between results of survey respondents in the financial services companies and advertising agencies respectively to highlight GAPS between the parties.....	109
Table 9:	Financial service company process used in the development and media flighting of an above the line advertising campaign.....	114
Table 10:	A summary in diagram format of the steps in the advertising campaign from concept to review	115
Table 11:	Confidence ranges as developed for the Diagnostic Filter quantitative results	150
Table 12:	Comparison between results from this study and the Services Gap Model of Boulding (1993).....	155
Table 13:	The campaign brief/process matrix – active key leverage areas	168
Table 14:	The campaign brief/process matrix – developing the campaign brief protocol.....	169
Table 15:	The campaign brief/process matrix – alignment with Plan – Organise – Lead – Control	170

CHAPTER 1: INTRODUCTION

Chapter outline:

The purpose of this chapter is to:

- Provide background as to how the study came about
- Sketch the thought journey that the study will follow
- Present the current study's research objective and questions
- Give an indication of why this study should be of value
- Discuss the significance of the current study
- Define the key terms in the study
- Provide a brief summary of the research methodology used in the study
- Plot an overview of the dissertation's chapter breakdown

1.1 BACKGROUND

Working in the financial services industry in a Marketing Department made it evident that there are misunderstandings between the financial services company and the advertising agencies used by the particular company. These misunderstandings leading up to the execution of an advertising campaign cause frustration between all parties, and usually waste time and money.

The following questions arise: What is the cause of the misunderstandings? Is there a communication gap between the two parties? If so, where does it originate from and can the process be improved? As marketers initiate the advertising campaign process when they brief the advertising agency (Koslow, Sasser & Riordan, 2006:81), the campaign brief is a good starting point to research these questions.

In the campaign briefing process people from different disciplines and different environments communicate with one another. Their occupations, that is, their background disciplines, influence their attitude to the way they handle other people (Van Staden, Marx & Erasmus-Kritzinger, 2002:33). If they have different attitudes, then the obvious question is: do they, as people who come from different

environments, have the same communication rules? Communication rules create a common ground for shared understandings of what communication means and how one should behave in different situations (Wood, 2009:503). Without these rules communication will be flawed. 'An advertising manager, who needs to be creative and persuasive, may have a very informal way of dealing with people, while a financial manager, who is responsible for the company's finances and works with books and figures all day, may appear conservative and formal or even unfriendly' (Van Staden *et al.*, 2002:33).

If the campaign brief which originates from the financial services company and is passed on to the advertising agency is taken as the starting point in the interaction between the two parties, the brief can be seen as the epitome of the rest of the communication process between them. At the same time, the brief can give an indication of the method of communication between the two. In evaluating this communication process, it should be possible to ascertain whether any breakdowns happen.

The briefing process – as the most formal element of the interaction between the financial service company and the advertising agency – can also be studied to provide suggestions for specifically a more efficient communication process between people from different environments or occupations but also generally how the actual briefing process should be managed.

For the purpose of the research the brief will be taken as the culmination of communication processes between the financial services company and the advertising agency. Therefore, the brief can give an indication of the method of communication between the two. In evaluating this communication process, it should be possible to ascertain whether any breakdowns happen and how they could possibly be overcome.

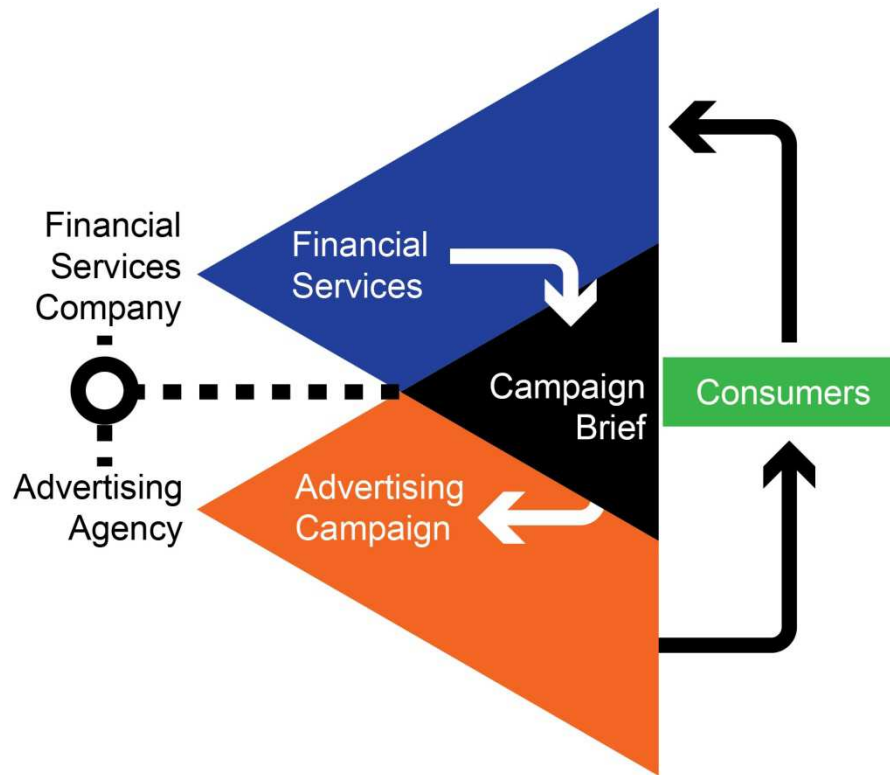
Dialogue box I: Illustration to describe the difference in appearance and benchmarks between the people from the financial services company and the people from the advertising agency, even though they both fulfil senior roles.

Compare Dru Mincher, from Johannesburg-based creative agency ThatsitCommunications, wearing a jacket and pants, to Sipho Silinde, from financial services business FNB Private Customers, wearing a jacket and pants. Dru also sports slight stubble, an earring and has a t-shirt with a quirky slogan underneath his jacket. His pants are faded designer jeans while Sipho is clean-shaven and his shirt has a collar and probably a stripy tie with a jacket. Dru's jacket sleeves are rolled up slightly while Sipho wears branded cufflinks.

Dru is proud to be mentioned at the Loeries. Sipho is proud to be mentioned in the Euromoney Private Banking Survey. Not only do their appearances differ greatly, their respective measures of success are also vastly different. These two need to come to an understanding in order for them to create a successful advertising campaign that will talk to customers.

The financial services company operates in a controlled, regulated, formal, corporate environment and contributes to social well-being through its role in economic development on a micro, as well as a macro, level (Ennew & Waite, 2007:21). The advertising agency, on the other hand, operates in a creative, artistic and innovative environment (Barker & Angelopulo, 2007:256) with the aim of persuasion (Olatunji, 2005:83). This formal financial services company requests the creative advertising agency to implement an execution for a campaign to communicate a business message, for example its value to its customers and potential customers. The request is formalised in the campaign brief whereby the brief forms the basis from which the advertising agency creates an advertising campaign (Jansen van Rensburg, 2011:553).

Figure 1: A view of the interaction between the financial services company, the advertising agency and the customer



Source: Calitz, 2016. Note: This study follows the above journey. It starts with background about the financial services company and the advertising agency, moving on to the advertising campaign. Finally, it focuses on the way the financial services company and advertising agencies communicate in order to get to an advertising campaign as seen in the instance of the campaign brief.

Amongst a range of communication platforms, financial services companies utilise advertising campaigns to convey a message about the value of their services and products to their target audiences (Olatunji, 2005:85). The objective of the companies may vary from creating awareness to selling products, but in the end, the aim is to contribute to the bottom-line profit of the business. An advertising agency is tasked with creating an advertising campaign for the financial services company to assist in achieving the stated objective. The advertising agency is required to use its expertise and skills and act as the creative interpreter and executioner on behalf of the financial institution.

One of the initial steps in the process of creating an advertising campaign is the discussion between the financial services company and the advertising agency. Formalising this discussion happens through the brief from the advertiser (the financial services company) to the advertising agency (Jansen van Rensburg, 2011:553).

Through the brief the financial services company attempts to convey what it perceives to be its distinctive assets and values, and informs the advertising agency of what it expects to achieve, as well as what the budgets are (see examples of actual briefing templates attached in Appendix C). On the other end of the spectrum, the advertising agency interprets the request or brief and then converts the information received into an advertising campaign with elements that include words, visuals, and possibly sound and motion as well, to communicate the value the financial services company offers its customers.

1.2 PROBLEM STATEMENT

The briefing process is a process of communication between the financial services company and the advertising agency (PRCA, 2011). The outcome of the entire campaign to the target audience depends on clear and accurate communication between the two parties. It is not just about providing a set of documents, but a process whereby the designers get to understand the needs of their customer/s clearly (Blyth & Worthington, 2010).

Conrad (2014) illustrates through a range of real-office examples the type of pitfalls, bottlenecks, challenges – and opportunities – that occur on a day-to-day basis in offices where all the staff (managers and employees alike) work towards the same corporate strategic intent.

However, when a financial services company and an advertising agency are discussing the briefing process, the two parties operate in different environments with entirely different sets of rules and benchmarks and (frequently/mostly) with a different corporate strategic intent (Andrew Nebel, in PRCA, 2016:5). The language that the two parties speak is not the same and the possibility of misunderstanding is large as communication between people from different environments often poses challenges. These challenges are even more demanding because of the intangible

products that a customer such as a financial services company offers (Nussey, 2000:73).

If there is a breakdown in the communication in any part of the briefing process, the advertising campaign is not as effective – either in time spent, which leads to further costs incurred, or in achieving the goals that the financial services company set out to achieve.

1.3 PURPOSE STATEMENT

The aim of this study is to provide an insight into the difference in interpretation between the financial services company and the advertising agency with a focus on the briefing stage. The study further seeks to determine why these differences occur and how they can be avoided by appropriate management interventions. Ultimately, the findings could aid the development of more efficient briefs between financial services companies and their advertising agencies, achieving better results.

1.4 RESEARCH OBJECTIVES

The following research objectives will guide the study and will be revisited through the insights obtained from the research:

- To describe the difference in perception between how the financial services company and the advertising agency each view their own communication abilities, and how they see the gaps in the communication between themselves.
- To look at conceptual frameworks that can assist in pointing out the communication gaps and consequently the different perceptions regarding the required outcome resulting from different backgrounds of the financial services company and the advertising agency.
- To look at the elements in the briefing process and investigate what the impact of each element is, as well as the opportunity it provides for misunderstanding.
- To unpack and review different formats in which financial services companies brief advertising agencies.

- To provide a framework for improved communication, including a suggested briefing template and toolkit that the financial services company could use in the briefing process to the advertising agency.

1.5 IMPORTANCE OF THE STUDY

Producing a consistent and clear advertising message, which conveys the intangible value proposition as offered by services companies, can add to the bottom-line profit of the financial services company. Both financial services companies and advertising agencies will benefit from a better understanding of the message/s they need to communicate to customers and potential customers. By inquiring about the intention, process, method or arguments the advertising agency uses to create an advertisement or an advertising campaign, the research can assist in eliminating gaps between the company's perceived value proposition and the advertising agency's creative interpretation thereof..

The study commences by looking at the financial services company and its relationship with the advertising agency. It concludes with the interpretation of the brief from the financial services company to the advertising agency, and finally focuses on the communication process that takes place during the briefing.

1.6 DELIMITATIONS

The proposed study has several delimitations related to the context and construct as it was be conducted in South Africa, excluding other African as well as developing countries with similar circumstances. Considering financial and time constraints, the study was conducted with participants residing in Gauteng, even though the company operates internationally. Therefore, further research could expand the study parameters to include the rest of the country, and other countries. To have a more general appeal, the study would have had to include other services companies such as cell phone network providers and airline operators. However, this study was conducted in the financial services sector only and did not look at other services companies. Comparing the results of the study of financial services companies to those for other services companies can be a significant study for the future.

Finally, the study's exploratory literature review focuses mainly on communication from the marketing departments of financial services companies. Reference will only be made to other aspects that directly influence the understanding of the value of the company. It should be noted, though, that a more specific and focused review of pertinent and relevant literature will be introduced later in the study to help explain some of the findings as well as in the introduction of a suggested approach to the handling of campaign briefs between financial services companies and advertising agencies.

1.7 ASSUMPTIONS

Certain assumptions or self-evident truths underlie all research studies (Leedy & Ormrod, 2005:5), it is also true of this proposed research, and as such, it is assumed that:

1. Quantitative surveys combined with one-on-one interviews for qualitative data will provide the required information needed to get an understanding of the content of services advertising;
2. Relevant key stakeholders from both advertising agencies and financial services companies will be prepared to participate in interviews; and
3. The targeted interviewees will be knowledgeable and informed about the value proposition of the financial services company and the advertising strategy respectively.

1.8 CONTRIBUTION OF THIS STUDY

1.8.1 Theoretical

The study adds to the academic literature focusing on the process of interaction with specific emphasis on but not limited to communication *per se* between the financial services company and the advertising agency during the briefing process as part of the development of an advertising campaign.

1.8.2 Research methodology

The study provides insights into the gaps in the process of interaction between the financial services company employees and the advertising agency employees. The statistical analysis provides data whereby the Gap Model (Boulding, Kalra, Staelin & Zeithaml, 1993) can be used to point out possible pitfalls and areas where misunderstandings could happen.

1.8.3 Practice

In practice the study provides a briefing template as well as a thorough toolkit that could be implemented in the briefing process. The toolkit uses the analogy of a journey to make the themes and key concepts accessible to all levels of marketing stakeholders.

1.9 DEFINITION OF KEY TERMS

This study involves a number of key concepts, such as brand and services industry. For the context of this study, these key terms are defined as per the definitions in Table 1:

Table 1: Key concepts used in the study about financial services company and its advertising

Concept	Definition	Source
Advertising	Advertising has been defined in a number of ways. The main difference between advertising and other marketing communications mix of elements is that it is impersonal and communicates with large numbers of people through paid media channels.	Kotze, 2009: theme 7:36
Advertising agency	An advertising agency is responsible for the design and execution of an advertising campaign based on certain expectations and needs of the advertiser. Advertisers view the advertising agency as a partner in the development of the advertisement that can provide the organisation with a competitive edge.	Barker & Angelopulo, 2007:256
Advertising campaign brief	The advertising campaign brief is a point of reference, the foundation to an advertising campaign and provides the crucial information issued by a customer to an agency.	PRCA, 2003:8

Concept	Definition	Source
Brand	The attributes of the bundle of promises that a customer buys make up the brand. It may be real or illusory, rational or emotional, tangible or invisible.	Ambler & Styles, 1996:10
Brand equity	Just like any other asset in a business, a brand carries weight and can be seen as a set of assets building on the value of the product or service.	Aaker, 1996:7-8
Briefing	Briefing is an interactive process for clarifying the advertising strategy between advertisers and their advertising agencies.	Jansen van Rensburg, 2011:553
Financial services companies	Financial services are a prerequisite for a fully functioning economy and for economic growth; and should be seen as providing inclusive means for improving the financial well-being of all.	Ennew & Waite, 2013:15
Integrated marketing communication	The concept under which a company recognises the benefit of a comprehensive plan and coordinates its many communications channels to deliver a clear, consistent and compelling message about the organisation and its products.	Barker & Angelopulo, 2007:152
Marketing	Marketing is about getting and keeping customers.	Ennew & Waite, 2013
Marketing communication	The various ways a business talks to its customers through newsletters, e-mails, advertising, and public relations.	Berry, 2000:129
Services industry	This industry is making a profit by supplying a service to its customers. It involves the action of doing something for the customer.	Brady, Bourdeau & Heskell, 2005:402
Values	The intrinsic beliefs as portrayed by the culture of the business. This is a culture focused on doing the right thing for the customer. In businesses that are more traditional the values of the business are formulated in the vision and mission statements.	De Chernatony & Segal-Horn, 2003:1108

1.10 OUTLINE OF CHAPTERS IN THE DISSERTATION

Chapter 1 aims to provide an overview of the study conducted and to give an idea of the environment that was researched. It poses the question whether there is a communication gap between the stakeholders who come from different backgrounds that are managed by different success criteria. The objectives, high-level methodology and key terms are briefly discussed.

Chapter 2 contains an exploratory literature review, which provides the scoping for the study. It reviews the financial services company and the products and services it provides, as well as the advertising agency, the one receiving the brief from the financial services company. It describes the role of the advertising agency, as well as the importance of the relationship between the advertising agency and the financial services company. It then lastly focuses on advertising campaigns and the associated campaign briefs as a critical point in the communication between the financial services company and the advertising agency with the aim of developing an advertising campaign to customers that will result in the desired goals.

Chapter 3 delves into the research methodology. It looks at the mixed method: combining qualitative and quantitative analysis of data from online surveys and one-on-one interviews.

Chapter 4 discusses the data analysis, the calculations and the core findings of the research.

In Chapter 5 a comprehensive synthesis is done of the findings and leads to a proposed template and briefing process to be used for campaign briefings in the financial services industry.

Chapter 6, finally, concludes with the conclusions and recommendations of the study.

The dissertation is informed by a set of Appendices (nine in total) that provides all the supportive evidence and data for the discussions in the dissertation..

CHAPTER 2: AN EXPLORATORY LITERATURE REVIEW

Chapter Outline:

The purpose of this chapter is to do an exploratory (scoping) literature review of the main elements defining this topic, as articulated below:

FINANCIAL SERVICES COMPANY

- Discuss the nature of financial services companies and their products.
- Distinguish between services products (intangible) such as those sold by a financial services company and physical goods (tangible).
- Review the importance of branding in the services category, and confirm the importance of brand equity.

ADVERTISING AGENCY

- Ascertain what the role is that the advertising agency plays with regards to the financial services environment.
- Look at the importance of the relationship between the employees of the financial services company and the advertising agency.

ADVERTISING CAMPAIGNS

- Define advertising campaigns
- Compare service and product advertising, or in other words the advertising of tangible and non-tangible goods and discuss the differences between the two, if any.

CAMPAIGN BRIEF

- Discuss the brief as a method of communication and/or interaction between the parties.
- Look at the communication between the advertising agency and the financial services company, including but not limited to the brief.

2.1 CONTEXTUAL DESCRIPTION OF FINANCIAL SERVICES

2.1.1 Introduction

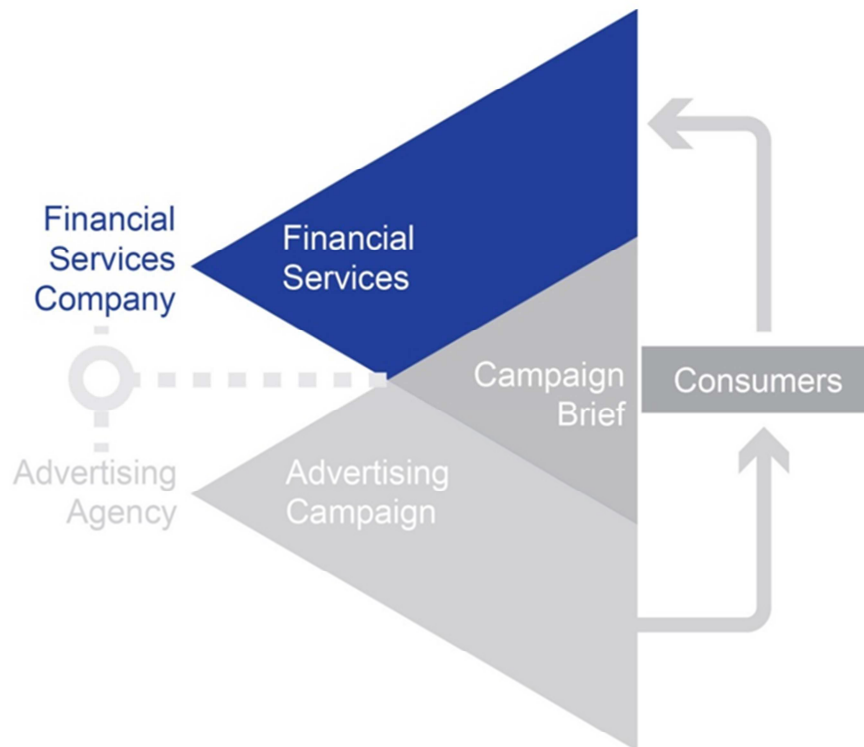
Financial services companies need to create awareness around their value offering of intangible services in the market and use advertising campaigns to achieve this awareness and subsequent sales. As introduction to the briefing process between the financial services company and the advertising agency, this study looks at the financial services company and its value offering to its customers. What is the unique selling proposition that the financial services company offers its customers?

2.1.2 Financial services

In the communication between the financial services company and the advertising agency, the financial services company is the customer. So what does this customer look like and what are the products and services that its customers should be aware of and should be enticed into buying? Various factors influence the ease with which a financial services company can communicate externally in the marketplace, such as a lack of trust in the sector caused by the aftermath of the financial crisis, the industry's conservative nature and the influence laws and regulations have on the sector (Sahin, 2015; Scott, 2009).

With this in mind, the marketing teams of the financial services company set the direction for the advertising campaign starting with the brief to the advertising agency and then being involved in the agency's planning and execution process. The marketing team also provides the resources that the advertising agency would need to develop an advertising campaign. This *inter alia* involves issues such as access to the relevant knowledge and people in the business (i.e. top management), strategic insights, customer research, as well as their time and budgets (Koslow, Sasser & Riordan, 2006:81).

Figure 2: Focusing on financial services as a commodity in the lives of customers, and the suppliers or creators of this commodity, the financial services company



Source: Calitz, 2016.

Nature of financial services

Financial services fulfil a major role in transacting business, protecting customers against risks and managing customer's assets (Degener, 1999). In order for financial services businesses to be sustainable, they have to counter takeovers, keep up the market share, and increase profits (Kotze, 1991).

All service businesses have their unique offerings. In financial services companies the financial services offerings can be placed on a large scale varying from insurance to transactional banking to investments. Successful financial services companies have continuously challenged the *status quo* and have effected change and adaptation by governments, financial intermediaries and financial markets alike (Atack & Neal, 2009).

The pace of the change has increased tremendously over the last thirty years (Deloitte, 2013) as a result of a variety of influences such as expanding innovations

in technology and an evolving regulatory environment with changes allowing for new financial services offerings and the way these services are rendered (Ennew & Waite, 2013:124; O'Loughlin & Szmigin, 2004:11). This fluid sector also has to deal with new entrants from non-traditional spheres, changing delivery channels, and rapidly emerging new services. In addition, customer knowledge and attitudes are also changing (Deloitte, 2013).

The perceptions stakeholders hold of financial services had been hugely impacted by the recent financial crisis (Deloitte, 2013). These perception changes have created a very competitive environment which necessitated the need for scale and product offerings of value across banks, finance and insurance companies, advisory firms and brokerages (Lawson, Borgman & Brotherton, 2007:19).

Ennew and Waite (2013) listed the following factors whereby the financial services industry will fail, (as it happened in the economic crisis of 2007/2008) if care is not taken of:

- Putting the customer first, in the middle of all business strategies
- Aligning stakeholder interests
- Implementing proper, informed and effective regulation
- Knowing how what the financial services products are designed and operate; and
- Appreciating the connection and interdependencies of the domains that comprise the whole of the financial services sector.

As a result of successful implementation of the factors listed here, wealth creation and growth will follow (Atack & Neal, 2009).

Financial services products were originally not marketed in a very formal manner (Ennew & Waite, 2013). However, packaged goods have been subject to an enormous investment in marketing skills and capabilities since early on in the twentieth century. This was a result of competitive pressures, and the relative simplicity of the products (Ennew & Waite, 2013).

In this context it is important to note that Sahin (2015) states that in a 2014 survey of financial sector respondents they want to be more closely involved with the brand(s)

of the financial services companies, including the characteristics of their services portfolio.

To understand the development of the marketing of services better, it would be insightful to look at the difference that customers experience between financial services and packaged goods. Financial institutions all have marketing departments and work with advertising agencies to fulfil their advertising needs (Braungard, 1997). Advertising agencies complement the marketing team of the financial services company and bring expertise and industry knowledge into the fold.

Other divisions or departments support the marketing departments in the business with specialists doing market research, managing databases, products, product development and special projects (Braungard, 1997).

It is imperative that the financial services companies' marketing stakeholders understand the products and services it offers and that they are able to communicate these to the advertising agency stakeholders. If the financial services marketers (who in this instance are the customers of the advertising agency in the creation of an advertising campaign) are not experts with regards to their overall knowledge of their business and organisation as well as the business' strategic focus, then their ability to brief others to achieve a successful outcome seems unlikely (Castell, 2005:323).

Included in their knowledge of the business, the marketers need to understand and be informed about the marketing mix, which, for a financial services company, comprises price, product, place, promotion, personnel, process and physical evidence of the service. Marketers also need to understand the changing environment that demands of banks to embrace an active marketing approach (Kotze, 1991).

Difference between services and goods in the lives of customers

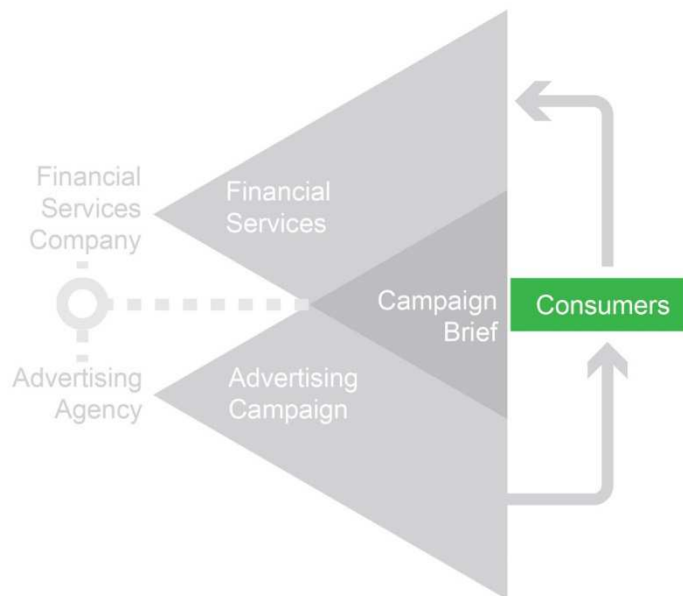
Financial services fall into the services category. Services do not have the advantage of identity that products have as a result of the physical characteristics and presence of the tangible goods (Ennew & Waite, 2007:112; Degener, 1999). In services businesses there is typically nothing physical to move from company to

customer (Verma & Boyer, 2000). If one looks at the characteristics of services described in academic literature, attributes such as intangibility, heterogeneity and perishability are mentioned and call for a different marketing strategy for services than that adopted for products. Another distinction is that services are performed while products are manufactured (Kotze, 1991).

There are various services and the scope is vast. If one looks at leisure services for example, these services offer hedonic pleasure to customers, thereby creating favourable emotional responses and would amongst others include performing arts and cruise liners, to name but two (Duman & Matilla, 2005:313). These are quite different from the value that financial services companies add to the lives of customers.

The value offering of a service business is made up of the experiences the customer has and therefore the employees should focus their attention on the customers' needs and problems at all times to create a favourable experience for the customer (Brebner, 1974). Without branding, services are often without identity, or perceived identity and customer value (Degener, 1999).

Figure 3: Do customers perceive goods differently than services?



Source: Calitz, 2016

Services products are perceived to be far more complex than packaged goods, and there are lower levels of customer knowledge and self-confidence (Ennew & Waite, 2013; Brodie, 2009:109). Does that mean that the differences between products and services are substantial enough to call for a different marketing strategy and advertising campaign execution? To further complicate this question, the services category comprises many sectors, and in one service sector there are different focus areas.

One grouping divides services into that of utilitarian services, which are practical, functional, or down-to-earth services compared to experiential services that are experimental, observed or pragmatic. Another way of grouping services could be to look at the inherent characteristics of services such as intangibility, heterogeneity, inseparability of production and consumption, and perishability (Brady, Bourdeau & Heskell, 2005:402).

In an effort to find the best advertising campaign for a financial services company, it calls for an answer to the question whether it would make a difference if services were marketed differently from packaged goods. If they should be marketed differently, how should it be done? This study focuses on financial services. Even though this is a focused services industry, there is still a broad range of services. Consider the variety of services in the broader category of the financial services companies with value offerings from banking, investments, to insurance (Atack & Neal, 2009:452). A clue to the differentiation between different financial services companies lies in the branding.

Academics have recognised the intangibility of services as a critical issue in service marketing; yet there is little evidence to suggest that the advertising industry agrees with this concern (Mortimer, 2001:137). In fact, Mortimer found that creative directors are not influenced by the fact that they are advertising a product or a service. When conceptualising an advertising campaign, advertising agencies are influenced far more by the advertising objective for the campaign, which is valid across all sectors of business, than whether the company provides a service or a product (Mortimer, 2001:141).

However, making the service tangible in the mind of the customer assists with the clarity of the message and in doing so; is more successful in reaching more existing or potential customers. Advertising and promotion as communication platforms to reach customers were found to have a considerable impact and contributed significantly to brand word-of-mouth. This is a result of the ability of advertisements and promotions to make service concepts more tangible, more attainable (Mangold & Faulds, 2009; O’Cass & Grace, 2004:135).

Against this background, Mortimer (2001) put together guidelines for financial services advertising in order to make the service more tangible. The result is achieved by showing physical evidence through concrete language. In other words, by using real examples and turning those actions of the financial service into the visual language, advertisements depict both the services provider and the customer. Performance records and other documents illustrated in advertisements could provide the proof of the quality of service. Advertisements have the ability to, at the same time, depict the service encounter through a series of events. According to Mortimer (2001:139), more than half of the financial services advertisements at the time contained information on performance data.

In Ireland it was found that the marketing communication and advertising campaigns of financial service providers did not succeed in neutralising or reducing the negative perception that existed in the Irish retail financial services sector. Participants in the study claimed that they took little or no notice of the advertisements of financial suppliers and supplied comments such as “...it is not relevant”. This could be ascribed to a lack of image-based attributes (O’Loughlin & Szmigin, 2004:19-20). Many financial services companies have achieved only limited success in creating and projecting a genuine corporate identity, brand image and value proposition. This highlights the important role that the advertising agency has to play when creating the advertising campaigns.

2.1.3 The importance of branding

Devlin and McKechnie’s (2008:653) solution to the marketing of financial services is to emphasise the corporate brand rather than specific offerings. They say that it has been proven that an overarching or so-called corporate brand is the most successful

way of branding the marketing efforts of financial services companies (Devlin & McKechnie, 2008:654). Yet, this overarching brand view does not refer to the structure of the company, as it is not of significance to customers.

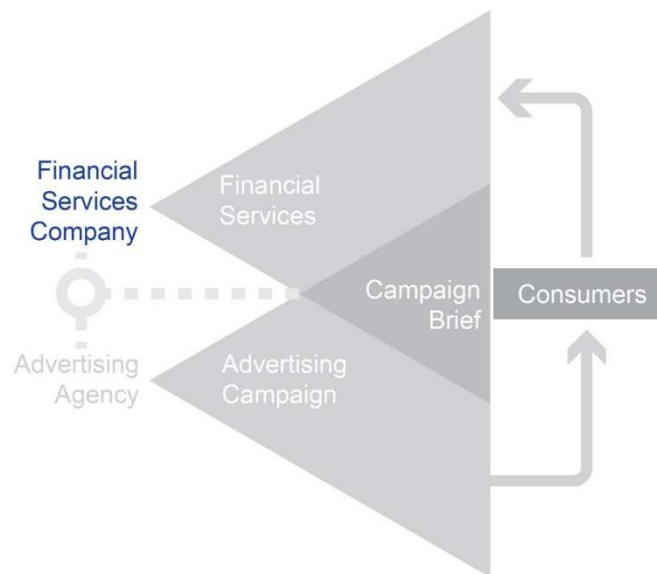
Although there is academic interest in the brand architecture, customers are mostly indifferent to this aspect of financial services. There appears to be a general acceptance that changes with regard to the brand architecture are inevitable, and provided that they do not result in confusion or have a significant impact on customer experiences, they are accepted (Devlin & McKechnie, 2008:658).

Whether manufacturing a product or providing a service building equity through a brand would be part of the success of any company (Cant & Machado, 2002:262). Devlin and McKechnie (2008:655) concur with this when saying that corporate branding should form part of an appropriate focus for services markets. However, not enough academic attention has been given to branding in the services arena (Grace & O’Cass, 2005:136).

One of the studies about brand building in the services industry is that by Berry in 2000. Berry’s study argues that the experience a customer has of services is a significant contributor to the formation of the brand. “Branding is not just for tangible goods, it is a principal success driver for services organisations as well” (Berry, 2000:128). If brand is such an important element, should it always be an element in the advertising campaigns? The branding process in a company starts with putting together a brand team who then creates a brand vision including a strategy for internal and external brand activation conducts brand audits, adoption of the strategy and controls the activation of the brand (Degener, 1999).

De Chernatony and Cottom (2006) define a brand as the promise of the bundle of attributes that a customer buys. In other words, the attributes that contribute to a brand may have all the qualities of the real or the imaginary, the rational or the emotional, and could be tangible or invisible. Other functions of a brand include the role of identification of the source of the product; the perception of reduced risk; it proclaims quality; and communicates economic and symbolic value to the customer (O’Cass & Grace, 2004:125).

Figure 4: Branding as the most important element in distinguishing the offering of the financial services company



Source: Calitz, 2016

Different elements contribute to creating brand equity for a company (Berry, 2000:130). The model in Figure 5 on the next page illustrates the influence of different contact points to create brand awareness and brand meaning, which, together, create brand equity. Brand perceptions and awareness are formed through the combined results of the brand as presented by the company, the external brand communications and the customer experience while dealing with the company. These also create the brand meaning and the idea that the brand has to offer.

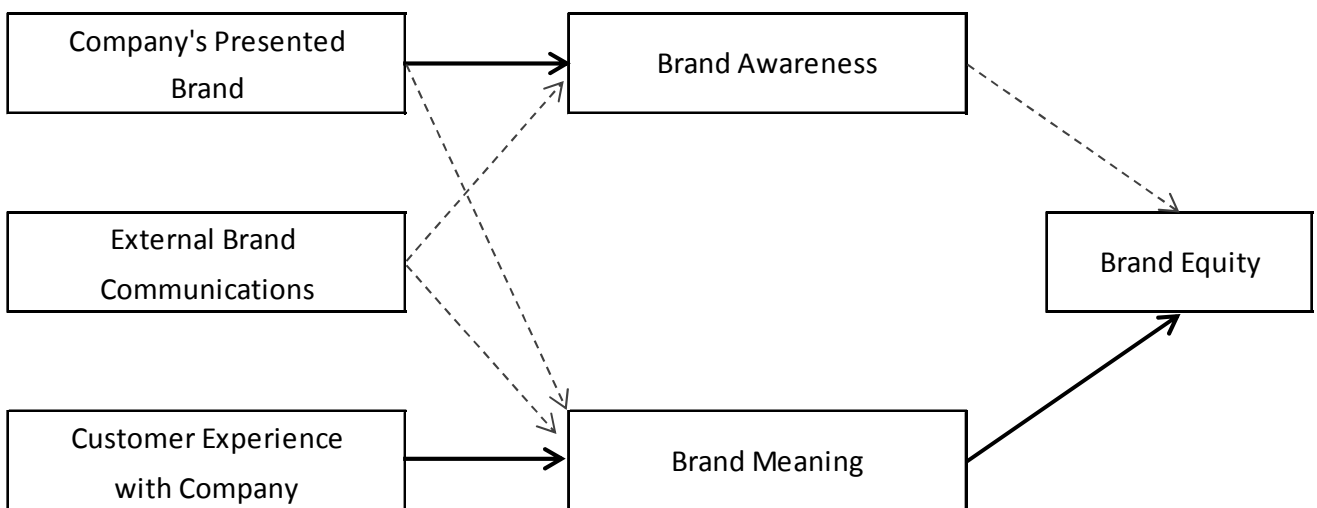
Brand awareness, perceived quality, brand loyalty and brand associations

Having a unique selling proposition and a competitive position are regarded as important creative guidelines. The intangible service of banks provides a challenge in positioning themselves in the mind of the customer in all fields of branding. However, awareness, relevance, quality and competitive differentiation can be achieved by brand strength (Nussey, 2000). Many stakeholders influence the strength of the brand. As they are the ones who deliver the service, the employees of the service provider play a vital role in creating primary brand perceptions (Degener, 1999).

Branding is one of the most important elements in the marketing mix, and the question can be asked as to the extent that brand concepts that have been mainly developed for tangible goods, can be used for services (Degener, 1999). Brand equity comprises brand awareness, brand loyalty, customer’s perception of quality and all brand associations (Nussey, 2000:86, 88). Arguably, the need for a strong brand, is more important in services and especially financial services than in the product realm (Sadek & Tantawi, 2016; Degener, 1999).

Figure 5: Model to illustrate the importance of incorporating both brand awareness and brand meaning to build brand equity

A service-branding model

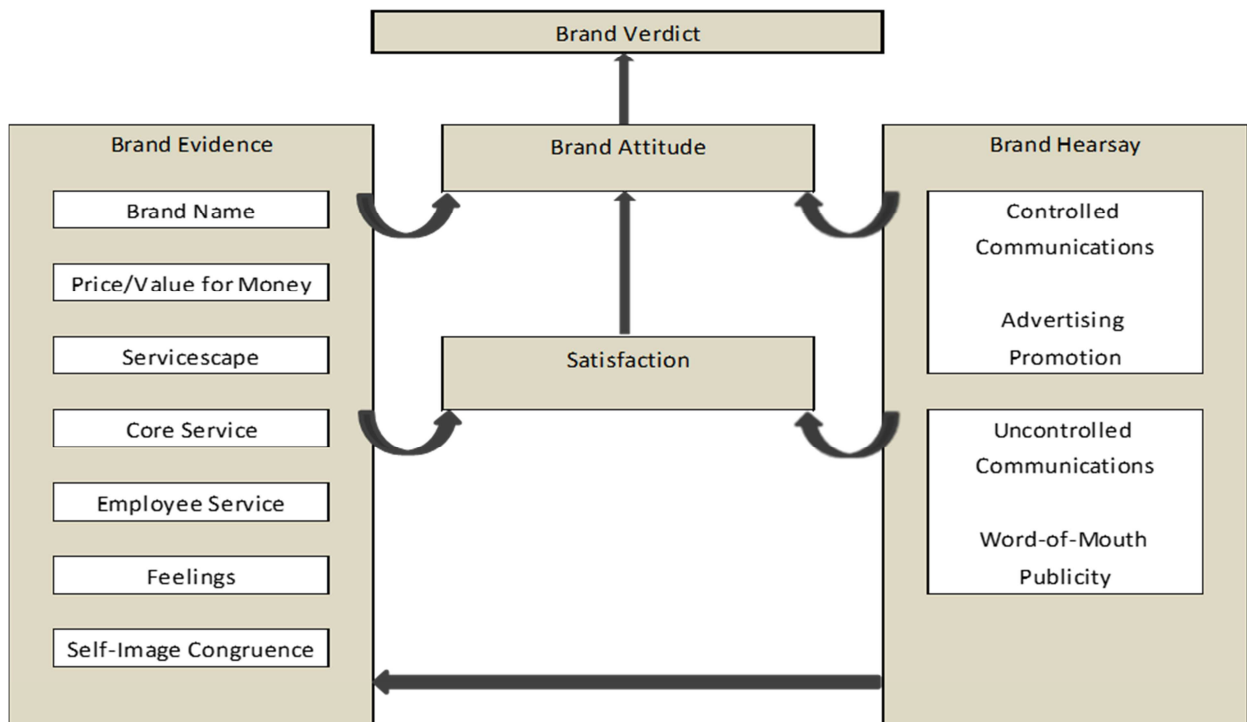


Source: Berry, 2000:130

O’Cass and Grace (2004:125) further investigated brand dimensions, and the relationships brand dimensions have to customer response variables. Their studies resulted in a new service model called the *service brand verdict model*, depicted in Figure 6. The brand verdict can be translated into the final decision and response on which a customer acts concerning services.

Brand attitude precedes the *brand verdict* and comprises *brand evidence* and *brand hearsay*, which together create the stimuli for a customer. *Brand evidence* again comprises *brand name, price, servicescape, core service, employee service, self-image congruence* and *feelings* (O’Cass & Grace, 2004:134: Figure 6).

Figure 6: Service brand verdict model



Source: O’Cass & Grace, 2004:126

Brand as equity in financial services companies

An essential part of the marketing strategy for any organisation is to identify its competitive advantage (Ennew & Waite, 2007:109). Tait (1995) identified a few gaps between the business and the customer, one of which is the gap between service delivery and external communications to customers. However, the stronger the brand, the more trust the service will evoke as brand advertisements are designed to establish a positive corporate identity or image (Barker & Angelopulo, 2007:235). De Chernatony & Segal-Horn (2003:1100) who state that “services brands remain under-developed” and a strong brand becomes the surrogate to a company that does not offer a tangible product echo this. In packaged goods, the product is the primary brand. However, with services, the company is the primary brand (Berry, 2000:128).

Banks need to position themselves as top of mind when it comes to their customers who need to be aware of them, their offerings, quality of services and competitive differentiation (Nussey, 2000). A tangible product automatically has visual impact through its packaging, labelling, and displaying. It can be concluded that it is not

possible to package and display a service in the same way; therefore, the importance of the brand in the financial services industry is even more relevant.

Traditionally product branding assumed that the value delivery system encompassed an internal, quality controlled process unseen by customers (De Chernatony & Segal-Horn, 2003:1098). The competitive advantage a service industry has is that it can control and influence the core value by the service experience it provides. This is directly linked to the people providing the service.

In his research about Starbucks, Berry (2000:128) notes that a multimillion-dollar advertising programme is not a prerequisite for building a national brand, but that is rather achieved by incorporating the viewpoint of one customer at a time, one store at a time, one market at a time. This refers to the personal service and subsequent word-of-mouth advertising that emanates from superb service, and consistency in messaging.

Externalising the brand: advertising campaigns consistent with brand building efforts

An advertising campaign should form part of the clear and concise brand building efforts of the services company. Research results suggest that it is essential for service providers to have a strong presence in the media in order to create and maintain a trustworthy image. To be more astute with budget, the message should be broadcast to the target audience only and in the appropriate media. Consistency and clarity in times of a more strained economic environment will be even more relevant and important (Barker & Angelopulo, 2007:261).

To assist the consistency of the message, companies may use overarching corporate branding strategies in their marketing efforts where they have a large number of brands attached to an individual service offering (Devlin & McKechnie, 2008:656).

Services companies with the strongest brands reveal a conscious effort to be different. “Top brand builders are almost always mavericks that defy convention and forge new paths to reach and please customers.” (Berry, 2000:131). Invention rather than imitation rules branding efforts. At first, this does seem to be applicable to financial services companies, and in Berry’s examples, not of financial services

companies, but for rental vehicle companies, he illustrates that even the dress code of employees assisted in differentiating the company from its competitors. Any services industry could have implemented this. Once again, both the image the company wants to portray and the message that the company wants to convey need to be consistent in its advertising campaign and all other communication endeavours in order for it to be successful.

2.1.4 The South African context

The financial services sector is extremely competitive in its nature and to achieve success, marketers need to understand the environment including competitors and legal requirements (Carter & Chattalas, 2001:76). Most companies currently have an integrated marketing strategy that combines above-the-line and below-the-line with television being the most frequently used above-the-line advertising medium (Tustin, 2002). Consumer-generated content is also growing in significance, and increasingly, form part of the marketing mix (Steyn, Wallstrom & Pitt, 2010:50).

The banking landscape includes rising consumerism, automation and computerisation, increasing competitions and a growing number of legislative changes and implementation of other government controls, while at the same time aiming for greater profitability (Brebner, 1974). Phillips (1999) concluded that banks needed to rethink their role and business to face the challenges in order for them to meet growing customer needs, adhere to the demanding regulatory environment and implement monetary policy.

South African banks are no different from the rest of the world in that they are consistently evolving and changing (Nussey, 2000). Apart from the ever-changing landscape, customers are highly ambivalent and a large portion considers moving to another bank (Ennew & Waite, 2013:33; Nussey, 2000). Developing technologies are one of the driving forces behind the changes in banking services. In the study conducted in 1991, Kotze predicted that technological changes would ensure that electronic banking would become part of our daily lives. Today technology influences not only lifestyle and financial services behaviour, but also the nature of services and the kind of products and services offered (Ennew & Waite, 2013:121, 239).

Looking at the South African context for advertising in financial services, it could be worthy to note the regulatory bodies that oversee this sector. The South African Reserve Bank regulates banking in South Africa and the Financial Services Board supervises and oversees the financial services industry (Ennew & Waite, 2013:20).

As with any company or business return on investment needs to be measured, and even more so in the marketing department where results are not always as clear-cut as in the rest of the company. Companies need strict budgetary measures if they want to ensure the survival of their products or services (Tustin, 2002).

The innovative nature of the financial services industry is an example of the comparative advantage of competition theory (Hunt & Morgan, 1995:2) where the competition develops the market-based industry and so, superior results are achieved. Innovation is as part of the makeup of the company as is quality and quantity. When looking at the South African banking landscape today, innovation has definitely become a key differentiator in the financial services offering (Theron & Terblanche, 2010:383).

As mentioned, customers are highly ambivalent and a large portion considers moving to another bank (Nussey, 2000) and that places even more importance on and raises the need for awareness around and understanding of the value of the service offering of the financial services company.

2.1.5 Conclusions on financial services companies

The purpose of financial services companies is to provide a service to its customers to assist them in managing their finances. The products offered by these companies are intangible goods that could potentially be challenging to advertising agencies when creating advertising campaigns. The industry incorporates technology that is ever evolving and has to keep up with not only these changes, but also that of continuous legislative changes. Although the study touches on financial services companies in other countries, its main geographical focus is South Africa.

How does a financial services company create the awareness around its products and services? Advertising campaigns as put together by the advertising agencies form a very big part of the awareness. So far, the literature review has focused on

the financial services company side of the communication. In the next section, the advertising agency, which sits on the other side of the creative process, is reviewed.

2.2 A CONTEXTUAL DESCRIPTION OF ADVERTISING AGENCIES

2.2.1 Introduction

The second primary stakeholder in the creation of the advertising campaign is the advertising agency. The advertising agency needs to align closely with the financial services company and its goals in order to create an advertising campaign. In this chapter, the advertising agency and its environment is discussed, as well as the relationship it holds with the financial services company.

2.2.2 The advertising agency environment

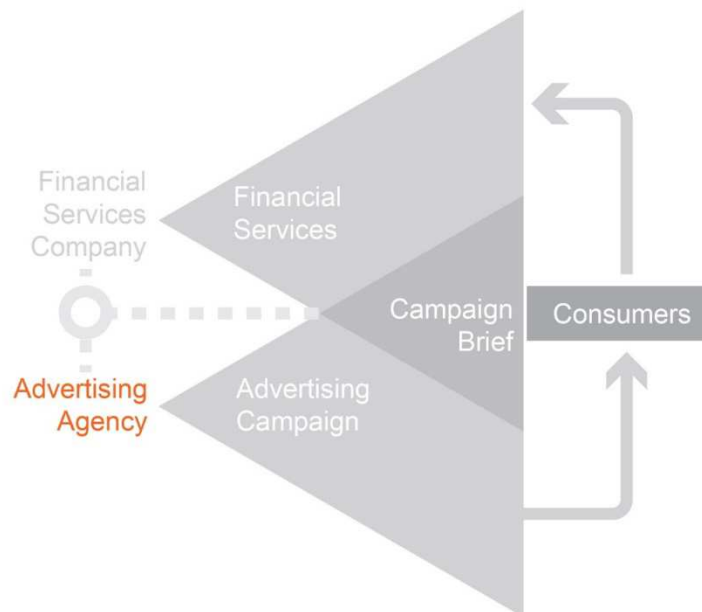
The advertising agency acts as the project manager in the creation of the advertising campaign and the employees working on the campaign need to have the relevant skills such as knowledge (about the business) understanding about the project (or campaign), decision making capabilities, administration and process skills and the relevant personal characteristics (Castell, 2005:324). The graph in Figure 7 illustrates where the advertising agency fits into the discussion.

The relationship between the financial services company and the advertising agency influences the quality of work. Nilsson and Karlsson (2015:30) go as far as to say that chemistry between the two parties results in a long mutually beneficial relationship and without chemistry, it is impossible to have a decent relationship.

What is the role of an advertising agency?

Advertising agencies are the conduits that should take the customer, the financial services company, from where it is at any moment in time to where it wants to be in future, while aligning and incorporating current practices and marketing efforts (Communications Agencies Federation, the IPA, MCCA and the PRCA; referenced as PRCA, 2003:29).

Figure 7: The role of the advertising agency in the creation of an advertising campaign



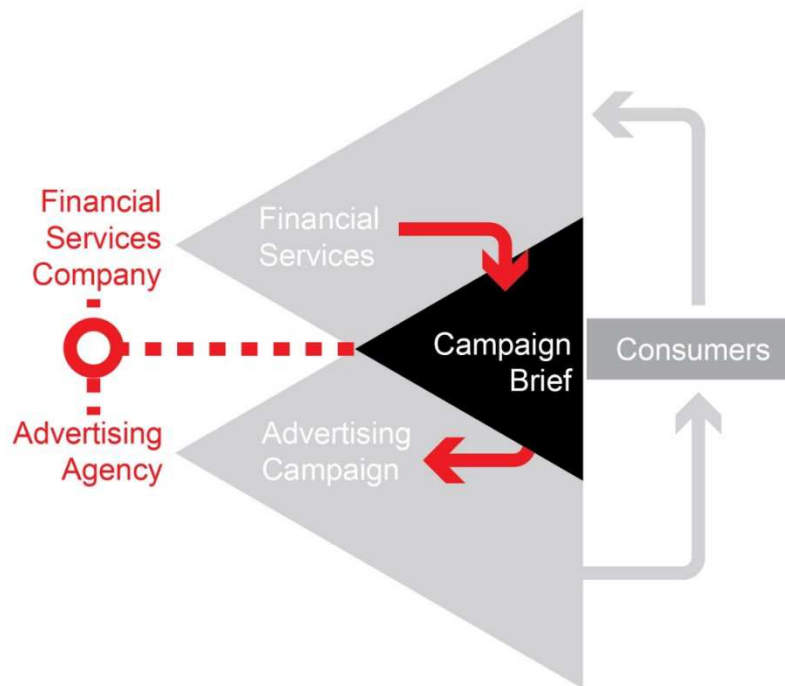
Source: Calitz, 2016

In theory, the role of the advertising agency is to develop a holistic, all-encompassing communication strategy that is aligned to the customers' marketing and corporate objectives (Barker & Angelopulo, 2007:256; Warren, 1998) which is to inform, persuade to buy or take up, or remind current as well as potential customers of the business offering, including services and products. The role could also include creating awareness about the business itself (Steyn *et al.*, 2010). Advertising agencies should be responsible for advising customers concerning various marketing instruments and their synergy, and should not only focus on visual elements incorporated in the campaign (Barker & Angelopulo, 2007:256; Botha, 1996).

In order to aid brand integrity, advertising agencies have to think strategically about the increasingly diverse market environment and they should understand what Integrated Marketing Communications entail (Kallmeyer, 1999). Functions of an advertising agency typically could include copywriting, creative development, media placement, production, branding and company positioning (Braungard, 1997).

Companies need advertising agencies as they lack the skills internally and cannot produce the work themselves. It is also considered to be more cost-effective to consult an agency while accessing the professionalism and expertise the agency possesses (Nilsson & Karlsson, 2015:29).

Figure 8: The symbiotic relationship between the financial services company and the advertising agency



Source: Calitz, 2016

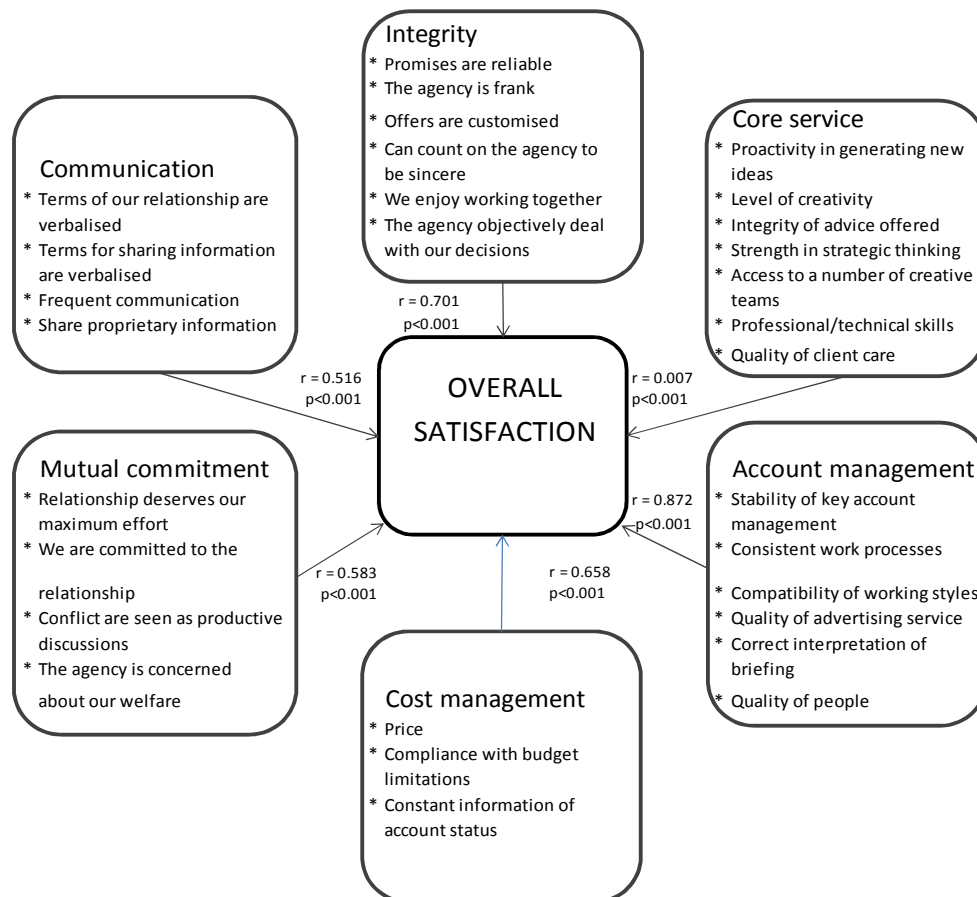
The importance of a good relationship between the advertising agency and the financial services company

“For an agency and customer to work together, both teams need to have relationships not too dissimilar to those required to make marriages work” (Moerdyk, 2014). Great advertising agencies know how to assist their customers to create brand identity and differentiate their products and services from the competitors. Good advertising agencies stand out as seen on their websites, their accomplishments and all of this should be taken into account when finding the right agency (Theron & Terblanche, 2010:383).

The relationship between the financial services company and the advertising agency should be strong in order to achieve the best results. A look at the structure between

the two would provide an indication of what the relationship looks like. The best relationships are those where the customer makes the agency part of the team (Moerdyk, 2014).

Figure 9: Determinants of overall satisfaction



Source: Jansen van Rensburg, 2011:568

Note: This diagram summarises the elements that ensure overall agency satisfaction with requirements from mutual commitment between the advertising agency and the customer, to how the account and costs are managed. Many of these elements are present in the briefing process. If, for example, costs are stipulated and managed efficiently in the briefing process, the result should add to the overall satisfaction experienced in the process of creating an advertising campaign.

The major functions of a full-service advertising agency include account management, creative services, media planning, buying, and research (Barker & Angelopulo, 2007:257). Therefore, the people one would find at an advertising

agency would be graphic designers, media planners, media buyers, account managers, and copywriters (Braungard, 1997). Traditionally advertising agencies handled the role of communication agents of a business (Louw, 2001) and nowadays the advertising agency's task no longer stops at developing an advertising concept as per the customers' instructions, but includes doing the media planning, buying and implementing the plans (Jansen van Rensburg, 2011:549; Warren, 1998).

For advertising campaigns to be successful in the eyes of the financial services company, the objectives of the agency and the financial service should align. Louw (2001) found that because agencies did not understand the changing marketing environment and struggled to stay abreast of the evolving relevant technologies, they had to reinvent themselves through the implementation of infrastructural changes. There has since been an emergence of specialised agencies that include agencies that are in-house, industry-focused, minority agencies, creative boutiques, vendors, agencies that offer media buying services, and virtual services (Barker & Angelopulo, 2007:257-258).

The service quality goes hand in hand with the quality of the relationship that the advertising agency holds with the advertiser when measuring the overall customer satisfaction (Jansen van Rensburg, 2011:556). Account support including the experience and diligence of the team would influence the quality of service the advertising agency provides (Jansen van Rensburg, 2011:556) and the subsequent success they achieve. Having an account executive as point of contact between the customer and the rest of the advertising agency team is invaluable.

The elements for success in overall customer satisfaction pertaining to advertising agencies that was identified by Jansen van Rensburg (2011:560-562) is grouped into *Service Quality* (including core service, account management and cost) and *Relationship Quality* (looking at integrity, mutual commitment and communication).

Steyn *et al.* (2010) concur with the model for online advertising and in short point out that a customer-generated, online advertising campaign could be successful if it implements the following characteristics:

- **Costs less** than the rest;
- Provides **direct feedback** from customers to the financial services company;

- Breaks through the clutter by being **creative**;
- **Enhances brand awareness** (electronic word-of-mouth; eWOM);
- Is interesting, offers **compelling marketing messages**; and
- Embraces **peer-created credibility and trustworthiness**.

If these are measures of success, it should be included in the brief to the advertising agency.

Compare Steyn's above-mentioned list of 2010 to the list below, required by Keystone Financial Inc., a financial services company, of their advertising agency in 1997:

- Quick **turnaround time**;
- Advertising that is **cost-effective** and gain economies of scale as far as possible;
- An **account executive** appointed to the account who is compatible;
- An excellent **creative product**;
- **Advice** on advertising challenges; and
- A **communication** process that works (Braungard, 1997).

Keystone Financial Inc., was not satisfied with their agency because of a lack of these same reasons (no exceptional creativity, too high costs, lack of responsiveness) and opted to use their in-house skills and marketing department to cater for their advertising needs (Braungard, 1997). It illustrates the importance of advertising agency staff demonstrating that they have the skills to meet the needs of their clients (Nilsson & Karlsson. 2015:30). Although much has changed in almost two decades, the principles are still relevant and integral to the creation of a decent campaign.

How do advertising agencies measure their success?

Botha (1996) found shortcomings in the way success was measured for advertising campaigns and the changes in perception and power to influence brought about by the campaigns.

One of the ways that advertising agencies measure their success is when comparing the awareness, attitude or opinion and communication in pre-testing with the recall or recognition and attitude in post-testing (Mahne, 1989). Mahne (1989) focuses on the success of advertisements and looks at ways to measure the effectiveness as contributing factor. Setting the objectives would form part of the essential steps in creating successful advertisements (Mahne, 1989).

Louw (2001) argues that because agencies did not understand the changing marketing environment and struggled to stay abreast of the evolving relevant technologies, they had to reinvent themselves (Kallmeyer, 1999) through the implementation of infrastructural change (Louw, 2001).

Account support including the experience and diligence of the team would result in the quality of service the advertising agency provides (Jansen van Rensburg, 2011:556). Once again, the service quality goes hand in hand with the quality of the relationship that the advertising agency holds with the advertiser when measuring the overall customer satisfaction (Jansen van Rensburg, 2011:556).

The elements for success in overall customer satisfaction pertaining to advertising agencies that were identified by Jansen van Rensburg (2011:560-562) are summarised in Table 2 below:

Table 2: The connection between service quality and relationship quality

Service quality		Relationship quality	
Element	Activity	Element	Activity
Core service	<ul style="list-style-type: none"> • Ability to proactively generate new ideas • Creativity • Integrity of the service • Professional skills • Technical skills • Strength of strategic thinking 	Integrity	<ul style="list-style-type: none"> • Reliable promises • Sincerity • Objectivity regarding advertiser's decisions • Personalised offers • Enjoy working together

Service quality		Relationship quality	
Element	Activity	Element	Activity
Account management	<ul style="list-style-type: none"> • Stability of staff working on key account • Consistent work processes • Compatibility of working styles • Quality of the service offered • Correct interpretation of briefings • Quality of the people working on the accounts 	Mutual commitment	<ul style="list-style-type: none"> • Maximum effort • Expressed commitment to the relationship • Perception that conflict should be productive • Agreement that agency is concerned about advertiser's welfare
Cost management	<ul style="list-style-type: none"> • Price • Compliance with budget limitations • Constant information of account status 	Communication	<ul style="list-style-type: none"> • Manner in which they communicate and share information • Clear verbalisation of the terms of the relationship and information sharing • Sharing proprietary information • Frequency of communication • Agency to learn about advertiser's business

Comparison of these principles with those for the online world as listed above (Steyn *et al.*, 2010) show a remarkable similarity.

2.2.3 Conclusions on advertising agencies

The role of the advertising agency is to develop an advertising campaign that will communicate the value that the financial services company has to offer its customers. A portfolio of several different project management skills is required in order for the advertising agency to fulfil this role. Advertising agencies operate in a different environment to that of the financial services companies and success is measured through different platforms and against vastly different benchmarks when compared to those used in the financial services sector.

One of the key ingredients in achieving a successful advertising campaign for a financial services company is the interaction between the financial services company stakeholders and the advertising agency stakeholders. The stronger the relationship between the two, the better the results of the communication and working process will be.

2.3 ADVERTISING CAMPAIGNS

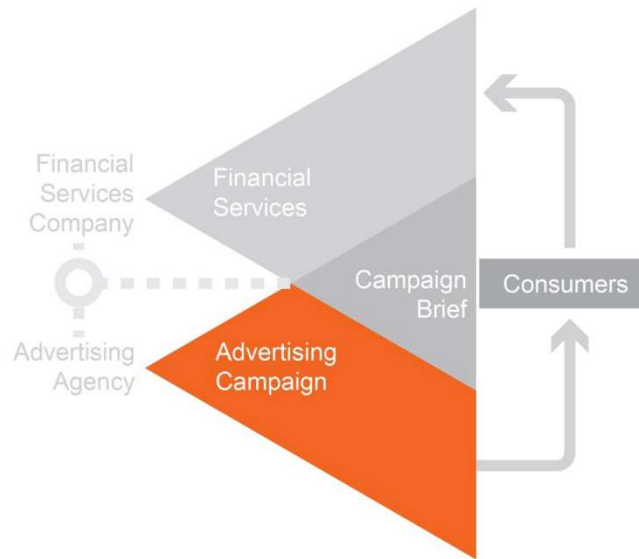
2.3.1 Introduction

The previous sections expanded on the stakeholders in the creation of the advertising campaign. In this section of Chapter 2, advertising campaigns and what they entail and require are discussed, as well as the change in the campaign channels through the introduction of customer-generated content. It looks at the differences in approach to the advertising of tangible and non-tangible goods, and expands on services advertising in particular.

2.3.2 What is an advertising campaign?

Advertising is paid-for mass communication with a target audience in mind and has a function and place amongst the elements in the communication strategy, promotional and marketing mix of a business. The field of study of advertising is complex and dynamic (Barker & Angelopulo, 2007:224). It is an evolving and ever-changing discipline and as technology speedily develops, new platforms for advertising arise. Presbrey (2000:3) referred to the exponential development of advertising when he said that “advertising as we know it today dates from yesterday.”

Figure 10: Advertising campaigns to the customer



Source: Calitz, 2016

The advertising message, together with the vehicles used to convey this message have evolved to a complex discipline involving research, design, aesthetics, psychographics, demographics, sound, humour and professional copywriting. Advertising forms part of the visual range of elements in an integrated marketing communications approach (Temple, 1997). This approach follows a conceptual framework and process methodology for marketing, which includes architecture, corporate communications, corporate identity, interior décor, and dress code (Temple, 1997). Note that the advertising industry has developed much since 1997 to the present day and the progression up to 1997 was preceded by a long history (Grove in Mortimer, 2001).

Understanding the process the customer follows when buying something, logically leads to an understanding of the pivotal role of marketing and advertising. The customer decision process involves five steps and these include identifying a need, searching for information, evaluating the options available, making the decision to purchase and doing a post-purchase evaluation to gauge the fit for purpose of the purchase (Lawson *et al.*, 2007:21).

Today we experience advertising as a multitude of ideas and messages in a variety of media, conveying concepts or offerings to entice their target audiences to take

note of the product or service, with the end goal that the targeted audience would respond favourably (Koekemoer, 2004 in Barker & Angelopulo, 2009:232). Advertising campaigns comprise a variety of channels and creative executions. All of us are exposed daily to countless advertisements on the radio, billboards, street poles, in magazines, in newspapers, on television, online, on the web, through posters, and in product placements in films (Wood, 2009:309) as well as social media.

From above-the-line and below-the-line advertising to through-the-line advertising

The rapid increase in spending in below-the-line promotions relative to the above-the-line advertising spend, indicates that South Africa is moving into an era where integrated marketing communication strategies across all sectors are implemented exponentially (Tustin, 2002). The spend is still skewed towards above-the-line advertising with a ratio of around 60/40 and a point of 35/65 where the below-the-line would incur deteriorating profits as a result of the costs of these below-the-line activities (Tustin, 2002). In the financial services sector both above-the-line and below-the-line advertising is used.

Above-the-line advertising is advertising on the media of television, radio, print, outdoor and cinema. Below-the-line promotions include traditional communication channels, and also customer and trade promotions, direct marketing, sponsorship and public relations (Tustin, 2002). However, with the emergence of customer-generated advertising or in other words social media, the more traditional types of brand management are seen as an outdated, hierarchical way of marketing and market-making in its one-way form of communication to the customer with the aim to affect customer behaviour (Mandelli, 2010; Steyn *et al.*, 2010:51).

Customer-generated advertising and social media

Outside of through-the-line advertising, a new way of advertising has emerged in the form of social media (Mangold & Faulds, 2009:359). Where advertising used to be controlled by advertisers and their advertising agencies, there is a new trend developing called customer-generated advertising (CGA) whereby customers create their own advertisements which they then publish on social networks such as YouTube, Facebook, Twitter (Steyn *et al.*, 2010; Mandelli, 2010). As this

phenomenon is new, not much has been written in academic papers about the effects it has on marketers and their advertising strategies, and scholars have only recently begun paying attention to it (Steyn *et al.*, 2010).

The turnaround speed for creating and distributing such CGA is notably faster than traditional production processes, but there is little or no control over the content (Mangold & Faulds, 2009). Pistelak (in Steyn *et al.*, 2010) argues that CGA could create the opportunity for financial services companies to have advertisements which are similar to those of fast moving customer goods, and that could bring about significant change in the manner in which financial services are marketed.

The main impact of internet-based social media is arguably the shift in control, or more precisely, the loss of ownership of control. The possibility that any one person now has of communicating with (to) any number of people, sometimes thousands of them at once, has magnified customer communication in the marketplace (Mangold & Faulds, 2009:357). Although this is in contrast to traditional marketing and execution on traditional channels Mandelli (2010) warns marketers to not oversimplify the inclusion of social media in the marketing mix. The social media are by nature more flexible, but not without their challenges.

However, the media are still structured by communication through interaction and words, as well as by communication economies. Narrative authority and managing communication resources and media in line with an organisation's brand and objectives have become important (Mandelli, 2010; Mangold & Faulds, 2009:360).

After conducting research to find out whether the new media could provide the solution for the waste of advertising spend for the financial services company, Steyn *et al.* (2010) cautions this sector about embarking on this journey. Their findings indicate that any negative comments would have a negative impact, and the financial services companies should be ready to react to these negative comments. Marketers from these companies should rather inform customers about successful advertisements, as that will contribute to the favourable perception created through the campaign (Steyn *et al.*, 2010).

Other articles and viewpoints advise financial services companies to include social media in the marketing mix, and to ensure that there is a proper strategic approach

to social media and the respective executions thereof. The power has now moved away from brand owners to customers and traditional brand owners should sharpen their listening and conversational or interacting skills and learn to shape the customer discussions that is aligned to the objectives and brand of the organisation. A move away from one way discussions to two-way communication is now required (Mandelli, 2010; Mangold & Faulds, 2009:364).

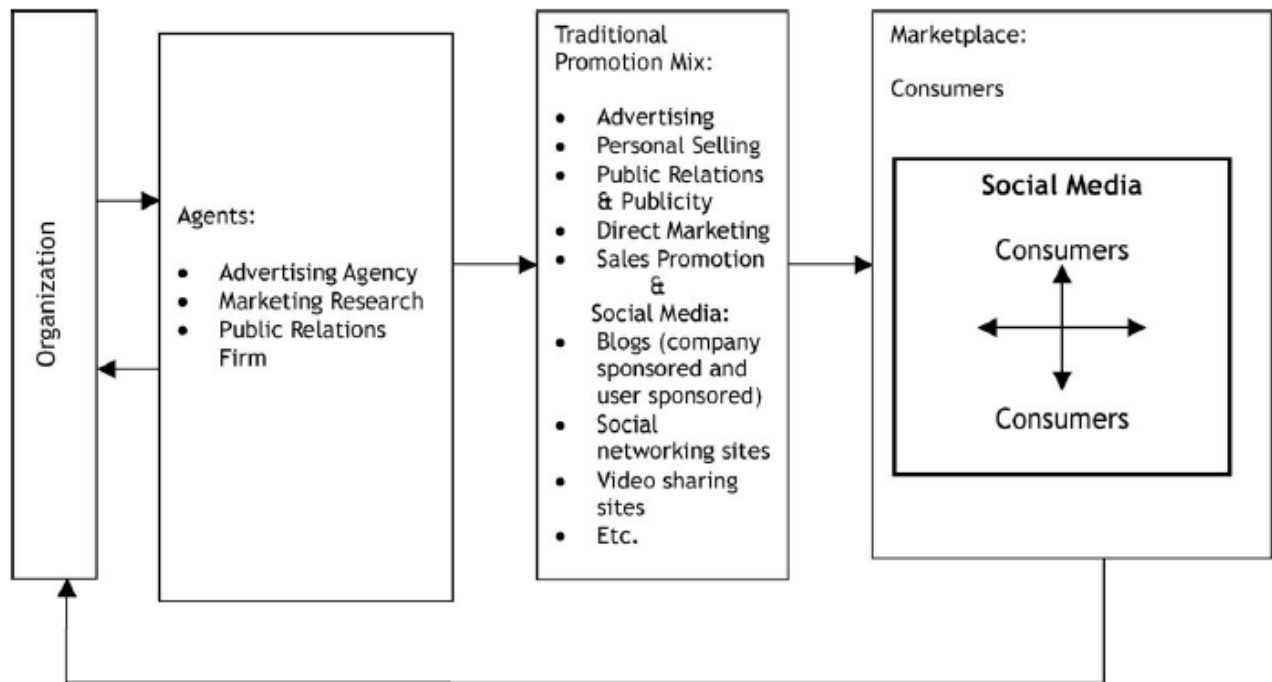
An important, but often undervalued aspect in communication, is listening. People do not pay attention to what others are saying and often do not pay attention when they are talking which creates barriers to communication (Lunenburg, 2010:6).

The process of listening involves discrete actions, namely hearing what is said, understanding what one heard, remembering what one heard, evaluating what one remembered (heard), and responding appropriately to the information one received (Tyagi, 2013). Tyagi (2013:4-5) describes 19 different types of listening, which, if one understands how to distinguish between them, allows one to gauge the state and quality of the conversation, and identify potential challenges, bottlenecks and pitfalls. Having good listening skills makes for a very productive member of the team, allows team members to better understand the brief as well as what is expected of them, and is also a powerful enabler that helps build a better team spirit and team environment (Tyagi, 2013:5-6). Listening is also considered a key part of communication – also for social media marketing.

Dwyer (2009) gives an excellent overview of how to integrate the multi-directional streams of information making up a communication process and/or an office dialogue, specifically also with reference to multi-disciplinary project teams, such as the team from the financial services company and the advertising agency, in order to focus outcomes and impact.

The diagram below illustrates the shift in the marketplace from traditional media to customer communication as the new communication paradigm, which immediately identifies the need for a different approach to integrated marketing communication strategy formulation. The one-dimensional communication controlled by the brand has been replaced by communication by customers to customers about products and services, at the very moment when the customer interacts with the company's products and services (Mangold & Faulds, 2009:360).

Figure 11: The new communications paradigm



Source: Mangold & Faulds, 2009:360

Approach to creating advertising campaigns

Advertising agencies employ a variety of possible strategies and work through a process of elimination ending in the best possible way to push products or services sales for their customer. In order to tailor the optimal communication certain ingredients are used in advertising. When customer motives and positive emotions are depicted in an advertisement, a positive brand image is created which leads to a positive attitude towards the brand (Steyn *et al.*, 2010). With the emergence of social media, marketing managers have to ensure that they part of the discussions customers have and that they influence the conversations to thus positively affect the brand (Severi, Ling & Nasermodeli, 2014; Mangold & Faulds, 2009:360).

A connection between the service provider and its prospective customer needs to be made, a personalisation of the intangible quality of the service (Mortimer, 2001). The communication environment and likeability of the advertisement enhances the success of the marketing efforts – the advertisements that are perceived to be more popular are also more successful. When customer motives and positive emotions are depicted in an advertisement, a positive brand image is created which leads to a positive attitude towards the brand (Botha, 1996).

Creativity is seen as an important ingredient for successful advertisements to illustrate the unique selling proposition and competitive advantage of the business (Botha, 1996). Other techniques to implement are testimonies from customers, highlighting the brand name, and positioning the brand in an unconventional but credible approach (Botha, 1996). Once again, social media now provides the platform for the curation of customer interaction and content (Kietzmann, Hermkens, McCarthy & Silvestre, 2011:249).

Corporate advertising, that is when a company uses the company itself as the focus of its advertising rather than its products or services – has in the past been considered to not have any substantial benefits. A study comparing results of this practice in South Africa to findings of a study done in America found that this kind of advertising showed a positive influence on share prices with an 85% confidence level (Sater, 1988). That would lead us to believe that corporate advertising could be used successfully in the services industry with the ability to influence the investment community and increase share price.

In any advertising media, standing out from the clutter of communication often requires a unique approach. There is a need to find a creative way of putting the message across to get noticed. The creative concept, which involves the message and approach, creates the ‘big idea’ and therefore creativity is an important ingredient for successful advertisements that need to illustrate the unique selling proposition and competitive advantage of the company (Barker & Angelopulo, 2007:411-412; Botha, 1996). Mortimer (2002:461) feels that in order for services advertising to address intangibility, it should contain concrete language, include elements that represent the company and that illustrate the service experience the customer will have.

All of the above form part of the communication of larger brand goals. With all elements in place and consistently working toward the same brand personality or image, a stronger brand will be built. Buy-in from all stakeholders within the organisation raises confidence levels about the success of the business, which makes for a stronger corporate message.

Effectiveness of an advertising campaign

Steyn *et al.*, (2010) argue that to analyse the elements of persuasive communication, one needs to consider:

- (a) The independent variables such as source, message, audience, channel or medium, target audience behaviour (Oskamp & Shultz in Steyn *et al.*, 2010) that could be manipulated by advertisers; as well as
- (b) The dependent variables consisting of aspects of the persuasion process which result from the communication.

The customer's perception of the source of the advertisement or advertising campaign impacts the success and effectiveness of such a campaign (Wilson & Sherrell in Steyn *et al.*, 2010) as it raises questions about the authenticity of the content of the advertisement. Steyn *et al.* (2010) also points out that the communication environment and likeability of the advertisement enhances the success of the marketing efforts – the more popular perceived advertisements are more successful.

Globally communication (which includes advertising campaigns) is undergoing phenomenal change whereby turnaround time is getting shorter and shorter. The faster the advertising campaign could be developed as per requirements in the brief, the more profitable, or less expensive is the advertising campaign. Good quality and insightful briefs that ensure great understanding and alignment (PRCA, 2011) could only achieve faster execution that is closer to the customer's requirements.

PRCA (2011) expands on this point by stating: “according to the joint industry guidelines created for a British market the possible financial loss that could be concurred as a result of bad quality briefs, could reduce the impact of the advertising dramatically”. If an advertising campaign is delayed as a result of bad practices including a poor brief, the loss in sales in the lost time could be calculated based on linear relationship of advertising/sales ratio of 3% and marketing investment (ROMI) of 10% and assuming there was no replacement activity (PRCA, 2011:11).

2.3.3 Difference between services and product advertising

As mentioned earlier, there is a debate with opposite viewpoints regarding the need to differentiate between the advertising of services and that of products. Advertising

agencies often find the distinction between products and services unnecessary and unclear. Similar elements such as branding were as part of the value proposition of all businesses and therefore the question arose whether it was necessary to view advertising of services in a different light than advertising of products (Mortimer, 2001:132).

(Brady *et al.*, 2005:402) reckon that it is necessary to differentiate between the two. According to them, “services differ fundamentally from physical goods.” (Brady *et al.*, 2005:402). There has been an interest in distinguishing products from services since the 1960s (Edgett & Parkinson, 1993 in Mortimer, 2001:132) but the distinction between tangible goods and intangible services is so wide that to group offerings only into services or products, would be too simplistic. A continuum wherein products and services could be placed would give a more realistic view of the offerings available and will therefore be more beneficial to the search to understand the intrinsic value of the products and services to customers (Mortimer, 2001:135).

Mortimer (2001:138) mentions that an un-named director made the following statement “A product is a service is a brand”. When tasked to group printed advertisements, not one of the creative directors in Mortimer’s survey found it necessary to differentiate between products and services as one of their distinguishing criteria.

Many researches also argue that there should be no difference between services and products: When developing successful services brands, marketers rely on the same principles they would use when developing the brands for products. O’Loughlin and Szmigin (2004:10) mention that branding strategies for both products and services involve the blending of functional and emotional values.

It is not only employees who impact the perception of the brand, but as the nature of services is such that customers get involved in their delivery, they (customers) play a role too. The purchase of services usually tends to involve a longer commitment than that of customers of customer goods and therefore a more intimate or deeper relationship develops with services customers (O’Loughlin & Szmigin, 2004:10).

Because of the fluidity of services, customer experience bears more weight than when compared to an industry with tangible products and therefore customer

experience has to be factored in when developing the communication strategy for the financial services company.

The well-known and highly acclaimed agency, Foote Cone and Belding (FCB), created the FCB Grid which looks at the level of involvement needed from the customer when interacting with a product as well as the emotional involvement with a bias towards either 'thinking' or 'feeling'. Products and services were thereby categorised as either high or low involvement products. High involvement products that are technical in nature and purchased based on rational thinking and with a clear motive as to why the purchase is necessary, such as cars, houses, and computers also have a big thinking component. High involvement products that provide psychological benefits such as cosmetics, jewellery, and fashion are grouped in the feeling category (Choi, Paek & Reida, 2012:92-93).

Low involvement products in the thinking category need habit formation strategies as these products are bought repeatedly after researching first purchase decision and include products such as tomato sauce, soap, and toothpaste. On the feeling side of low involvement, the products are 'life's little pleasures' and strategies should look at self-satisfaction (Barker & Angelopulo, 2007:249).

Successful services brands incorporate consistency, a golden thread that starts with the company culture and is pulled through to the brand; it embraces all elements from the attitude and behaviour of employees to its above-the-line, mass advertising to the market. The key message, core value offering or central message should be reproduced and communicated in a clear and consistent manner to both the employees and the customers (De Chernatony & Segal-Horn, 2003:1107).

Branding is one of the most important elements in the marketing mix, and Degener (1999) asks the question as to what extent brand concepts that have been developed for tangible goods, can be used for services. The unique selling proposition and competitive position are regarded as important creative guidelines in the building of a brand.

The intangible service that banks (or in this case financial services companies) offer provides a challenge in as far as banks need to position themselves in the mind of the customer in all fields of branding and to cut through the clutter. Awareness,

relevance, quality and competitive differentiation can be achieved by brand strength (Nussey, 2000).

Arguably, the need for a strong brand is more important in services and especially financial services than in the product realm (Degener, 1999). Brand equity comprises brand awareness, brand loyalty, the customer's perception of quality and all other brand associations (Nussey, 2000). The customer needs to buy into the full offering of a services brand, compared to a product brand that entails less commitment. The customer can easily make a different choice the next time they purchase a product. In comparison, the prospect of a longer-term engagement with a services organisation implies a greater need for trust in that particular brand.

A brand team who, in collaboration with business, creates a brand vision that includes a strategy for internal and external brand activation, conducts brand audits, adopts strategy and controls the activation of the brand (Degener, 1999) initiates the brand building process in a company.

As mentioned before and seen from the research of Mortimer (2001) advertising agencies do not view service advertising to be different from product advertising. Other researchers have also found that according to the creative directors the creative interpretation depends on the brief from the services company.

With today's focus on the economy, broadcasters and media facility managers are looking for ways to stretch revenue while reducing operating expenses. Advertisers or advertising agencies are pressured to do more with smaller budgets while at the same time not lose any quality. In addition, they are expected to maintain and even advance the competitive advantage within the marketplace (De Chernatony & Cottam, 2006). Beside shrinking budgets, a further challenge to broadcasters is the threat of content on demand where the viewer can choose to skip advertising on air altogether. Furthermore, ever-wider media platforms necessitate a much larger field of monitoring for branding and advertising activity.

In Mortimer's study, advertising agencies acknowledged the difference between a product and a service only in stating that a service is abstract and not manufactured. In the services industry, the characteristic of intangibility provides further challenges when aiming to differentiate and evaluate the service from its competitors (Mortimer,

2001:132). For the purpose of this study, and to distinguish between services and products, intangibility was chosen as the characteristic of distinction (Brady *et al.*, 2005:402).

Berry (2000:130) states that in order to build retention and loyalty with customers, service companies should consciously pursue distinctiveness in performing and communicating service, connect emotionally with customers and internalising the brand for service providers. Word-of-mouth is as noteworthy to the success of the company in financial services advertising than in any other company. Encouraging customers to tell their friends about the service is often one of the ingredients for advertising (Berry, 2000:129). In practice this is often done by means of customer testimonials.

The experience a customer gets should reflect the philosophy of the company and the communication internally and externally should be similar (O'Loughlin & Szmigin, 2004:10; Berry, 2000:135).

The question remains: How does an advertising agency translate the intangible qualities such as corporate culture and quality of service into a visual presentation that is suitable for an advertisement?

Advertising agencies embrace visual images as an integral part of the advertising makeup or concept. This should, however, be realistic. The image the customer conjures up should not be a setup for disappointment (O'Loughlin & Szmigin, 2004:20; Mortimer, 2001:140). Studies have shown that services companies that require a high level of contact with customers, such as banking, are more likely to show the interface in their visual depiction as opposed to low degree contact companies.

In a study about Irish retail financial services company, O'Loughlin and Szmigin (2004:11) argue that in financial services, the only way to achieve a competitive advantage is through the effective use of advertising and communication imagery. They further say that customers rely on "extrinsic cues such as image and reputation" when it comes to explaining the financial services to customers.

The academic literature indicates that showing the service in some way as an important element in the advertising was in contradiction to the practitioners' view

(see e.g. Grace & O’Cass, 2005; Berry, 2000,). The practitioners concentrated on showing the benefit of the service, rather than the service itself, or if not, then the unpleasant, negative consequences of not availing of the service. Incorporating the factual information for utilitarian services such as showing for example customers using credit cards received recognition (Mortimer, 2001:139).

Utilitarian services, including insurance and financial services, contains a higher percentage of assurance cues than the experiential services such as airlines, hotels and travel agents (Mortimer, 2001). The assurance cues that were implemented provided proof to the user in the form of certification, accreditation or awards. Performance data is an important ingredient in the marketing and advertising mix of especially financial services, and this is clear when the financial services company advertising is compared to advertising in other services categories.

2.3.4 Conclusion on advertising campaigns

An advertising campaign is a form of paid communication to a target audience created through the culmination of various disciplines. The communication is brought to the public on various channels and media with the purpose of convincing customers or potential customers to buy the product or service.

The research asked the question whether service and products could follow the same process in the creation of an advertising campaign. Some argue that there should not be a difference between the two, as the same elements are present in both – such as branding, message, physical components of the campaign. Other academics feel that it is not only necessary to distinguish between services and physical products, but to further categorise services into the types of services that companies offer.

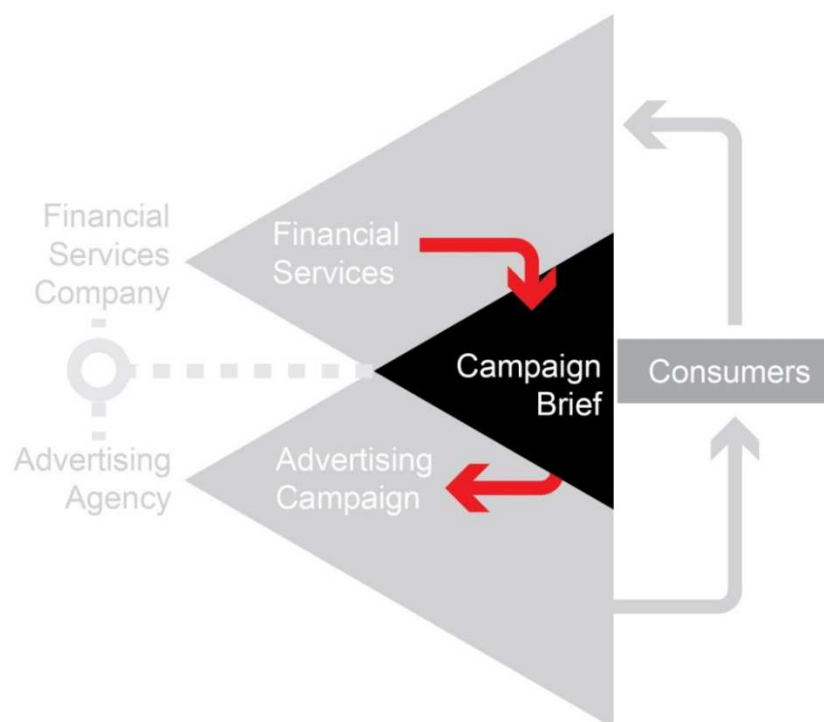
Branding is the hero factor that is mentioned by all. Whether one is advertising a services or a physical product, the strength of the brand is most often mentioned one of the success factors. In the next section the literature review moves to the exchange between the services industry and the advertising agency. It looks at the communication process and exchange of communication during the campaign brief.

2.4 CAMPAIGN BRIEFS

2.4.1 Introduction

The previous chapters focused on the stakeholders in the creation of an advertising campaign, namely the financial service company and the advertising agency. It also looked at the advertising campaign, the communication about the financial services offering to its customers. In this chapter, the transmission of information and knowledge from the financial services company's marketing team to the advertising agency is discussed (Refer to Figure 12.) The brief is taken as the focal point in the interaction between the two parties and is posed as the epitome of all communication between these two.

Figure 12: Introducing the campaign brief into the communication mix to customers



Source: Calitz, 2016

2.4.2 Campaign brief, a formal method of communication

A campaign brief is intrinsically a formalised framework for communication between a company and an advertising agency.

Table 3: The strategic intent or purpose behind an advertising brief Analysis and definition of campaign brief

Note: Developed using the construct for strategic intent as developed by Manning (2001).

The advertising brief	
<p>The written advertising brief specifies the basic elements of the creative strategy. Different agencies may call this document by a different name, such as a copy platform, a creative platform or a work plan, a creative brief, a creative blueprint, or a creative contract. In this dissertation the term advertising brief, which is defined in the four broad blocks below, will be consistently used.</p> <p>The account representative or manager assigned to the account usually prepares the advertising brief. In larger agencies, an individual from the research team or the strategic account planning department may write it (Belch & Belch, 2003).</p>	
<p>What does the advertising brief offer?</p> <p>Just as there are different names for the advertising brief, there are variations in the outline and format used and in the level of detail included. Typically the following will be involved (Belch & Belch, 2003):</p> <ol style="list-style-type: none"> 1. Basic challenge, problem or issue the advertising must address. 2. Advertising and communications objectives. 3. Target audience. 4. Major selling idea or key benefits to communicate. 5. Creative strategy statement (campaign theme, appeal, and execution technique to be used). 6. Supporting information and requirements. <p>Based on the findings of the research carried out in this study the above list taken from Belch and Belch (2003) could be extended, with most notably the list of eight areas of PRCA (2003) and PRCA (2011) to be blended in with the above list.</p>	<p>Whom does the advertising brief serve?</p> <p>The setting of advertising objectives requires specifying a well-defined target audience and developing a communication task statement that spells out what message must be communicated to this audience (Manning, 2001).</p> <p>This shows who benefits mainly from the brief – parties here are typically the briefing organisation, being the financial services company in this research, The brief gives them confidence that they have conveyed accurately and appropriately what they want to achieve; but also the advertising agency, because they now know exactly what is required of them.</p> <p>One can argue that the current and prospective customers of the financial services company will ultimately also benefit from the advertising brief because if it is meticulously constructed it has to deliver for the customer.</p> <p>The specific requirements of the financial services company could add other potential beneficiary groups of the service as eventually rolled out here, or other groupings in the financial services company and advertising agency, not directly involved in the campaign.</p>
<p>What is the ultimate objective with the advertising brief?</p> <p>Determining what problem the product or service will solve or what issue has to be addressed in the advertising campaign helps in establishing</p>	<p>Why does the advertising brief matter?</p> <p>The advertising brief is the one chance that the briefing organisation, in this dissertation the financial services company, has to convey to the advertising</p>

communication objectives for the campaign to accomplish. Similarly, it will also set the targets that have to be used to track progress as the briefing process and the campaign unfolds (Belch & Belch, 2003).

The financial services company will do well to align very closely the content in the campaign brief and thus ultimately the message portrayed in the campaign, to their overarching corporate strategic intent. In that way they will be sure that through every campaign that they engage in they will be building out the perception of their customers of the financial services company intent and thus its corporate brand (Manning, 2001).

agency exactly what the set purpose is with the associated campaign and what and how it has to be planned, set up and rolled out (Belch & Belch, 2003).

The properly constructed and communicated campaign brief will therefore contribute to the competitive advantage of the financial services company and as such it is in their best interest. Similarly the advertising agency may consider a properly understood, developed and executed campaign brief as part of their own competitive advantage over other advertising agencies because they can “claim” more impact from the campaign brief which they had managed (PRCA, 2011; Belch & Belch, 2003; Boulding *et al.*, 1993).

Inferred definition of a campaign brief

A campaign brief is a written document developed by the financial services company with clear details of what campaign the advertising agency has to develop on behalf of the financial services company and who the target audience will be of the campaign. In addition, it will clearly articulate what the competitive advantage is that the financial services company plans to achieve and what their ultimate targets are with the campaign as planned.

The content of the brief is a fine balance between relevant and necessary information and too much or irrelevant stats and data (PRCA, 2003:25). Time constraints, ineffective working methods or lack of expertise might lead to customers, such as financial services companies briefing advertising agencies by providing them with all information they can find. Distilling information to provide useful ‘background information’ is demanding, however marketing employees need to put in initial effort in order to get to the key information to establish where the company is now (PRCA, 2003:25).

A United Kingdom report published findings showing that advertisers are wasting up to a quarter of their investment with advertising agencies because of a lack of financial controls and insufficient campaign briefs (Jansen van Rensburg, 2011:549). According to Olatunji (2005:87) the top expectations that advertisers have of their agencies include creativity, expertise, keeping to the deadline, transparency, credit facility and staff training. The advertising agency needs to unambiguously

understand the goals for the creative part of the campaign development (Ehrlich & Fanelli, 2012:71).

Briefings could vary from very *informal* where (for example) a briefing would present a summary of facts in a short period to a *formal* briefing where (for example) an employee presents an update on the status of a project (Hamilton, 1993:318). An *oral briefing* is intended to use a short period of time to verbally give a short report or summary of facts to an individual or a group of people. Oral briefings could be informal or as per the focus of the subject, formal (Hamilton, 1993:328). There is not much available in academic literature that focuses on the briefing between advertising agency and the financial services company.

Communication between the advertiser and the advertising agency is one of the determinants of overall customer satisfaction (Jansen van Rensburg, 2011:568). A simplistic explanation of communication would encompass the process of transferring thoughts and ideas from one place or person to another. The Collins English Dictionary (1988) defines *communication* as the act of giving, especially information, messages or means of exchanging messages between places. Yet, Hamilton (1993:4) feels that this definition is not sufficient and argues that in this explanation the essence of communication is not clear, but rather allows for multiple interpretations leading to miscommunication and misunderstanding. There is more to successful communication than this one-way interaction.

Although communication, rightly, is a process, an ongoing happening, it is not as simple as only transferring knowledge, ideas or thoughts from one person to the next. Transferring is a one-way action that could easily result in miscommunication (Hamilton, 1993:5).

In her summary Wood, (2009:3) states “communication is a systemic process in which people interact with and through symbols to create and interpret meanings.” She delves deeper into this summary, and explores the process in more detail and concludes that communication is ever-changing, always in motion. She goes so far as to say that one cannot pinpoint where exactly the communication process starts and stops.

Erasmus-Kritzinger (in Van Staden *et al.*, 2002:12) agrees with Wood's thoughts and defines communication as a two-way process whereby information or the message is transmitted from one person called the sender to another, the receiver. The process does not end here as the receiver, in turn, reacts by providing feedback.

Therefore, as the study investigates the process of a financial services company briefing an advertising agency, which is essentially a form of communication with a defined outcome in mind it proves relevant to look at overall barriers to communication. Apart from other added contextual challenges, these more general barriers would still be present and could be the cause of possible misunderstanding or misalignment between the two parties.

Of all the potential barriers in the communication process, the perceptual barriers are the ones to be most likely to be present during the briefing process between the advertising agency representatives and the company. The other barriers are generic and one would possibly be able to eliminate them or soften the impact they might have on the communication process in this instance. How do perceptual barriers evolve?

Perceptual barriers could be formed by a multitude of factors. Here are some of the factors playing a role in forming perceptual barriers (Van Staden *et al.*, 2002:33):

1. **Background** – cultural, socio-economic influencing values, morals, symbols and expectations
2. **Education and training** – knowledge and vocabulary
3. **Intelligence** – determining the speed and level of understanding and insight with which a person grasps a message
4. **Occupation** – behaviour influenced by the expectations a role has of a person
5. **Interests** – different interests will evoke different priorities
6. **Needs** – Behaviour, decisions and actions are determined by a person's needs; depending on where one is focusing on for example Maslow's hierarchy of needs.

Apart from personal circumstances, personality, age, gender and religion will have an influence on a person's needs.

2.4.3 Communication between an advertising agency and a financial services company

In the interaction between the advertising agency and the financial services company, there are many forms of communication ranging from informal telephone conversations to formal documented communication including budgets, goals and timelines.

Financial services companies do not only have to overcome the challenge of diverse brands and brand strategies, but have to communicate the brand message to the creative agency. The advertising agency acts upon the brief it receives. "It all comes down to the brief" was echoed in the view of a creative director (Mortimer, 2001:139). The execution of the brief is just as important to the advertising agencies as their reputation depends on the correct interpretation thereof (West, Christodoulides & Bohomme, 2016).

Although marketers and communicators in services companies put in every effort to maximise the inherent value a company offers to its customers, this message about the value is often diluted by inconsistent approaches as portrayed through various platforms. The importance of consistency is illustrated in the research of De Chernatony and Segal-Horn (2003:1107) where an advertising consultant comments on the success of one services brand, a mobile telephone, compared to the inconsistent brand values of a bank. While the telephone brand could sustain coherence in spite of dealing with various related subjects ranging from employees, and ecology to customer-related topics, the bank could not. In banking, different departments, for example overdraft services and mortgage services, had completely different behaviour styles, and therefore brand experiences, even though customers saw the divisions as part of one entity.

O'Loughlin and Szmigin (2004:10) suggest that the key to brand differentiation in financial services is through the effective management of the unique emotional values. When asking the creative directors in Mortimer's (2001:137) study to group together various offerings with common characteristics, to enable a similar creative

approach, Mortimer found that this made creative directors uncomfortable. They felt strongly that the creative approach depended on the specific objectives and target group, and that every campaign was different (Mortimer, 2001). For most of the practitioners, the service/product divide was not the overriding characteristic.

Once the financial services company has decided that an advertising campaign is needed, it will brief the advertising agency, discussing *the needs*, and in more detail, *budget, profit goals, and timeframes* (Braungard, 1997). Communication between the advertiser (for the purpose of the study: the financial services company) and the advertising agency is one of the determinants of overall customer satisfaction (Jansen van Rensburg, 2011:568) – refer to Figure 5.

What should an advertising agency therefore do to answer in the need of their customers, for example, the financial services company? A number of requirements need to be adhered to in order to create overall customer satisfaction (Jansen van Rensburg, 2011:568). The core service includes being proactive, being creative, providing advice, offering strategic thinking, being professional, giving technically sound advice and being caring towards the customer (the financial services company). Satisfaction is also higher when rules of engagement have been laid down and when the company finds that the advertising agency has a high level of integrity. Communication is perceived to be more effective where the terms have been verbalised.

2.4.4 The eight elements towards advertising campaign success

The Communications Agencies Federation, the IPA, MCCA and the PRCA (PRCA, 2003) developed an industry best-practice standard to guide professionals in developing and implementing campaign briefs, which has stood the test of time. It is used below as a component framework to develop a protocol for a financial services company advertising campaign brief engagement.

The PRCA (2003:13) lifts out eight key components that should be addressed in the campaign brief. They present these eight components in the form of the following eight section headings. The eight elements that will be taken into consideration are:

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 if we have arrived?
7. Practicalities
8. Approvals

The elements listed above were identified from the analysis of data obtained from surveys and is taken as a foundation on which the research for this study is based. In the next section, the eight elements are verified through references to academic literature on the same topics.

PRCA Element 1: Project management

Competitive advantage can be obtained either through containment of costs or the ability to add superior value to the customers' lives. The *Competitive Position Matrix* of Hunt and Morgan (1995:7) illustrates the importance of managing costs in the effort of achieving the highest value offering. This differs from the previous idealistic neoclassical view of perfect competition where management only had to determine the quantity and implement the production function. However, to be comparative management now needs to be far more operational in their approach in understanding, interpreting, translating and developing of strategies. Furthermore, the financial services industry, a market-based economy, has to be innovative – for example, in keeping up with technology – to achieve a competitive advantage (Hunt & Morgan, 1995).

Being efficient and effective is not only about innovation, but also about good governance through disciplined project management (PRCA, 2003). Administration forms part of the project management and establishes the working relationship between the customer and the agency. Once again, managing costs are imperative and the process of achieving that is simplified by allocating job numbers and purchase orders. Other seemingly insignificant pieces of information such as contact details of both the customer or for the purpose of the study, the financial services

company, and the advertising agency, contained in the briefing template, makes for easier communication (PRCA, 2003:1).

The following is important administrative elements to include in the brief, as seen from literature and confirmed by the research conducted:

- 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

PRCA Element 2: Where are we now?

In this part of the briefing activity, the financial services company should paint a picture to the advertising agency of where it is at. This is usually referred to as the 'background'. However, marketing employees should take care not to use this opportunity as a download onto the advertising agency of any and all information available to them. It should be distilled, relevant, while still providing enough data to give the context of the current situation (PRCA, 2003:25).

The financial services environment of intangible goods and services

The literature review looked at the intangibility of financial services. In contrast to the intangibility of financial services, the cruise service comprises both tangible and intangible elements (Kandampully & Hu, 2007; Lovelock & Wright, 1999). However, a tangible element, such as a cabin, hardly serves a differential purpose, and the challenge for a cruise line operator is to develop the cruise experience possibly by means of creating a strong, sustainable service brand. A strong service brand visualises the intangible elements of the cruise service and thereby serves as a risk reducer as perceived by the travellers (Skaalsvik & Olsen, 2013:428; Sok & O'Cass, 2011).

The Hurtigruten attraction product consists of both tangible and intangible elements. The tangible elements are quite easy for competitors to copy. A cabin on the Hurtigruten is comparable with one on any other cruise ship and does not provide any competitive advantage. Similarly, the restaurants on the Hurtigruten are quite similar to restaurants on other cruise ships. Consequently, in order to gain a competitive advantage and to be a lead-explorer cruise line operator, the intangible elements are the key factors in business survival. The differentiating values of the Hurtigruten, as perceived by travellers (Skaalsvik & Olsen, 2013:442) are top of their key survival list.

PRCA (2003), which contains a best practice guide for the briefing of advertising agencies, contains a list of issues which should be reviewed as part of the question “Where are we now?” in order to better inform decisions about the exact scope and focus of either advertising content or product/service redesign. This list plus its descriptors provides a comprehensive overview of all elements and issues that should be considered and taken into account when planning an advertising campaign.

This list is still relevant today (see PRCA, 2016; and PRCA, 2011), and has in fact been adopted by National Advertising Organisations / Authorities in various other countries and regions as well, with little or no adaptations (CAANZ, 2015, New Zealand; ACA, 2006, Canada; WFA/EACA, 2006, World Federation of Advertisers / European Union). For the detailed list of elements / issues to consider as part of the “Where are we now?” assessment, refer to PRCA (2003) or ACA (2006).

- Core product or service description
- Manufacturing or service delivery
- Distribution channels
- Market context
- Usage and attitudes
- Brand positioning
- Brand communications
- Key issues facing the brand

PRCA Element 3: Where do we want to be?

The components of the goals that a service provider aims to achieve are termed as 'a service centric view', 'a customer centric view', 'a service employee centric view', 'an organizing centric view' and 'a knowledge centric view'. The paper by Skaalsvik and Olsen (2014:55) contributes to existing knowledge of services branding by showing how innovative brand leadership may be obtained at the level of an individual service enterprise.

According to the American Marketing Association (AMA), a brand is *"a name, term, sign, symbol or any other feature that identifies one seller's product or service as distinct from those of other sellers"* (Skaalsvik & Olsen, 2014:427) and as "any announcement or persuasive message placed in the mass media in paid or donated time or space by an identified individual, company, or organisation" (Ansari & Riasi, 2016:22). Thus, according to this view, to become successful in services branding, a holistic approach is needed which encompasses all layers of an organisation (Skaalsvik & Olsen, 2013:431).

In the branding and service branding literature, a host of concepts are discussed, such as brand awareness, brand contacts, brand equity, service brand equity, brand identity, brand image, brand knowledge, brand messages, brand associations, brand promise, brand values, service brand co-creation, just to name a few (Brodie, 2009:109). The concepts Skaalsvik and Olsen (2013:427) focused on and that are relevant to this study are service branding, service brand equity and service brand co-creation (Skaalsvik & Olsen, 2013:427). Skaalsvik and Olsen (2014:55) argue that more research is needed on the appropriate branding of services. Skaalsvik and Olsen (2015:56), on the other hand, discusses a typology of services brands, which they suggest is built on two constructs, namely, a "customer-based" perspective (which can according to them be either "stable" or "dynamic") on the one hand and a "competitive environment" perspective (similarly either "stable" or "dynamic") on the other. They conclude that based on these dimensions/constructs it is possible to conceptualise four different services brand scenarios (stable/dynamic; stable/stable; dynamic/stable; and dynamic/dynamic), each of which has different implications for the marketing of the respective services (Skaalsvik & Olsen, 2015:60).

Advertising campaign activities should align with and reflect the organisational orientation in an effort to achieve overall competitive advantage (Day, 1994). When combining strategic management with quality management, the competitive advantage could be achieved through the following steps suggested by Day (1994:49):

1. The diagnosis of current capabilities;
2. Anticipation of future needs for capabilities;
3. Bottom-up redesign of underlying processes;
4. Top-down direction and commitment;
5. Creative use of information technology; and
6. Continuous monitoring of progress.

In order to achieve superior performance, empirical research suggests that the (financial services) company should be market oriented. Understanding the market and being able to predict what it wants and how it will react as well as achieving a position where customers will like the brand will enable the desired performance (Day, 1994).

PRCA Element 4: What are we doing to get there?

Service quality perceptions are influenced by factors such as how often contact is made between the service provider and the customer, as well as age, but not gender or income. The feedback from more mature respondents in the study on service quality was more positive with regards to the quality of interactions, physical environment and also systems quality (Ganesan-Lim, Russell-Bennett & Dagger, 2008:550). Marketers listen to stories that customers tell about the brand but they also participate in the conversation and storytelling practices, with their objectives and history. Differently from the past, brands negotiate their role in telling the story of the product (Mandelli, 2010).

PRCA Element 5: Who do we need to talk to?

A business needs to sell its products and services in order for it to exist, in other words to keep its market share and competitive edge (Hosseini & Navaie, 2011). To this end, once a business strategy is formulated, the target market needs to be

pinned down in line with that strategy, answering who and where the customers and prospective customers are. Elements such as demographics, lifestyle preferences, income level, provide insights for the development of the advertising campaign. Market research should provide data for the marketer to formulate what the relevant target market should look like (PRCA, 2003:31).

Example: We are looking primarily at urban women, 18 - 34, with household incomes over 50k per year. But the most important fact about this audience is that it is evolving, with race and ethnicity reflecting the increasing diversity of the US population. The magic word is "multicultural." – Adcracker.

When a company reaches out to a certain target market, it aims to influence a group to feel "love and passion" for the brand. Fournier (1998:363-364) went as far as to develop a typology, or list of 15 different kinds of customer-brand relationships, comparable to relationships between humans in order to explain the bond between the customer and the company. The list of human-brand relationships ranged from "arranged marriages" to "kinship" and "enslavements" and expanded on the different relationships customers could have with the brands with which they interact.

However, marketing today is all about context, therefore providing relevant information and content for the customers (Hosseini & Navaie, 2011). The industry expert website "Adcracker" agrees with the statement in the following words: 'An audience profile is more about how real people think, feel and behave than it is about numbers and percentages' (Adcracker, 2016)

Lastly, social media has had a tremendous impact on marketing and has forced a shift change in the marketing focus including the target market. The value of the brand is now determined by what customers are saying to one another on social media channels. In future, the target audience will fulfil the role traditionally played by the market in influencing customers (Severi, Ling & Nasermodeli, 2014:92).

PRCA Element 6: How do we know we have arrived?

Marketing does not only have the ability to influence the success of the business in a major way, but also often have a huge cost implication to the company. Therefore,

marketing efforts should ultimately be measurable. However, marketing is a complex discipline with a plethora of variables, which makes it challenging to measure. The results of marketing efforts could possibly only be seen in the long term (Faridyahyaie, Faryabi & Noubar, 2012:48). Proposed metrics to measure marketing effectiveness include market share, profitability, sales growth, customer numbers, customer satisfaction and customer loyalty (Faridyahyaie *et al*, 2012:55).

PRCA Element 7: Practicalities

Advertising appeal has an impact on how customers experience service advertising and possibly influences customers' attitude towards advertisement, brand and their intent to purchase (Khan & Sindhu, 2015:49). A prerequisite for the advertising agency in the development of an advertising campaign would be to get an understanding of the business challenges, as well as the needs of the customers.

It is important to be clear and precise in the brief as the level of detail is not the defining issue, but should rather provide a proper understanding of the requirements. A bad brief will be rife with contradictory information and vague goals. Part of the clarity that the marketer should provide is a true budget that should ensure more value is derived from the campaign (Makungo, 2015).

Furthermore, the advertising agency should be allowed to make decisions and have administration and process skills. If however, the customer is not familiar with the notion of setting and controlling project objectives (i.e. time, cost and quality) then one could expect discrepancies (Castell, 2005:323).

Nowadays, advertising agencies are often compensated for their bid-preparation when entering the contest to win an advertising campaign contract over their competitors (Horsky, Horsky & Zeithammer, 2014).

PRCA Element 8: Approvals

Advertising campaigns need to be approved by not only marketing managers, but also product managers as they often have different ideas of what the brand stands for. Looking at the brand from the outside, with a view of how external parties see the business, elevates the management perspective above traditional marketing

perspective in which the brand is viewed as a marketing communication tool which is the responsibility of the marketing department (Simmons, 2007 in Skaalsvik & Olsen, 2013:430).

2.4.5 Conclusion about campaign briefs

The study takes the advertising campaign brief as the focus point of communication between the financial services company and the advertising agency. The briefing process includes verbal and written communication between the two with the brief the written document that formalises the discussions, goals and expectations that the financial services company has of the advertising agency. This chapter has highlighted some of these expectations.

In the high-level reference to communication, it is evident that there are different forms of communication as well as different barriers to successful communication. This furthermore underlines the importance of proper and formal briefing methods, including a briefing document.

During the briefing process the financial services company aims to communicate the value of its offering to the advertising agency. As established earlier, once again, the brand plays an important role in positioning the value to the customer that the products and services would have.

To conclude this chapter, the study looked at what was found so far in the academic documents. The graph below gives a view of the key themes. Some examples of actual campaign briefs used in the industry are given in Appendix C.

2.5 SYNTHESIS OF KEY THEMES EMERGING FROM THE EXPLORATORY LITERATURE REVIEW

To recap, the literature reviewed the advertising campaign, which is the communication of the products and services offered by the financial services company as produced by the advertising agency.

Figure 13: The two diagrams explaining the rationale, approach and assessment in the literature review



Source: Calitz, 2016

During the briefing process the financial services company aims to communicate the value of its offering to the advertising agency. It was established that the brand plays an important role in positioning the value that the products and services would have to the customer.

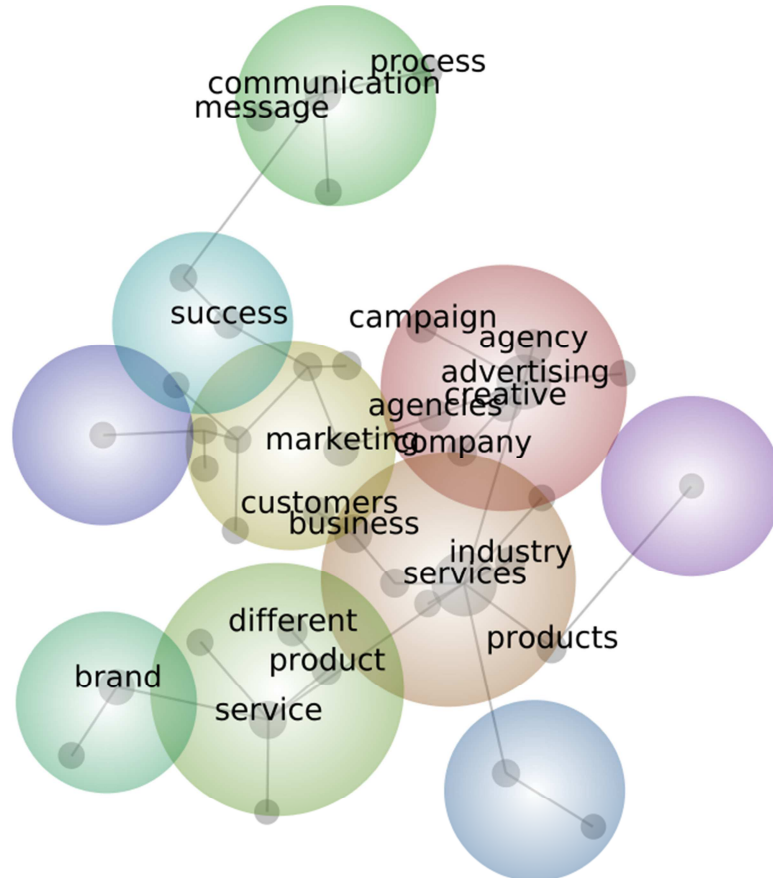
The diagrammatic representation (Figure 13) summarises the elements in the development of an advertising campaign. It mentions the perceived elements, role players and interactions at play when the campaign brief is negotiated and developed, whereas the Leximancer diagram in Figure 14 below highlights emerging themes based on the researcher’s analyses.

Throughout the literature review, the study takes the advertising campaign brief as the focus point of communication between the financial services company and the advertising agency. As stated, the briefing process includes verbal and written communication between the two with the brief the written document that formalises the discussions, goals and expectations that the financial services company has of the advertising agency.

In the high-level reference to communication, it is evident that there are different forms of communication and different barriers to successful communication. This furthermore underlines the importance of proper and formal briefing methods, including a briefing document. In order for a brief to be successful, the relationship between the financial services company and the advertising agency influences the success of the communication.

The literature builds on guidelines for a brief and unpacks the eight elements as suggested in these guidelines. Figure 14 overleaf is a high-level visual of the main concepts and themes as found in the literature. It will be compared in Section 4 with the results of the research conducted in the present study.

Figure 14: Visual view of emerging concepts



Source: Leximancer, 2014. Concepts and their links as found with Leximancer provide for themes to emerge throughout the review. The concepts illustrated here summarise the discussion so far and inform the way forward.

CHAPTER 3: RESEARCH METHODOLOGY

Chapter outline:

The purpose of this chapter is to:

- Revisit the research objectives for the study, and use it to establish a research topic for the study (this is already partly in the text);
- Inspect the research topic in the framework as provided by the exploratory literature review in Chapter 2, and if necessary adjust the research topic;
- Consider what the key outcomes from the research are likely to be;
- Discuss the advantages and disadvantages of using either a qualitative or a quantitative or a mixed-method research approach (already partly in the text);
- Frame the research topic in a philosophical world view;
- Craft a research approach (qualitative; quantitative and/or mixed-method) that will be most likely to reach the key outcomes as posited above and which is aligned suitably to allow a verification or refuting in the study of the findings of the exploratory literature review;
- Identify and formally record the terminology to be used in the experimental (data collection) phase, insofar as it differs from that recorded in Table 1 in Chapter 1;
- In the context of the research approach as selected, develop an experimental design that is both feasible (can be executed), practicable (against a reasonable time investment) and allows sufficient flexibility (such that it would be possible to amend the experimental design if results show that to be necessary, without compromising the experimental design and/or results);
- Based on all of the above, establish the target respondent group(s) that will be best equipped (through their experience, background and competence) as focus for the experimental phase of the project;

3.1 INTRODUCTION

Various studies have been done on the gaps and breakdowns in communication between people from different backgrounds (Bornman, 2016:183). The previous

chapters not only describe the different environments that the financial services company and the advertising agency operate in, but also their different measures of success. To understand the high probability of a communication breakdown between the mentioned parties during the creation of an advertising campaign, the research aimed to describe the inconsistencies in the perception of the value of the offering that the financial services company has. The instance of communication where the research investigates the possible breakdown is the campaign briefing process with the briefing document as the focus point or tactical element in the process.

In the research, the study aims to answer the question of how do or how should marketers brief advertising agencies successfully to achieve effective campaigns? What should the initial communication process between the advertiser, which in this case is the financial services company, and the advertising agency entail? This chapter describes the methods that were implemented to analyse the process between the financial services company and the advertising agency and to provide suggestions and a framework for a formal briefing process to be used in the workplace.

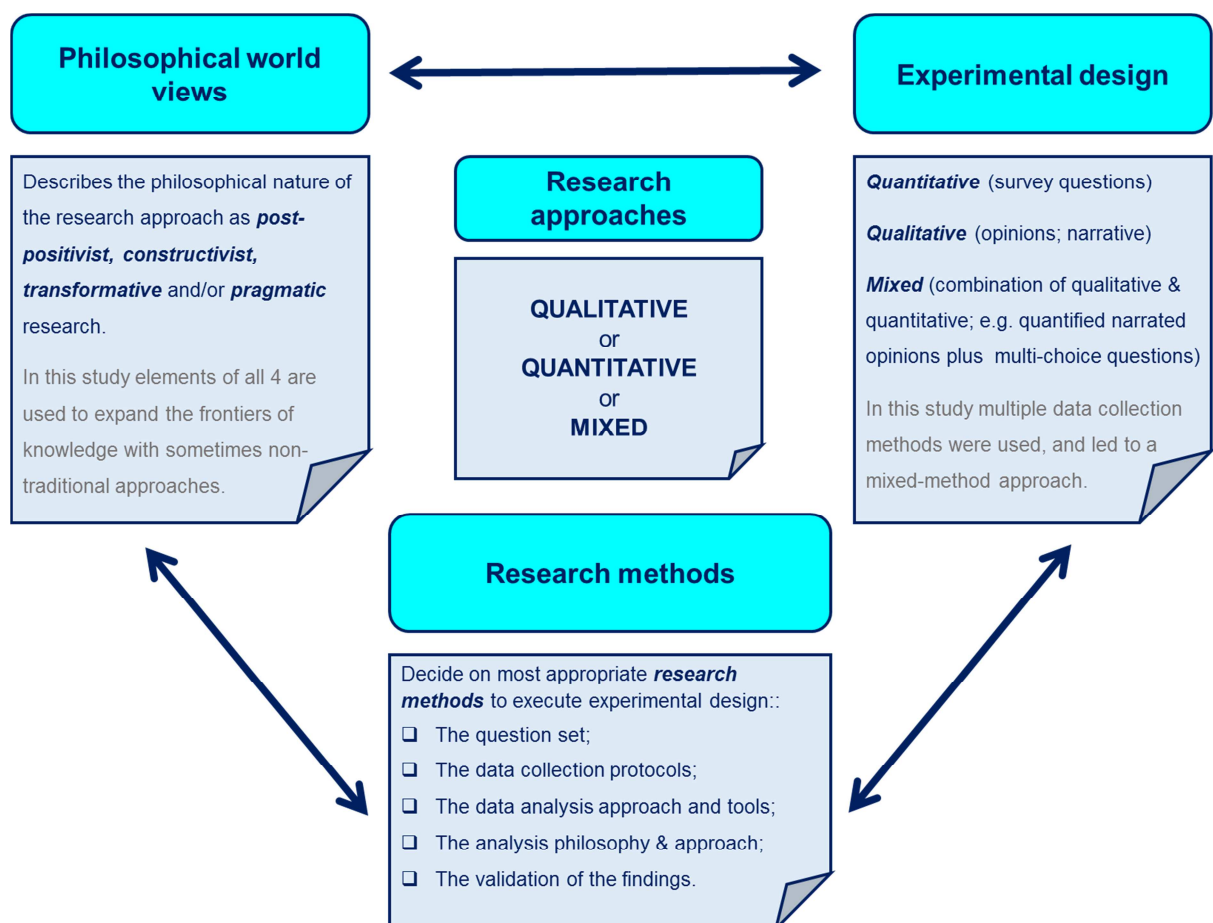
Revisiting the research objectives set out initially to guide the study:

- To describe the difference in perception between how the financial services company and the advertising agency view their own communication abilities and how they see the gaps in the communication between themselves.
- To look at conceptual frameworks that can assist in pointing out the communication gaps and consequently the different perceptions regarding the required outcome resulting from different backgrounds of the financial services company and the advertising agency.
- To look at the elements in the briefing process and investigate what the impact of each element is, as well as the opportunity it provides for misunderstanding.
- To unpack and review different formats in which financial services companies brief advertising agencies.
- To provide a framework for improved communication including a suggested template and toolkit for use during the briefing process.

So, based on this listing of the research objectives, it is fair to say that the research topic, namely to perform an “interpretation of campaign briefs between South African financial services companies and advertising agencies”, is a fair representation of what this study intends to achieve. Reference to the exploratory literature review in Chapter 2 also shows that the framework as listed above for the research objectives and the research topic as embodied in the title to this study are accurate, to the point and appropriate.

Figure 15 below was adapted from Creswell (2014: 35) to show the framework within which the rationale for an experimental study is developed. It will also be used and referred to in the text below to guide the discussion about the research into the campaign brief and associated briefing process.

Figure 15: A Framework for research



Source: Adapted from Creswell (2014: 35)

Based on the research objectives as articulated above and the exploratory literature review, it is the expectation that the research in this dissertation should allow for an in-depth assessment of potential gaps in the understanding of how financial services participants and advertising agency participants respectively see the development of a campaign brief and the associated briefing process. It is further anticipated that these insights can lead to the development of a toolkit and/or a protocol that will facilitate the development of an improved campaign brief as well as the associated briefing process.

3.2 RESEARCH METHODOLOGY

3.2.1 Introductory comments

Fundamental research, also called pure or basic research, aims to extend the boundaries of knowledge with no immediate application to existing problems. Applied research, or decisional research seeks to use existing knowledge to aid in the solution of some given problem or set of problems (Smith & Albaum, 2010:4).

Market research mostly focuses on the customer needs, behaviour and influencers, as well as on the company and its products, services, sales, price and influencers. This study aims to focus on the communication between the company and its third party suppliers, with a focus on the advertising agency (Smith & Albaum, 2010:4).

Such research typically incorporates both quantitative research and qualitative research to provide a broad picture (Pinto, 2010:813). These two types of research have traditionally represented the dominant paradigms when considering the research approach. In recent decades there has been an important academic discourse about these and other research approaches, which will be debated in Section 3.2.2 below.

3.2.2 Basic constructs guiding research approaches

Quantitative research has historically been the method of choice when the research question or topic is investigating a given theory, construct or model and where the research question aims to establish whether data and/or information collected from the target population factually supports theory, construct or model. In such cases, it

is required of the investigator to have a thorough understanding of the theory, construct or model being tested. Williams (2007) refers to historical records that indicate that the first recorded quantitative investigation was carried out in the 13th Century and involved investigators needing to quantify factual data.

Creswell in Williams (2007) noted that quantitative research involves collecting, analysing and interpreting information and then writing a report on the findings of the study, whereas qualitative research is an approach to data collection, analysis, and report writing that focuses more on the qualitative processes than the quantum of what has transpired, thus differing fundamentally from the traditional, quantitative approaches.

Qualitative research traditionally is the method of choice when the research question or topic requires a thorough understanding of processes, events and relationships in the context of the actual situation, whether that be societal, cultural and/or communal. Whereas a quantitative study approach, for example by using a questionnaire with multiple-choice questions, would have illustrated quantitatively nuances in the known aspects of the situation being studied, qualitative research would identify new insights, which are then contextualised relative to the facts that are already known (Oxford Journals, 2016).

Williams (2007) concluded after a comprehensive review of case study material that quantitative and qualitative research methods investigate and explore different types of claims to knowledge and that the two methods are designed to address different, but specific, types of research topic/question. It was concluded that the quantitative research method provides an objective measure of reality, whereas the qualitative research method assists the researcher in properly investigating all aspects and understand the complexity of a phenomenon. Blakeman (2015: 30-31) has a slightly different, although not mutually exclusive view from that of Williams (2007), namely that quantitative data refers to new data and is specific (typically employed in online surveys), whereas qualitative data gathering allows for the free expression of opinions.

Brannen in De Lisle (2011; 3) notes that the first recorded case of a researcher employing a multiple method research approach is that of Thomas and Znaniecki

studying the Polish peasant issue in the 1920s, and that it should be recognised as the birth of the mixed-method research approach. Over the 80-odd years since that first mixed-method study this so-called third research paradigm – the mixed-method research paradigm – has been extensively applied. Yet, at the same time, a war of words has raged about what can and what cannot be done in crafting a research approach, that still persists up to this day.

Researchers who favour mixed-method research approaches typically do so because they realise that by mixing methods appropriately and judiciously, they will be able to combine the benefits of both the qualitative and the quantitative research approaches, and can in most cases nullify or at least minimise the potential negatives associated with the disadvantages of both approaches. It is therefore clear that what is at stake here is not a right or a wrong way to structure the research approach, but rather the best and most optimal way, keeping in mind what it is that one wants to achieve as well as any known particular issues relating to the application of the respective research approaches.

The question nevertheless arises as to why both methods (qualitative and quantitative) should be used? Quantitative research is best if there is a large sample size (Myers, 2010:9), which was not the case as the chosen sample of the marketing fraternity in the FirstRand Group and the advertising agencies they deal with is relatively restricted, from a statistical point of view. Furthermore, communication is strongly influenced by the respective social, cultural and political views, amongst others, in each of the financial services company and the advertising agency. It is therefore not quite as straightforward to compare aggregate answers for the two parties and arrive at a definitive assessment of the degree to which communication is aligned between the parties and is effective. According to Myers (2010:10) triangulation as suggested in the method of research combining two types (it could be more) of research is an *“excellent idea if you want to look at a topic from different angles”*.

Nevertheless, in line with the emerging view that mixed-method research approaches are based on the strongly complementary application of qualitative and quantitative research approaches, the decision was made for the present study to employ a mixed-method research approach with the view to thus create far richer

content. Supplementing the quantitative survey results with qualitative data obtained via semi-structured one-on-one interviews created a much richer data set than would have been the case if only the quantitative online survey results had been used. The qualitative data set was obtained by analysing eight in-depth one-on-one interviews that had been conducted with knowledgeable participants from both the financial services company and advertising agencies.

Having made this decision, there is one last set of considerations, namely, what mental model will be employed during the research project which is the topic of this dissertation. De Lisle (2011) discusses the “philosophical world views” as articulated by Creswell (2003) and concludes that depending on the school of researchers this could either be as Creswell calls it a philosophical world view or in a more pragmatic approach it can be a mental model guiding investigative practice. Whatever the best reflection of this debate is, it is important to consider the researcher’s contextual framework from which the research will be conducted, analysed and interpreted, as well as ultimately reported.

In Figure 15, Creswell (2003) compares the four philosophical world views, namely, the philosophical nature of the research approach which is labelled as post-positivist, constructivist, transformative and/or pragmatic research. The following tabular comparison was drawn up using information contained in Creswell (2003):

Table 4: Comparison of claims in the literature for the respective mental states and the positives for this study

Post-positivism	Constructivism
Determination; reductionism; empirical observation and measurement; and theory verification	Understanding; multiple participant meanings; social and historical construction; and theory generation
Post-positivist research (also called post-empirical) goes beyond the borders of traditional research and frequently used non-traditional approaches to knowledge acquisition.	Constructivist research emphasises knowledge construction rather than knowledge transmission typically through a social intersection of people such as in meetings and social gatherings.

Transformative	Pragmatism
Political; empowerment issue-oriented; collaborative; and change-oriented	Consequences of actions; problem-centred; pluralistic; and real-world practice oriented
<p>Transformative research involves ideas, discoveries, or tools that radically change our understanding of an important existing scientific or engineering concept or educational practice or leads to the creation of a new paradigm</p>	<p>Pragmatic research disrupts the assumptions of older approaches based on the philosophy of knowledge, while providing promising new directions for understanding the nature of social research</p>

Adapted from Creswell (2003)

The interpretative text in each of the four blocks in Table 4 above paint a picture of the unconventional, of moving beyond the traditional, of exploring the research topic in new, innovative and exciting ways. Therefore, for this study, as a conscious decision, no choice of mental state or philosophical world view is made and the better aspects of every one of these four is used in the assessment, analysis, interpretation and write-up.

This truly establishes this study as a mixed-method, mixed framework and mixed paradigm approach; an approach which is believed will lead to excellent results. Therefore, in this study elements of all four the so-called philosophical world views are used to expand the frontiers of knowledge with sometimes non-traditional approaches whilst using a combination of qualitative and quantitative research approaches.

3.2.3 Data collection strategy

As the academic literature that focuses solely on the brief between a financial services company and an advertising agency was limited, the method for the research called for some form of mixed method, or put in a more direct manner, using different data collection approaches / methods to explore different aspects of the research topic. To put this in other words, different aspects of the perceived problem area concerned with campaign briefs and the associated briefing process were researched through different methods.

Therefore, to start with, the study followed an exploratory research methodology where the main concern was discovery to generate a theory (or approach) (Davies & Hughes, 2014).

Online surveys provided the base data to start with. It differs from pure exploration conducted simply as investigation as the end result is to discover, to use the field observation for the development of a theory, an approach often used to carry out social studies (Stebbins in Davies & Hughes, 2014). The features of an online survey enable one to develop dynamic and sophisticated surveys that include the possibility to apply skip logic, branching and looping and control (Smith & Albaum, 2010:175) which all add to the ease and effectiveness of use.

As technology advances, so does the way research is conducted and accordingly, surveys are therefore being conducted online more often and so, it has become an acceptable way of getting insights from respondents. Online surveys have the added benefits of cost-effectiveness, as well as technology features that allow, for example, for advanced survey flow logic and increased communication abilities as graphics can be included to aid and enhance the understanding of the questions. This form of conducting surveys is easy and administration is minimal (Smith & Albaum, 2010:72).

Benefits of online surveys are numerous, including the ability to collect data faster than would have been the case had it been manually conducted surveys. Respondents can complete the surveys when it suits them and at a pace that suits them. With the advancements of technology, surveys can also incorporate complexity in the questions and display a variety of graphics, illustrations or graphs, in an attempt to explain the questions better. The researcher can measure response time and automatic data encoding provides for fewer errors (Smith & Albaum, 2010).

Combined with the initial academic exploratory work, a descriptive study with data obtained from one-on-one interviews was therefore conducted, endeavouring to fill in gaps as identified through the online survey responses.

This is an approach often used in social studies to gather information about people, their circumstances and their environments and describe these social phenomena (Thyer, 2001). Descriptive studies are valuable for identifying themes and patterns

by examining the environment, examples, records and experiences of participants. Descriptive research asks questions pertaining to ‘What is happening?’ as opposed to ‘Why is this happening?’ (Palsy in Thyer, 2001).

3.3 EXPERIMENTAL DESIGN

The basic terminology used in this research project in general and in the experimental (data collection) phase is listed in Table 1 in Chapter 1 of this dissertation.

To summarise, this is an empirical study collecting and analysing primary data. This study incorporates results from quantitative as well as qualitative data collection. The data was collected through online interviews to advertising agencies and financial services company, and expanded on by data gathered from one-on-one or face-to-face interviews.

South African advertising agencies usually have the experience of working to advertise both tangible goods and intangible services and were able to comment on the distinction between the two.

With the use of the online tool Leximancer, the study conducted an initial analysis of the content found in the academic literature through web-like illustration of the major themes. This provided a visual representation of the main themes that were researched in more detail. “The thematic networks technique is a robust and highly sensitive tool for the systematisation and presentation of qualitative analyses” (Bryman, 2006:97-113).

In the context of the research approach as selected, the optimal approach would be to develop an experimental design that is both feasible, that is, can be executed, and practicable, that is, can be completed with a reasonable time investment, AND allows sufficient flexibility. The flexibility would be of such a nature that it would be possible to amend the experimental design if results show that to be necessary, without compromising the experimental design and/or results.

Figure 16 below summarises the complete value chain for the experimental design including the associated supportive action steps required.

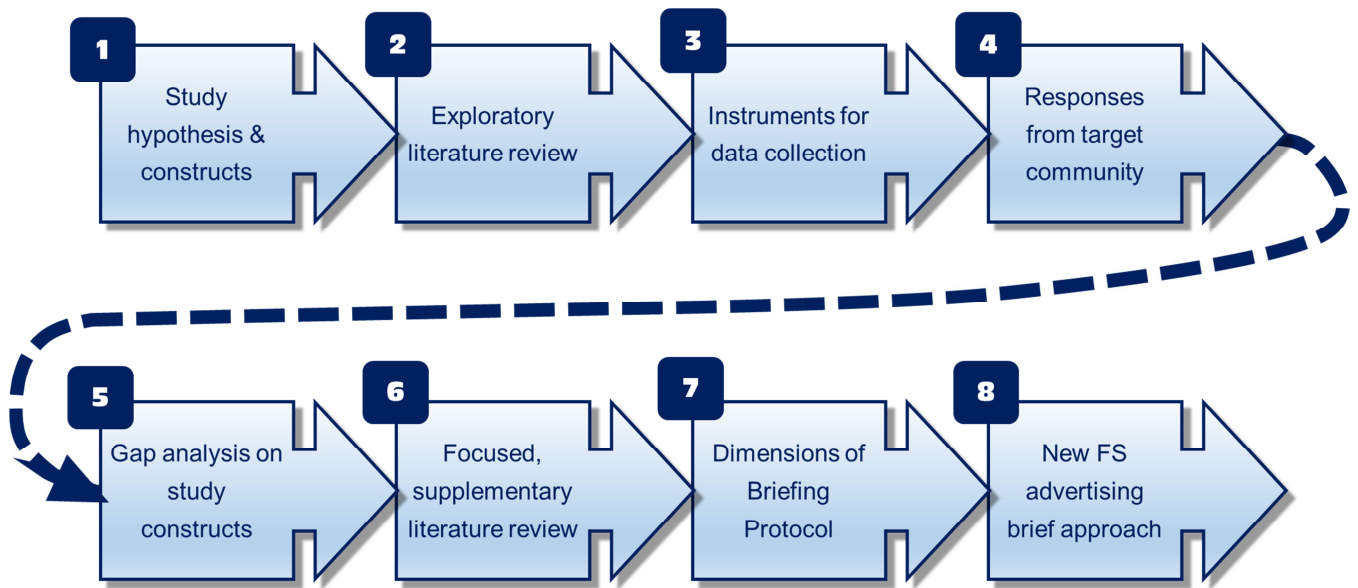
The steps 1 to 3 have been discussed earlier in this dissertation. Details of steps 4 and 5 follow below in the rest of this Chapter, whereas steps 6 to 8 are developed, analysed and discussed in Chapters 4 to 7.

The approach followed was at all times to establish what needed to be done, then proceeded to do it and in the event that either the process or the outcome did not achieve what the idea at the outset was, to modify the protocols and repeat the process. The following is a summary of some of the significant detail encountered during this process, to demonstrate the flexibility with which the study was undertaken:

- Originally it was intended to do an in-depth analysis of some the development of a finite number of specific advertising briefs at one or more financial services companies, with the idea being to either survey or interview members of the team that developed each brief from both the financial services company and the associated advertising agency. This approach ultimately had to be abandoned because of specific conflict-of-interest issues with the intellectual capital, interestingly of both the financial services company and the advertising agency. The risk of divulging sensitive information that might benefit competitors prohibited the participants to provide this information.

The experimental design was consequently amended to rather focus on a generic advertising brief. This implied that the sampling strategy had to be amended to ensure that sufficient statistical coverage is obtained to enable meaningful decision-making. Although this had been a potential showstopper, the change in approach turned out to yield an unexpected wealth of information which in the latter stages of the value chain allowed the development of a new advertising brief protocol.

Figure 16: Experimental design value chain



Source: Calitz (2016)

Note: FS – Financial Services

When the research proposal was originally developed, the focus was heavily on the quality and content of communication during the advertising brief development phase. Although this hypothesis was quickly borne out by the results from the survey and interviews, it rapidly became apparent that in order to properly understand issues relating to communication, it would be necessary to expand the scope of the constructs being interrogated deeply. The scope had to change from only communication to also include the actual content of the brief, the composition of the team involved in the development of the advertising brief, the value chain of this development process and the success measures being used to evaluate the outcome of the process of developing the advertising brief.

This again proved to be an inspired change as the five constructs being studied, coupled with an analysis using Service Industry Gap Model of Boulding (1993) provided an excellent overview of areas where the respondents from the financial services companies and those from the advertising agencies differed significantly in their views. In doing so, it provided the platform from which to develop a new advertising brief protocol.

The study objectives as agreed at the outset envisaged inspecting various templates for the advertising brief and protocols for the associated process, and using these together with the outcomes of the research to establish a recommended approach. During the exploratory literature review, a whole host of templates and approaches were evaluated. After completing the data collection process through the online survey and the one-on-one interviews, it was found that the process and template as proposed by the British Public Relations and Communication Association (PRCA, 2003; 2011) is the closest to the philosophy strived towards in the present study, and it was decided to continue with PRCA (2003) as platform. It is interesting to note here, as an aside, that the approach followed by the PRCA was virtually identical to that adopted here, including surveys and interviews with industry players to inform their decision taking about a proposed methodology.

However, the fact that the point raised in the immediate previous bullet led to the identification of the five constructs as described, opened the possibility of not simply endorsing a certain approach with maybe some margin comments from the present study added, but to develop an entirely new protocol. This was done and led to the protocol as described in detail in Chapter 5.

3.4 RESEARCH METHODS

Against the background of the experimental design as explained in this Chapter, and the research objective and topic, the research methods are required for each of the following areas through which to execute the experimental design. This summary listing is given here simply for completeness, with a cross-reference to where it is defined and used in the dissertation.

Table 5: Development and utilisation of research components

Research component	Described/Developed	Used in dissertation
<p>The question set</p>	<p>The question set is discussed in Section 3.6, and is contained in full in Appendices D and F and are used directly in Chapter 4 and indirectly in Chapter 5.</p>	

Research component	Described/Developed	Used in dissertation
The data collection protocols	These protocols are developed on the go and applied in Chapter 4.	
The data analysis toolkit	This toolkit is developed and described in Section 3.6.	The toolkit is extensively applied in Chapters 4 and 5.
The analysis protocols	These protocols are developed on the go and applied in Chapter 5	
Validation of the findings.	The framework of limitations is established and discussed in Section 3.7.	The findings are compared and tested statistically using state-of-the-art statistical testing protocols in Chapters 4 and 5.

3.5 DATA COLLECTION

3.5.1 Target respondent groups

Based on the development of the study as articulated in the earlier parts of this chapter, this section aims to establish those target respondent group(s) from the financial services companies and advertising agencies respectively that will be best equipped through their experience, background and competence to comment on the questions posed. Questions were posed either through the online survey or in the one-on-one interviews which form the central focus for the experimental phase of the project.

The purpose of the research is to discover the views of creative directors and relevant advertising agency stakeholders and then compare them to those of managers and relevant marketing team stakeholders in the financial services company. The participants in the study came from various company units inside

FirstRand, as well as Momentum, and the advertising agencies they work with. Only one person per business unit was approached to participate in the survey.

The study used a stratified random sampling approach to choose the participants. The two fundamental layers of the sample group are the population of respondents from the advertising agencies and the population of respondents from the financial services company (Leedy & Ormrod, 2005: 202).

The study focuses on the establishment of challenges and best practices associated with the establishment of the campaign brief for a financial services company. Therefore, it would seem logical to draw participants for either the online survey or the one-on-one interviews from on the one hand those departments in the financial services company that deal with the campaign brief, and on the other from the advertising agencies that are typically contracted to develop an advertising campaign based on the campaign brief.

In order to ensure that each participant is willing and able to answer all questions without any fear of retribution, in cases where the participants wants to raise a contentious and/or sensitive issue in his/her response, all survey and interview responses are protected and in all cases the anonymity of the participant is guaranteed. Therefore, the approach as described in Sections B and C below was followed conscientiously.

Advertising agencies

Advertising agencies that are used by marketing teams in the FirstRand Group in South Africa and with studios in Gauteng were contacted. The list of agencies contacted in alphabetical order are Actuate, BNMSA, Brainwwwave, Brandrenew, Coppercoast, Crazygrape, Creatiff, DDB, Eishdigital, Effective Measure , Etiket, Exposuremarketing, FoxP2, Freshive, Gloo, Google, Grid, Hasso, Helium, Icon, Impumelelo, KLCK, Lighthouse, Metropolitanrepublic, Missinglink, Own media, Paparazzo, Printx, Realmdigital, StickSA, Sunshinegun, Thatsit, Thewrittenword, Virtuosa, and Worldwide Creative.

In line with the undertaking re anonymity to interviewees and survey respondents, reference to the respondents from the advertising agencies (or the advertising

marketing sector) will typically be listed as “respondent from Advertising Agency A, advertising agency interviewee 1”, abbreviated as “AdAgl 1”.

Financial services companies

The list of financial services companies approached was confined to the FirstRand Group of companies that includes First National Bank and Rand Merchant Bank, and ex-FirstRand company, Momentum. In this study the views of marketers in FirstRand (mostly FNB) as representatives of financial services companies in Gauteng were therefore used.

In line with the undertaking re anonymity to interviewees and survey respondents, reference to the respondents from the financial services sector (or from the financial services company) will typically be listed as “respondent from Financial Services Company X, financial services company interviewee 1”, abbreviated as “FSCI 1”.

3.5.2 The data collection instruments

The main questions answered were around the brief and perceptions around the fulfilment thereof:

- What does a brief entail?
- How is the classification of products and services perceived?
- What is the role of services advertising (Mortimer, 2001:136); and
- Proposing a model to assist in making the briefing process more effective.

The same survey was used in both components of the study.

Since the online survey using the Qualtrics package (Qualtrics, 2005) involved individuals from the two respective sectors at play here, namely, the advertising/marketing sector and the financial services company, it created the opportunity to perform unstructured interviews as well, and to include the results in the overall data set.

This allowed the interviewees to voice a more definitive opinion as a result of their positions and experience (Welman & Kruger, 2001:189) and as a result substantively increased the depth and richness of the data set.

The instruments used can be found in Appendices D and F.

3.5.3 Process of conducting the research

The target agencies were all in Johannesburg and Pretoria and to initiate the study, the agencies were contacted to obtain the permission of management to contact certain individuals in their business to partake in the study.

Once permission was obtained an initial letter inviting relevant people to participate was followed by an email with a link to the survey. Respondents needed only click on the link to gain access to the actual survey instrument and to fill in the survey (Qualtrics, 2005).

Qualtrics employs advanced technology that offers users the capability to collect and track data and personalise questions as well as direct the flow of these questions. (Smith & Albaum, 2010:75), which made it easy to keep track of progress of the completion of the online survey.

A questionnaire was chosen as the research instrument to obtain data from a large sample population. The questionnaire (see Appendix D) comprised three parts.

- The first part asked demographic questions about the focus of the role (i.e. brand, marketing, project management, design) that the respondent fulfils; as well as the type of customer they typically serve (internal or external). The questions also looked into the background of the respondent as was deemed relevant to the study.
- The second part of the questionnaire comprised a list of questions with a multiple choice of answers to select.
- The third part requested information about the campaign brief. (The campaign brief process was described in a set of graphics (Figure 1) that summarised

the various relationships and processes that have to be implemented, rolled out and managed for success).

3.5.4 Project phases and timeframes

Research usually follows a well-defined value chain with a preliminary phase, followed by the main or principal investigative phase and concluded with validation phase (Oxford Journals, 2016):

- The **preliminary phase** is taken up with concept formulation (where qualitative research can prove exceptionally useful), but also the defining of project objectives and mostly then ends with a piloting phase.
- By using a mixed-method approach the **principal investigative phase** can either be phased or qualitative and quantitative research components alternately staggered in order to get optimal feedback from the principal investigative phase.
- Although many studies do not include a **formal validation phase** mixed-method research approaches are through their qualitative component exceptionally useful to conduct validity comparisons. Therefore, in the present study a component of validation is included.

The concept formulation phase and the establishment of project objectives, as already articulated above, was based on experience in the financial services sector, specifically with reference to campaign briefs and the briefing process and then also on the findings during the exploratory literature survey. During this process it became apparent that the perceived (real or apparent) service delivery gap of participants to a campaign brief process, respectively from the financial services company and from the advertising agency, was key to evaluating results (see Figure 17 below).

Before commencing with the study, a pilot study was conducted with a smaller sample size to go through the exercise and to test the relevance of the language used in the survey as well as the clarity of presentation of the subject. Thus, the questions were put through a process of pre-testing and re-evaluating to ensure that the study could achieve the required results. The pre-test ensured that the draft

survey questionnaire was built technically correct and that the outcome was concise without uncertainties such as ambiguously phrased questions.

Based on the survey responses of the initial participant group as well as specific feedback received from this test group, some amendments were introduced to the survey instrument before commencing with the actual study, which was launched in December 2014. The few tweaks that were made to the way in which the questions were formulated, ensured that there would be no misunderstandings or misconceptions, and that a robust data set was available on which the research could be conducted. The survey questionnaire used in this study is included in Appendix D (Documents D-1 and D-2).

The online survey was carried out first, with a target respondent group as discussed in Section 3.5.1 above. After an initial analysis of the responses, a prompt sheet was developed and used in selected one-on-one interviews. The prompt sheet used in the one-on-one interviews is included in Appendix F (Documents F-1 and F-2).

3.6 THE TOOLSET USED FOR THE INTEGRATIVE ANALYSIS OF THE RESPECTIVE DATA SETS

In this section an analysis is made of the respective data sets, and conclusions drawn about the most appropriate method of analysis, taking the nature and composition of the two respective data sets into account, as well as what the researcher wished to extract from this analysis.

On the one end of the spectrum, it was decided to use rigorous statistical analysis to establish the gaps (according to the Service Delivery Gap Model, see Section 6.5.1 below) between the survey responses from participants in the financial services company and those from participants from the advertising agencies. The statistical tools used here are discussed in Section 6.5.2. On the other end of the spectrum, a significant portion of the data gathered in this study is in the form of verbatim text of the interviews with participants from both the financial services company and advertising agencies.

Miles, Huberman & Saldana (2011) describe the way in which the analysis of qualitative and quantitative study results used to be treated within entirely different

paradigms. Quantitative data was treated in a formal statistical manner by using a toolset of statistically analyses and techniques to establish statistical significance of the respective data sets. Such an approach leads to a quantitative set of numbers on the basis of which the researcher can make decisions about whether any differences between the results from any two sets of data are statistically significant or not. Thus the assessment of the researcher on the results obtained from a quantitative data set is also quantitative, the findings are either statistically significant or not. On the other hand, qualitative data sets were analysed from a storytelling perspective, with themes and key concepts picked up from the analysis of the qualitative data sets used to make (at best) qualitative conclusions about the outcomes of the research.

Creswell (2014; 2003) explores ways of using the findings of both qualitative and quantitative survey designs in one study to gain meaningful findings, conclusions and recommendations that can withstand rigorous review and inspection and that can be used with confidence to manage a host of primarily social issues. Both Creswell (2014; 2003) and Miles, Huberman & Saldana (2011) advocate the use of so-called mixed-method research approaches in which the data gathered in each of the two paradigms discussed above, that is, the qualitative as well as quantitative research approaches, are routinely used in the same study. This therefore makes it possible for the researchers to tap into the quantitative outcomes obtained via the traditional statistical toolset as well as into the thematic analysis of narratives to draw collective conclusions based on the two sets of results.

Kelchtermans (2017) describes how he had needed to defend the findings of an entire social construct study to a group of peers without using any traditional statistical analyses and/or tools. This is one extreme example (using only the qualitative paradigm) but typically the approach used in recent years has been to apply both paradigms side-by-side (Creswell 2014; 2003; Miles, Huberman & Saldana, 2011; Ponterotto, 2005; Bazeley, 2004 and Simonton, 2003).

Although this parallel approach certainly allows the researcher to extract the best from both paradigms (Creswell, 2014), it still does not allow for the extraction of all potential cross-correlators, which could significantly improve the overall findings. Consequently, researchers such as the social research team at Stanford University (Stanford University, 2012) and others (see Section 3.6.3 below) have developed

powerful narrative analysis tools. This approach allows a much more coherent merging of findings extracted from the two paradigms and in an overall manner more reliable statistical “proof” of the research hypothesis.

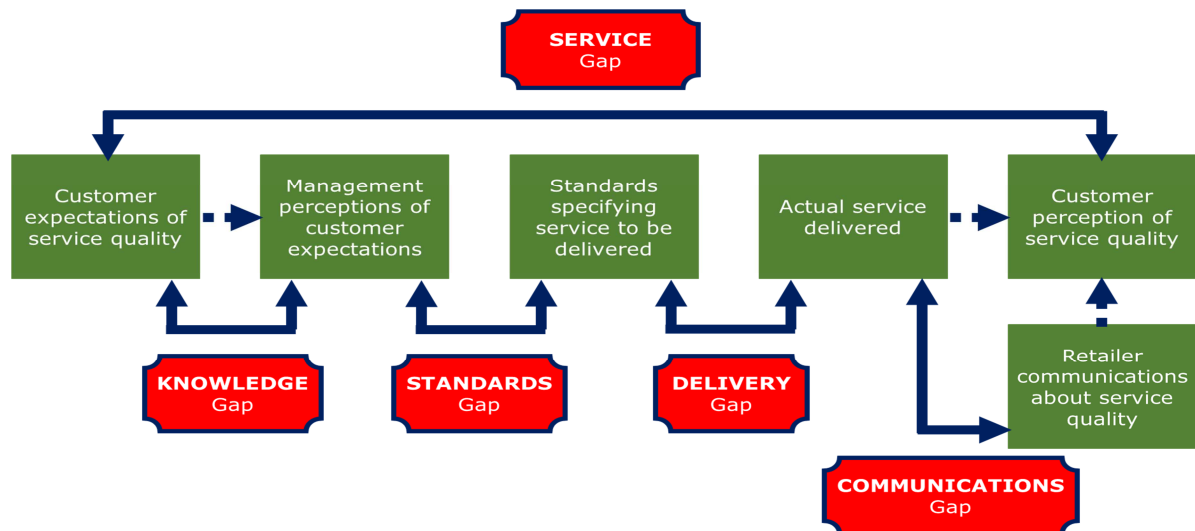
Against this background, it was decided to use a true mixed-method approach in the present study. This allows statistical treatment of concepts as opposed to that of frequently occurring words in the qualitative data set, while simultaneously providing for a traditional statistical treatment of multiple choice responses in the quantitative set.

These two sets of results are then combined to make high-level, holistic conclusions regarding the combined results set that can be used to assess the nature of the dynamics concerning the establishment of the campaign brief. The toolset used in this approach is briefly described in Sections 3.6.1 to 3.6.3 below, as well as the manner in which these respective tools are then combined to do a holistic assessment of all data gathered from both research paradigms and key points highlighted in Chapter 4.

3.6.1 The Services Industry Gap Model

In the creation of an advertising campaign the financial services company is the advertising agency’s customer. Interaction between the two coincides with results of perceived quality-service model studies where there is the possibility of a gap when the experience of the customers differs from their expectations (Boulding, Kalra, Staelin & Zeithaml, 1993:7). Customers form judgements of service quality and their judgements influence their actions (Boulding *et al.*, 1993:7). These judgements arise from expectations of what will, or should be delivered, and are formed during the briefing of the advertising campaign as that is the point in the communication where the rules of engagement as well as the requirements are formalised. Figure 17 schematically outlines the five potential gap areas (red shapes) that can occur at various points in the campaign brief establishment value chain.

Figure 17: The Services Industry Gap Model



Source: Boulding *et al.*, 1993

Figure 17 shows that the five gap areas between the two parties to the establishment of the advertising campaign, namely, the (mostly) marketing team members of the financial services company as well as the managers and staff members of the advertising agency. They take charge of the campaign brief assignment, covering gaps in:

- Knowledge (insight, understanding);
- Standards (i.e. of quality, of time management, of results);
- Delivery (what is delivered, and why, and when, and how?);
- Communication (perceptions, discussed in detail in earlier chapters); and lastly,
- Service.

This in itself is an important insight, because it shows that the gap is far wider than just in communication.

3.6.2 Statistical tools used to establish statistical significance and the gap between the parties

In order to assess to what extent the sample mean of two independent samples (seen in this study as samples taken either via online survey or via one-on-one interviews) agree or differ at a statistical level of significance, the Student's t-test is

used (McDonald, 2014). The so-called p-level is used, where the p-level is the significance level of the difference between Sample # 1 and Sample # 2 (in this study, the responses collected from the financial services company respondents (Sample # 1) and the advertising agency respondents (Sample # 2)).

The difference between Sample # 1 and Sample # 2 is considered significant if the p-level is less than 5%. If the p-level = 5%, there is a 1 in 20 chance that the difference was produced by pure chance. If the p-level is 1%, there is a 1 in 100 chance that the difference was produced by pure chance. Therefore, at a p-level of 10% and 20% respectively, there is a 1 in 10 and 1 in 5 chance respectively that the result was produced by pure chance.

The following segmentation will therefore be used in the current study:

- For the p-level less than 5%, there is no agreement between the samples, and consequently the service gap is unacceptably large;
- For the p-level ranging between 5% and less than 10%, there is only weak agreement between the samples, and consequently the service gap is still too large;
- For the p-level ranging between 10% and less than 20%, there is reasonable agreement between the samples, and consequently the service gap is reasonably small; and
- For the p-level greater than 20%, there is good agreement between the samples, and consequently the service gap is at an acceptably small level.

3.6.3 Using Open Text Analysis to create a strategic framework

A standardised and robust process had to be used to ensure access to all the issues that needed to be evaluated and used to establish a workable solution. This process is fact-based and contains checks and balances to guarantee the validity of the outcomes.

Numerous powerful software tools are available on the market for qualitative text analysis, with NVIVO (Stanford University, 2012; Welsh, 2002), Leximancer (Penn-

Edwards, 2010), Optimal Workshop (Wilson, Zeithaml, Bitner & Gremler, 2012) and Azure (Kosara & McKinley, 2013) some of the more popular paid options, and, for example, QDA Miner (Cuva, 2014) as freeware option. NVIVO (Stanford University, 2012; Welsh, 2002) and Leximancer (Penn-Edwards, 2010) were frontrunners in such analyses, and the proprietary software which underpinned these applications was referred to in their own marketing materials as computer-aided qualitative data analysis software or Caqdas (Predictive Analytics Today, 2016a). However, all of the above-mentioned approaches, whilst performing adequate to good qualitative analysis are at best limited in their quantitative analyses to some form of summative totals for hit words or hot topics (Predictive Analytics Today, 2016a; 2016b). Nevertheless, these developments have ushered in the era of computer-aided qualitative and quantitative data analysis software, called Caq²das for short, as opposed to the previous generation of software which as mentioned above was referred to as the Caqdas generation (Predictive Analytics Today, 2016a).

With the advent of this type of computer-aided qualitative and quantitative data analysis software (Caq²das), the segmented approach described above was essentially replaced by a holistic evaluation approach that integrated findings obtained for each of the major themes with those in the other themes.

In evaluating the options available to this study, the researcher gained access to a South African proprietary software tool which purports to perform a both qualitative and quantitative analysis of free texts. The outputs from this analysis provide a **diagnostic overview of leadership, operations and strategy issues as raised by respondents**, leading to its informal name, that is, the so-called “Dolos”. This software package has been in development BETA mode for more than fifteen years, and has over this period been applied exhaustively both in South African applications and in selected cases abroad (leading to more than 500 free text project data sets; or put differently, a collection of more than 5 million individual data sets (Swart, Personal Communication, 2016).

This so-called “Dolos” software is in fact a true computer-aided qualitative and quantitative data analysis software approach. The diagnostic filtering technology imbedded in the software allows for interpretation of open, unstructured text and extracts the high-level top-of-mind issues prevalent in the study. The software was

developed to quantify trends as discerned from qualitative (free text) interview results, that cover all aspects of aligning business processes, competence, governance, capacity and results with the strategic value proposition of the business in case (Swart, 2016, Swart, Personal Communication, 2016).

Figure 18 below schematically shows how the various components referred to above are connected. The software was initially created to holistically position all feedback from all stakeholders of a company or organisation in one single continuum. Rather than search for repeats of certain words or phrases, the software makes use of a type of Thesaurus, which is very extensive and contains more than 50 000 business and social concepts.

In recent years there has been an abundance of literature advocating viewing a business as one cohesive whole, or holistically, since all events and actions in any business impact in some way or another either directly or indirectly on all other parts of the business (Sherwood, 2014: 57; Manning, 2001).

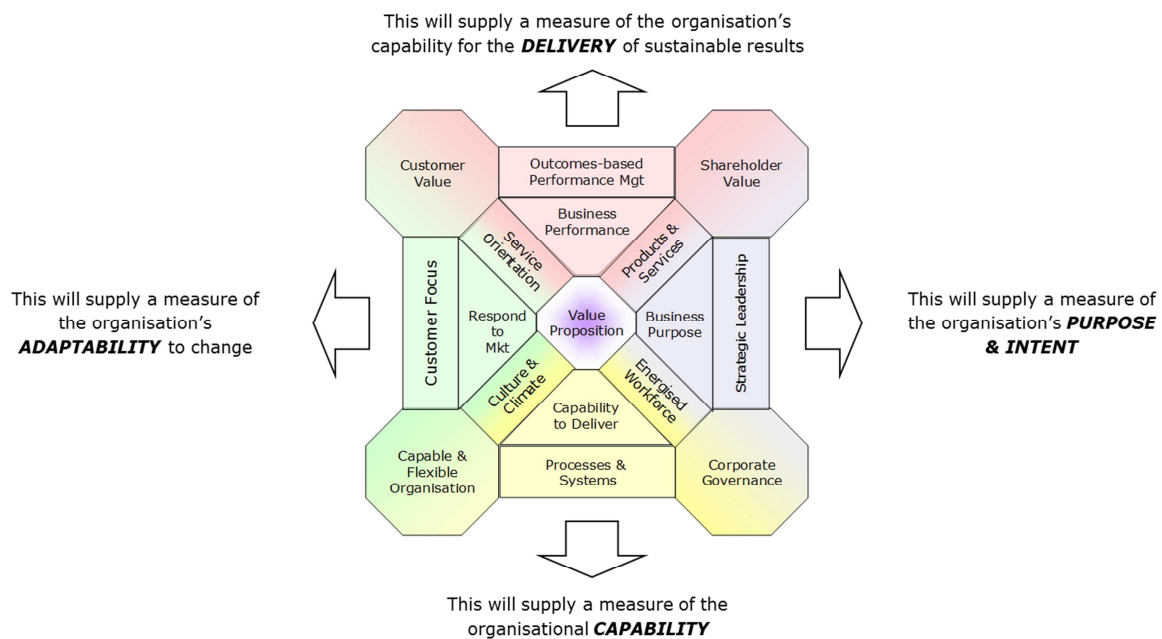
After an in-depth study and a preliminary analysis of the interviews as conducted in the this study, it became clear that the various interviewees had made wide-ranging statements concerning business dynamics as connected to the campaigns that follow on the campaign brief process. Seeing that the software had traditionally achieved a very strong performance record with a holistic reach across all aspects / dimensions of business, including advertising, it followed that using this software in the present study would potentially yield insights not readily obtained via either a qualitative, or a quantitative or even a more traditional (parallel) mixed-method approach.

It was not found necessary to do any customisation and/or calibration of the search engine of this software package in order to make it usable in the present study. All that was required was to add some graphical outputs to make the results more palatable or understandable to both advertising professionals and financial services professionals. In the rest of this dissertation the source of any outputs achieved using this software approach will simply be given as Caq²das (2016).

Therefore, in summary, the toolset used to analyse the qualitative data in this study consists of a portfolio of computer-aided qualitative and quantitative data analysis

software programs (Caq²das), of which the original BETA version of the “Dolos” analysis engine is the cornerstone. It also has access to and utilises the traditional statistical analysis techniques. In practice, the use of the Caq²das software implies applying a Caq²das diagnostic software filter to the raw data set. Such an approach allows a seamless integration of the results of qualitative and quantitative data sets.

Figure 18: Diagnostic filtering is a key element of the open response technology called Diagnostic Overview of Leadership, Operations and Strategy



Source: What Works, 2003-2016

Note: The open response technology based on the framework of inter-related concepts comprising a “Diagnostic Overview of Leadership, Operations and Strategy” and which in the BETA version of the software was called “Dolos” is referred to hereinafter as Caq²das.

The dialogue box below shows how the Caq²das software works in practice by using an analogy.

Dialogue box II: How does a Caq²das diagnostic filter software application work?



Europe II – A reconstruction of old family photograph

This method is similar to the reconstruction of an old family photograph from memory. The key features and important aspects of the study are highlighted through interpretation provided by the participants.

Like the selective memories and perceptions of the artist about how the family functioned back in Poland in the 1920's, the diagnostic filter takes all feedback received during a survey, and filters out other inputs to sequentially present views on particular issues.

How does the diagnostic filter software application work?

The Caq²das diagnostic filter is a software application that could be applied to all open feedback received (surveys, interviews, focus groups, and more). It uses an extensive processing engine, which recognises and sorts business concepts and issues. It allows for the reconstruction of the perceptions of respondents about the organisational process under review.

As with the painting and the photograph, the perceptions of respondents resemble the actual situation but are not perfect (or exact). Nevertheless, these perceptions are seen as reality and should be managed as such.

Source: Swart, 2016.

3.7 LIMITATIONS OF THIS RESEARCH DESIGN

3.7.1 Introductory comments

The validity of the findings from a study such as the present needs to be well understood. In reviewing potential areas where the research design and the constructs used are perhaps insufficient, the following potential critical areas were identified:

- The financial services sector as a sub-set of the services industry;
 - Potential implications of using a mixed-method research approach;
 - The participant profile;
 - The portfolio of areas probed in the data collection phase;
 - The communication gap between financial services and advertising professionals;
- and
- The intellectual property dilemma.

These are discussed below.

3.7.2 The financial services sector as a sub-set of the services industry

The financial services company is but one area of the services industry, but at the same time comprises many disciplines with often separate, seemingly unrelated offerings, which are typically a portfolio of intangible services. Yet, the outcomes of this study should provide enough of a generic result to ensure that it will be equally applicable to other service companies with different sets of intangible services.

More importantly, the approach researched here distinguishes between the campaign brief and the process surrounding it for a financial services offering as an intangible service but could be applied for the development of an advertising campaign also for tangible services and even fast moving consumer goods.

3.7.3 Potential implications of using a mixed-method research approach

The experimental design was from the outset geared towards a mixed research approach with quantitative data gathered via an online survey and qualitative data gathered via one-on-one interviews. In both instances, data was gathered from persons in both the financial services company and the advertising/marketing sector.

It will be shown below that it is possible to develop a mixed-analysis method that extracts complementary data from both the quantitative and the qualitative data sets. This approach will allow the extraction of those critical factors, which will be used to establish a robust and reliable best-practices protocol for the successful rollout of a campaign brief engagement and the associated subsequent advertising campaign.

This complementary approach also guarantees that it is possible to get optimal benefit firstly from the respective advantages and benefits associated with both the qualitative and the quantitative approaches for data collection. It also allows the extraction of sometimes extraordinary detail based on the computer-aided qualitative and quantitative data analysis, as employed in this study.

Thus, it can be concluded that the mixed-method approach to data collection is an advantage rather than a disadvantage.

3.7.4 The participant profile

The present study is neither about a specific financial services company nor about any given advertising agency, but rather about establishing from a variety of respondents in both sectors what issues can either stall or facilitate a campaign brief engagement.

One needs to consider whether the subset of targeted respondents (in this study) represents an appropriate mix of the right level and type of individuals. As an example, it would be irrelevant and inappropriate to interview the human resources manager of a financial services company about campaign brief development. The discussion about financial services as an example of tangible services in Section 3.7.2 above is also pertinent here.

In the present study, all potential participants in the study were selected either because they directly worked or managed in this area, or because of their in-depth understanding of and insights into the subject field, namely the development of campaign briefs and the subsequent roll-out and implementation thereof.

3.7.5 The portfolio of areas probed in the data collection phase

The online surveys commenced by gathering information about the participant, including demographic, academic background and field experience. The questions following those were multiple choice questions about the industry and perceptions around the engagement between the financial services company and the advertising agency. Lastly, participants were asked to write in their own words any suggestions or comments they might have around the advertising campaign briefing process and documents used in practice.

The interview questions also started with background, from there the aim was to get far more in-depth insights and perceptions with added attention paid to the areas of management of the process and the relationship and subsequent communication between the two.

3.7.6 The communication gap between financial services and advertising professionals.

The example of Dru Mincher and Sipho Silinde in Dialogue Box I on page 3 shows two individuals with very different ways of looking at the world. In either an advertising agency or a financial services company the internal communication style is steeped in a large volume of essential background information, which means that internally in these organisations intra-organisational communication is very much dictated or determined by the common knowledge of the speaker and the listener (think for example of an internal staff meeting). This type of communication is called high-context communication and focuses nearly exclusively on the end goal and in most instances does not even refer to the basic premises underlying whatever is being discussed. This is because all employees and managers know all of the (same) background information, or if they do not know it, they are expected to know it (Fill & Jamieson, 2011; Hooker, 2008; Nishimura, Nevgi & Tella, 2008).

On the other hand, when professionals from two such high-context environments work together, their basic portfolio of basic background organisational (or sectoral, or cultural) knowledge may and normally does vary dramatically (Nishimura, Nevgi & Tella, 2008). Therefore, in order to be able to properly understand one another lots of background needs to be shared for each point raised. This is called low-context communication and is very different from high-context communication. It has been shown that even professionals from high-context environments, such as is the case in this study with financial services professionals and advertising agency professionals, find it difficult if not nearly impossible to switch from their usual high-context communication style to a low-context communication style (Fill & Jamieson, 2011; Nishimura, Nevgi & Tella, 2008). The probability of misunderstandings is therefore very real and significant.

Both the advertising agencies who (predominantly) target working with financial services companies and the advertising and other professionals working in financial services companies and who are mostly involved in establishing the scope and guidelines for the development of campaign briefs are aware of this potential pitfall. They usually take extra precautions to ensure that differences in communication perspective, context and style do not lead to misunderstandings.

This aspect is probed in the online survey as well as the one-on-one interviews and it is shown that there is considerable awareness in this regard. Nevertheless, the findings with regard to communication need to highlight this as a caution.

3.7.7 The intellectual property dilemma

In developing a research approach for this study, the original concept was to take a number of specific cases where campaign briefs are developed and to probe both groups of parties to each such campaign brief. This was done to establish a framework of issues that could guide the development of an effective approach to take the development of campaign brief for financial services forward. In this way, one would be comparing like with like when the interview and/or survey responses from participants from either the financial services company or the advertising agency that took place in the development of a specific campaign brief were compared, analysed and assessed.

In the early part of the research, a number of interviews following this approach was therefore conducted. However, it very early on became apparent that such an approach posed a very real stumbling block. When a specific campaign brief was put under the magnifying glass the conversation was for a large part centred around intellectual property issues, which although a key part of the development of any campaign brief is never really a contentious issue. Both parties, that is, the financial services company and the advertising agency, understand the issues surrounding intellectual property and have systems in place to deal with it. From the perspective of this study though one cannot report on specific intellectual property issues since neither the financial services company (their intellectual property) nor the advertising agency (their frequently protected approach for dealing with intellectual property) would be willing to allow specific cases to be dissected such as is required for the present study.

Therefore, the initial set of interviews was discarded and the project approach changed to one where the views about the development of a campaign brief for any unspecified or undisclosed financial service offering is researched by interviewing and surveying participants from both financial services companies and advertising agencies. Although those companies and agencies invited to participate, work together frequently on specific campaign briefs the focus of the research was never on a specific brief but always on the general approach and processes involved. This is reflected in both the survey and the interview constructs (see Appendices D and F).

The risk therefore is that because of this generalised research approach the comments from the two groups, that is respondents from financial services companies and participants from the advertising agencies, would not be “like for like” but could be about unrelated issues which may compromise the study results and findings.

In order to counter this possibility the number of participants invited to the data collection process was therefore made sufficiently large to ensure that the statistical significance of any findings is guaranteed.

Because of the size of the economy in South Africa very few advertising agencies can afford to specialise only in one sector i.e. financial services. In protecting their intellectual capital, financial services companies usually require advertising agencies to enter into a sole mandate contract for campaign work. The advertising agencies therefore have clients in many sectors.

One would need to interview all of the advertising agencies that does any work for a financial services company to get a statistically reliable response at any level of confidence of 90% or more and any margin of error of 1 in 20 (5%) or less (McDonald, 2014). That is not practically possible, so with that in mind this study targeted 35 advertising agencies, albeit more than one person in one agency, and got collectively 20 online responses supplemented by 7 interviews from the advertising agencies, which is considered sufficient for the purpose of this study.

Similarly, the number of significant financial services companies in South Africa is very limited, and each of these really house a number of businesses under one roof (divisions). From a logistical point of view, two such companies were selected for this research, namely FNB and Momentum. These two businesses with a core focus on banking and related services, as well as life insurance and related services, were selected to represent financial services in South Africa. The study targeted all of them and got 25 online responses and one interview response.

Based on the statistical significance considerations referred to above (reference) this response rate is again considered sufficient for this study.

Lastly, on the issue of intellectual property, the findings will therefore have to include a caution in this regard.

3.7.8 Synthesis

Once it is decided to continue with this research and validate the proposed recommendations of this study, it is more than likely that a completely different research construct and approach will be developed, but for this study we believe that the approach as followed is appropriate and does not limit the study in any way.

It will, however, be necessary as shown above, to caution appropriately about the level of detail and shared understanding of any intellectual property involved and about different styles of communication between financial services and advertising agency professionals, and in particular about the differences in dialogue demands associated with high-context and low-context communication.

CHAPTER 4: ANALYSIS OF SURVEY AND INTERVIEW RESULTS FOR A FINANCIAL SERVICES ADVERTISING CAMPAIGN BRIEF

Chapter outline:

The purpose of this chapter is:

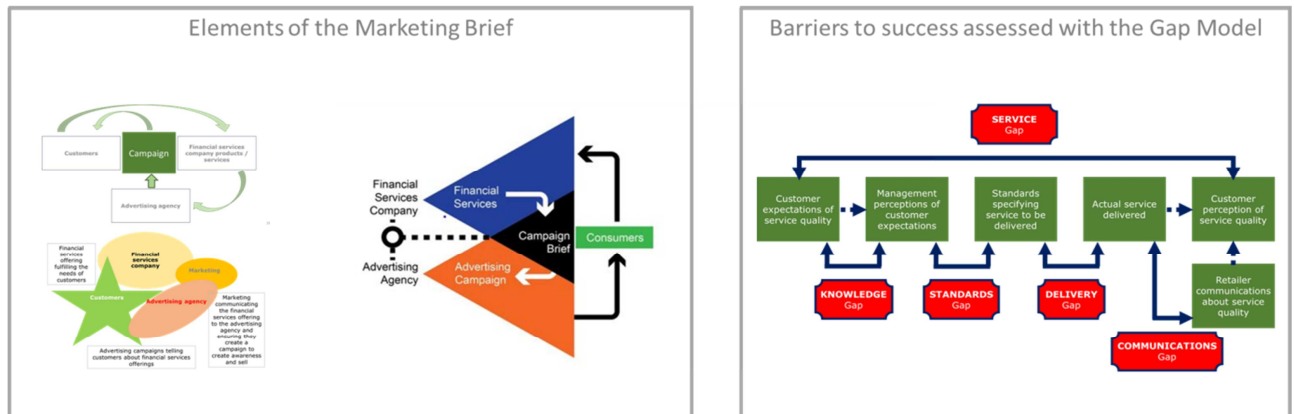
- The analysis of the various sets of data as gathered through the online survey and the one-on-one, face-to-face interviews;
- Including, *inter alia*, for each of the collective outcomes of survey and the collective outcome of the interviews a qualitative, as well as a quantitative processing, analysis and representation of the results.

4.1 INTRODUCTION

The study brief is reiterated in this chapter as basis for the evaluation of the data gathered through online surveys with both financial services company middle managers and staff, and also senior/executive managers in a selection of advertising agencies. The data gathered in this manner was augmented by face-to-face interviews with appropriate employees from both a financial services company and from several different advertising agencies.

The storyline in Figure 19 develops the analysis in the context of the comprehensive overview in the preceding chapters, which evaluates communication processes implemented in different types of campaign briefs and how these are rolled out in order to achieve success. In the case of a campaign brief, the campaign brief culminates in a campaign that entices potential (or existing) customers to take up the products or services that are on offer.

Figure 19: Storyline of communication between a financial services company and an advertising agency as summarised in the briefing template



Sources: Calitz, 2016 & Boulding *et al.*, 1993

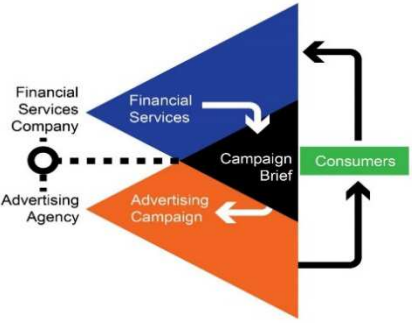
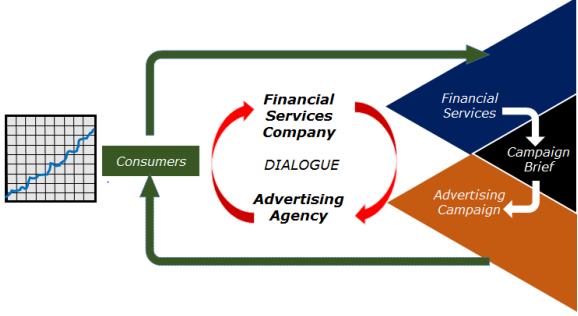
4.2 DATA ANALYSIS

Data were analysed to depict patterns as well as similarities and/or opposites. The steps that were followed are:

1. categorisation;
2. unitising the data;
3. recognising the relationships and creating suitable categories for these relationships and
4. reaching conclusions through developing and testing of the said theories (Saunders, Lewis & Thornhill, 2007:479).

In the following text the qualitative and quantitative analysis of the online survey will be discussed in Section 4.3 first, to be followed by the qualitative and quantitative assessments of the data obtained through the one-on-one interviews in Section 4.4.

Table 6: Updated schematic representation of study discussion - in the communication process during a campaign brief for an advertising campaign

<p><i>Schematic presentation used in the first part of the study as indication of the flow of the discussion and where the content is focusing in the discussion</i></p>	<p><i>Updated schematic presentation for easier reference used in concluding portion of study.</i></p>
 <p>The diagram shows a funnel shape on the right. The top part is blue and labeled 'Financial Services', and the bottom part is orange and labeled 'Advertising Campaign'. A black arrow points from the 'Financial Services' section to a black box labeled 'Campaign Brief', which then points to a green box labeled 'Consumers'. Another black arrow points from the 'Advertising Campaign' section to the 'Campaign Brief' box. On the left, 'Financial Services Company' and 'Advertising Agency' are connected to the funnel by dashed lines.</p>	 <p>The diagram shows a similar funnel shape on the right. A red circular arrow labeled 'DIALOGUE' connects 'Financial Services Company' and 'Advertising Agency'. A green arrow points from the 'Campaign Brief' box to a green box labeled 'Consumers'. A green arrow also points from 'Consumers' back to the funnel. A small line graph icon is shown next to the 'Consumers' box.</p>

Source: Calitz, 2016

4.3 RESULTS OF THE ONLINE SURVEY

4.3.1 Introductory comments

The online survey was submitted to 149 possible participants in the financial services company and to 35 possible participants in advertising agencies. With regard to the financial services companies, where 149 invitations to complete the survey was distributed of which 50 opened the e-mail, 32 started the survey and 25 completed it in full. Of the 35 invitations to complete the survey that were distributed to the advertising agencies, 21 started the survey and 20 completed it. The results therefore reflect the viewpoints of 45 online survey respondents.

4.3.2 Qualitative assessment of survey results

Table 5 below summarises the similarities and differences between respondents from the two sectors, providing insights into varying backgrounds and viewpoints.

Table 7: Comparison between the results from the online surveys sent to financial services company marketing employees and advertising agency employees

Attributes	Similarities	Financial services company (25 completed in full; 7 partial)	Advertising agency (20 completed in full; 1 partial)
What do the respondents look like?			
Demographics	The average respondent is an English-speaking female between the ages of 25 and 34, living in Johannesburg, holding a post-graduate degree	Working mostly as a marketing manager.	Working mostly as a manager or CEO of the agency. Higher percentage females responded with a skew towards an older person.
Business size and focus	The respondent works in an environment with 10 employees.	Although the company is far bigger, the direct area in which the respondent works has fewer than 10 employees and the focus is on personal finance or retail.	The company or agency the respondent works for has fewer than 10 employees and the focus is mostly on digital advertising.
Relationship between financial services company and advertising agency			
Relationship and role	Different agencies are used for different work.	The feeling is that the relationship is good.	The feeling is that the relationship is <u>very</u> good.
	Respondents feel that there is a difference between advertising tangible goods compared to advertising services.	The respondent uses the agency for both branding and creative work	The respondent (agency) is sometimes used for both branding and creative work.



Attributes	Similarities	Financial services company (25 completed in full; 7 partial)	Advertising agency (20 completed in full; 1 partial)
Briefing process			
Brief	The brief happens through a combination of elements.	Written documents and face-to-face meetings are most important.	Written documents and the combination of elements are most important. Face-to-face meetings are not as highly rated.
		Financial services companies perceive themselves to be more formal than other industries.	Financial services companies are not perceived as more formal than other industries.
		The brief is perceived to be effective, with an average of <u>three</u> reverts.	The brief is perceived to be effective <u>to a certain extent</u> , with an average of <u>four to ten</u> reverts.
Elements that could influence the success of the campaign in the brief and execution of the brief			
Success	The <u>measure</u> of success is not clear.	An advertising campaign is successful when it aligns with the original brief.	An advertising campaign is successful when the customer is satisfied. The <u>opinion</u> about success is not as clear-cut.
Tools	The tools to measure success vary between the financial services company and the advertising agency.	Financial services-related tools that are used, are often originally created or coded by the company itself.	Mostly tools for digital measurement and industry standards are used as tools.
Language	The respondent believes there is a difference in the language that the	Although the financial services company respondents feel that they use jargon, the	The advertising agency respondents feel that financial services company employees



Attributes	Similarities	Financial services company (25 completed in full; 7 partial)	Advertising agency (20 completed in full; 1 partial)
	financial services company uses compared to that of the advertising agency in terms of financial services jargon.	feeling is not as strong as with the advertising agencies.	<u>definitely</u> use jargon.
Communication	Communication is important.	The respondent tries to improve communication by having <u>face-to-face meetings</u> with the advertising agency.	The respondent tries to improve communication <u>following the process</u> agreed upon with the financial services company.
Communication barriers experienced	The respondent experiences barriers in the communication process.	The following barriers are experienced in the communication process: Physical: Noise or faulty equipment	The following barriers are experienced in the communication process: Physical: The venue or meeting room
		Physiological: Combination	Physiological: Combination, but eyesight is less important to this respondent than to the financial services company respondent.
		Psychological: Business focus and education.	Psychological: Language and education.
Elements to include in the brief	Content, words Message Timing schedule Budget	Strategic intent Target market Action steps Customer journey	

Attributes	Similarities	Financial services company (25 completed in full; 7 partial)	Advertising agency (20 completed in full; 1 partial)
	Both agree that the <u>objectives</u> are important, but there is a slight difference in the focus of these objectives. (It could be that the different respondents used different words to describe the same function.)	Clear description of objectives and outcome	Communication objective Objective of the campaign The business objectives

4.3.3 Quantitative assessment of survey results

The survey results on a question-by-question basis are given in Appendices E and G and are summarised in Table 8 below.

In order to quantify potential GAPS between the views of the participants residing in the financial services company (FSC) and those from the advertising agency (AdAg) the mean selected position is calculated for each of the two populations, namely the financial services (called FSC in the table overleaf) and the respondents from the advertising agency. This implies that the average of all selections for each sector is calculated for each of the respective groups (FSC and AdAg).

In the case of a question where the choice is simply “YES” or “NO” or is one of multiple choices which logically go from one end to the other of a continuum (for example, ALWAYS, MOST OF THE TIME, SOMETIMES, NEVER) the calculation of the GAP and the understanding of what the answer means is simple. If 58% of one group said YES, and 74% of the other said YES the GAP in the “yes”-answers between the groups, the GAP is 16%.

However, in the case of a series of alternate options as potential answers to the question posed, if these options are also labelled 1 through to N where N is the last option, a calculated result where one group as an example select on average option $n + \delta_1(i)$ (where n is an integer between 1 and N-1 and $\delta_1(i)$ is a fraction

between 0 and 1) and the other group select on average option $m + \delta_2(i)$ (where $\delta_2(i)$ is a fraction between 0 and 1 and m is an integer between 1 and $N-1$ with $m \neq n$). One could then say with safety that the GAP between the selection of the two groups is equal to $[n-m + (\delta_1(i) - \delta_2(i))]$ and once the standard deviation of the two sets of results is added one can make statements about the statistical significance of the observed differences between the average selection by the two groups.

In Table 8 overleaf the comparative results for the different questions are colour-coded to indicate the degree of divergence (increased GAP) between the two groups, with green signifying little divergence and red on the other end of the scale signifying statistically significant divergence.

The colour coding in the table below indicates the degree of agreement between the two component data sets, that is, the data set collected via online survey from financial services members of the engagement team, on the one hand, and from participants hailing from the advertising agency on the other.

p-level less than 5% = no agreement between the samples
p-level between 5 and 10% weak agreement
p-level between 10 and 20% - reasonable agreement
p-level more than 20% good agreement

Table 8: Comparisons between results of survey respondents in the financial services companies and advertising agencies respectively to highlight GAPS between the parties

QUESTION	Mean GAP	Confidence Interval		Group 1 FSC		Group 2 AdAg	
	FSC-AdAg	From	To	AVE	StD	AVE	StD
How would you rate your relationship with the employees of the advertising agencies?	-11.61%	-22.86%	-0.36%	75.9%	19.8%	87.5%	15.5%
When thinking of the advertising agencies you use, are they your primary design agency as well as primary advertising agency? In other words, are you responsible for creating their advertisements, and also do their branding and design work?	14.09%	-2.59%	30.77%	57.1%	25.3%	43.1%	28.2%
Do you think there is a difference between advertising financial services and tangible goods?	11.51%	-9.60%	32.62%	89.3%	28.4%	77.8%	42.8%
When creating an advertising campaign, what do you consider to be a formal brief?	-3.77%	-17.63%	10.09%	54.0%	32.1%	57.8%	33.7%
Please choose the most important element in the brief	3.09%	-16.41%	22.59%	52.1%	32.5%	49.0%	31.2%
How often do you use a formal briefing template?	12.84%	-3.02%	28.70%	70.2%	24.5%	57.4%	26.2%
In your opinion, do financial services companies use a formal, prescribed briefing process more often than non-financial services companies ?	24.43%	-6.66%	55.53%	53.8%	50.8%	29.4%	47.0%
In your opinion, how formal is the average briefing process you adhere to?	20.36%	4.99%	35.73%	61.5%	23.7%	41.2%	26.4%



QUESTION	Mean GAP	Confidence Interval		Group 1 FSC		Group 2 AdAg	
	FSC-AdAg	From	To	AVE	StD	AVE	StD

Do you think there is a difference between the language financial services company employees use compared to the language used in the advertising agency?	9.33%	-1.96%	20.62%	74.0%	18.0%	64.7%	17.8%
In your opinion, how effective is the briefing process between yourselves and the advertising agency?	-2.56%	-17.54%	12.41%	64.1%	26.1%	66.7%	19.5%
In general how many reverts does it take before you agree with the advertising agency on the goals and the way forward for the advertising campaign?	3.88%	-5.74%	13.50%	68.6%	13.6%	64.7%	17.6%
What do you feel the advertising agency has to achieve for you to consider an advertising campaign to be successful?	-5.48%	-17.57%	6.61%	54.7%	32.0%	60.2%	28.8%
Do you have tools to measure the success of your advertising campaigns?	9.13%	-22.69%	40.96%	65.4%	48.5%	56.3%	51.2%
On a scale of 1 to 5 how important do you think communication is in the briefing process?	12.88%	-13.36%	39.12%	82.0%	37.2%	69.1%	46.4%
Do you try to improve your communication success by taking specific actions?	5.56%	-3.72%	14.83%	100.0%	0.0%	94.4%	23.6%
Please choose the boxes that will indicate which actions you take.	-4.24%	-14.24%	5.76%	47.2%	23.7%	51.4%	24.4%
Do you sometimes experience barriers when communicating with the advertising agency?	-18.12%	-42.22%	5.98%	76.0%	43.6%	94.1%	24.3%

QUESTION	Mean GAP	Confidence Interval		Group 1 FSC		Group 2 AdAg	
	FSC-AdAg	From	To	AVE	StD	AVE	StD

According to you, which physical barriers will influence the communication during the briefing?	14.50%	-6.35%	35.35%	64.5%	11.4%	50.0%	12.7%
According to you, which physiological barriers will influence the communication during the briefing process?	10.81%	7.01%	14.61%	78.0%	2.8%	67.2%	9.0%
According to you, which psychological barriers will influence the communication during the briefing process?	-5.07%	-30.45%	20.32%	72.4%	20.0%	77.5%	14.4%

4.3.4 Summary of online survey results

Sections 4.3.2 and 4.3.3 above contain the results obtained from the online survey from both a qualitative and a quantitative perspective. The qualitative assessment shows that for large parts of the issues probed the respondents from the financial services companies and those from the advertising agencies agree remarkably well with one another, with the only differences being a matter of detail, for example as far as specific systems and approaches used by the two groups of respondents are concerned. It is, however, difficult to pin this down exactly because of the fact that the survey was not probing the same marketing brief for both the financial services company and the advertising agency, but rather phrased the questions in a generic manner to prevent any intellectual property conflicts of interest (see also Section 3.7.7 above where this is addressed).

The quantitative results, which largely support the above-mentioned qualitative assessment, do show that there are differences in some areas between the responses from the two groups at a statistically significant level. In Table 6 above the lines corresponding to such issues are coloured red, orange and yellow (in decreasing order of level of difference of opinion). The issues are mostly to do with either team dynamics or the detail of the brief.

4.4 RESULTS OF THE ONE-ON-ONE INTERVIEWS

4.4.1 Introductory comments

The next part of the study expands on the results gained through the one-on-one interviews with employees from both the financial services company and the advertising agency. It looks at differences and similarities found through semi-structured interview questions.

The interviewees were also asked for any documents that would assist and add to the understanding of the campaign development process, which includes the briefing process.

In Section 4.4.2 a qualitative assessment of the findings is first given, after which a quantitative assessment of the same interview texts is given in Section 4.4.3.

4.4.2 Qualitative assessment of interviews

The data from the one-on-one interviews was grouped into sections with the same core content for ease of reference, with verbatim quotes to substantiate and reference the introductory statement/s. Therefore, to confirm, the respondents' anonymity was protected by giving each respondent a coded label (FSCI or AdAgl and a number). A transcription of the complete set of interviews is included in the dissertation pack.

(a) *General commentary about the briefing process*

The results from the interviews align with the results of the survey and confirm that wherever an advertising agency gets involved in a financial services campaign, whether internal, external, above-the-line, or below-the-line, some form of brief exists and a good brief makes the campaign much more efficient and effective. There is a range of ways to brief and the formality differs widely from campaign to campaign and advertising agency to advertising agency. [*... it is a mail that is being sent through by the bank ... and then we discuss it via telephone and ...try to sort it and then we go to quotation*' (AdAgl 6)].

The format of the brief and the briefing process also differs from one area in the business to the next. [*I also don't think critical thinking has been applied to the structure of the briefs and the content that goes into the briefs*] (AdAgl 7)].

This again could mean that there is no agreed upon process in place when it comes to briefing. [*... the briefing system is not ... perfect ... what we have done from our side is to ... make a form that will make it easier for the customer to send us a brief*] (AdAgl 6)]. Advertising agencies see imperfect briefing processes as inevitable, an unavoidable reality that they just have to deal with and get on with the work.

The absence of a prescribed, formal process makes the interaction between the financial services company and the advertising agency less cumbersome initially and more flexible, however it is often frustrating. Results for both parties could be hampered and work is not always delivered as efficiently as possible. [*We actually implemented that formal template ... all the important info, put it in a formal brief ... We didn't have a formal process and I now see the benefits of it*] (AdAgl 4)]. Agencies agree that where there is a formal brief, the process runs more effectively. [*... a formal process and structure does have its benefit*] (AdAgl 7)].

Despite the formality of the brief, it is the starting point of the advertising campaign and working process that follows between the financial services company and the advertising agency to create an advertising campaign. [*... for bigger campaigns it is important to start with the brief as the origination of the campaign.*] (AdAgl 1); [*... the better the brief ... the better, the quicker the turnaround*] (AdAgl 6).]

The brief has various goals, one of which is to formalise the relationship, roles and responsibilities between the advertising agency and the financial services company. [*... a formal process gives the project or campaign the focus it needs. It also establishes the relationship between the two parties in the execution thereafter*] (AdAgl 1); [*... getting it right the first time saves a lot of time*] (AdAgl 6).] In line with this, the brief also establishes the roles and responsibilities on both sides of the campaign. [*It creates and establishes the responsibilities on both sides, on the side of the agency and on the side of the customer*] (AdAgl 2).]

The size of the job as well as the size of the advertising agency also seems to have an influence on the formality of the processes that have been established. [*For quick jobs, it is different; then we do not need to meet face-to-face*] (AdAgl 1).]

Often, the smaller the agency, the less it can rely on working within a formal framework. [*... we have a briefing template, but we don't use it*] (AdAgl 5); [*It gets tricky to manage all of this because of the extreme tight deadlines that there are. So it needs to go through that process*] (AdAgl 6).]

When collaborating with other agencies, the smaller advertising agency has to follow the direction of a lead agency. The lead agency will need much more information than the secondary agency. [*I think that as the lead agency, you would need more information from the current situation, the business's challenge, where they want to be and how to make the adjustment to get there. You will need a lot of information on where you are now and where you want to be*] (AdAgl 5).]

Having a properly completed written briefing document simplifies the life of the designers and clarifies objectives. [*It (the brief) is perfect for us to understand exactly what the customer wants*] (AdAgl 3); [*... what this form actually does is to get the customer to think really what is the (desired) outcome, who is their customer, who does this ... go to*] (AdAgl 6).]

A proper brief also gives the advertising agency a formal document to fall back on when the financial services company deviates from the original goals. [*... going back to the brief and highlighting what some of the objectives are*] (AdAgl 7).] The advertising agency could refer back to the brief throughout the various phases of the advertising campaign – from the proposal to implementation, timelines, reviews and reports. [*... we do. ... the brief already helps us to create the template for the reporting ... start with the big result and then you start unpacking it. The big result relates to the objective or the brief at least*] (AdAgl 7).] Without a brief, the advertising agency experiences stress. [*... someone will phone and tell you something is very urgent. We do cater for a bit of urgent time but ... it is difficult. They think they can just add things and we can still deliver and we can't*] (AdAgl 6).]

There is no consistent briefing process and when there is a process, it is often perceived to be out of date or insufficient. [*I do not find that there is a formal*

template in place and the state of advertising has changed quite a lot since some years ago and I find that the briefs and the templates currently being used haven't adapted to this changing environment' (AdAgl 7).]

In short, a brief ensures that everyone working on the campaign is aware of what is required, what the costs will be and how long it will take to implement. [*'We bill for our time, and if we work according to a brief, everything is easier. Everyone knows what they are doing and what the implications in terms of money and time would be'* (AdAgl 1).]

(b) General commentary about the advertising campaign process

The financial services company through a collaborative effort between the product house marketing team and the above-the-line marketing manager initiates the brief. The above-the-line campaign direction takes the lead in terms of concept and message and other elements of a holistic through-the-line campaign will follow that lead.

The briefing template is used to capture the details of the required results and objectives of the advertising campaign. Table 9 shows the process used by the financial services company in the development and media flighting of an above-the-line advertising campaign. This was confirmed by the commentaries received from one-on-one interview respondents.

This marketing or communication person then conveys the goal of the business to the advertising agency to enable it to create a campaign. The confirmation could be done telephonically, or via email. [*'We are usually present at a meeting where the customer gives us instructions. But this could also be on the phone ... Then we also meet face-to-face.'* (AdAgl 2).] Most respondents preferred a face-to-face meeting to discuss the requirements. [*'You could get more information and understanding in a face-to-face meeting'* (AdAgl 5).]

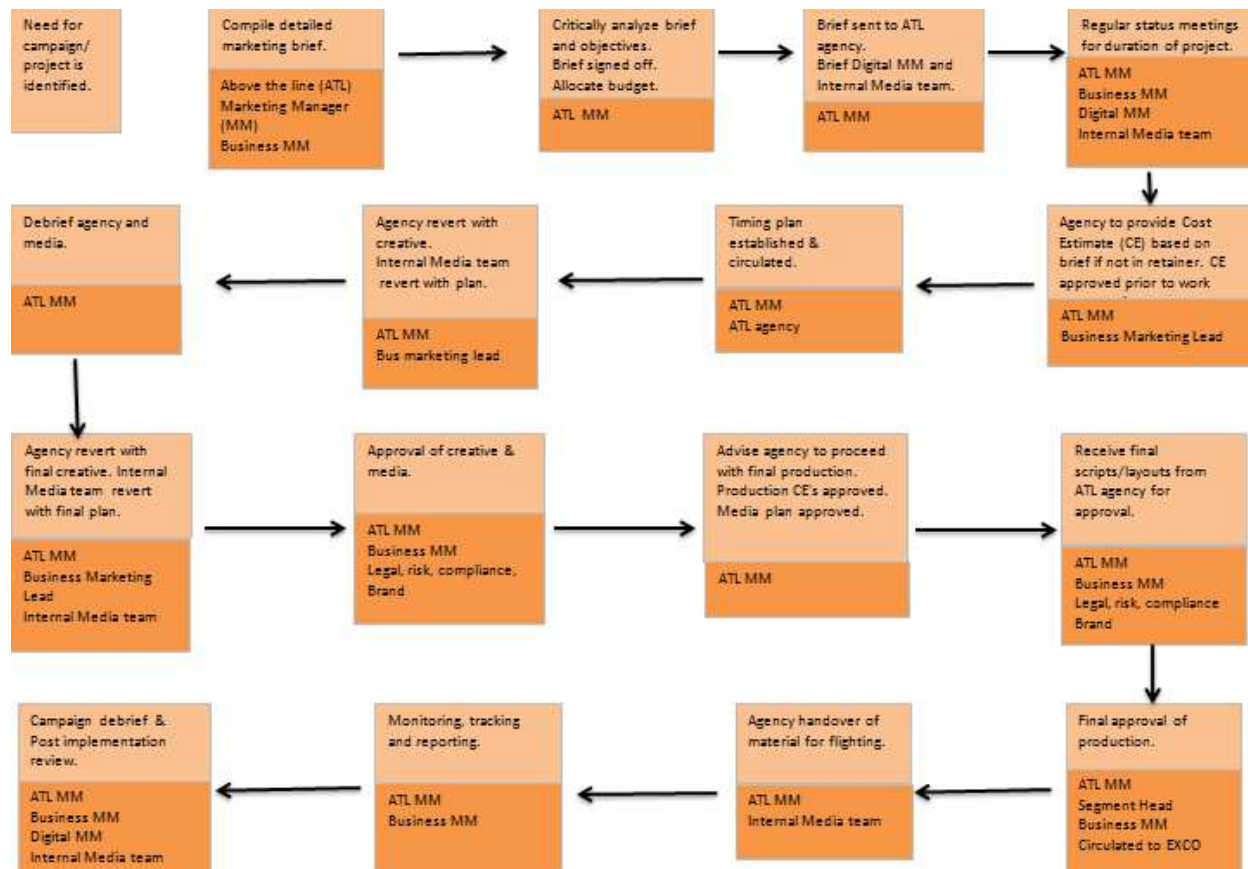
(c) General commentary about the process value chain in developing a campaign

The person at the financial services company, responsible for marketing or communication, acts as the interpreter to the advertising agency and should

therefore understand the business – what it is they are doing, what the benefit is, which need it fills for customers.

Already in this stage of the briefing process there are communication gaps as indicated in the surveys. The financial services company uses industry jargon that might not be known or is not clear to the advertising agency. This could lead to misunderstanding and could ultimately hamper the results of the campaign. Table 10 below conceptually shows the process value chain from concept to review.

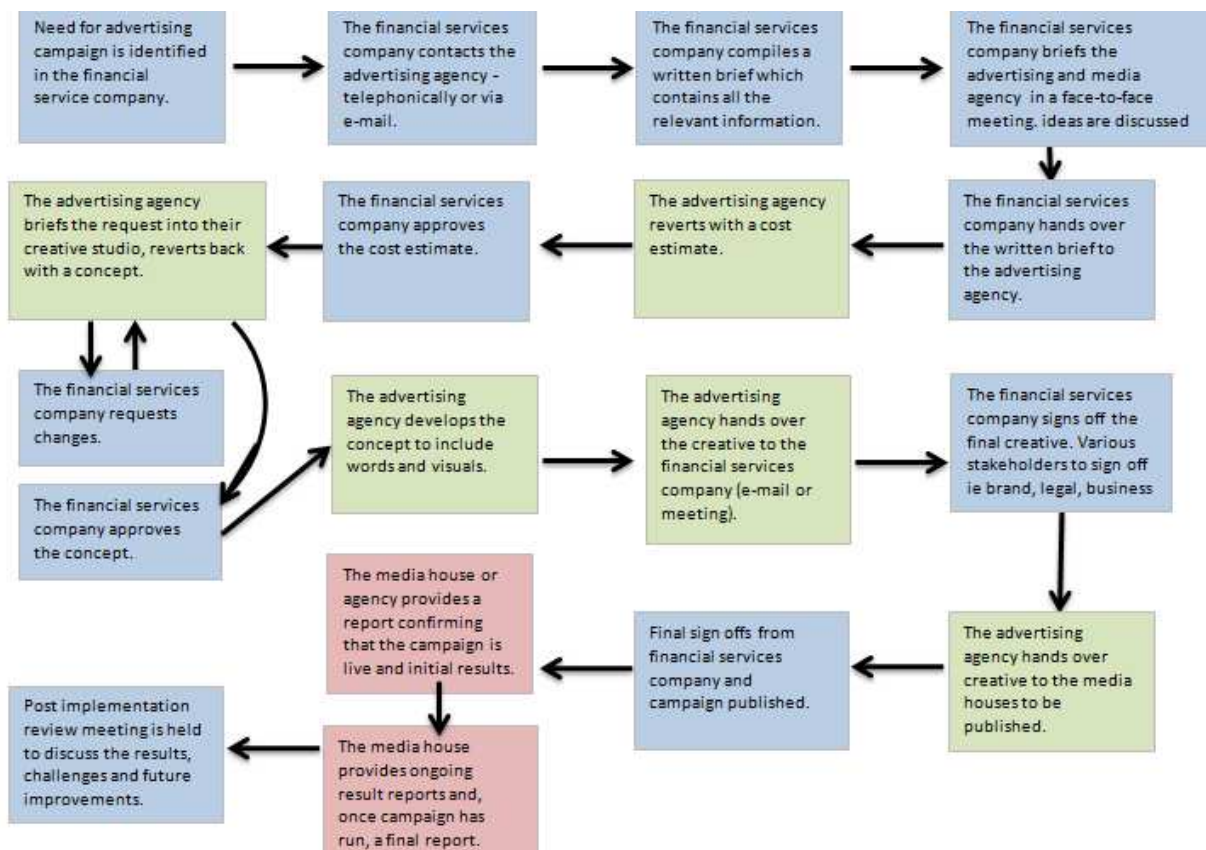
Table 9: Financial service company process used in the development and media flying of an above-the-line advertising campaign. The light blocks on top indicate the actions and the darker blocks below shows the roles responsible for the various functions



Source: South African Financial Services company, 2015

After the financial services company has briefed the advertising agency, the agency should immediately start to play an advisory role and suggest possible implementations of which the customer might not have thought. [*... it's our responsibility to highlight things the customer might not even be aware of and in particular in the digital space*' (AdAgl 7).] Talking the customer through the campaign or event systematically, imagining the prospective customer journey, helps the financial services company marketing people to include all the necessary and relevant detail and information in the discussion. [*... who is the event for; when, where is the event, so that will make the customer think ... all of that information adds to the value; do you have a budget ...*' (AdAgl 6).]

Table 10: A summary in diagram format of the steps in the advertising campaign from concept to review



Source: South African Financial Services company, 2016

From the advertising agency’s point of view, the account executive takes the brief back to the agency to draw up a quotation for the costs. Once the financial services company has signed the quotation, the designers at the advertising agency will be

briefed and work on the campaign will commence. Apart from the brief and briefing documents that are exchanged between the financial services company and the advertising agency, the advertising agency often has to compile another briefing document to use internally to brief the designers or developers. [*... it opens a creative brief and we talk through it with the customer.*] (AdAgl 5).]

The advertising agency comes up with the first creative concept, which is taken back to the business to approve. Business signs off or gives approval and the advertising agency can develop the brief. [*... the power of a signature on a document is a good way to commit a customer to a specific direction*] (AdAgl 7).]

(d) *General commentary about the method of briefing*

The different types of briefing (communication channels, really) are clearly distinguished below:

- **Telephone call**

Often the first step is a phone call or email to set up a meeting initiated from the financial services company to the agency. [*... we receive the brief, the task, in a meeting or via an email or on the phone*] (AdAgl 2); [*Actually I haven't ever done it telephonically because it doesn't work*] (FSCI 1).]

- **Meeting**

During the first interaction, the agency gets some background, and the marketing people from the financial services company should have discussions with product owners or business units and other team members, which would enable them to discuss the needs and perhaps some thoughts on the theme and the thinking about it. [*Ask as many questions as possible about the reasons and the context around the brief and what the role is of the brief in context of the broader objectives and ask questions about the restraints. I suppose it's a verbal unpacking of the brief to come*] (AdAgl 7), [*We sit together and discuss where we want to go...*] (FSCI 1); [*... we would have a meeting*] (AdAgl 4). In the first meeting the stakeholders share initial ideas: [*... like a brainstorming session ...*] (FSCI 1).]

- **Briefing document**

The briefing process should not only be a verbal one; the requirements need to be documented in a written brief to take back to the advertising agency studio where the designers take the process further and implement the creative process to end with a campaign. Respondents agreed that there are document requirements, as well as a discussion [*'... at the end of the conversation we put down the details in writing about what we want by when, a bit of a project scope'* (FSCI 1).]

- **Briefing to the design studio, revert and final concept**

Steps after briefing include concept presentations, editing and feedback reverts until the campaign is ready for implementation. Thereafter a series of reports and updates follow until the campaign has run its course. [*'And then we will have a first presentation to the customer where we show a kind draft, a mood board ... we get feedback from the customer which helps us to better understand what it is they want to achieve, what their goals are, so that we can come up with better communication, a better end product. ... we edit our ideas ... sign off. Once ... we have concept approval, we can continue to the actual art work'* (AdAgl 2).]

(e) *General agreement on composition of briefing discussion and / or template*

Please note that the list below was compiled by using both survey responses, interview results as well as from examples of briefs provided by the interview respondents.

- Company name.
- Name of the contact person and contact details.
- Job description/Name of the campaign.
- Job number (for administrative purposes – where required).
- Background to the campaign. The background could go back years, tell the history of the business, where this is relevant [*'... we used to do to it like this, and we are now doing this'* (FSCI 1)].

- Objectives, goals, purpose of the campaign, business need, key objective [*'... we need to know what the goal is'* (AdAgl 2); *'and makes that marketing person also more aware of what they actually require'* (AdAgl 6)].
- Target audience, target market, who the market is, who will be receiving the message [*'... part of the brief is to say what the target market is'* (AdAgl 6)].
- Call to action.
- Budget from the financial services company and cost estimate from the advertising agency.
- Key insights into the business or product (and/or service) that will be the focus of the campaign, the unique selling point of the product, as well as how the product will be sold.
- Any planned media (where the advertising agency is smaller and works with other agencies, they are brought on board only after the media have been booked and briefed).
- Timelines, deadlines, timeline management – as part of the advertising agency's responsibilities [*'When does the customer want to go to the market? ... and when will the products, if not yet ready or available, when will that be ready to be launched?'* (AdAgl 2); *'... it is very important to stick to the deliverables and, you know, get it done'* (AdAgl 6)].
- Scope, which could include target market, reach and how big the reach should be.
- Information about competitors.
- Expected final product: technical specifications, format, size.
- Discussion of assumptions. [*'These could be legal issues, or political. Social sensitivities could be a risk factor. If you have the same message as another product has, or even just the same construct. Ask yourself, does the creative solution work with the rest of the business?'* (AdAgl 5)].
- Stipulate constraints and restrictions [*'... what is not acceptable in the environment that the man on the street would not know'* (AdAgl 5); *'... monetary constraints is an obvious one. Resource constraints, because*

often as a creative agency you might think of ideas and not think of what the consequence or the impact is on actually managing that particular component of the campaign and whether the resources are available to manage that component of the campaign ... (AdAgl 7); *'We also need to know what the pitfalls are for the customer. What is worrying you? Is there anything we need to mend, or that you need to mend? Or is there anything that we need to stay away from?'* (AdAgl 1); *'... the project owner will know exactly how to say things and what not to, where not to go'* (AdAgl 6)].

- Inclusion of possible risks in the briefing process [*'... some briefs ask for more innovative, creative solutions in which case we just make clear what the risk are with that approach. Or a risk might be that a campaign gets too much traction ... and we can't manage the scale of that response'* (AdAgl 7)].
- Dependencies – where more than one brand or more than one business unit has a stake in the advertising campaign. [*'Business stakeholders need to be available for things like signoff. And the people who are available should also have the authority to sign off'* (AdAgl 5); *'... it is vital for us to understand what the timelines and budgets are that are available and that allows us to come back with realistic sort of schedule of events'* (AdAgl 7); *'... you send out a mail but you don't update the website. That is not good'* (AdAgl 6)].
- Budget.

(f) *General commentary about purpose, scope, goals and desired outcome*

The outcome could be about sales numbers, or about changing behaviour, or even changing emotions. [*'Discuss "why are we doing this? 'what is the desired outcome?" ... I believe that communication always aims to get some sort of action as an outcome.'* (FSCI 1)]. It is good practice to refer back to the brief throughout the process and ensure that both parties stay close to what they intended doing. [*'Does this suggestion that you have ... speak to the objectives that you have or does it contradict it?'* (AdAgl 7)].

[*'Scope is important because it gives context to the objectives. ... with the objectives, the scope gives us some understanding why these objectives are in place as well as*

what is the role of these objectives as it relates to ... the campaign or broader company objectives' (AdAgl 7)].

(g) General commentary about details and specification

The more detail is discussed and agreed upon, the easier it is for the advertising agency to create a campaign that aligns with the initial need of the customer.

- *['... we go into detail about the feeling of the communication, the feeling, the character and the identity of the messaging' (FSCI 1)].*
- Which channels will be used? Posters, emails *['... how will we reach them' (FSCI 1)].*
- Creative interpretation, if there are any ideas that should be looked at from the customer's side.
- If the customer already knows what has worked in the past, share that with the agency. The customer should understand the target market best. *['...we as an agency try and spend as much time as possible to be a hundred percent clear on what those deliverable are ... and deliverables do not only relate to saying that I need a banner, it actually can relate to the size of the banner and the type of the banner. ... as detailed as possible' (AdAgl 7)].*

(h) General commentary about budgets

Advertising agencies agree that it is imperative to know what the budget is with which they will be working. They concur that it happens that they get a brief without any indication of what the budget is. The team member/s from the marketing department in the financial services company might ask for suggestions or proposals, which they would then use to motivate the necessary budget. *['... we try to get that (budget) in the very first conversation' (FSCI 1 AdAgl 5), '... we need sign off first' (AdAgl 4)].*

The size of the budget is not as important as knowing what the budget will be. *['We can work with blue sky thinking, but the budget should be clear. We will accommodate any size of budget ...' (AdAgl 1)].*

Part of the cost that needs to be budgeted for and that often becomes a contentious issue is the initial meeting or brainstorming session to formulate the main message. The advertising agency could view this time spent with the customer as a chargeable action and calculate its costs per hour, or per product. Depending on the advertising agency and its relationship with the financial services company, both might have a good idea of how much a project or campaign will cost and will just request the work to be done. [*You don't have that very strict process of: this is the budget and you have to stick to that ... It's more: we know you will deliver so you tell us how much you ask for it.*] (AdAgl 6)].

When the financial services company does not give a budget, the advertising agency sends a cost estimate or quotation to the customer. Work only commences once the quotation has been approved. [*... we always look at the scope and make sure that our quotes are for that scope. If the scope changes, we re-quote ... It's an informal ... process but it needs to be backed up by a quote and ... acceptance process*] (AdAgl 6)].

When the financial services team briefs without giving a definite budget, with the idea of getting business approval for the concept and then the accompanying budget, it more often than not does not get approval for the full concept and budget, which is demotivating to both the financial services marketing team and the advertising agency. [*Without a clear budget, it is very demotivating to have our ideas that we are passionate about and that we have worked hard to put together, get turned down*] (AdAgl 1); [*It is also demotivating for the people we deal with, usually in the marketing department*] (AdAgl 2)].

(i) *General commentary about reverts*

Most respondents agree that on average three reverts are the allowed norm, but there could be more. [*After three reverts, the customer starts incurring extra charges. Our quote includes three reverts*] (AdAgl1); [*... eight versions ... we don't put a cap on ... allowing for three and we are going to start doing that ...*] (AdAgl 6)].

The survey results illustrate a definite disparity between the number of reverts as perceived by the financial services company and the advertising agency. According to the financial services company survey respondents three reverts are the average,

while the advertising agency respondents replied that in general four to 10 reverts are the norm. If the agency does not progress satisfactorily within three reverts (and if the brief has not changed), there is a feeling that they will never be able to understand or interpret the business need properly. [*... you cut your losses and move on ...*] (FSCI 1)]. One of the agency respondents said that one has to be strict with customers and after a period of backwards and forwards with more requests and changes, tell them that they have two reverts left, after which they will incur more costs.

It is not only the initial concept that might go through reverts, but after the initial meeting, the brief could also go through reverts to make it acceptable to both customer and advertising agency. [*The refining process can take up to two or three reverts and it is a collaborative exercise between the two parties*] (AdAgl 7)].

The stronger the relationship with the agency is, the better the communication between the financial services company and the advertising agency. When the relationship is not particularly good, the communication gaps make the process more cumbersome. [*... when the partnership is new, the amount of reverts are higher than when the partnership is established*] (AdAgl 7)].

(j) *General commentary about intra-project relationships*

In the following text, the feedback received from the interviews regarding various aspects of the respective parties forging intra-project relationships with one another is discussed (points A to D below).

A. Quality of the relationship

The quality of the relationship influences not only the number of reverts. Respondents from both the advertising agencies and the financial services companies agreed that it is important to have a good relationship. [*We have a good relationship with our customers. It is important for the results*] (AdAgl 5); [*The industry needs partners, not auditors*] (AdAgl 1)].

Survey results show that although both the financial services company and the advertising agency values the importance of a good relationship, it also indicates that

in general the advertising agency is more positive about the relationship than financial services company.

B. Match between personalities

The customer, the financial services company, should also be comfortable with the character and personality of the agency. The agency values should align with what it is that the customer's brand portrays. [*I also think that apart from the results, the customer needs to get along or feel comfortable with the character of our agency. There is awareness that people have bigger fish to fry ... We try to simplify their lives*' (AdAgl 5); *'Where we have a great relationship with our customers, we have the same goals and ambitions.'* (AdAgl 1)].

With any type of relationship, the inherent personalities come into play. [*... in the financial services company, it is very much personality driven*' (AdAgl 7)]. It is preferable to get along with the personalities of the people collaborating on the advertising campaign [*... we are acutely aware of personality clashes and personality types and people relating with each other*' (AdAgl 7)].

The advertising agency should, as far as possible, match the personalities inside the agency with that of the financial services marketing team. [*We ... often speak to the customer and find out as well what they're comfortable with or who they'd be comfortable to speak to*' (AdAgl 7)].

C. Kind of relationship

There were different opinions in terms of how intimate the relationship should be. Most respondents felt that their relationship with the financial services company was a professional one, but some mentioned that as a result of the work, customer and agency representative often become friends on a personal level.

On the far end of the close relationship scale, one of the advertising agency respondents felt that it is important to understand the personal circumstances of their customers in order to have a better working relationship. [*... try and understand ... their family situation, who (sic) their children's names are ...*' (AdAgl 4); *'It is necessary to have a good relationship, then the interaction is easier and we get closer involved, also physically with the work. It might be idealistic but it is better if*

you know the individuals you work with as people, not just members of a team of a business. If you know the person, understanding comes easier. Also (understanding) of the work' (AdAgl 5)].

The viewpoint was raised that even if the relationship is not good, the advertising agency still needs to be professional. [*The results are more important than the relationship but we have to always be professional, courteous' (AdAgl 5)].* However, other opinions were that a negative relationship could damage the brand of the agency so that it outweighs the positive results that might be achieved were they to do the work. [*... if that partnership is not strong and that partnership is ... a barrier to creating an effective relationship, our future customers and industry finds out about that and it might have a negative impact. ... we have in the past decided to not do business with a particular customer or personality because we just feel it will damage our relationship or our reputation within the industry in the long run' (AdAgl 7)].*

As the relationship grows, the advertising agency develops an understanding of the progress it is making in terms of getting to a result that the customer wants. If there is no progress and the work suffers as a result of the gap in communication, it might be best to end the relationship and let another agency do the work. [*... with experience comes that intuition and the worst case is then if you do not come to a resolution and sort of get to a point where there is no happiness really coming through, then it becomes a case of one of two routes. Either you force a decision and say "... we need to ... go with a direction". The second option is to come back with a suggestion of using another designer, or using another agency to help' (AdAgl 7); 'It has happened that a marketer will commission our services, but we find that we cannot work with that customer. If so, it will not work and we suggest another agency' (AdAgl 1); 'If there is no mutual understanding, it is better not to ... embark on a journey together' (AdAgl 2)].*

Advertising agencies might damage their own brand as a business if they work with a customer with whom the relationship is not good. [*... we will obviously do our best to look at the business and solve the problem but if you have to cut the ties, it is better to face the facts than to hang on to business that will not be a success and damage our own reputation as a result' (AdAgl 1)].*

A very close relationship could result in the marketing members from the financial services company following a less formal process. This tends to happen mostly in a smaller agency and could decrease the efficiency of the said agency. [*... they feel that they don't need to actually complete a form. So, it is a difficult process for us to get them to ... think about what they need. It's easier for them to say ... you come up with something*' (AdAgl 6)].

D. Elements of a good relationship

The marketing team plays the role of interpreter between business and the agency. [*I don't believe communication is a separate function from business*' (FSCI 1)]. The marketer needs to understand what business is doing in order for him to communicate to the advertising agency what it is they are doing and what they want from the advertising agency. This is one of the main challenges.

Often where the relationship between the financial services company and the agency is very good, the brief tends to be informal – especially in the case of a smaller or mid-sized project [*... agency that we have worked with for a very, very long time, so they almost feel like colleagues*' (FSCI 1)].

According to interviewees a good relationship:

- Includes working together, collaboration;
- Encompasses trust and comfort;
- Is mature enough to handle feedback; and
- Is flexible.

The teams from the customer side as well as the agency side should work together. [*I see it as a process of co-creation*' (FSCI 1)]. It is easier where there is a relationship of trust and comfort. [*It is on trust that we chain our collaboration, the work we do has the same end goal*' (AdAgl 1)]. A mature relationship where people have learnt to discuss opinions and be open to input that differs from others' ideas is most effective. Where there is a good relationship between the financial services company and the advertising agency, the results are better. [*I believe that you get a better outcome in the creative process when you work together well*' (FSCI 1)]; '(a

good relationship) is the base ... built on relationship ... you can't do business any other way' (AdAgl 6)].

It is important to be flexible and to work with and adjust to different personality types [*'... as an agency ... we need to be flexible and be able to respond to different types of personalities and work ethics from customer point of view. It is the nature of our business' (AdAgl 7)].*

Where the relationship is good, both sides can handle positive and negative criticism. However, when there is no good relationship, most respondents agreed that they are in the customer service business and would still have to get the job done, as it is their role. [*'... since it is business at the end of the day ...' (AdAgl 4)].*

How does one deal with the challenge of not having formed a good relationship with the customer? One respondent suggests that one should not take things personally and focus on the needs of the customer. The tone of the conversation would also be important. [*'You are not going to be rude to a customer ... it is about how you try and get through to the customer' (AdAgl 4,)].* AdAgl 3 added that it is the reason why the designers need customer service consultants.

At the start of the relationship, as part of establishing the boundaries of the relationship and in order to see what the needs and appetite for stretching the limits of the creative approach are, it seems like a good idea for the advertising agency to see how far it could push the creative process. By doing work that is far out of the norm and then seeing how the financial services company react on it, staff of the agency could gauge what the appetite for creative work is. [*'We try and start it off with as a high a rating, creative rating, as possible ... in order to show the customer, look, this is what we can do. Often there isn't an appetite to go that far and there is a sort of risk aversion to bring it back' (AdAgl 7)].*

Usually, as trust in the advertising agency grows, the financial services company allows the advertising agency more freedom to deal with the creative concept or creative proposal as it thinks best. [*'As relationships grow and as there's more of a comfort of an agency with the customer and from the customer with the agency, it*

allows us to be a bit more creative ... it becomes more about what's best from a sort of campaign point of view' (AdAgl 7)].

(k) *General commentary about being in partnership with one another*

In the following text the feedback received from the interviews regarding various aspects of the respective parties working in partnership with one another is discussed (points A and B below).

A. Collaboration and co-operation

Collaboration at the briefing stage contributes to the success of the campaign. [*It helps with the accuracy of the brief and ultimately with the execution of the brief if both parties are actively collaborating to define the brief' (AdAgl 7)]. All advertising agencies and financial services companies agreed with this. Collaboration on the creative aspects of the campaign could save time later on. [*... bring the customer in that creative process sooner later than later, which, in the long run, will save us time on the project' (AdAgl 7)].**

B. Involvement of the financial services company in the creative part of the campaign process

When it comes to the creative stage, advertising agencies do not agree about the involvement of the customer in the creative part of the process. Some feel that the customer should not be involved at all and should trust the creative expertise of the agency, as that is what they are paid to do. [*Customers think that they should come up with the creative process, that they should have the answers to the questions. They think that, creatively speaking, they should solve the problem. We prefer it if they tell us what they want us to communicate. Tell me what the problem is, not the answer. That is my job.' (AdAgl 1)].*

Others feel that it does not hurt if customers participate in the creative process, as they understand their products and target market best. [*.. we will definitely use exactly what they ... have given us. It is very important for a customer to see ... that one listens to them, although ... sometimes ... something is not working so we ... give them what they need (ask for) but then give them a proper solution for their problem.' (AdAgl 6)].*

However, all advertising agencies agree that at some point, the responsibility becomes theirs and the customer should only be involved in approving the concept or creative work. [*Once the concept is signed off and approved the involvement ends, it should end*] (AdAgl 5)]

In instances where customers are very prescriptive in terms of ideas, advertising agencies will mostly try to accommodate the idea, but then also convince the customer of the solution they think is better. [*... at some point when it doesn't work, then we will have to advise otherwise*] (AdAgl 4) [*... we don't want the customer to micromanage the creative process*] (AdAgl 7)].

A new advertising agency should not collaborate with only the employees from the financial services company; it could help them establish the relationship by also working with existing advertising agencies or previous agencies with which the customer worked. [*... that might be an agency that the customer has worked with in the past and as an agency we need to be comfortable with that. ... and bring the ... existing agency relationships as part of that relationship*] (AdAgl 7)].

(l) *General commentary about the elimination of misunderstandings and/or miscommunication*

Apart from and as an element of the importance of the good relationship between the advertising agency and the financial services company, communication remains key. [*... we ask questions, we interrogate*] (AdAgl 4); [*To get there, we ask a lot of questions*] (AdAgl 5); [*... spend a lot of time to try and compile the brief in partnership with the customer rather than just taking a brief and executing on it directly*] (AdAgl 7); [*Communication is key ... we ask questions to do a sense check*] (AdAgl 2); [*... if you ask the right questions in this briefing form*] (AdAgl 6)]. The quality is as important as the fact that there should be open communication. [*And clarity in the communications*] (AdAgl 1)].

Results from the surveys agree that good communication between the two parties is crucial. However, the efforts to improve communication differ. The financial services company endeavours to improve communication by conducting more face-to-face meetings, while the advertising agency feels that if they follow the process,

communication will improve. The financial services company as the customer takes a lead role while the advertising agency follows. In the in-depth interviews the communication challenges are more complicated and can usually not be solved by a blanket approach. Each stage in the process has its own difficulties.

At the proof of concept stage, there could be communication gaps as a result of the customer not being on the same level of visual learnedness as the advertising agency. [*I often get the feeling that the customer is not as visually literate and we don't get the message across unless we show the concept visually*] (AdAgl 5)].

A way of ensuring the financial services company has given all the necessary information is to ask questions, even leading the customer to an element or aspect that could be included in the campaign that he might not have thought of. [*... immediately that puts something on the table whether there is a yes or a no response to that*] (AdAgl 7); [*... brainstorm sessions where we extract the value we need. Sometimes we have to ask many questions to enable us to get what we want*] (AdAgl 2)].

It could affect a campaign negatively if the advertising agency assumes certain things, which have not been agreed upon or perhaps do not exist. [*... we try to minimise the amount of assumptions. ... So it is important to highlight the assumptions and try to turn the assumptions into facts as best possible*] (AdAgl 7)].

Communication also extends to more technical detail. The customers do not always know what they need in terms of channel or campaign, therefore even when they suggest a certain creative execution, the advertising agency should still advise on whether the execution would achieve the desired results. Part of the role of the advertising agency is to provide advice – even when it is not the most profitable solution for itself. [*... you give them the options*] (AdAgl 4); [*Information on the website is different from information on a brochure*] (AdAgl 5)].

From time to time it happens that the employees of the financial services company with which the advertising agency deals are not knowledgeable when it comes to design or creative execution, or give feedback that is unclear, or use terms that the advertising agency employees are unable to understand. To ensure there are no

misunderstandings, the advertising agency needs to ask questions and repeat what the financial services company has said, but in other words. [*... if you get vague ... feedback on creative ... try and scrutinise that feedback: say 'So from an agency point of view, I can reiterate what you understand with that word ... you are saying, you want more.... Is that correct?' Ask the question'* (AdAgl 7)].

Furthermore, to ensure that there are no misunderstandings and that the goals are aligned to what is happening in the market, the advertising agency might need to find answers to the request outside of what the financial services employees provide for more background or insights. [*We do desktop research. We look at what the competitors are doing and what other players in the market do. We do our best to understand the market, to see and ... to know what is out there. We look at trends and listen to conversations about the market or the product or service'* (AdAgl 1)].

(m) *General commentary about approaches to measure success*

The measurements and indication of whether the campaign was a success, differ depending on the brief and desired results [*... that depends on what the project was.'* (FSCI 1); *'Measurements are dependent on the brief, what the original request was.'* (AdAgl 1)]. There are different measurements and tools for different mediums. [*Digital is fantastic as there are definite or direct measures to prove how the campaign has fared. For television and billboards, the reports or results are delayed and results cannot necessarily be contributed directly to the advertising on those mediums'* (AdAgl 1)].

According to survey results, the tools that the financial services company uses to measure success, are often created and coded internally. The most efficient tools are the ones used to measure digital results. Advertising campaign results are compared with industry standards to measure success.

In the following text, the feedback received from the interviews regarding various aspects of the measurement of success of the campaign is discussed (points A to D below).

A. Data and statistics

Numbers give an indication of success; for example, if the campaign aimed at getting a certain number of people to perform a given action, the number of people who have performed the action can be counted. Over and above the numbers, quite a few tools could also tell the success story, for example analytics for digital campaigns. [*We look at the financial institution's data and work with them to ascertain what success would look like*] (AdAgl 5)]. The financial services company often holds the data that shows the results and the advertising agency does not get access to these results. [*Where possible, we love to get the data on the results, but that is often in the hands of the customers. If you look at the digital campaigns, we do not have access to the analytics. We can only rely on the customer to give us the actual numbers*] (AdAgl 2), [*... with the events ... we use a system that ... allows for feedback, but we do not get too much feedback from the bank*] (AdAgl 6)].

The financial services company team and the advertising agency team should decide beforehand what the measure of success will be. They should agree on what success will look like. It is also important to share the results. [*We show the results visually in a PowerPoint presentation or we show the campaign in an interactive visual presentation.*] (AdAgl 5)].

B. Tools to measure success

Using tools to measure the success rate is a way of tracking the results of the campaign. It is easier to quantify the results when it is a digital campaign. [*... through measurement instruments. In particular, in the digital space that allows us to track ... objectives objectively and empirically*] (AdAgl 7)].

Where the results are not quantifiable, a survey could be used to find out how successful the campaign was. [*The second measurement instrument that relate[s] more to the quality of the creative ... is a bit of a subjective instrument ... we have a network of people within the industry that we often take work to and ask their opinion ... peer reviews. ... and it helps us test the standard of our creative as an agency*] (AdAgl 7)].

Having insight into the results of a campaign benefits the advertising agency and helps it when conducting future campaigns. [*... one could definitely look at why it was successful. Maybe it was just a good product, but if a product is well placed and well rolled out, it's bound to succeed better ...*] (AdAgl 6)].

C. Success from the advertising agency's point of view

For agencies the act of customers giving them repeat business is seen as a measure of their success, with a monthly retainer contract as the ultimate measure of success. [*...ultimately give us a retake ... that's how we measure it*] (AdAgl 4). [*you are... judged on your last project*] (AdAgl 6)] Success for the advertising agency's personnel could be to see that a campaign or project that they worked on and handed over to the financial services company is operational. [*... something that went into pilot is now working because we see it more. We see other communication coming out of it*] (AdAgl 6)]. A measure of success could be the social commentary that the campaign gets. [*"Is this remarkable?" In other words, is it worthy for people to remark on it and say well that is a good strong campaign*] (AdAgl 7)].

D. Challenges relating to the measurement of success

The marketing stakeholders from the customer's side who sign off on the concept are usually not part of the team working with the advertising agency. [*... people in the bank do not always work directly with a project, they get briefed by the product house*] (AdAgl 6)]. This is true of the face-to-face communication during the briefing process as well as when providing feedback to the advertising agency. Not having the stakeholders present pose a challenge in terms of misunderstanding, as well as from a practical point of view, as it could result in delays in getting approval on any aspect of the campaign process, or even getting approval with a retraction of the approval later on in the process.

Another related challenge is when the representative from the financial services company who meets with the advertising agency does not understand the business and is not really sure what it is they want. [*... you have a customer that don't know and that actually don't understand their own business – that is my biggest constraint*] (AdAgl 4)].

Marketing people from the financial services company might think they understand their unique proposition, but when briefing the advertising agency, the advertising agency might find that there is nothing unique about the offering. [*'We often find that what the customer thinks is unique or special, is just what everyone else is offering'* (AdAgl 2); *'We need to ask questions to get customers to tell us enough of the products or services so that we can find the special features or special, uniqueness of what it is that they are offering. It might be something very different from what they think it is'* (AdAgl 1)]. In campaigns, a positive campaign could have very negative results when thinking of brand perceptions if something goes awry. [*'... the same thing happens with competitions ... people who lose are not impressed'* (FSCI 1)].

Learning from the insights gained from one campaign to implement in the next does not always happen. Reviewing the results of the campaign post-implementation as part of the measurement often falls away as priorities shift and new projects take the time and place of the previous ones. [*'... in the perfect world, we must definitely have reviews afterwards and do the research, but very often it doesn't happen'* (FSCI 1)].

Even where the campaign is reviewed, documented and reported on, it does not get the necessary focus to find insights and learn from the results to improve in future. [*'... it's almost as we go along we review but it is not a formal process'* (FSCI 1)].

(n) *General commentary regarding the tools available to the advertising agency in the briefing process*

Below is a list of documents from the financial services company that could assist in eliminating confusion and would add to the clarity of the message:

- Company corporate identity guidelines should be available [*'We need to get the CI, the corporate identity guidelines, and photography if there is any ...'* (AdAgl 5)]. The company's style guide for content and language usage must be provided [*'... the way in which we speak is very important'* (FSCI 1)].
- Copywriting is key – relevant content that was written for the product or service.

- Discussion and checking of assumptions must take place to ensure the advertising agency understands what the financial services company thinks it is doing.
- The financial services company should prepare and provide the relevant terms, conditions and rules to the agency to ensure adherence to legal requirements.
- Providing the advertising agency with available competitor insights and research that is available greatly aids it. [*... understanding exactly what we are dealing with, so we can then actually communicate, the real, like you say, the unique selling point*] (AdAgl 4)].
- Apart from the briefing template, advertising agencies often use software in order to keep track of the project. [*... we have Chase Software. It is a project management system developed in South Africa for ad agencies*] (AdAgl 5)]..
- To let the customer incur costs could also be used as a tool, as it forces the customer to be cognisant of spending money. [*We use cost as a tool. If a customer knows that he needs to be serious about commentary, feedback, otherwise he will incur costs, he is usually far more focused*] (AdAgl 1)].
- Consolidating feedback from the customer and putting in every effort to understand, repeat and confirm the feedback from and again to the customer, create the same understanding of the campaign. [*We also put in an effort to consolidate all feedback from business to ensure we are communicating properly and understanding what was said rightly*] (AdAgl 2)].
- It must always be ensured that communication is updated and that the advertising agency keeps the customer informed about any change in the agreed upon timelines. [*... delivered on time and if we can't, we let the customer know*] (AdAgl 4)].

(o) *General agreement about the differences between tangible and non-tangible goods*

In an effort to find out what the most effective and efficient way of briefing is, advertising agency respondents were asked if they saw a difference between tangible and non-tangible goods. Here the responses differed, with some of the respondents saying that it did make a difference if the product was tangible vs non-tangible services and others feeling there was difference as the outcome was still the same. [*... tangible product is per definition ... you touch it, you feel it, ... you experience it, so there is a whole different approach*] (AdAgl 6); [*I think there is a different process, definitely very different*] (AdAgl 4)].

However, it looks as if the briefing process in both instances should be the same.; [*There is a difference in the product. The effort and approach is also different. When one has to advertise a service, it is the theoretical selling of an idea. And a product, one can just say, here is the product*] (AdAgl 1); [*For an intangible campaign it is necessary to understand the essence of the company*] (AdAgl 5)].

Some respondents felt that there was no difference between tangible and non-tangible goods [*... you want to achieve the same thing; you want to stir some emotion - whether you want something bought or whether you want to change behaviour*] (FSCI 1)]

Advertising agencies grouped tangible goods as part of fast moving customer goods with a short advertising life span, while advertisements for services were seen to require more longevity.

A few of the respondents felt that it was easier to find a creative way to advertise a tangible product. [*I would say that we are restricted by the intangibility*] (AdAgl 5)]. Services, for instance financial services, are a complex business and for the agency to have real insight, the person from the financial services company briefing the advertising agency needs to educate the agency about the products and services.

Tangibility could furthermore extend to the products that the advertising agency creates. If, for example, digital advertising is seen as non-tangible and above the line

components such as print advertising as tangible, there is a correlation between the results of a purely digital campaign and one where there are tangible elements in the mix. [*I've seen a direct link between work that we do in the digital space and if it allows, if there's a tangible component to that, an offline component ...*] (AdAgl 7)].

(p) *General commentary about the financial services company's expectations of advertising agency*

The agency must have the ability to understand the business [*... we ... have to define and clearly articulate the messages we take to the market. We have to define the brand. We have to enable a way to take the message to the market, make it tactical*] (AdAgl 1)].

The financial services company requires an advertising agency to have the creative ability that translates business needs into campaigns [*... to execute the communications in a skilful creative way ...*] (FSCI 1); *'The most important role of the agency is to get to the crux of what it is that the customer wants to advertise, what the core value is that they want to communicate'* (AdAgl 1)].

To provide expertise that is not available inside the business [*... creative expertise is very important ... because we don't have those skills internally...*] (AdAgl 1)].

Formal education or training is not important, but the portfolio of work the agency has done will provide an indication of what it is capable of.

The advertising agency should be flexible in its approach. [*There should not be a lot of drama. Availability is important and a no-fuss attitude. We have a can-do attitude that the customer likes. We make the process easy for the financial institution to work with the marketing department*] (AdAgl 5)].

Translating the value that the financial services company offers is part of the role of the advertising agency. [*We have to create a story to tell the customer*] (AdAgl 1)].

The advertising agency has to play the role of educator [*Our role is to advise on the "laundry list". We advise on what it is that you should be thinking about*] (AdAgl 5)].

When the financial services company views the advertising agency as an extension of the marketing team, the expectations are very high. [*... Always delivering on time ... good planning ... good project management, good feedback ... keeping in touch, follow up*] (AdAgl 6)].

(q) *General commentary about the advertising agency's expectations of the financial services company*

The more information the financial services company gives the agency, the easier it is for the agency employees to do work that is relevant and effective. [*... we need as much info as possible because if you have more info it easier to reduce. Lots of information, the more information, the more background information we have – even if it seems irrelevant and not to the point – it helps because you understand the thinking behind the project better. ... if you do not have enough information, you can't make the connection to start off with*] (AdAgl 6)].

The advertising agency expects the financial services company to brief them properly. [*... the manner in which the customer briefs us, sets the tone ... if the customer is not even prepared to meet face-to-face, it means he is not as passionate, not as serious about the work. He is not willing to spend time on the project and it will reflect in the work.*] (AdAgl 1)].

To enable the financial services marketing team to do that, it needs to understand the business and its needs. [*We expect to get the key insight, their goal from them. They have to be clear about their goal*] (AdAgl 5)]. *'What is the actual product or service that the business wants to advertise or wants to create awareness around?'* (AdAgl 2). *'Good marketers are the ones who understand the value. To put it in English, they will be able to tell you what the value is they add to the market in simplistic sense'* (AdAgl 1)].

The financial services company should explain clearly and make the agency understand what its requirements are [*... if it is a point of sale campaign, should we create banners, posters, or if it is an activation campaign like a conference or event...*] (AdAgl 5)] and also provide the guidelines [*The creative notes are quite important, ... how does it relate to the brand ... brand guidelines .. what design*

resources ... or files are available' (AdAgl 5); ... 'very clear message, properly set out ... plus CI' (AdAgl 6)].

The more background the agency has to work with, the easier it is for it to do its work. [*'... what are some of the ideas that a customer already has and experience: What has worked in the past'* (AdAgl 7)].

Providing the advertising agency with available research or insights benefits the outcome of the advertising campaign. [*'We call it market information ... Statistics, customer insights can be relevant. (We) make key decisions from that market information and when we present creative ideas, concepts and strategies we can rationalise it by referencing back to the insights and market information'* (AdAgl 7); *'The content of what they tell us will be important and we will interpret that. We will use their style and translate it for them'* (AdAgl 2)].

Understanding the context of the campaign – irrespective of the size of the campaign – aids the success of the campaign. [*'We need to know what the timings of the various elements are. Where does the initiative fit into the total brand stable? We need the full understanding of the brand and the brand philosophy. Even for small projects like a mailer to customers. We need to understand if it will form part of a series or will it be a once off communication to customers?'* (AdAgl 1)].

The financial services company should give the advertising agency sufficient time to focus on the campaign and to formulate the most relevant, suitable or possibly successful concept. [*'... if you have a bit longer to think about it, your communication is better'* (AdAgl 6)].

Advertising agencies viewed communicating the dependencies as one of the responsibilities of the financial services company's marketing team. The marketing team needs to understand what the dependencies are and should ensure that these are dealt with or cleared up before briefing the advertising agency.

(r) General commentary about project management

When looking at the briefing process for an advertising campaign, it could be divided into four stages (Saylor Academy, 2013):

- A. Plan
- B. Organise
- C. Lead, and
- D. Control.

During the face-to-face interviews respondents were asked what they would group into each of these phases. The verbatim feedback is given below.

A Planning

In this stage, all those involved need to understand their own roles and whether they should be part of the briefing process. [*... who needs to hear the brief? Who needs to be briefed? Who will be involved from the agency?*] (AdAgl 5). An idea for a new advertising agency's staff is to ensure they know more about the customer. They could find out more about the people who will be part of the process using social media. [*One could also research the customer or the person who will see you from the business. Look at who it is and what they do ... you could look at the person's LinkedIn profile*] (AdAgl 5)].

In the planning phase, the marketing or communications representative from the company should understand where the business needs are. [*... Getting my head around what business needs...*] (FSCI 1); [*The customer needs to tell us what the objective is ... this is the customer's responsibility. If they brief us their heads should be clear on what it is they want.*] (AdAgl 2). ... [*if we do not get a briefing form ... after the cost estimate is accepted, we do a rough planning and ... we let the customer know this aspect we don't understand, this aspect is not clear ... and then really the thinking process starts for the customer*] (AdAgl 6)].

On the advertising agency side, the account executive needs to understand what the capacity of the studio is. The account executive should also know what the urgency of the projects is to know whether a more important project could get priority attention above another. [*... the plan is to also see the flow of work within our agency ... some briefs are more urgent than others*] (AdAgl 4)].

The account executive should have a good grasp of what the skills and expertise of the designers are to align them with the customer's brief. [*... who actually has the insight, the know-how of a certain brief.* AdAgl 4 and AdAg 3; *'Define the brief. Check internal resources and availability. ... Finalise budgets and timelines'* (AdAgl 7)].

B. Organising

- Set up a meeting with all the stakeholders, brief the agency; ensure that it is not only verbal, but also a written document. [*The customer would know who the stakeholders are and who should be in the meeting. They (the customer) should also prepare the brief and have all the relevant information about the product or service, other useful facts like business stats and competitor info would also help* (AdAgl 1)]. Document the discussion and business needs. One needs to ensure that all information is extracted in one meeting. Fill in the briefing document.
- Find out what the timelines are.
- Establish what the available budget is, set up the first meeting where background and needs are discussed.
- Brainstorm possible directions with the agency.
- Describe the process.

[*... look at studio schedules, allocate appropriate resources, ... finalise sequence of events, ... the steps so to speak ... and set up key performance measurements, measurement instruments'* (AdAgl 7)].

C. Leading

Describe the process and start developing the concept. Get on with the work. [*... this is the communication between the customer and the studio. This is the transfer of knowledge to the studio, and the translation of what it is that the customer wants. The agency's role is the account management and everything that goes with that.* (AdAgl 1); *'Lead is getting into action, kicking off the creative part of the campaign and the initiative lies in the hands of the customer. The brief would be in this phase'* (AdAgl 2)].

Brainstorm is also part of leading the campaign. [*... you have to lead the team to get the best out of them ...*] (FSCI 1)]. Setting up the milestones that need to be followed to ensure the success of the campaign will fit into this phase. [*... we have set milestones of getting to certain places*] (AdAgl 6)].

The account executive from the advertising agency has to lead the designers in the studio. [*... they need some guidance ... I am the one who is in touch with the designers ...*] (AdAgl 4); *Lead is getting into action, kicking off the creative part of the campaign and the initiative lies in the hands of the customer* (AdAgl 1)].

[*... leading can be broken down into two components. The one is project management, so it's leading the deliverables of a project against the timelines and the budgets, and then there's the strategic lead that keeps the campaign accountable to its objectives and its purpose*] (AdAgl 7)].

D. Controlling

This phase is about the actual execution, an iterative process where the financial services company confirms that the campaign and creative elements that the advertising agency produces are aligned to what was initially stated in the briefing.

[*Control is making sure that ... the work has been done and delivered on time ...*] (AdAgl 4); [*... in a bigger agency there is usually somebody looking after traffic, but with us, as a smaller agency, the process and interaction is much more direct*] (AdAgl 1)].

Some agencies felt that this phase would be about the results and seeing how the campaign performed.

[*We call it iterative development ... it's to make slight changes based on performance that might be technical or design or marketing changes ... it is reviewed I suppose as part of the process. To review performance constantly throughout the period of the campaign ... Communicate performance to customer and get feedback from customer on their own expectations and experiences of the campaign to date ... and at the end there's a final reporting, ... a final dissection of the campaign*] (AdAgl 7); [*We as the agency, need to make sure we deliver on time and in full – whatever it was that was briefed in to us*] (AdAgl 2)].

(s) *Concluding remarks about qualitative analysis of interviews*

The above-mentioned narrative on the feedback received in the interviews, as summarised mostly in verbatim format, has created a clear vision of what the respondents believe are workable and winning approaches. The following are the key issues lifted out:

- In the creation of an advertising campaign, all respondents agree that some form of brief exist but there are different opinions as to the effectiveness of the interaction in the process.
- There is agreement about the need for a formal process, but once again, there is no agreement on what that means and what it would entail.
- The financial services company is a large corporate organisation that is also perceived as such, while even the larger advertising agencies are small in numbers compared to the teams in the financial services company. There is a perception that the size of the advertising agency negatively influences their ability to enforce formal processes.
- Communication gaps as well as the opportunity for gaps to creep in to the fold are plentiful. Various factors would be responsible for this perception and reality, some of which are the subject expertise level of the stakeholders in the briefing process.
- Most respondents concur that a formal briefing document which serves as written confirmation of the discussion and desired outcomes aids the process. The challenge, however, is the time-strapped environment where even a written document could be of no assistance if not completed with the necessary focus and thought.
- Agreeing on what the purpose, scope and goal of the campaign should be is not always as simplistic as it sounds.
- Details, specifications and exact budgets are not always clear.
- A strong relationship between the employees from both the financial services company and the advertising agency seems to enhance the process. Respondents have varying opinions about what constitutes a strong

relationship and how to build one while simultaneously keeping it professional. Flexibility is recommended and that in itself provides for more complexity.

- There are differences in opinion about success and what it should look like.
- For some, the intangibility of financial services provides an extra layer of possible communication gaps when creating an advertising campaign that is supposed to be creative and enticing, while at the same time resulting in sales and/or increased awareness.
- Expectations from the advertising agency's side include time and focus from their customer. The financial services company expects time and expertise, *inter alia*.
- When it comes to project management, the question is asked "Who leads?"

4.4.3 Quantitative assessment of Interviews

A Caq²das Diagnostic Software Filter was applied to the raw narrative interview text inputs, as described in Chapter 3. It was used to evaluate the narrative emanating from the one-on-one interviews. These results were quantitatively processed and evaluated, resulting in complementary findings to those reported above in the qualitative assessment of the interviews.

The digitised conversation for each interview was captured in the above-mentioned software application and analysed on an interview-by-interview basis. This allowed the quantification of the dominant conversations and also supplied an indication of the degree of positivity (or negativity) with which each topic was addressed. This allowed the extraction from the data of the degree of inter-party agreement (in line with the important focus on the gap between the perception of the financial services company respondents on the one hand and the advertising agency respondents on the other. Similarly, the data set could be used to extract information about the relative importance of the various themes picked up.

Since the software covers the entire business domain, more than hundred threads of elements of important conversations were picked up. The software furthermore suggested a logical clustering of issues with the following five major themes emerging. These themes depict those topics that dominated the conversations in the interviews. The five topics for the themes are:

- A** **The brief:** This would seem to be obviously logical but the fact that the software picked up “The brief” as one of the major themes, confirms that this is one of the most hotly discussed issues. This theme covers the scope of the brief, the detail and content as well as the structure of the final product;
- B** **The parties to the engagement:** This item deals with the members of the campaign brief team from the financial services company as well as those who work in the advertising agency and who are part of the campaign brief team. All items referring to the team but excluding communication and the process value chain are included here;
- C** **Communication:** All aspects relating to communication and general interaction between the teams with a view to pass knowledge and information between the two parties to the campaign brief for the financial services company, with a view to launching a successful advertising campaign;
- D** **Process of the engagement:** The process value chain for the preparation of the advertising campaign by virtue of the campaign brief from the financial services company is another popular topic of discussion in the interviews. This topic contains all that happens separately in each team as well as in their interactions, with the exception of communication (see above) and the success criteria for the engagement (see below);
- E** **Success of the engagement:** This item is crucial to the success of the engagement, as it is imperative that the two parties to the engagement agree on what will constitute mutual success.

The quantitative analysis for the interview results, clustered into the above five themes, gives a very clear indication of both the relative importance of each of the five themes, as well as of the perceived relative performance for each of the five themes, in both cases as perceived by the respective parties.

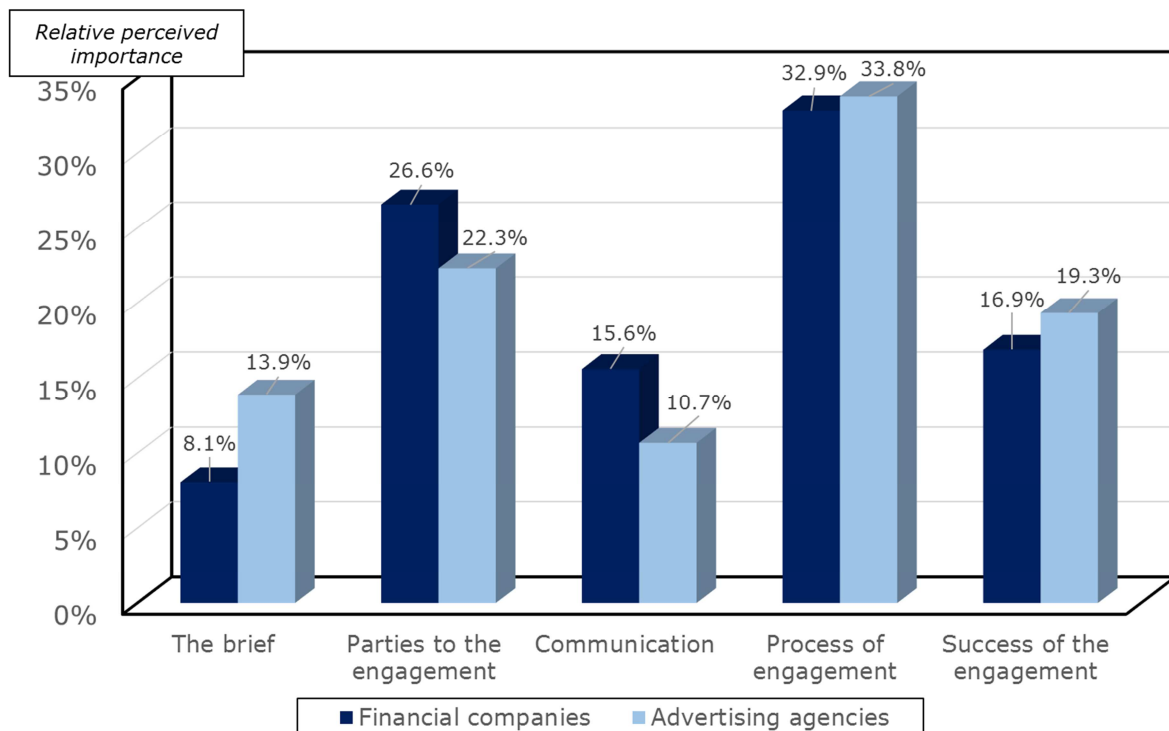
The results for relative importance are given in Figure 20 below in the form of a histogram. On first inspection the two sets of bars follow a reasonably similar pattern. However, upon further scrutiny, the following patterns and trends become apparent:

- Both parties rate **the process value chain** (Theme D – Process of the engagement) as most important, by quite a margin;
- Both parties rate **the parties to the engagement** (Theme B) as second-most important with **the success of the engagement** (Theme E) as third.
- However, if one looks at the actual values the financial services company participants rate Theme B as 10% more important than the success of the engagement – Theme E, whereas the advertising agency participants rate Theme B only 3% more important than Theme E.
- The significance of this observation is that the financial services members of the engagement team place significantly more emphasis on **team dynamics** and correspondingly less on **the success measures** for the engagement, whereas the advertising agency members do the opposite, and in fact seem to believe that the two themes are virtually equally important;
- The risk inherent to this behaviour is that the financial services members do not strongly enough communicate the success measures by which the engagement and associated advertising campaign will be measured, placing their focused attention on the team instead.
- The last two themes, namely **the campaign brief** (Theme A) and **communication** (Theme C) get the lowest relative importance rating, but interestingly, the financial services company participants rank communication as twice as important than the campaign brief, whereas the advertising agency participants rate the brief as the more important of the two;
- The risk associated with this approach by the financial services company participants, is that they can be perceived to under-sell the actual brief, that is, exactly what it is the financial services company wants to achieve. Coupled with the earlier conclusion about their lack of sufficient attention to the success measures, it could mean that they fail to properly project-manage the engagement, with the concomitant resulting failure nearly inevitable.

Secondly, the quantitative results can be used to assess the perceived, relative performance rating of each of the five themes. What this means, in short, is that, based on the narratives that had been processed through the software, one can draw a graph that shows the relative, perceived degree of success (or sufficiency) with which each group of participants (financial services company versus advertising agency participant) has performed in each of the five theme areas.

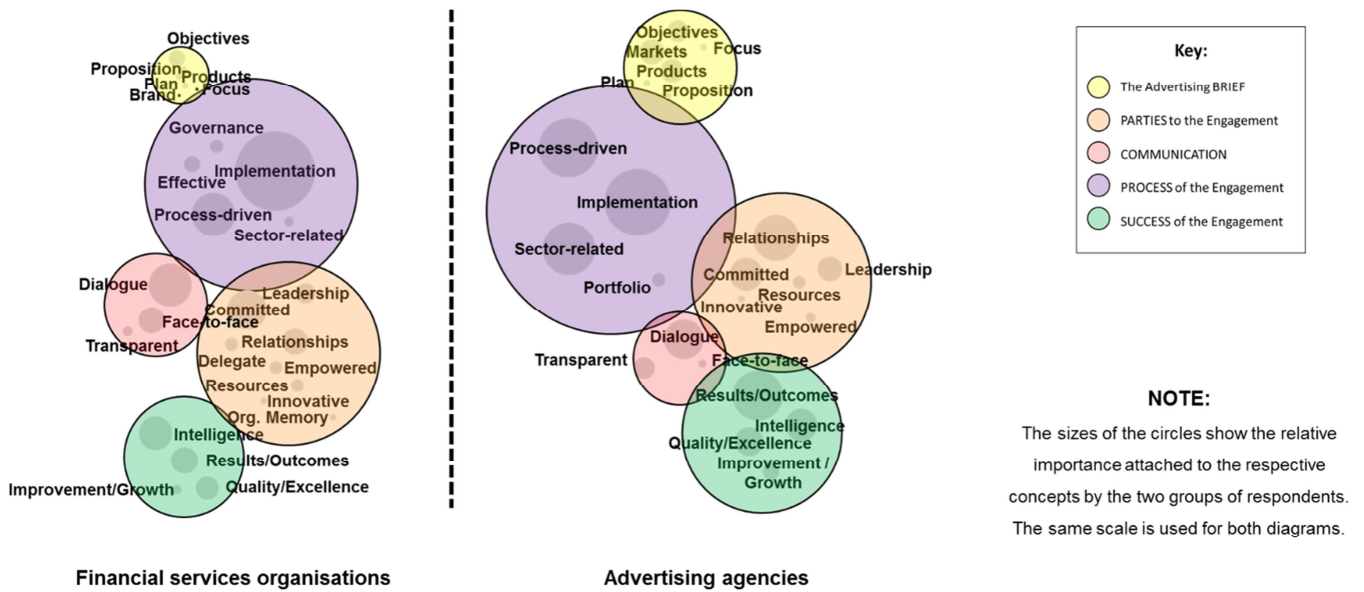
Figure 20 below shows the collective result for the two groups of respondents, which shows definitive trends and differences for and between the respondent groups. However, the differences in importance attached by the respective groups, i.e. advertising agencies and financial services companies respectively, to the different elements of the campaign, as shown in Figure 20, do not indicate why there are differences. Figure 21 below shows the relative importance attached by the parties to the different concepts underpinning each of the 5 major components (or elements). It starts to paint a picture of entirely different sets of priorities between the parties. This will be explored further in the rest of this chapter.

Figure 20: Quantitative analysis of perceived relative importance of the five themes as assessed by the two parties to the engagement team



Source: Caq²das, 2016

Figure 21: Visual comparison of the concepts driving Advertising Agencies and Financial Services Organisations in the Engagement

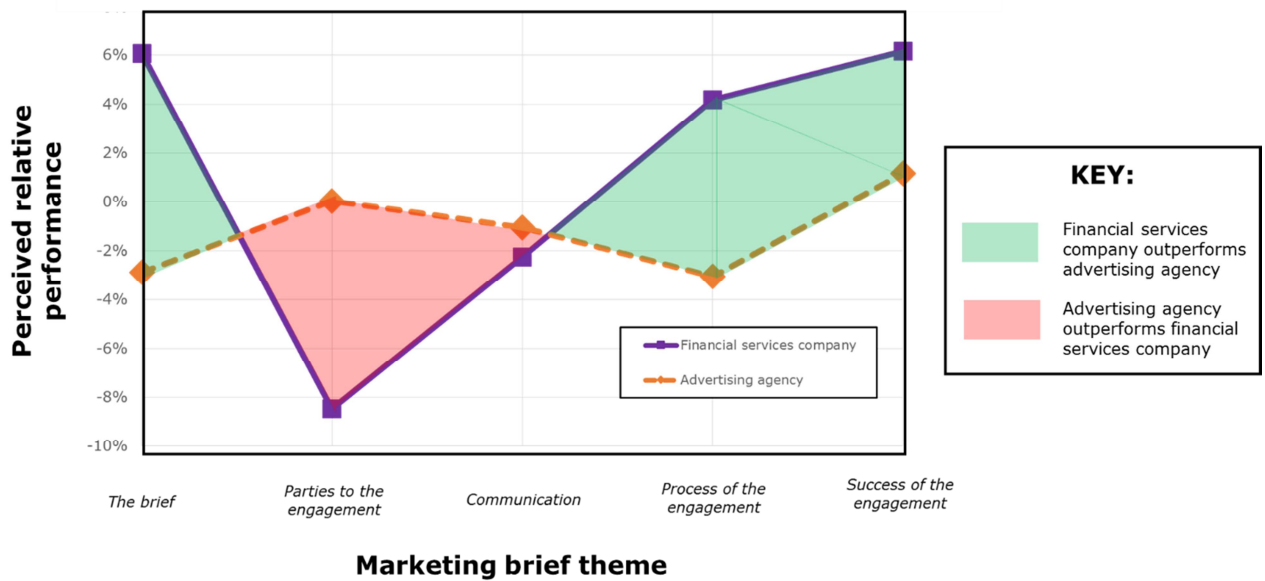


Source: Caq²das, 2016

Figure 22 below shows the results obtained when this is done. It shows that the two groups view their performance (or degree of success/sufficiency) as reasonably similar for communication, and that the financial services company participants from their perspective believe that they had out-performed the advertising agency participants with respect to their involvement of and participation in the brief (Theme A), the process value chain (Theme D) and the success of the engagement (Theme E). However, the advertising agency participants believe, from their perspective, that they had outperformed the financial services company participants in Theme B, dealing with the parties to the engagement.

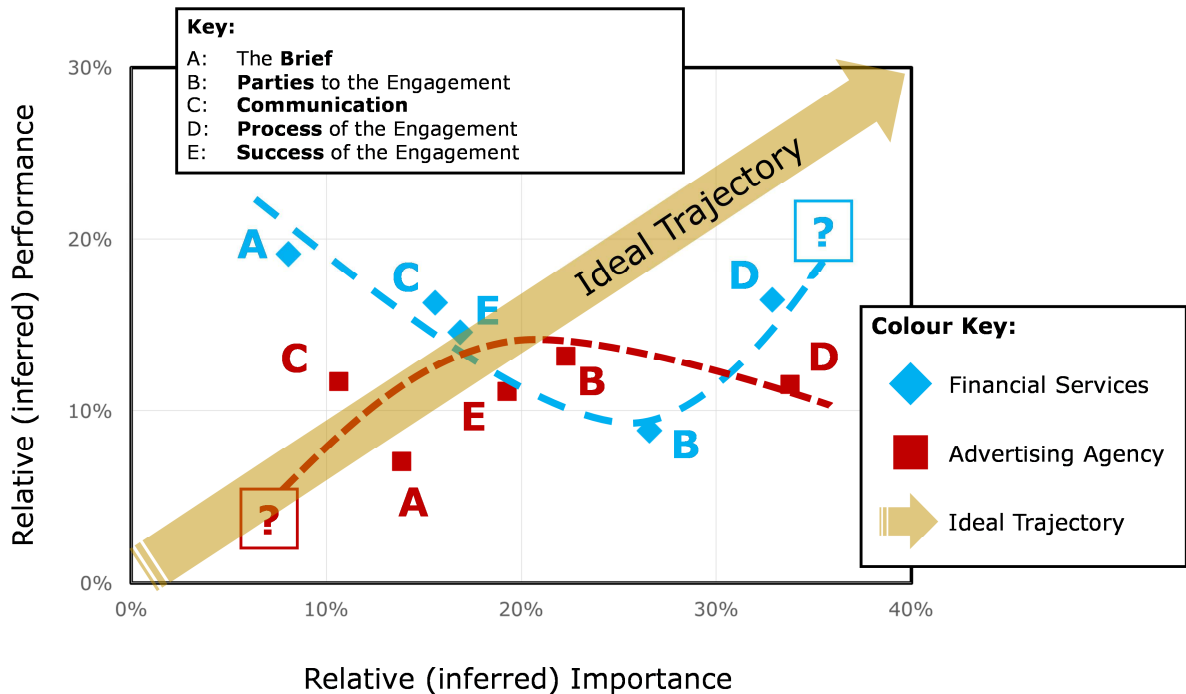
Taking the above two views on the result, as depicted in Figures 20 and 22, and combining the basic data leads to Figure 23, which shows, based on the diagnostic filtering of interview data, a first iteration of a Performance-Importance diagram. One would expect that as the importance increases, it would equally become more important to have an increased performance – with the logic being that if the importance is low, performance would not matter that much. This would lead to an ideal Performance-Importance diagram that follows a diagonal trajectory from bottom left to top right as indicated in Figure 23. However, the results for the two sets of participants show that the best-fit line through their data points deviate from the ideal diagram.

Figure 22: Quantitative analysis of perceived relative performance of the five themes as assessed by the two parties to the engagement team



Source: Caq²das, 2016

Figure 23: Quantitative Performance – Importance analysis for the five themes as assessed by the two parties to the engagement team



Source: Caq²das, 2016

Apart from the fact that the two best-fit curves deviate substantially from the ideal trajectory, the most important risk that can be flagged here is that it would appear

that as relative importance increases (moving across to the right) the relative performance decreases, which is contrary to the ideal trajectory. This would imply that if the financial services company does not enact strict project management routines there is every possibility that the advertising agency members of the engagement team will underperform on the important aspects of the engagement.

4.4.4 Summary of one-on-one interview results

In summary, the results in Sections 4.4.2 and 4.4.3 above, from a qualitative and a quantitative perspective, show that the two parties, that is, respondents from financial services companies and those from advertising agencies, agree that it is important to have a brief and even that it should be formal. On issues such a team dynamics, how communication should be structured, with specific reference to the communication channels, as well as on firstly what would constitute success and secondly how would the team decide whether the set targets have been met, the parties largely disagree.

This is reflected in the group of five themes identified by the computer-aided qualitative and quantitative data analysis software, and which it is suggested should be managed meticulously to ensure that the campaign brief does indeed achieve what the financial services company had set out to achieve, namely:

- A The campaign brief;
- B The parties to the engagement;
- C Communication and communication channels;
- D Process of the engagement; and
- E Success of the engagement.

4.5 COMBINING THE QUANTITATIVE SURVEY AND INTERVIEW RESULTS

In Sections 4.3.3 and 4.4.3 above comprehensive conclusions have been drawn from the quantitative analysis of the data, using the computer-aided qualitative and quantitative data analysis approach (Caq²das) in the case of the one-on-one interviews and standard statistical techniques for the online survey results. The

standard statistical techniques were used with a view to establish the statistical significance of the GAPS as found from the analysis of the multiple choice questions in the survey.

A review of the base data shows that the best information available in this data set to allow for a quantitative assessment of the statistical significance of the service GAP is present in the survey responses. Similarly, the quantitative analyses of the respective one-on-one interviews provide the best data set to assess relative, perceived importance for each of the five themes.

It was already shown above that it is difficult to judge – based on the variety of inputs pulled together – what will signify a statistically significant gap between the respective views of the two parties to the engagement. Therefore, the statistical Student’s t-test and the associated p-value (McDonald, 2014) as defined in Chapter 3 is used to gauge statistical significance of the agreement (or not) of the responses from the two parties to the engagement. Using the p-value calculator associated with the tabular results for Student’s t-test that is widely available in statistics handbooks as well as on-line (McDonald, 2014) the following confidence ranges were developed for the results as presented in Table 11 below.

Table 11: Confidence ranges as developed for the Diagnostic Filter quantitative results

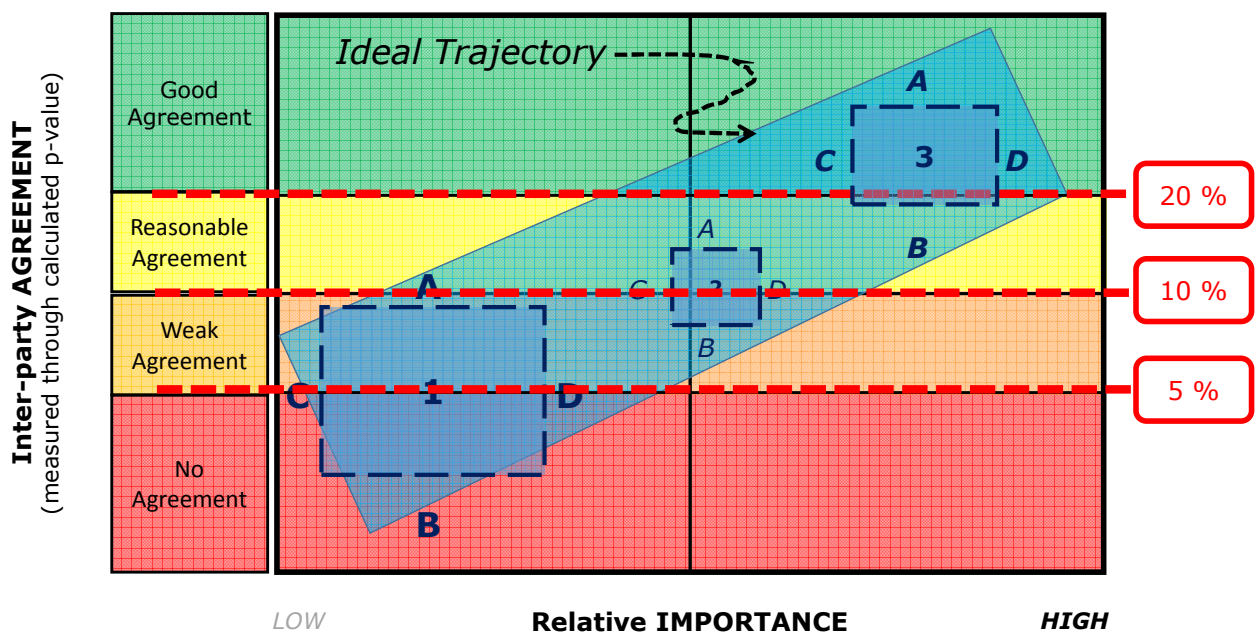
<i>p-value range</i>				<i>Implication for data comparison</i>	
		p-value	<	5%	No agreement between the two data sets
5%	>=	p-value	<	10%	Weak agreement between the two data sets
10%	>=	p-value	<	20%	Reasonable agreement between the two data sets
20%	>=	p-value			Good agreement between the two data sets

Schematically, therefore, we would expect a diagram such as is shown in Figure 24. It should be noted that each of the five themes is informed by more than one question, and therefore the measure of degree of agreement (Statistical p-level per question) along the vertical axis will most likely have a range of p-levels (one for

each question in the theme). The values “a” and “b” in Figure 24 therefore represent the highest and lowest p-values in that particular theme. The estimates of perceived importance as computed by the software for each of the groups of respondents for each theme are not necessarily the same and hence each theme will occupy a finite distance on the horizontal axis. The values “c’ and “d” represent the lower and upper extremity of the perceived importance value for the particular theme, with (d-c) as the horizontal “finite distance” between these two extremes.

In conclusion, therefore, each theme will represent itself as a rectangle – the size of which will indicate to what extent the parties agree on importance (horizontal axis) and to what extent the p-values are consistent (or not).

Figure 24: Schematic representation of a matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance



Source: Caq²das, 2016

Note: The letters A, B, C, and D around the sides of each of the three rectangles are used in the text below to describe aspects of the services gap. The letters “A” and “B” describe the possible range of p-values for each specific rectangle; whereas the letters “C” and “D” describe the possible range of perceived relative importance for each specific rectangle.

The five themes as defined in Section 4.4.3 (Themes A to E) were used with the outcomes from the quantitative analysis to calculate firstly the GAP between the

views as expressed by the respective respondents from the two parties to the engagement, with the gap being expressed as a statistical p-value (McDonald, 2014) to signify the type of agreement. Secondly the value indicated the relative importance that the respondents ascribe to each of the five themes.

Figure 24 shows schematically what one would expect when you do this analysis – typically as the relative importance of the five issues listed above increases; it also becomes more important that the respective parties agree with one another about the quality of what is done. Therefore, for larger relative importance numbers (towards the right of the schematic diagram) the assessment by the respective parties of the inter-party agreement (the so-called services gap) should converge. This is shown schematically in Figure 24 by the blue rectangles moving to higher p-values, and therefore to better agreement between the parties. If we assume that A and B are the computed p-values of the inter-party agreement for the two parties, the position of the rectangle along the vertical axis depicts the overall degree of agreement and the difference (A-B) reflects the range in assessed value of the statistical agreement between the parties on what they perceive they have achieved. Although one would hope that the absolute value of (A-B) should decrease as the importance grows, this is not necessarily always the case, again as shown schematically.

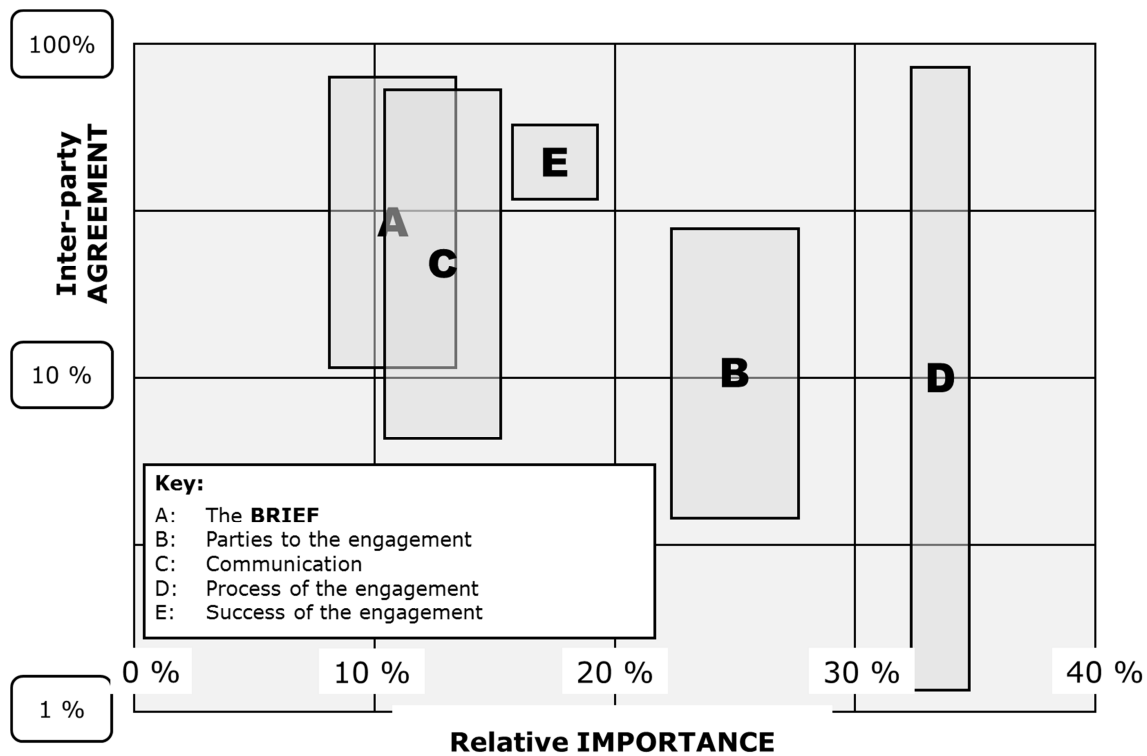
Similarly, if we assume that C and D are the relative importance numbers then the difference (D-C) is indicative of the difference in perception between the parties about the relative importance. Typically, one would also think that as the relative importance increases (from left to right in Figure 24) the difference in assessed importance would decrease, meaning that the parties agree on the important items. However, as for the service performance gap above, this is not necessarily always how it pans out.

The quantitative data from these two component data sets were combined. Figure 25 shows the actual results as obtained from the Caq²das results. In order to represent the data meaningfully the vertical axis in Figure 25 is plotted logarithmically. A lot of the data (approximately 60%) fall in the range 0 to 20%, which is only 20% of the plot area. By changing the vertical axis from a linear scale to a logarithmic scale, this

situation is largely rectified because 0 to 20% occupies 65% of the plot area, and 60% of the data occur in that area.

This figure shows that both parties agree that the process value chain for the campaign brief engagement is the most important to get right, although at the same time the parties differ substantively on how big the service gap is. The parties to the agreement, which is the multi-party team, is the second-most important issue – with specific focus on getting the participants from the respective parties to work well together towards achieving success.

Figure 25: Quantitative analysis of interview results in matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance



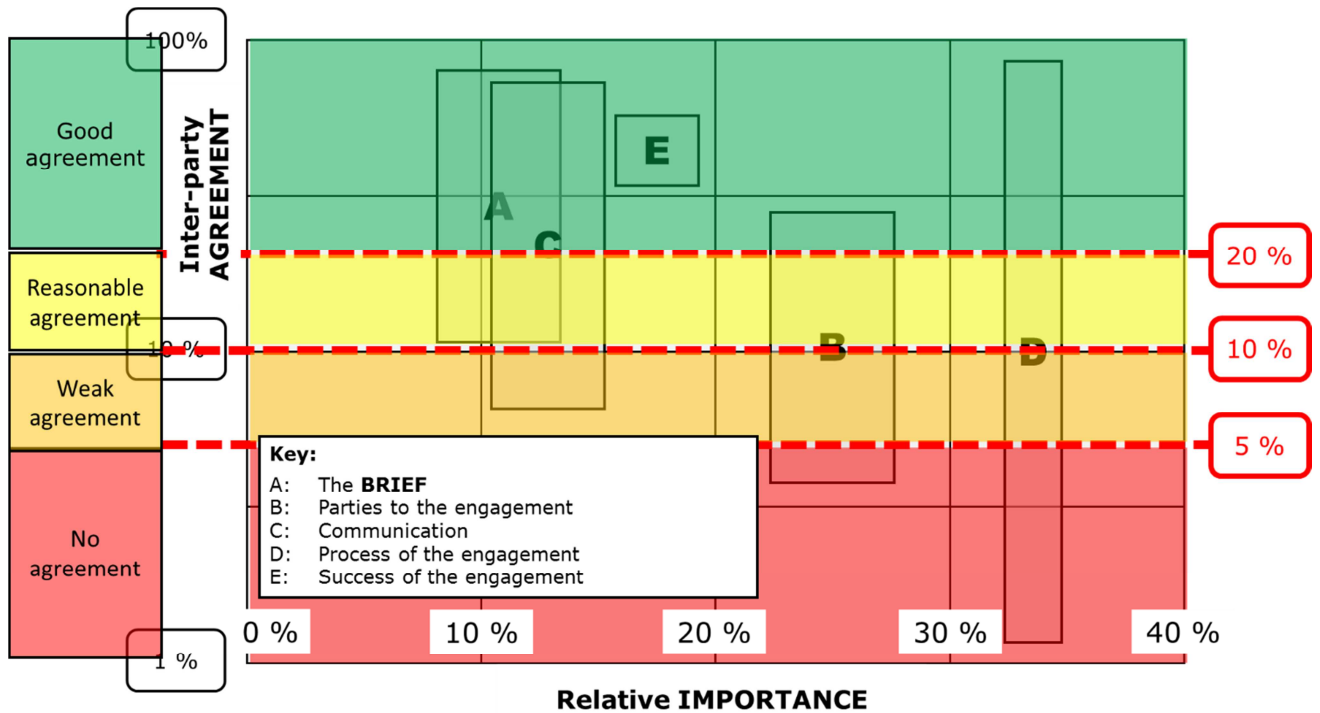
Source: Caq²das, 2016

Although the perceived GAP between what the parties believe is the agreement is significantly less than for the process value chain (rectangle D), the agreement about the extent to which teams typically get this item right is not very good. The brief itself, and communication, interestingly are not deemed to be all that important in the bigger scheme of things (rectangles A and C), contrary to what the literature says. The parties lastly agree reasonably well about the importance of getting the success

criteria right, as well as on the perceptions of the parties about the level of performance (rectangle E).

The narrative discussion of Figure 23, as given above, leaves one with one specific uncertainty, namely, even though the gap is expressed as a statistical p-value, how big a perceived gap between what the parties believe is the real inter-party agreement, that is, (A-B) in Figure 24, would be statistically significant. Therefore, the researcher took the analysis a step further and added the statistical equivalent of this difference to Figure 25, in similar fashion as was done in the schematic diagram in Figure 22, thus arriving at Figure 26.

Figure 26: Quantitative analysis of Interview Results in Matrix of inter-party agreement (measured by calculated statistical p-value) and relative importance against zones of statistical significance



Source: Caq²das, 2016

Note: The inter-party agreement as shown on the vertical axis is expressed as the computed, statistical p-value, obtained via the Student's t-test (McDonald, 2014)

Now it is possible to assess the results clearly, and one can see to what extent the values cross between the four zones of agreement, as marked. In the case of the brief (Theme A) and the success of the engagement (Theme E) the agreement

between the parties is such that the p-values predominantly signifies “good agreement”. However, for communication (Theme C) a sizeable portion of the rectangle falls in the “weak agreement” part of the diagram. On the other side of the spectrum, for both the process of the agreement (Theme D, effectively focusing on the process value chain) and the parties to the agreement (Theme B) large portions of the rectangle fall in the “weak agreement” and “no agreement” parts of the diagram.

Comparing these results with the services gap model of Boulding *et al.*, (1993) leads to the result in Table 12.

Table 12: Comparison between results from this study and the services gap model of Boulding *et al.* (1993)

Campaign brief engagement themes	GAPS in the Services Gap Model (Boulding <i>et al.</i>, 1993)				
	Knowledge	Standards	Delivery	Comms.	Service
The campaign brief (A)	YES	YES			
Parties to the engagement (B)			YES	YES	YES
Communication (C)				YES	
Process of the engagement (D)			YES		YES
Success of the engagement (E)	YES	YES	YES		YES

Source: Caq²das, 2016

The important factors lifted out of this cross-data analysis are that although there is broad agreement about the relative importance of each of the five respective themes, there are important divergence areas as well, specifically as far as the brief (Theme A), the parties to the engagement (Theme B) and communication (Theme C) are concerned. This conclusion derives primarily from the interview results.

Secondly, with reference to the perceived service gap, the analysis has shown that the areas of weakest agreement between the parties relate to the process value chain for the engagement (Theme D), the parties to the engagement (Theme B) and to a lesser extent to communication (Theme C). This conclusion derives primarily from the survey results.

A cross-correlation between the results as depicted here in Figure 26 and discussed above with the Services Gap Model (Boulding *et al.*, 1993:7), shows that all 5 the Gaps in the Services Gap Model, namely, the Knowledge Gap, the Standards Gap, the Delivery Gap, the Communications Gap and the Service Gap, can potentially come into play here (Refer to Table 11). It is therefore pivotally important to develop a best practice approach to the campaign brief engagement and associated campaign that takes account of all service gaps.

4.6 CONCLUDING REMARKS ABOUT THE SURVEY AND INTERVIEW RESULTS

The present study followed the same broad approach as the PRCA study that was conducted in 2003. The one change relative to that study is that the present study followed a mixed method approach to data collection. Whilst applying a mixed-method research design, the researcher also used an analysis toolset that consisted of a portfolio of computer-aided qualitative and quantitative data analysis software programs (Caq²das), which also extensively accessed traditional statistical analysis techniques. In practice, the use of the Caq²das software implies applying a Caq²das diagnostic software filter to the raw data set, thus allowing a seamless integration of the results of the qualitative and quantitative data sets.

CHAPTER 5: ESTABLISHING A FRAMEWORK FOR A BRIEFING PROCESS AND TEMPLATE

Chapter outline

The purpose of this chapter is to:

- make use of the findings from the literature in combination with the outcomes of the mixed method data collection, with one-on-one interviews as well as online survey responses available for the purpose;
- Overlay the diagrams used throughout the exploratory portion of the study with the themes in an effort to develop metrics for the engagement in the briefing process.
- Combine the new metrics with the project management discussion from the interviews.
- Ascertain the importance of the themes and discuss what that means.
- Merge the results with project management principles to broaden the briefing spectrum and move away from a template only, but provide a holistic process framework.
- Identify key leverage areas to be used as the framework in the briefing engagement.
- Validate the findings by means of another look at academic literature with eight key elements as identified in industry best practice guide for briefing

5.1 INTRODUCTORY COMMENTS

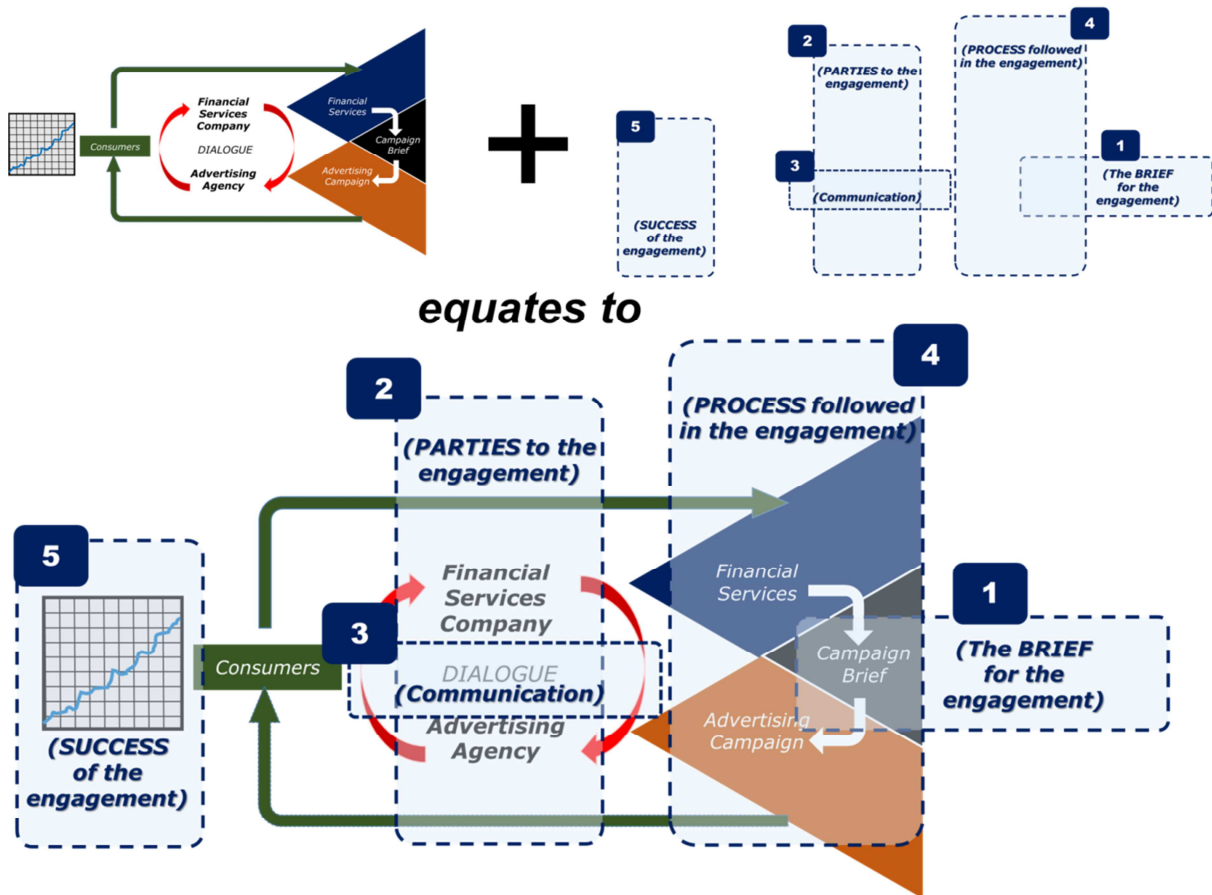
When the study was initiated, a lot more emphasis was placed on just understanding what was being done in the field, than to develop a totally new protocol.

However, since the study gained access to the Caq²das software package as discussed in Section 3.6 above (Swart, 2016) that assesses data (free text) both qualitatively and quantitatively, the decision was made to expand the scope slightly. As it turned out this led to the development of a unique new protocol for the development of campaign brief for the financial services company.

The first insights were obtained in the analysis of the results from the online surveys. These results provided information as to gaps in perception between the financial services company respondents and advertising agency respondents and gave an indication of where priority attention should be given. Detail of the statistical data can be found in Appendix E.

The diagrams below combine the diagrams explaining stakeholders and processes present in the creation of an advertising campaign (as discussed in the first part of the study) with the five themes identified in the research.

Figure 27: Process of developing themes from the text analysis outputs



Source: Calitz, 2016

5.2 OVERVIEW OF FINDINGS FROM THE LITERATURE

The purpose of **financial services companies** is to provide a service to its customers to assist them in managing their finances. The products offered by these

companies are intangible goods, which could potentially be challenging to advertising agencies when creating awareness in the form of advertising campaigns.

Advertising agencies operate in an environment that differs from that of the financial services companies and success is measured through different platforms and against vastly different benchmarks when compared to those used in the financial services sector. In short, the role of the advertising agency is to develop advertising campaigns that would communicate the value that the financial services company has to offer its customers.

An **advertising campaign** is a form of paid communication to a target audience created through the culmination of various disciplines. The communication is brought to the public on various channels and media with the purpose of pursuing customers or potential customers to buy the product or service. One of the key ingredients in achieving a successful advertising campaign for a financial services company is the interaction between the financial services company stakeholders and the advertising agency stakeholders. The stronger the **relationship** between the two, the better the results of the communication and working process will be.

Lastly, the study takes the advertising campaign brief as the focus point of communication between the financial services company and the advertising agency. The briefing process includes verbal and written communication between the two, with the brief the written document that formalises the discussions, goals and expectations that the financial services company has of the advertising agency. Some examples of actual campaign briefs and briefing templates used in the industry are given in Appendix C.

In the high-level reference to communication, it is evident that there are different forms of communication and also different barriers to successful communication. This furthermore underlines the importance of proper and formal briefing methods, including a briefing document.

So, ultimately – the literature summarised: During the briefing process the financial services company aims to communicate the value of its offering to the advertising agency. It was established that the brand plays an important role in positioning the value that the products and services would have to the customer.

The diagrammatic representation in Figure 27 summarises the elements in the development of an advertising campaign. It mentions the perceived elements, role players and interactions at play when the campaign brief is negotiated and developed. The Leximancer-type diagram in Figure 21 above was developed against the background of the five themes as shown schematically in Figure 21 and highlights emerging themes based on the analyses.

Throughout the literature review, the study takes the advertising campaign brief as the focus point of communication between the financial services company and the advertising agency. The briefing process includes verbal and written communication between the two with the brief the written document that formalises the discussions, goals and expectations that the financial services company has of the advertising agency.

The literature builds on guidelines for a brief and unpacks the eight elements as suggested in these guidelines.

5.3 OVERVIEW OF FINDINGS FROM THE SURVEY AND INTERVIEWS

The present study followed the same broad approach as the PRCA study that was conducted in 2003. The one change relative to that study is that the present study followed a mixed method approach to data collection. However, because of the fact that in the present study a Caq²das quantitative software package was available for use meant that although strictly speaking the approach was a mixed method, the software also extracted quantitative findings from the narratives that were the interviews.

The views of respondents in the interviews were unanimous that a brief is important in ensuring the success of an advertising campaign. Although advertising agencies were prepared to go the extra mile for their customers and would often complete a brief themselves after an initial discussion with the financial services company, it was not experienced as the most effective way of briefing. Furthermore, most respondents preferred both a verbal and a written brief.

Other factors that influence the effectiveness of the communication between the financial services company and the advertising agency include factors such as the

quality of the relationship as well as the knowledge and level of expertise of the marketing team members. In the instance where the briefing process is more formal, the process seem to progress with bigger ease.

Five themes were identified in with the use of the Caq²das diagnostic filtering software tool, namely:

The brief, parties to the engagement, communication, process of the engagement and success of the engagement.

The themes from the research data prompted the study to progress from the initial singular focus of the brief only to the total process of communication during the briefing. All of the themes were important to both of the parties, however, the level of importance provides insights into the differences and gaps between the two parties.

Lastly, the insights were then used to identify GAPS, which could cause breakdowns in the communication and overall briefing process.

5.4 DEVELOPING A CAMPAIGN BRIEF PROTOCOL

5.4.1 General introduction

This section will pull together all of the findings made in the earlier chapters of this dissertation.

5.4.2 Developing the content of the campaign brief

The content of the campaign brief has been research over the years and numerous peer-reviewed articles, multi-author handbooks as well as research reports have been written on the topic. A distinction has been made between developing a campaign brief for tangible products as opposed to that for intangible services. Lately a further distinction has been made between developing a campaign brief for intangible services in general and for largely intangible financial services in particular.

The PRCA (2003) developed an excellent industry best-practice standard to guide professionals in developing and implementing campaign briefs, which has stood the

test of time. It is used below as a component framework to develop a protocol for a financial services company campaign brief engagement.

The PRCA (2003) lifts out eight key components that have to be addressed in the campaign brief. They present these eight components in the form of the following eight section headings:

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

5.4.3 Campaign brief process as informed by study findings

An analysis of the one-on-one interviews performed with managers and executives in the financial services company and in advertising agencies as part of the data collection process in this study, indicated that respondents place a lot of emphasis on five key themes, namely:

- A. The **campaign brief** itself, which defines the “contract” between the partners in the engagement, being the financial services company as the customer and the advertising agency as the contractor;
- B. The **parties to the engagement**, which in this case are the participants in the engagement team from on the one hand the financial services company and on the other hand from the advertising agency;
- C. **Communication**, which is the key component to ensure that the parties communicate with one another, hear and understand what is conveyed and can then interpret what they heard and act on it. It contains all forms of written, verbal and other communication, as may be relevant;
- D. The **process of the engagement**, or in other words, the process value chain for the campaign brief engagement, which covers all activities, actions and happenings on the campaign brief engagement, except communication (Theme C above) and the success measures for the engagement (Theme E below); and

- E. The **success of the engagement**, or in other words, the process involved with establishing joint understanding, acceptance and buy-in to the targets as articulated by the financial services company and where necessary moderated by the advertising agency, and making sure through the manner in which the engagement is run, that these targets are achieved or exceeded.

These five themes will form a key part in the development of a Campaign brief Protocol in Section 5.5 below. The quantitative software package used for the analysis of the one-on-one interview narratives indicated that there are a set of key leverage parameters (KLAs) that underpin these five themes, and therefore their inclusion in the development of a campaign brief protocol is really an imperative.

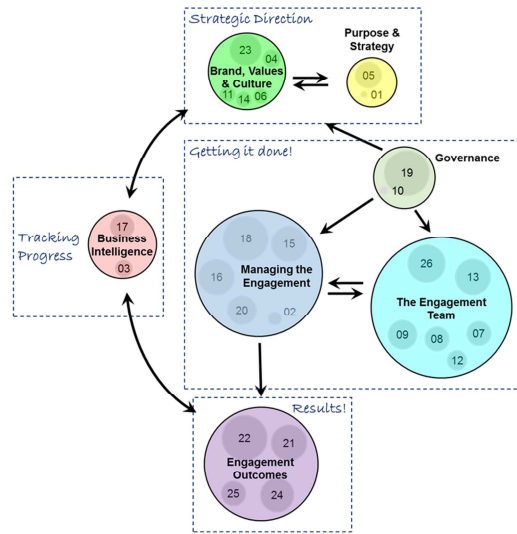
Figure 28 below shows a Leximancer-like diagram with the key leverage parameters grouped by type of impact they will have, showing that some of these key leverage parameters will impact the **strategic direction** of the advertising brief engagement, others will contribute to **getting the engagement done**, a third group will impact the **results achieved through the engagement** and a fourth group will assist with the better **tracking of progress and results**.

Figure 28 also highlights the relative impact that each key leverage area can potentially have, or in other words, how important it is to include each of these KLAs. The list of 26 key leverage parameters in Figure 28 contain some that are highlighted in bold, these 11 KLAs can be seen from the Figure to have the biggest potential impact and should if either cost or time is a major consideration be used in preference to the others.

Dialogue Box III below contains a list of these KLAs, structured according to the five key themes (A to E) as described above. More detail about each of these key leverage areas, underpinned by literature references, is contained in the Appendix I to this dissertation.

Figure 28: Visual representation of the Key Leverage Areas impacting the Advertising Brief Engagement

KLA # 01	Strategic intent
KLA # 02	Service offering
KLA # 03	Market intelligence
KLA # 04	Company brand
KLA # 05	The scope of the briefing engagement
KLA # 06	The actual message underlying the engagement and ultimately the campaign.
KLA # 07	High-functioning team
KLA # 08	Quality team members
KLA # 09	Strategic leadership
KLA # 10	Corporate governance framework
KLA # 11	Alignment of organisational values and company culture
KLA # 12	Strategic conversations and dialogue with the team
KLA # 13	Unlocking team potential



NOTE: The sizes of the circles show the relative importance attached to the respective concepts by the Advertising Agency respondents. The numbers refer to the KLA numbers shown on the sides of this diagram

KLA # 14	Operating to the highest professional & ethical standards
KLA # 15	Logistical arrangements for the advertising brief engagement.
KLA # 16	Project managing the advertising brief engagement
KLA # 17	Strategic conversations & dialogue with key market role players
KLA # 18	Advertising brief process value chain
KLA # 19	Value chain governance framework
KLA # 20	Mutual agreement on the process to be followed
KLA # 21	Managing performance in the advertising brief engagements
KLA # 22	Rigorous success matrix to evaluate roll-out of advertising campaign
KLA # 23	Measuring impact on organisational brand leadership
KLA # 24	Cost-effectiveness of the advertising brief
KLA # 25	Upfront, mutual agreement on the measures of success
KLA # 26	Upfront, mutual agreement on the respective roles and responsibilities

Source: Caq²das, 2016

Dialogue box III: KEY LEVERAGE AREAS FOR THE CAMPAIGN BRIEF ENGAGEMENT	
Theme A: The campaign brief	
<ul style="list-style-type: none"> ✓ KLA # 01: Strategic intent ✓ KLA # 02: Service offering ✓ KLA # 03: Market intelligence ✓ KLA # 04: Company brand 	<ul style="list-style-type: none"> ✓ KLA # 05: The scope of the briefing engagement ✓ KLA # 06: The actual message underlying the engagement and ultimately the campaign.
Theme B: Parties to the campaign brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 07: High-functioning team ✓ KLA # 08: Quality team members ✓ KLA # 09: Strategic leadership 	<ul style="list-style-type: none"> ✓ KLA # 10: Corporate governance framework ✓ KLA # 11: Alignment of organisational values and company culture
Theme C: Communication	
<ul style="list-style-type: none"> ✓ KLA # 12: Strategic conversations and dialogue with the team ✓ KLA # 13: Unlocking team potential 	<ul style="list-style-type: none"> ✓ KLA # 14: Operating to the highest professional & ethical standards ✓ KLA # 15: Logistical arrangements for the campaign brief engagement.
Theme D: Process of the campaign brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 16: Project managing the campaign brief engagement ✓ KLA # 17: Strategic conversations & dialogue with key market role players 	<ul style="list-style-type: none"> ✓ KLA # 18: Campaign brief process value chain ✓ KLA # 19: Value chain governance framework ✓ KLA # 20: Mutual agreement on the process to be followed
Theme E: Success of the campaign brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 21: Managing performance in the campaign brief engagements ✓ KLA # 22: Rigorous success matrix to evaluate roll-out of advertising campaign ✓ KLA # 23: Measuring impact on organisational brand leadership 	<ul style="list-style-type: none"> ✓ KLA # 24: Cost-effectiveness of the campaign brief ✓ KLA # 25: Upfront, mutual agreement on the measures of success ✓ KLA # 26: Upfront, mutual agreement on the respective roles and responsibilities

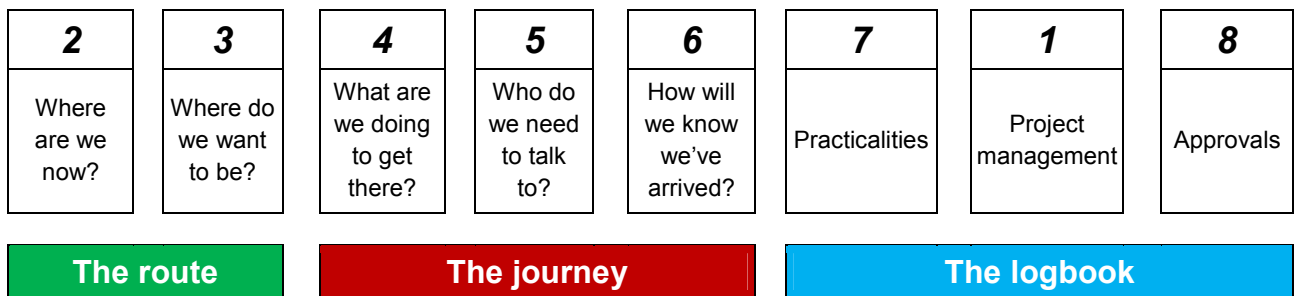
Note: Refer to Appendix I for more detail on the content and intent of each of these KLAs.

5.4.4 The campaign brief/process matrix

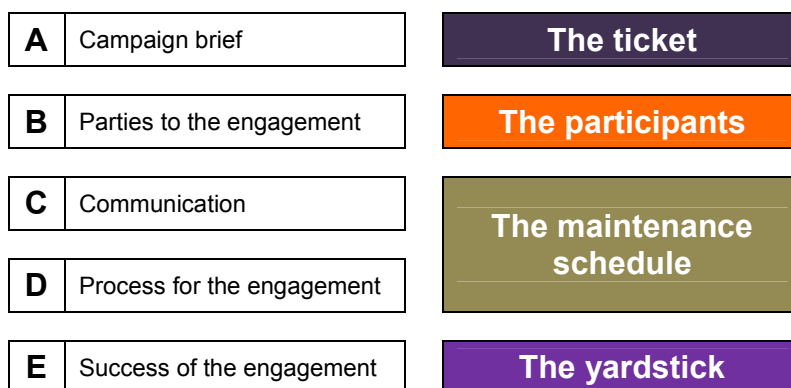
The 8-step campaign brief content page of the PRCA (2003) and the five themes as identified from the information gathering portion of this study will be used below to develop a matrix of potential actions.

Reference to the PRCA (2003) index, as highlighted in Section 5.4.2 above (see also Appendix I) shows a strong analogy to travelling (for example, where are we now; where do we want to be; how will we know we arrived?). It was therefore decided to develop the campaign brief protocol with a race (such as a rally where strict race management is required in order to be successful in the competition) in mind, choosing destinations, setting targets, planning the trip, and so forth. The coloured blocks below are developed against this background.

The PRCA list of eight will become the horizontal “axis” for our matrix, and is presented as follows.



On the other axis, the five themes emanating from the information gathering portion of this study (one-on-one interviews as well as an online survey, both of these targeting managers and executives in the financial services and in advertising agencies) will form the vertical “axis” of the matrix, as follows.



The matrix is developed below in Tables 13 - 15.

The qualitative and quantitative diagnostic filtering software, that is, the portfolio of computer-aided qualitative and quantitative data analysis software programs (Cdq²das) described in Section 3.6 was used to evaluate the narratives derived from the one-on-one interviews with financial services and advertising agency managers and executives in Chapter 4. Links were established with both the five themes as outlined in Section 4.5.3 above and the eight elements of the index for the campaign brief as developed by the PRCA (2003).

Based on this analysis the areas where key leverage areas (KLAs) can make a pivotal input were identified. These are typically the areas where most impact will be gained by appropriate action. Therefore, in Table 13, the number of KLAs active at each cross-sectional interaction point in the matrix is shown. This table therefore clearly shows where most action should be exercised. Although this is but a first approximation, the relative number of KLAs per cross-sectional interaction point gives an indication of the effort spent on each type of activity. The tabular representation uses the framework as developed here and indicates an estimate of total time spent on each set of cross-sectional activities.

	The route	The journey	The logbook	Σ
The ticket	10.5%	4.7%	0.0%	15.1%
The participants	0.0%	9.3%	4.7%	14.0%
The maintenance schedule	5.8%	22.1%	11.6%	39.5%
The yardstick	4.7%	17.4%	9.3%	31.4%
Σ	20.9%	53.5%	25.6%	100%

In order to maintain the crisp storyline necessary to develop the “Protocol for the campaign brief engagement” the detailed development of the 26 KLAs as identified by the quantitative software (see Dialogue Box III above) is contained at the back of the dissertation in Appendix I.

Lastly, in Table 15 the correspondence between this approach and Plan – Organise – Lead – Control is self-evident.

Table 13: The campaign brief/process matrix – active key leverage areas

<p>NOTE:</p> <p><i>The numbers in the cells of the matrix are the number of active KLAs; as estimated using the quantitative Caq²das software</i></p>		2	3	4	5	6	7	1	8
		Where are we now?	Where do we want to be?	What are we doing to get there?	Who do we need to talk to?	How will we know we've arrived?	Practicalities	Project management	Approvals
		The route		The journey		The logbook			
A	The ticket	9		4		-			
B	The participants	-		8		4			
C	The maintenance schedule	5		19		10			
D									
E	The yardstick	4		15		8			

Table 14: The campaign brief/process matrix – developing the campaign brief protocol

<p style="text-align: center;">NOTE:</p> <p style="text-align: center;"><i>The 10 steps of the campaign brief engagement protocol are marked sequentially in the cells of the matrix. These steps are developed further Section 5.5</i></p>		2	3	4	5	6	7	1	8
		Where are we now?	Where do we want to be?	What are we doing to get there?	Who do we need to talk to?	How will we know we've arrived?	Practicalities	Project management	Approvals
		The route	The journey		The logbook				
A	The ticket	1 Choose a destination	2 The route map		-				
B	The participants	-		4 Travel companions		8 Dealing with hitch-hikers			
C	The maintenance schedule	3 Planning the trip		7 Implementing the journey plan		9 Attending to breakdowns			
D		5 Success criteria		10 We have arrived!		6 Managing for success			
E	The yardstick	5 Success criteria		10 We have arrived!		6 Managing for success			

Table 15: The campaign brief/process matrix – alignment with Plan – Organise – Lead – Control (after Saylor Academy, 2013)

		2	3	4	5	6	7	1	8
		Where are we now?	Where do we want to be?	What are we doing to get there?	Who do we need to talk to?	How will we know we've arrived?	Practicalities	Project management	Approvals
		The route		The journey		The logbook			
A	The ticket	1 Choose a destination		2 The route map					
B	The participants			4 Travel companions				8 Dealing with hitch-hikers	
C	The maintenance schedule	3 Planning the trip		7 Implementing the journey plan				9 Attending to breakdowns	
D									
E	The yardstick	5 Success criteria		10 We have arrived!				Managing for success	

5.5 THE CAMPAIGN BRIEF PROTOCOL

5.5.1 Introduction

As stated in the summary on the literature relevant to this study the eight steps towards developing a “killer” advertising campaign brief as contained in PRCA (2003) will be followed in pulling together our data, basically because they followed the same type of approach.

The detailed development of the content for each of the ten steps in the “Protocol for the campaign brief engagement” is contained in Sections 5.5.2 to 5.5.11 below and covers the following ten steps:

Step # 01: Choosing a destination

Step # 02: The route map

Step # 03: Planning the trip

Step # 04: Travel companions

Step # 05: Success criteria

Step # 06: Managing for success

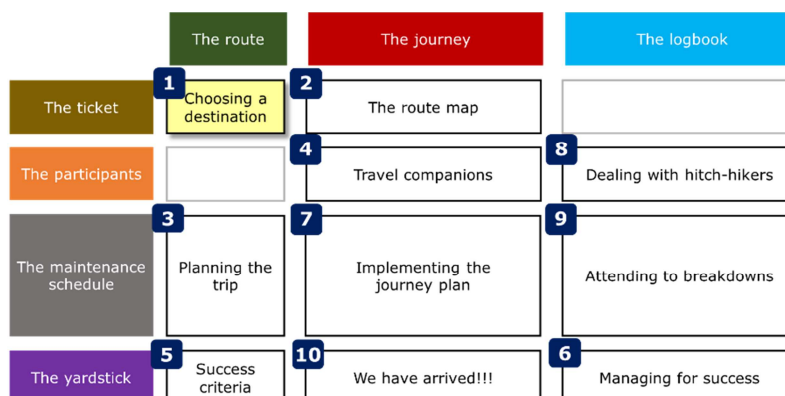
Step # 07: Implementing the journey plan

Step # 08: Dealing with hitch-hikers

Step # 09: Attending to breakdowns

Step # 10: We have arrived!

5.5.2 Step # 01: Choosing a destination



The marketing equivalent of “Choosing the destination” is for the financial services company to develop a clear set of objectives that will guide them to target what they want to achieve through the campaign brief engagement and the associated advertising campaign.

Figure 29: Cross-sectional point that defines “Choosing the destination”

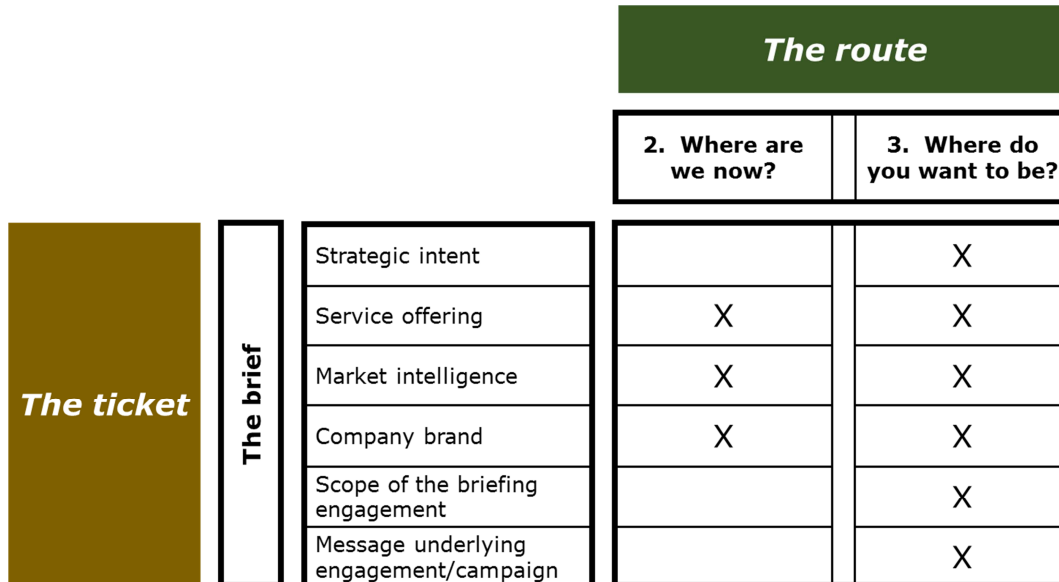


Figure 29 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 01. The collective name given in this Rally Race analogy for PRCA steps 2 and 3 is “The route”. It contains the two extremities of the route, namely, in step 2 the start point is defined; whereas step 3 defines the desired end point. Appendix B outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

The so-called “The ticket” contains the first theme as identified by the Caq²das diagnostic filtering software, that is, “The brief” and its various component activities, as well as informs the key leverage areas as shown (KLA # 01 to 06).

This quantitative software indicated that the six key leverage areas listed (KLA # 01 to 06) will potentially impact the two PRCA steps as shown in Figure 29, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

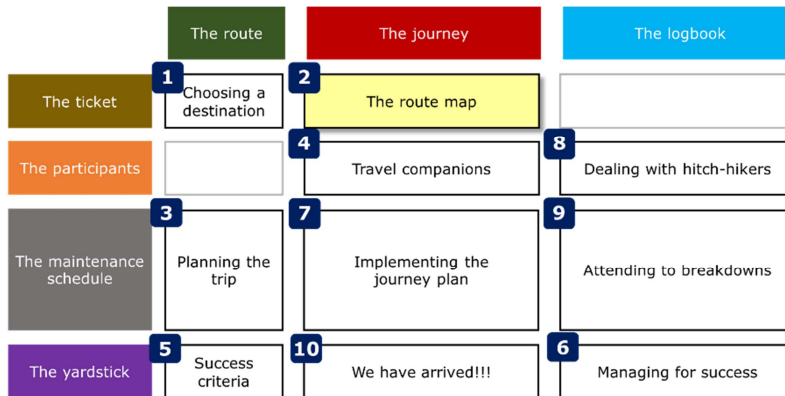
- ❑ The current **service offering** and the current **company brand** will inform where the financial services company should currently operate, whereas **market intelligence** will confirm whether that is indeed a valid assumption (Manning, 2001);
- ❑ The **strategic intent** of the financial services company will help define the playing field they want to operate in, whereas the **service offering** will largely contribute to how the financial services company can operate in their desired playing field (Hamel & Prahalad, 2005);
- ❑ Appropriate **market intelligence** will inform management in the financial services company whether they are indeed achieving what they set out to do (Igbaekemen, 2014);
- ❑ The extended **company brand** will have to adjusted to encompass the new reality that will be defined by the destination the financial services company decides on (Keller & Lehmann, 2005);
- ❑ The **scope of the briefing engagement** will go a long way towards putting in place exactly how this should be approached and what should define the end destination, but also what one would expect when you get there (PRCA, 2016, 2011, 2003);
- ❑ The **message underlying the briefing engagement and the advertising campaign** is really what the advertising agency has to embrace and fully understand and internalise if they are to do justice to where the financial services company want to end up once a successful advertising campaign is launched (AccountAbility, 2011).

Details of these six key leverage areas are contained in Sections KLA # 01 to KLA # 06 in Appendix I.

The marketing equivalent of the above is that the financial services company decide at executive/senior management level what their newest advertising campaign should be about and exactly what they hope to achieve with the campaign. They will define various success indicators to describe what it is that must be presented to the market, and how it differentiates them from potential competitors, as well as what should and what should not be said in the campaign. The advertising agency should make sure that they conduct a process to fully understand what it is that the financial services company wants and where it is they want to end up once the campaign has eventually been successfully launched.

To summarise, both the financial services company and specifically also the advertising agency have to consider the collective of information about the desired outcome of the advertising campaign (“choosing the destination”) and in innovative fashion craft an approach to ensure that the desired outcome is indeed met and if possible exceeded.

5.5.3 Step # 02: The route map



The marketing equivalent of “The route map” is for the financial services company to understand exactly how they want to get to the target they had set for themselves (“the destination”) and to have conveyed that clearly to the advertising agency.

Figure 30: Cross-sectional point that defines “The route map”

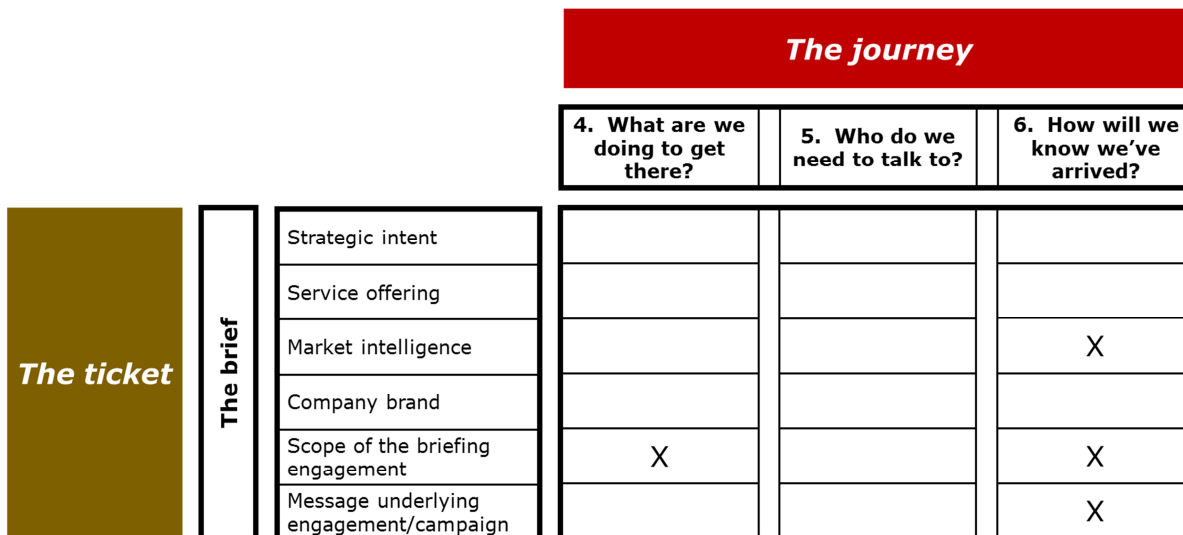


Figure 30 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 02. The collective name given in this rally race analogy for PRCA steps 4 to 6 is “The journey”. It addresses what needs to be done to achieve what is embodied in the “destination” (MBPS # 01), it also addresses who have to be either

consulted or briefed about what needs to be done, and thirdly it asks the very pertinent question “How will we know we have arrived”. In other words, it asks what the targets are, as well as standards and yardsticks set for this journey, so that the team will know that having done what was agreed they have now indeed reached their destination. Section 2.4 above outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

The so-called “The ticket”, which contains the first theme as identified by the Caq²das diagnostic filtering software, that is, “The brief” and its various component activities, as well as informed six key leverage areas as shown (KLA # 01 to 06), of which three are active at this intersection point (KLA # 03; KLA # 05; KLA # 06).

The software indicated that three of the six key leverage areas associated with the campaign brief (see Section 5.5.2 above) are pertinent for this intersection point, namely KLA # 03, 05 and 06 and could potentially impact the three PCRA steps as shown in Figure 30. These three KLAs can therefore be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

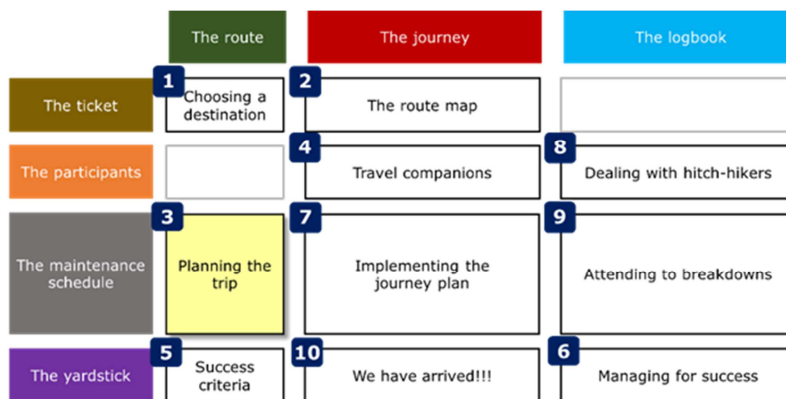
- ❑ Appropriate **market intelligence** will inform management in the financial services company whether they are indeed on the right track as they engage in the journey to get to the desired end situation (Igbaekemen, 2014);
- ❑ The **scope of the briefing engagement** will obviously go a long way towards putting in place exactly how one should go about it, but also importantly what you should and what you should not do and/or mention in the campaign, with due consideration for market conditions and the particular strengths and weaknesses of potential competitors in the marketplace (Hamel & Prahalad, 2005; Manning, 2001);
- ❑ The **message underlying the briefing engagement and the advertising campaign** is really what the advertising agency has to embrace and fully understand and internalise if they are to do justice to the approach that the financial services company would want to follow as well as where they want to end up once a successful advertising campaign is launched (AccountAbility, 2011).

Detail of these three key leverage areas are contained in Sections KLA # 03, KLA # 5 and KLA # 06 in Appendix I.

As stated above in Section 5.5.2, the financial services company will have decided at executive/senior management level what their newest advertising campaign should entail and exactly what they hope to achieve with the campaign. The marketing equivalent of the text above is now based on factors not necessarily known. The financial services company may decide that there are certain approaches that need to be followed in order to arrive at the desired target for the campaign, or conversely they may decide to NOT follow a certain, logical approach and to rather go about matters in a roundabout way. Whatever it is, it will be imperative for the financial services company members on the briefing engagement team to appropriately and timeously communicate with and brief their team members who are from the advertising agency. This will ensure that all team members are on the same page with not only what is required but also on how to achieve it.

To summarise, both the financial services company and the advertising agency have to consider the collective of information about the desired approach to achieve the financial services company's outcome of the advertising campaign ("the route map"). They should then, in innovative fashion, construct a method to ensure that the desired approach is indeed followed to the letter or, if not possible, as close as possible to what was specified.

5.5.4 Step # 03: Planning the trip



The marketing equivalent of "Planning the trip" is for the advertising agency to take the lead and to develop clear and systematic project plan with appropriately phased intermediate tasks and targets and to put in place a project management plan that will ensure that the team keeps to the plan as developed.

Figure 31 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 03. The collective name given in this rally race analogy for

PCRA steps 2 and 3 is “The route”. It contains the two extremities of the route, namely, in step 2 the start point is defined; whereas step 3 defines the desired end. Section 2.4 above outlines the detail of what the PCRA sector best practice guidelines suggest should be part of the campaign brief for these steps.

Figure 31: Cross-sectional point that defines “Planning the trip”

		<i>The route</i>		
		2. Where are we now?	3. Where do you want to be?	
The maintenance schedule	Communication	Team conversations & dialogue	X	X
		Unlocking team potential		
		Professional & ethical standards		X
		Logistical arrangements re brief		
	Processes	Project management of the engagement		
		Key market stakeholder conversations & dialogue	X	X
		Marketing brief process value chain		
		Value chain governance framework		
		Mutual process agreement		

The so-called ‘Maintenance schedule’ is made up of the various component activities of communication as well as of the process value chain for the engagement, as well as informed the key leverage areas as shown (KLA # 12 to 20).

The Caq²das diagnostic filtering software indicated that of these nine Key leverage areas (KLA # 12 to 15 for ‘Communication’ and KLA # 16 to 20 for Process of the Engagement) only three will influence the two PCRA steps as shown in Figure 31, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ❑ Right from the planning phase, the campaign brief engagement team should engage in **team conversations and dialogue** to ensure that both as far as the financial services team members briefing the rest of the team and in critical two-way communication to ensure that all viewpoints are taken on board in developing a

sound project plan. DeChurch and Mesmer-Magnus (2010) through a meta-analysis of team dynamics showed the importance of team cognition, a parameter which is underpinned by open and transparent team conversations and dialogue, for successful team operations and teamwork;

- ❑ The team should at all times uphold only the highest **professional and ethical standards** and team members should always keep one another honest and should not tolerate anything but the highest standards. With specific reference to marketing, the engagement team should ensure that all decisions taken in establishing the promotion mix i.e. 4P's (Reddy, 2013), follow ethical principles and the team should act as if they will personally be responsible for the consequences of all activities following on their particular decisions; and
- ❑ It will be essential to engage in **market stakeholder conversations and dialogue**. This will aide keeping abreast of the newest trends and expectations in the market, and to further the cause as promoted by the advertising campaign through the maintenance and building out of the commitment and trust as promoted by the relationship marketing (Stephen, Cheveldave & Gelowitz, 2010; Morgan & Hunt, 1994).
- ❑ It is also relevant to consider the broader definition of the marketing mix (7Ps) as articulated by Mohammad (2015), Wilson *et al* (2012), Yassanallah & Vahid (2012) and Goi (2009), to name but a few. It is clear that the marketing mix is a multi-parameter concept and in order to make proper meaning from the marketing mix and utilise it to the full in the development of the advertising brief it will be important to consider the marketing mix from as broad a perspective as possible. In this regard it is also interesting to note that the PRCA (2003) list of issues to consider as part of the question "Where are we now?" in Section 2.4.4 above.

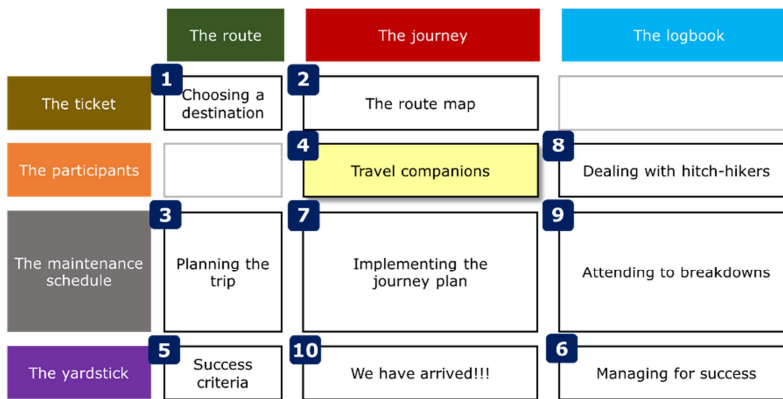
Detail of these three key leverage areas are contained in Sections KLA # 12, KLA # 14 and KLA # 17 in Appendix I.

The marketing equivalent of the above is that the advertising agency has to fully understand and internalise that portion of the campaign brief that details both the desired result to be achieved through this campaign as well as any particular directives about how to do so, and to then meticulously plan this process.

This implies that they should make sure that they conduct a process to understand fully what it is that the financial services company wants and where it is they want to end up once they campaign has eventually been successfully launched.

To summarise, both the financial services company and specifically also the advertising agency have to consider in innovative fashion the collective of information about the approach that should be followed. This would ensure that planning is all encompassing and that all eventualities are appropriately addressed in this plan (“Planning the trip”).

5.5.5 Step # 04: Travel companions



The marketing equivalent of “Travel companions” is for the financial services company to identify who all the key partners, associates and stakeholders are that they have to take along and engage as part of the development of this campaign brief and during the roll-out of the associated advertising campaign. The financial services company has to then be certain that they appropriately communicate with the advertising agency to ensure that they fully understand what is at stake here.

Figure 32 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 04. The collective name given in this Rally Race analogy for PRCA steps 4 to 6 is “Travel companions”. As already articulated above, it addresses what needs to be done to achieve what is embodied in the “destination” (MBPS # 01). It also addresses who have to be either consulted or briefed about what needs to be done. Thirdly it asks the very pertinent question “How will we know we have arrived”, that is, what are the targets, standards and yardsticks set for this journey, so that the team will know that having done what was agreed they have now indeed reached their destination. Appendix B outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

Figure 32: Cross-sectional point that defines “Travel companions”

		<i>The journey</i>			
		4. What are we doing to get there?	5. Who do we need to talk to?	6. How will we know we've arrived?	
<i>The participants</i>	Parties to the engagement	High-functioning team	X	X	
		Quality team members	X	X	
		Strategic leadership	X	X	
		Corporate governance framework	X		
		Alignment of values & culture	X		

The so-called “The participants” section, is made up of the various component activities of the parties to the engagement, which is the second theme identified by the Caq²das diagnostic filtering software in the analysis of one-on-one interview narratives, as well as informed the key leverage areas as shown (KLA # 07 to 11).

The software indeed indicated that the five key leverage areas listed (KLA # 07 to 11) will potentially impact the three PRCA steps as shown in Figure 32, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ❑ The campaign brief engagement will be undertaken by a **high-functioning team** of participants from both the financial services company and the advertising agency, selected for their ability to get the job done (see Hoever, Van Knippenberg, Van Ginkel & Barkema (2012) for key enablers of high-functioning teams);
- ❑ This high-functioning team will be made up of **quality team members**, who will be appropriately skilled and experienced in the particular focus area for the campaign brief, will be excellent communicators, listeners and team players and who will in creative and innovative ways work together to develop the best possible campaign, focused on success (British Council, 2015);

- ❑ The team will be guided in a lead-from-the-front but inclusive decision taking manner with the highest level of **strategic leadership** (see Morgeson, DeRue and Karam, 2010);
- ❑ The corporate governance framework of the financial services company will inform team practices, protocols and principles. In choosing the preferred advertising agency as partner for the development of the campaign brief and associated campaign, due consideration should be given to the corporate governance “credentials” of the advertising agency, to ensure that the team of participants from the financial services company and the advertising agency can seamlessly come together and function as one highly effective team. In the South African context the King Commission’s work on corporate governance frameworks has revolutionised thinking about how one goes about running a corporation (King I, II, III, IV; 2001 – 2015) but useful literature also exists which links the **principles of corporate governance** to effective roll-outs in the operational domain (see for example Haque, Arun & Kirkpatrick, 2007); and
- ❑ Similarly, in selecting the advertising agency partner to this venture the financial services company would have to ensure that there is sufficient **alignment of values and culture** between the individuals but also collectively between the advertising agency and the financial services company (Edmonds, 2010).

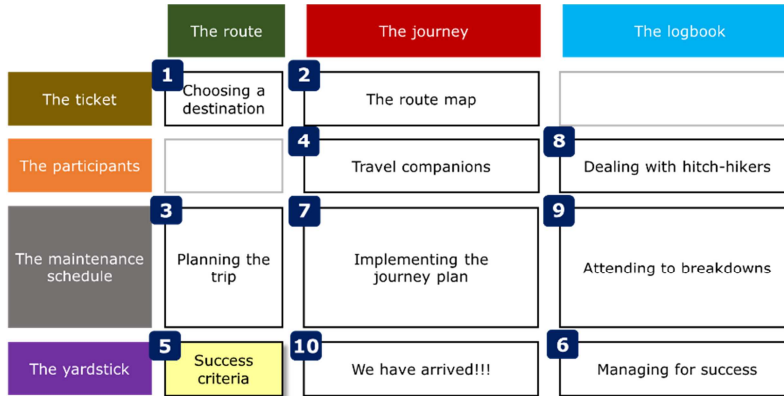
Details of these five key leverage areas are contained in Sections KLA # 07 to KLA # 11 in Appendix I.

The marketing equivalent of the above is that the financial services company will have to carefully consider before they enter into any agreement with an advertising agency what the character and team dynamic would be that it wants to put in place. The financial services company can then proceed to select an advertising agency partner that will fit the bill for the type of team required, and also to ensure that both themselves but also management in the advertising agency select only team members who will be able to operate optimally in such an environment.

To summarise, both the financial services company and even more so the advertising agency have to consider the collective of information about the desired outcome of the

advertising campaign (“the participants”) and in innovative fashion put together a team that will achieve exactly that.

5.5.6 Step # 05: Success criteria



The marketing equivalent of “Success criteria” is for the financial services company to develop a clear understanding of what it is they want to achieve through this campaign brief engagement and the subsequent advertising campaign. They should then, firstly, on their own but, secondly, consultatively with the advertising agency develop a set of criteria that will comprehensively measure whether the campaign objectives can and have been met.

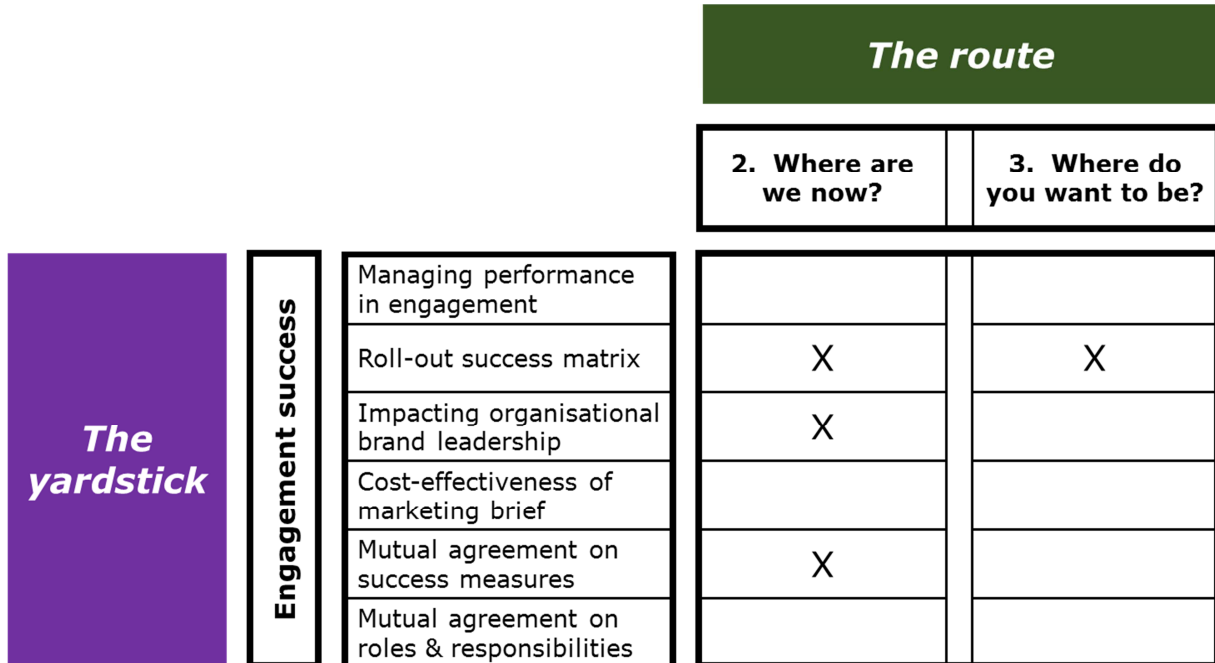
Figure 33 below paints a picture of the cross-sectional intersection point that defines the ‘Campaign brief protocol’ Step # 05. The collective name given in this rally race analogy for CAF steps 2 and 3 is “The route”. It contains the two extremities of the route, namely, in step 2 the start point is defined; whereas step 3 defines the desired end point. Appendix B outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

The so-called ‘The yardstick’, is made up of the various component activities as indicated by the Caq²das diagnostic filtering software for the engagement success theme, as well as informed the key leverage areas as shown (KLA # 21 to 26).

However, the software indicated that of the six key leverage areas listed (KLA # 21 to 26) only three will potentially impact the two PRCA steps as shown in Figure 33 (KLA # 22, 23 and 25), and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the

bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

Figure 33: Cross-sectional point that defines “Success criteria



- ❑ The **roll-out of a success matrix** which clearly stipulates what has to be achieved, how it has to be achieved and importantly how the financial services company will measure whether the campaign brief engagement team has indeed achieved this, is a crucial first step. Over the past twenty years a number of excellent articles have been published that charts the elements of the success matrix for an advertising campaign for a new product, services or an upgraded version of an existing product or service (vocus, 2013; Hultink & Robben, 1995);
- ❑ It is also important to establish up-front what the potential contribution would be to the **organisational brand leadership** of the financial services company in the likely event that the campaign is a success, on the one hand, but on the other to assess up-front what the potential risk to the organisational brand leadership of the organisation would be in the unlikely event of campaign failure (see discussion in Aaker, 2004); and
- ❑ Although the financial services company has to establish a framework for and have a clear indication of the success criteria that they want to inform the engagement and campaign, **mutual agreement on the success measures** are absolute essential to

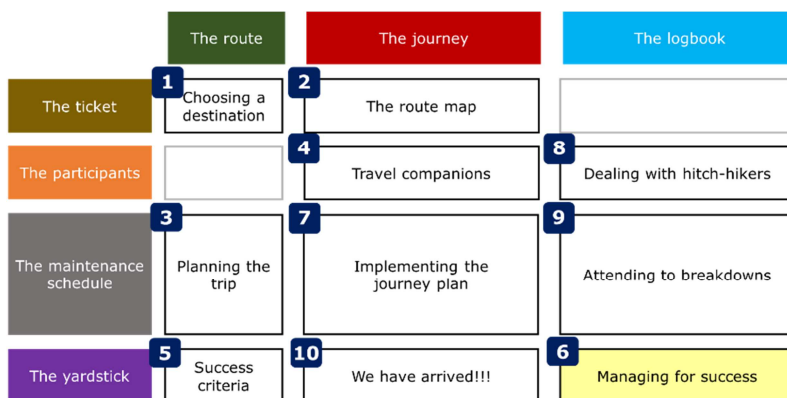
ensure that the campaign brief engagement, importantly, will be a success. Various approaches can be followed to reach agreement on the success measures, however, when selecting a method for use in the engagement team it will be essential to select an approach that will not compromise the work done to reach agreement (AmyPoh, Saludin & Mukaidono, 2004).

Details of these three key leverage areas are contained in Sections KLA # 22, 23 and 25 in Appendix I.

The marketing equivalent of the above is that the financial services company should firstly decide at executive/senior management level how they intend to measure the success (or not) of their newest advertising campaign, and secondly should engage consultatively with their chosen advertising agency partner to ensure that the advertising agency is also comfortable to be measured by these measures. With both parties to the engagement now in agreement and comfortable with the success measures, the next logical step would be to also consultatively engage with the actual team members of the campaign brief engagement team and to ensure that the team is also comfortable to be measured using the success measures.

To summarise, the financial services company, the advertising agency and all individual members of the campaign brief engagement team have to buy into and subscribe to the success criteria for the campaign brief engagement (“The success criteria”).

5.5.7 Step # 06: Managing for success



The marketing equivalent of ‘Managing for success’ is for the advertising agency to develop a clear project management plan, focused on achieving and exceeding all the

success measures as put in place firstly for the campaign brief engagement and secondly for the associated advertising campaign.

Figure 34: Cross-sectional point that defines ‘Managing for success’

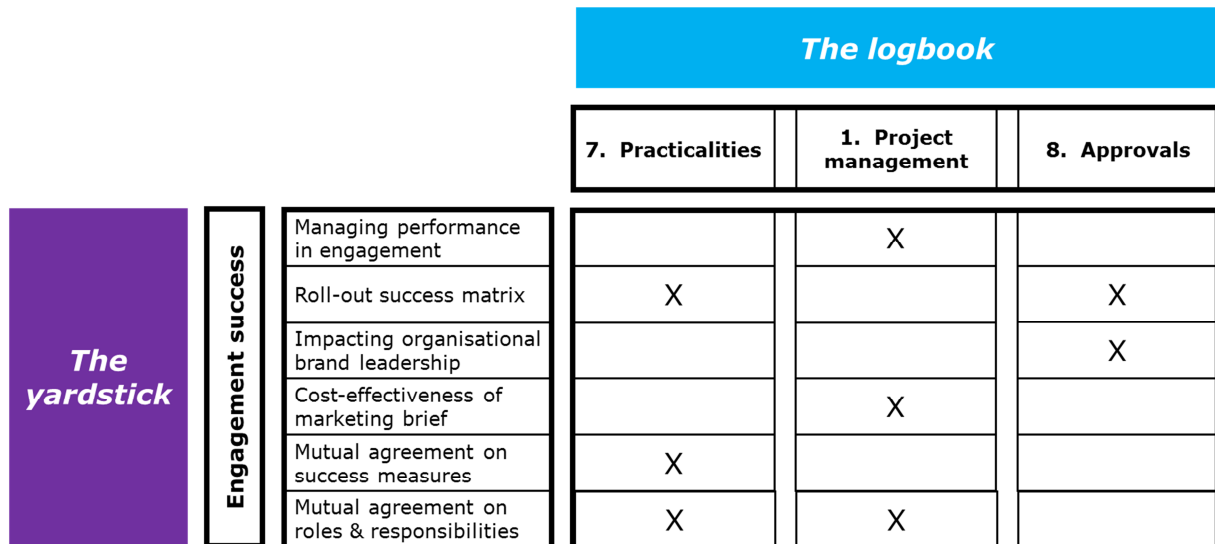


Figure 34 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 06. The collective name given in this Rally Race analogy for PRCA steps 7, 1 and 8 “The logbook”. It contains those administrative and logistical elements of the PRCA guideline on the content of the campaign brief, namely the project management aspects, being central to this “logbook”. It is also supported by the unplanned eventualities that can take place during this process (PRCA step 7 Practicalities) and on the other side by the approvals process (PRCA, 2003; but also PRCA, 2016, 2011).

The so-called “The yardstick”, is made up of the various component activities as indicated by the Caq²das diagnostic filtering software for the engagement success theme, as well as informed the key leverage areas as shown (KLA # 21 to 26).

The software indicated that all six these key leverage areas listed (KLA # 21 to 26) will potentially impact the three PRCA steps as shown in Figure 34, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ❑ **Managing performance in the engagement** is typically a project management activity; it should be taken on board by the campaign brief engagement team and managed with appropriate consideration for project timelines, the project team's competence, capacity and experience and as always with eye on day-to-day unfolding of the project playing field and horizon (See for example Victoria State Government, 2011; Bourne, 2010);
- ❑ The **rollout of a success matrix** which clearly stipulates what has to be achieved, how it has to be achieved and importantly how the financial services company will measure whether the campaign brief engagement team has indeed achieved this, is a crucial first step (see for example (Hultink & Robben, 1995);
- ❑ It is also important to establish up-front what the potential contribution would be to the **organisational brand leadership** of the financial services company in the likely event that the campaign is a success, on the one hand, but on the other hand to assess up-front what the potential risk to the organisational brand leadership of the organisation would be in the unlikely event of campaign failure (Aaker, 2004);
- ❑ The project may have been given specific targets and time lines, but at all times the project team management has to make sure that they also keep the **cost-effectiveness of the campaign brief** in mind. The only time when the project team should be able due to throw cost-effectiveness overboard would be if due to unforeseen circumstances they would only be able to reach the desired end point for the race if they splash on the expenses, and then only if they had carefully considered all other alternatives (for example see a best practice guide (Woolf, Malone, Schwartz & Shenot, 2013) and a practical assessment in the field by Hanson, Kikumbih, Armstrong, Schellenberg, Mponda, Nathan, Lake, Mills, Tanner & Lengeler, 2003);
- ❑ Although the financial services company has to establish a framework for and have a clear indication of the success criteria that they want to inform the engagement and campaign, **mutual agreement on the success measures** are absolute essential to ensure that the campaign brief engagement, firstly, will be a success (AmyPoh, Saludin & Mukaidono, 2004); and

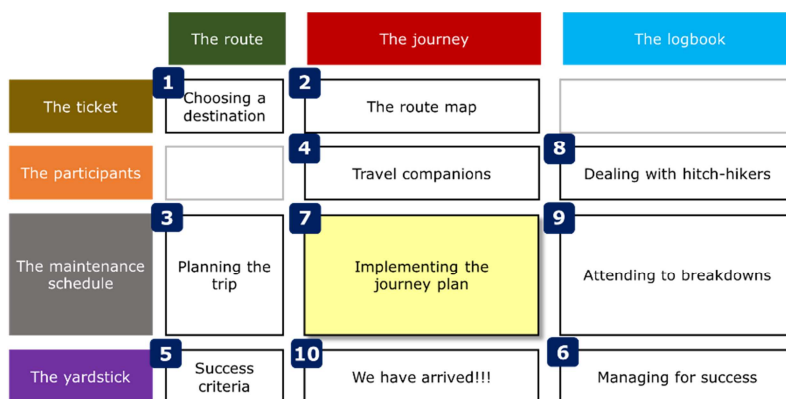
- ❑ **Mutual agreement on the roles and responsibilities** of the individual team members, but also of the corporate parties to the agreement, the financial services company and the advertising agency, with due consideration for the skills, competence and experience portfolio of each team member (see for example OECD/Mountford 2009; Goid & Campbell, 2003).

Details of these six key leverage areas are contained in Sections KLA # 21 to KLA # 26 in Appendix I.

The marketing equivalent of the above is that regardless of what they set out to achieve, and with whom the financial services company partner to get this done it is ultimately still a business venture and therefore the target must be to manage for success but in the most cost-effective manner possible.

To summarise, both the financial services company and also the advertising agency have to consider the collective of information about the desired outcome of the advertising campaign (Managing for success) and in innovative fashion craft an approach to ensure that this achieved as cost-effectively as possible.

5.5.8 Step # 07: Implementing the journey plan



The marketing equivalent of “Implementing the journey plan” is for the financial services company to give free reigns to the campaign brief engagement team to run with the project, as well as develop and roll out plans to achieve and exceed the brief. Essentially, that means giving the responsibility to achieve what is required to the advertising agency, as if the financial services company had the skills, competence in-house to achieve this they may not have needed the advertising agency in the first place.

Figure 35: Cross-sectional point that defines “Implementing the journey plan”

		<i>The journey</i>			
		4. What are we doing to get there?	5. Who do we need to talk to?	6. How will we know we've arrived?	
<i>The maintenance schedule</i>	Communication	Team conversations & dialogue	X	X	X
		Unlocking team potential	X		
		Professional & ethical standards	X		
		Logistical arrangements re brief	X	X	
	Processes	Project management of the engagement	X		X
		Key market stakeholder conversations & dialogue	X	X	X
		Marketing brief process value chain	X		X
		Value chain governance framework	X		X
		Mutual process agreement	X	X	X

Figure 35 paints a picture of the cross-sectional intersection point that defines “The campaign brief protocol” Step # 07. The collective name given in this Rally Race analogy for PRCA steps 4 to 6 is “The journey”. It has already been used in the definition of two of the steps of the campaign brief protocol, namely, Step 2, “The route map”, and Step 4, dealing with the “Travel companions” in the race. It addresses what needs to be done to achieve what is embodied in the “destination” (MBPS # 01), and also who have to be either consulted or briefed about what needs to be done. Thirdly it asks the very pertinent question “How will we know we have arrived”, that is, what are the targets, standards and yardsticks set for this journey, so that the team will know that having done what was agreed they have now indeed reached their destination. Section 2.4 above outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

The so-called “Maintenance schedule”, is made up of the various component activities of communication as well as of the process value chain for the engagement, as well as informed the key leverage areas as shown (KLA # 12 to 20).

The diagnostic filtering software indicated that all nine key leverage areas listed (KLA # 12 to 20) will potentially impact the two PCRA steps as shown in Figure 35, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to

Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ❑ The campaign brief engagement team should, right from the planning phase, engage in **team conversations and dialogue** to ensure that both as far as the financial services team members briefing the rest of the team and in critical two-way communication to ensure that all viewpoints are taken on board in developing a sound project plan (See for example, DeChurch and Mesmer-Magnus, 2010);
- ❑ It would be pivotal to firstly select a campaign brief engagement team that has the right skills, competence and capacity mix as well as the right experience profile to address the brief; and achieve and exceed success targets. However, associated to this but even more important is that one of the keys to achieve success is to make sure that the right resources and project governance is in place to ensure that it would be possible to **unlock the individual and team potential** to the benefit of the engagement (see for example Hoever *et al.*, 2012).
- ❑ The team should at all times uphold only the highest **professional and ethical standards** and team members should at all times keep one another honest and should not tolerate anything but the highest standards (see for example Reddy, 2013);
- ❑ Over and above the detail of the campaign brief engagement and the associated advertising campaign, it is essential for the team to consider and appropriately address any and all **logistical aspects of and arrangements regarding the brief**, (see for example Action for Enterprise (AFE), 2014; Geereddy, 2013)
- ❑ It has been shown above that the ultimate approach is (would be) to manage the engagement “for success”. However, the question remains, how that will be done. The answer is simple, by managing the intricate detail the greater whole of the project will get into focus and success will be achieved through the proper **project management of the engagement** (see for example Bourne, 2010);
- ❑ In order to keep abreast of the newest trends and expectations in the market, and to further the cause as promoted by the advertising campaign through the maintenance and building out of the commitment and trust as promoted by the so-called relationship marketing (Morgan & Hunt, 1994), it will be essential to engage in **market stakeholder conversations and dialogue**;

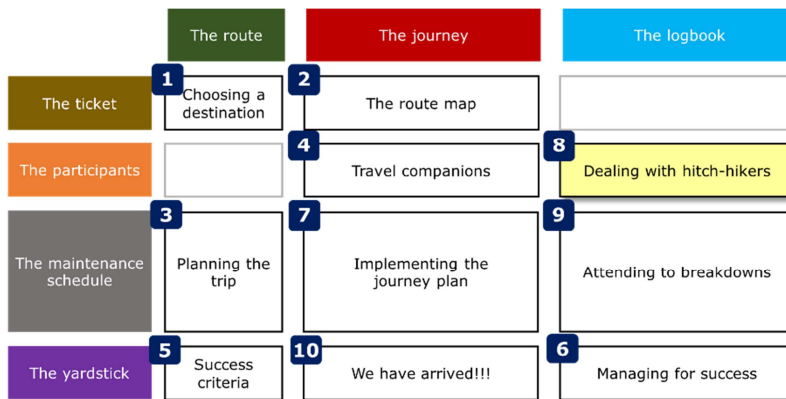
- ❑ The campaign brief engagement team needs to consultatively with other key stakeholders in the process value chain develop the **campaign brief process value chain** (Action for Enterprise (AFE), 2014), and with due consideration for the resources available to the team;
- ❑ At the same time, it is important to establish a sub-set of the organisational corporate governance framework on and for the engagement team, which identifies and beds down the **governance framework for the campaign brief engagement value chain**. Refer to useful practical notes based on extensive experience in this regard as captured in USAID (2009).
- ❑ Similarly, whereas the campaign brief engagement team has to mutually agree on the respective roles and responsibilities for the team members and the parties to the engagement, it is also imperative that these same parties should upfront reach **mutual agreement on the processes in the engagement value chain**. Frequently it will be easier for the parties to the engagement team to agree a process by which to establish what the engagement value chain will look like, thus in a way leading to an indirect approach to get mutual agreement on the processes (see for example, Ensign, 2001)

Details of these nine key leverage areas are contained in Sections KLA # 12 to KLA # 20 in Appendix I.

The marketing equivalent of the above is that the campaign brief engagement team and ultimately the advertising campaign team (if it differs from the campaign brief team) should with all information and inputs at hand, and after having planned every step along the way tackle the campaign brief engagement (and ultimately the advertising campaign) and make a success of it. The nine different key leverage areas define those things that have to happen to ensure that success is achieved – that is – the engagement is successfully completed.

To summarise, both the financial services company and specifically also the advertising agency have to hand ultimate accountability for the outcomes from the campaign brief engagement to the engagement team and hold them responsible for results (Implementing the Route Map).

5.5.9 Step # 08: Dealing with hitch-hikers



The marketing equivalent of “Dealing with hitch-hikers” is for the campaign brief engagement team (and ultimately the advertising campaign team. If that is different from the campaign brief engagement team), which as has already been stated above is composed of team members from both the financial services company and the advertising agency, to adequately deal with people issues whilst they are busy refining the brief and ultimately rolling out the advertising campaign.

Figure 36: Cross-sectional point that defines “Dealing with hitch-hikers”

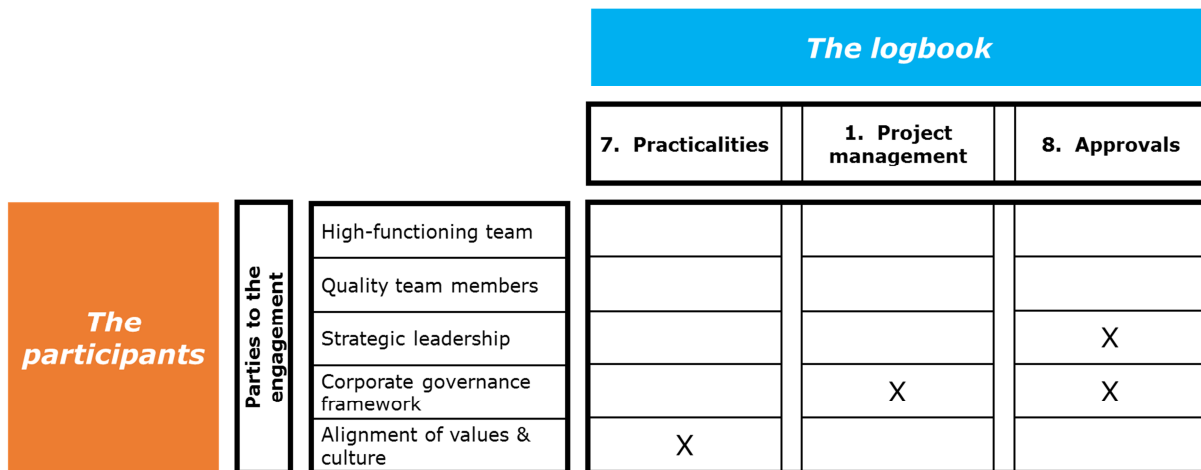


Figure 36 paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 08. The collective name given in this Rally Race analogy for PRCA steps 7, 1 and 8 “The logbook”. It contains those administrative and logistical elements of the PRCA guideline on the content of the campaign brief, namely the project management aspects, as central to this “logbook”, and supported by the unplanned eventualities that can take place during this process (PRCA step 7 Practicalities) and on

the other side by the approvals process (PRCA, 2003; and also PRCA, 2011). Section 2.4 above outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

The so-called “The participants” section is made up of the various component activities of the parties to the engagement, which is the second theme identified by the Caq²das diagnostic filtering software in the analysis of one-on-one interview narratives, as well as informed the key leverage areas as shown (KLA # 07 to 11).

The software indicated that three of the five key leverage areas listed (KLA # 09, 10 and 11) will potentially impact the three PRCA steps as shown in Figure 36 (PRCA Steps 7, 1 and 8), and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

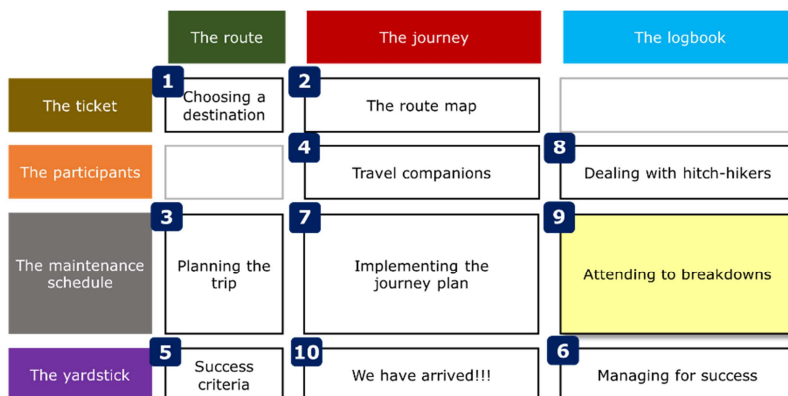
- ❑ The team will be guided in a lead-from-the-front but inclusive decision taking manner with the highest level of **strategic leadership** (see, for example, Morgeson, DeRue and Karam, 2010);
- ❑ Team practices, protocols and principles will be informed by the **corporate governance framework** of the financial services company. In choosing the preferred advertising agency as partner for the development of the campaign brief and associated campaign, due consideration should be given to the corporate governance “credentials” of the advertising agency, to ensure that the team of participants from the financial services company and the advertising agency can seamlessly come together and function as one highly effective team (see for South African corporate governance framework evolution King [2001 – 2015] and for a practical application of corporate governance frameworks Haque, Arun & Kirkpatrick, 2007); and
- ❑ Similarly, in selecting the advertising agency partner to this venture the financial services company would have to ensure that there is sufficient **alignment of values and culture** between the individuals but also collectively between the advertising agency and the financial services company (Edmonds, 2010).

Details of these three key leverage areas are contained in Sections KLA # 09, 10 and 11 in Appendix I.

The marketing equivalent of “Dealing with hitch-hikers” is for the campaign brief engagement team to adequately deal with people issues whilst they are busy refining the brief and ultimately rolling out the advertising campaign, as not doing so could seriously jeopardise the successful completion of the campaign brief engagement and the successful roll-out of the associated advertising campaign.

To summarise, team management of the campaign brief engagement team needs to balance effort at reaching the set engagement goals whilst at the same time ensuring that the project team members are working together effectively and efficiently to do so, without any people issues causing delays and/or project derailments.

5.5.10 Step # 09: Attending to breakdowns



The marketing equivalent of “Attending to breakdowns” is for the campaign brief engagement team (and as shown in Section 5.5.9 ultimately the advertising campaign team, if that is different from the campaign brief engagement team), to adequately deal with any project-related issues whilst they are busy refining the brief and ultimately rolling out the advertising campaign.

Figure 37 below paints a picture of the cross-sectional intersection point that defines the “Campaign brief protocol” Step # 09. As mentioned before, the collective name given in this Rally Race analogy for PRCA steps 7, 1 and 8 “The Logbook”. It contains those administrative and logistical elements of the PRCA guideline on the content of the campaign brief, namely the project management aspects, as central to this “logbook”, and

supported firstly by the unplanned eventualities that can take place during this process (PRCA step 7 Practicalities) and secondly by the approvals process (PRCA, 2003; but also PRCA, 2016, 2011). Section 2.4 above outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

Figure 37: Cross-sectional point that defines “Attending to breakdowns”

		The logbook			
		7. Practicalities	1. Project management	8. Approvals	
The maintenance schedule	Communication	Team conversations & dialogue	X	X	
		Unlocking team potential			
		Professional & ethical standards			
		Logistical arrangements re brief		X	
	Processes	Project management of the engagement	X	X	
		Key market stakeholder conversations & dialogue		X	
		Marketing brief process value chain		X	
		Value chain governance framework	X	X	
		Mutual process agreement		X	

The “Maintenance schedule”, is made up of the various component activities of communication as well as of the process value chain for the engagement, as well as informed the key leverage areas as shown (KLA # 12 to 20).

The diagnostic filtering software indicated that seven of the nine key leverage areas listed (KLA # 12 and KLA # 15 to 20) will potentially impact the three PCRA steps as shown in Figure 37, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ❑ Right from the planning phase, the campaign brief engagement team should engage in **team conversations and dialogue** to ensure that both as far as the financial services team members briefing the rest of the team and in critical two-way communication to ensure that all viewpoints are taken on board in developing a sound project plan. DeChurch and Mesmer-Magnus (2010) showed the importance of team cognition through a meta-analysis of team dynamics, a parameter which is

underpinned by open and transparent team conversations and dialogue, for successful team operations and teamwork;

- ❑ Over and above the detail of the campaign brief engagement and the associated advertising campaign, it is essential for the team to consider and appropriately address any and all **logistical aspects of and arrangements regarding the brief** (see for example Action for Enterprise (AFE), 2014; Geereddy, 2013);
- ❑ It has been shown above that the ultimate approach is (would be) to manage the engagement “for success”. However, the question remains, how that will be done. The answer is simple, by managing the intricate detail; the greater whole of the project will get into focus and success will be achieved through the proper **project management of the engagement** (see for example Bourne, 2010).
- ❑ In order to keep abreast of the newest trends and expectations in the market, and to further the cause as promoted by the advertising campaign through the maintenance and building out of the commitment and trust as promoted by the so-called relationship marketing (Morgan & Hunt, 1994), it will be essential to engage in **market stakeholder conversations and dialogue**;
- ❑ The campaign brief engagement team needs to consultatively with other key stakeholders in the process value chain develop the **campaign brief process value chain** (Action for Enterprise (AFE), 2014), and with due consideration for the resources available to the team;
- ❑ At the same time, it is importance to establish a sub-set of the organisational corporate governance framework on and for the engagement team, which identifies and beds down the **governance framework for the campaign brief engagement value chain**. Refer to useful practical notes based on extensive experience in this regard as captured in USAID (2009).
- ❑ Similarly, whereas the campaign brief engagement team has to mutually agree on the respective roles and responsibilities for the team members and the parties to the engagement, it is also imperative that these same parties should upfront reach **mutual agreement on the processes in the engagement value chain**. Frequently it will be easier for the parties to the engagement team to agree a process by which to establish what the engagement value chain will look like, thus in a way leading to

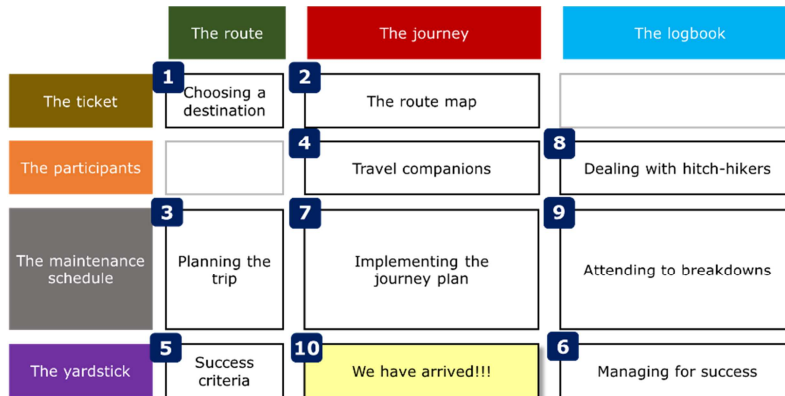
an indirect approach to get mutual agreement on the processes (see for example, Ensign, 2001).

Details of these seven key leverage areas are contained in Sections KLA # 12 and KLA # 15 to KLA # 20 in Appendix I.

The marketing equivalent of “Attending to breakdowns” is for the campaign brief engagement team to adequately deal with any project-related issues whilst they are busy refining the brief and ultimately rolling out the advertising campaign.

To summarise, team management of the campaign brief engagement team needs to ensure that project-related issues which could potentially cause delays and/or a project derailment are adequately addressed. Thus, the team management will ensure that the engagement team (and/or campaign team) can focus their attention on reaching the set engagement goals whilst at the same time ensuring that the project team members are working together effectively and efficiently to achieve success on or below budget, on or before time and at or better than expectations.

5.5.11 Step # 10: We have arrived!



The marketing equivalent of “We have arrived” is for the campaign brief engagement team to have successfully concluded the engagement and for the campaign to have been successfully concluded. “We have arrived” will only be meaningful for the financial services company, from a business perspective, if they can also say “We have achieved all and more than we set out to do” and thus it could really rather be “We have won!”

Figure 38 below paints a picture of the cross-sectional intersection point that defines the Campaign brief Protocol Step # 10. The collective name given in this Rally Race analogy for PRCA steps 4 to 6 is “The journey”. It has already been used in the definition of two of

the steps of the campaign brief protocol, namely, Step 2, “The route map”, and Step 4, dealing with the “Travel companions” in the race. On the one hand it addresses what needs to be done to achieve all that is embodied in the “destination” (MBPS # 01), but it also addresses who has to be either consulted or briefed about what needs to be done. Thirdly it asks the very pertinent question “How will we know we have arrived”, that is, what are the targets, standards and yardsticks set for this journey, so that the team will know that having done what was agreed they have now indeed reached their destination. Section 2.4 above outlines the detail of what the PRCA sector best practice guidelines suggest should be part of the campaign brief for these steps.

Figure 38: Cross-sectional point that defines “We have arrived!”

		<i>The journey</i>		
		4. What are we doing to get there?	5. Who do we need to talk to?	6. How will we know we've arrived?
<i>The yardstick</i>	Engagement success	Managing performance in engagement	X	X
		Roll-out success matrix	X	X
		Impacting organisational brand leadership	X	X
		Cost-effectiveness of marketing brief	X	X
		Mutual agreement on success measures	X	X
		Mutual agreement on roles & responsibilities	X	X

“The yardstick”, is made up of the various component activities as indicated by the Caq²das diagnostic filtering software for the engagement success theme, as well as informed the key leverage areas as shown (KLA # 21 to 26).

The software indicated that all six these key leverage areas listed (KLA # 21 to 26) will potentially impact the three PRCA steps as shown in Figure 38, and can be considered the essential success factors in getting this step right. The following is a brief summary of how this would happen, with reference at the end of the bulleted list to Appendix I where each of the 26 key leverage areas is discussed in greater detail and put in context with appropriate literature.

- ***Managing performance in the engagement*** is typically a project management activity; it should be taken on board by the campaign brief engagement team and

managed with appropriate consideration for project timelines, the project team's competence, capacity and experience and as always with eye on day-to-day unfolding of the project playing field and horizon. (See for example Victoria State Government, 2011; Bourne, 2010);

- ❑ The **roll-out of a success matrix** which clearly stipulates what has to be achieved, how it has to be achieved and importantly how the financial services company will measure whether the campaign brief engagement team has indeed achieved this, is a crucial first step (see for example Hultink & Robben, 1995);
- ❑ It is also important to establish up-front what the potential contribution would be to the **organisational brand leadership** of the financial services company in the likely event that the campaign is a success, on the one hand, but on the other to assess up-front what the potential risk to the organisational brand leadership of the organisation would be in the unlikely event of campaign failure (Aaker, 2004);
- ❑ The project may have been given specific targets and timelines, but at all times the project team management has to make sure that they also keep the **cost-effectiveness of the campaign brief** in mind. The only time when the project team should be able due to throw cost-effectiveness overboard would be if due to unforeseen circumstances they would only be able to reach the desired end point for the race if they incur further the expenses, and then only if they had carefully considered all other alternatives (for example see a best practice guide (Woolf *et al.*, 2013) and a practical assessment in the field by Hanson *et al.*, 2003);
- ❑ Although the financial services company has to establish a framework for and have a clear indication of the success criteria that they want to inform the engagement and campaign, **mutual agreement on the success measures** are absolute essential to ensure that the campaign brief engagement, firstly, will be a success (AmyPoh, Saludin & Mukaidono, 2004); and
- ❑ **Mutual agreement on the roles and responsibilities** of the individual team members, but also of the corporate parties to the agreement, the financial services company and the advertising agency, with due consideration for the skills, competence and experience portfolio of each team member (see for example Gool & Campbell, 2003; OECD/Mountford 2009).

Details of these six key leverage areas are contained in Sections KLA # 21 to KLA # 26 in Appendix I.

The marketing equivalent of “We have arrived” is for the campaign brief engagement team to have successfully concluded the engagement and for the campaign to have been successfully concluded. As stated above, “We have arrived” will only be meaningful for the financial services company, from a business perspective, if they can also say “We have achieved all and more than we set out to do” and thus it could really rather be “We have won!”

To summarise, team management of the campaign brief engagement team can claim the accolades when the targets as set are met and exceeded, on or below budget, on or before time and at or better than expectations.

5.6 CONCLUDING REMARKS

In Sections 5.5.2 to 5.5.11 a systematic, sequential protocol was developed, which when used as the blueprint for the development of an advertising campaign brief for financial services is expected to consistently give better results than methods for the development of campaign briefs for intangible services.

By using the results of an extensive exploratory literature review in conjunction with the results obtained through a mixed-method research approach, consisting of online surveys to respondents in financial services companies and advertising agencies as well as the outcomes of one-on-one interviews with respondents from both financial services companies and advertising agencies, a unique “Campaign brief protocol” was developed. This leads the campaign brief engagement team through the process of development, validation and roll-out in ten logical, sequential steps that are couched in the terminology of a rally race, where the ultimate prize is to come first and thus beat the competitors to the additional market share focused on in the campaign.

CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS: INTRODUCING A FRAMEWORK FOR A BRIEFING PROCESS AND TEMPLATE

Chapter outline

The purpose of this chapter is to:

- Briefly summarise the process and journey that brought this study that was focused on the interpretation of campaign briefs between South African financial services companies and advertising agencies to this point;
- Arrive at a comprehensive set of conclusions that adequately summarises the findings made and the breakthroughs made in arriving at a unique and new approach to develop and manage the roll-out of advertising campaign briefs for financial services companies; and
- Construct a series of recommended next steps that are designed to improve the method over the short to medium term.
- So in brief, this Chapter will aim to:
 - Recapture what was discussed in the study;
 - Introduce the framework for the briefing process;
 - Provide the template for the brief;
 - Recommend further steps for future academic research;
 - Recommend further steps for future implementation in the field.

6.1 SETTING THE SCENE

In the quest to research communication between stakeholders from opposite poles, the academic literature delves into the campaign brief as the epitome of the communication interaction between a financial services company and an advertising agency. The study

commenced by attempting to answer the question whether there is a difference between advertising tangible and intangible products. The intangible products and services of the financial services company are taken as the reference point with the advertising agency the other side of the development of an advertising campaign.

A study done by the PRCA to compile guidelines for briefing an advertising campaign is taken as the foundation to build on. A similar approach is adopted in this study, and expanded to not only include surveys as the original study had, but also one-on-one interviews adding depth to the existing knowledge. The eight areas identified became building blocks for the approach developed in this study.

The research done for this study:

1. used existing knowledge;
2. built on insights gained from academic and peer-reviewed literature; and
3. interpret the outcomes of both the online surveys and the one-on-one interviews by making use of management principles, perspectives and insights in order to create a process value chain, protocols and a toolkit to aid marketing practitioners in planning, negotiating and implementing campaign briefs. A mixed method approach was taken whereby data from both the financial services company and the advertising agency was collected through online surveys and one-on-one interviews and then put through quantitative as well as qualitative analyses.

Data obtained from online surveys were analysed to obtain qualitative and quantitative results, which were used to provide insights and an indication of the way forward.

A high-level view of the results from the surveys indicated in short that whereas there is broad agreement about a large number of logistical and fairly mundane aspects of any engagement to develop and roll out a campaign brief there is significant differences of perception about five key areas, namely:

- A. The content and structure of the **brief**;

- B. **Parties to the engagement** with specific reference to the skills sets (both soft and hard skills) required to make a success of this engagement;
- C. The role and quality of **communication** during the campaign brief engagement;
- D. **Process of the engagement**, or in other words, the components of the campaign brief value chain; and
- E. The approach followed to gauge the **success of the engagement**.

These five areas were validated by using the proprietary Caq²das diagnostic filtering software package that assesses qualitative and quantitative trends based on an analysis of text strings. It was furthermore shown by the software that these five areas are underpinned and enabled by a number of key leverage areas that are developed in Section 5.5 above and are discussed in detail in Appendix I.

6.2 CONCLUSIONS

This research was conducted to find out what the best practice would be in communication between a financial services company and an advertising agency. The brief was used as a reference point of the communication between the financial services company and the advertising agency.

For the purpose of the study, the brief was taken as the starting point of the advertising campaign.

The combined data set obtained from 45 online survey responses and a further eight in-depth face-to-face interviews indicates that the brief is indeed the pinnacle of the initial communication between the financial services company and the advertising agency.

The brief gives the advertising agency an indication of the attention the campaign will receive from the financial services marketing team. The thoroughness, clarity and professionalism that the financial services company employs in its brief to the advertising agency often sets the tone that will continue throughout the rest of the creative process in developing the campaign.

According to PRCA (2011:11), the benefits of a formal written briefing process include the following:

- Development of higher quality work as result of clear direction and focus
- Saving time and money through thorough initial planning and clarity upfront, so that once the agency starts working, it is easier and faster to get to the final product
- More satisfaction on both the customer and the agency sides as remuneration is perceived to be fairer as a result of formalised expectations in the brief, very similar to a contract.

A formal process with clear and complete documentation enhances the working relationship between the financial services company and the advertising agency. The more thought and effort are put into the initial stages, with well-defined goals, a target market and results required from the financial services company, the less cumbersome it is for the advertising agency to formulate a clear strategy and the more efficient the process becomes. Time constraints might prevent the advertising agency to give their inputs into the brief to ensure their experience, expertise and strategic insights into the process are taken into account. A suggestion is to, as one of the initial steps, include updates and reverts on the written briefing document. Although this might sound cumbersome and could be seen as a possible waste of precious time, this step should improve the efficiency of the process and save time in the end.

A secondary, contributing factor to the success of the development of the campaign (not in results only, but also in efficient use of resources, time and available funds) is the relationship between the financial services company and the advertising agency. The better the relationship between the financial services company and the advertising agency, the better the results. The relationship could extend to other advertising agencies that are part of the extended network responsible for executing the advertising campaigns for the financial services company. In that case, the relationship between the different advertising agencies is as important as that of the relationship between the financial services company and the advertising agency.

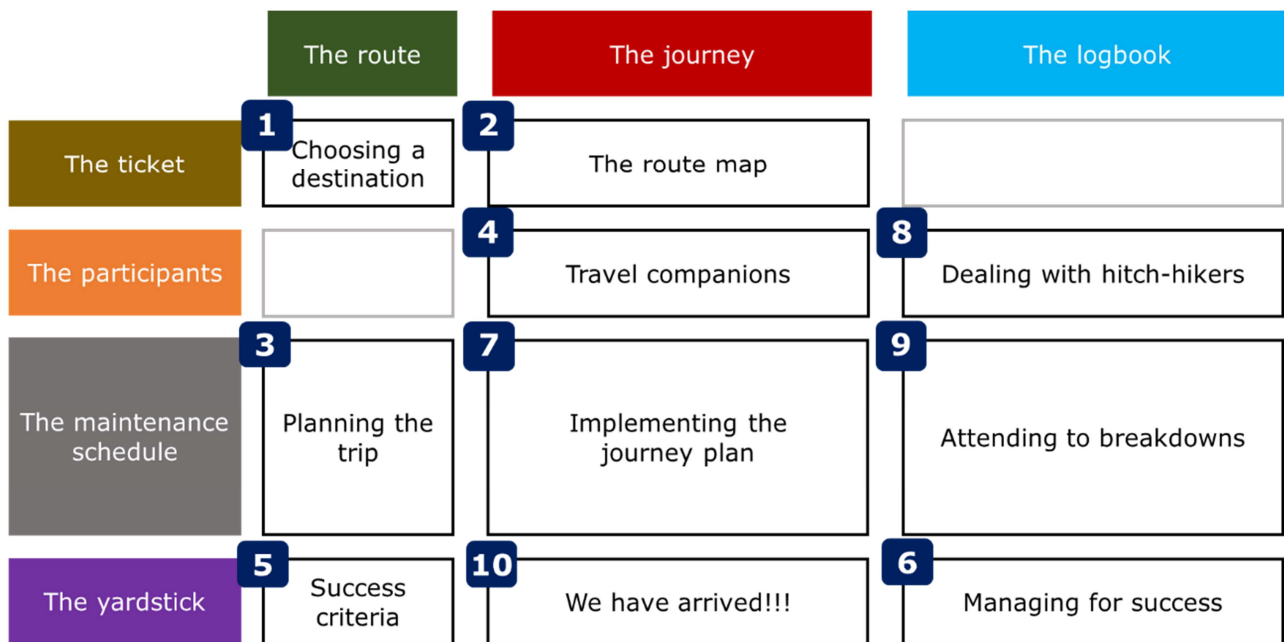
Usually it is the employees from the marketing teams within the financial services company that brief the advertising agencies. For them to brief the agency properly, they

need to understand the products and services and be able to articulate the value of these to their customers.

Once the advertising agency team understands the features and value of the products and services, they should be critical about what is required of them. They should not implement the request from the financial services company blindly, but should play a consultative role and give strategic input into the most effective execution and advertising or communication channels and platforms to use. The advertising agency should also educate their customer, the financial services company, about the latest technologies and platforms. Furthermore, they should endeavour to broaden the financial services company's creative limitations.

The research indicates that the briefing process should be formalised and both parties should adhere to the steps agreed on in the process. The return on the effort put into the brief is visible in the results that the campaign produces (IBSA's Morrison, in PRCA, 2011).

Figure 39: Overview of the ten steps in the campaign brief protocol



Source: Calitz, 2016

In summary, therefore, the ten areas illustrated schematically in Figure 39 are defined in the two-dimensional playing field created by the matrix of the eight steps of the PRCA (2003) and the five key themes as identified by the Caq²das diagnostic filtering software analysis program. This created the path to a practical toolkit with 10 key action areas.

6.3 RECOMMENDATIONS

The model and practical toolkit could be further developed with a specific focus on the financial services company. Although the base will be the model developed in the study, there might be tweaks to ensure further relevance.

The 10-point model should be developed into a more customer-friendly version with plain language to be implemented as guideline. For ease of reference, the model could be animated with illustrated steps to implement. The result would be a guide with the same kind of detail as contained in PRCA (2003).

In order to ascertain the value of the model, it should be implemented in the financial services environment and a few actual advertising campaigns could serve as case studies to further progress and expand on the learning and insights as reported in this study. The data gathered from this practical exercise would be the material used to establish what has worked and what proved to be challenging as well as how to go about solving and/or overcoming any of the listed challenges.

The researcher is employed in a financial services company and could gather the data in an informal manner as part of the role of integrated marketing manager.

LIST OF REFERENCES

NOTES re REFERENCES:

1. The key leverage areas (KLAs) as defined in Section 5.5 of this dissertation, are more fully discussed with reference to key findings from the literature in Appendix I. Apart from the references quoted in Section 5.5 in the main body of the dissertation; the additional references quoted in Appendix I are listed at the end of the discussion for each KLA in the Appendix, and are NOT quoted in the dissertation *per se*.

Aaker, D.A., 2004. *Leveraging the corporate brand*. California Management Review. Vol 46 No 3, 6-18. Adapted from Brand Portfolio Strategy, by D. A. Aaker. Simon & Schuster, Inc. New York.

Aaker, D.A., 1996. *Building strong brands*. New York, NY: The Free Press.

AccountAbility, 2011 AA1000 *Stakeholder engagement* standard 2011. Final Exposure Draft.

ACA, 2006. *The client brief*. Reproduced by the Association of Canadian Advertisers from the PRCA (2003) guide with permission; with only minor modifications and with added footnotes for clarification. Available at www.acaweb.ca/en/ [Accessed: 2016-08-30]

Action for Enterprise (AFE), 2014. *Value chain program design: promoting market-based solutions for MSME and industry competitiveness*. Last updated January 2014

Adcracker 2016. <http://www.adcracker.com/store/index.htm> 2016 Creative Director Set [Accessed: 2016-07-26]

Ambler, T. & Styles, C., 1996. *Brand development versus new product development: towards a process model of extensions decisions*. Marketing Intelligence & Planning, 14(7):10-19.

- AmyPoh. AL, Saludin, M.N., Mukaidono, M. 2004. *Deriving consensus rankings via multicriteria decision making methodology*. Paper of the National Defense University of Malaysia.
- Ansari, A. and Riasi, A., 2016. *An investigation of factors affecting brand advertising success and effectiveness*. International Business Research, 9(4),20.
- Atack, J & Neal, L., 2009. *The origins and development of financial markets and institutions: from the seventeenth century to the present*. Cambridge: Cambridge University Press.
- Attride-Sterling, J., 2001. *Thematic networks: an analytic tool for qualitative research* Qualitative Research December 2001 1: 385-405 Sage Journals
<http://qrj.sagepub.com/content/1/3/385.short> [Accessed: 2013-09-09].
- Barker, R. & Angelopulo, G., 2007 (first published 2006). *Integrated organisational communication*. Creda Communications (printers). Juta Academic (publishers), Cape Town.
- Bazeley, P. 2004. *Issues in mixing qualitative and quantitative approaches to research*. Published in Buber, R, Gadner, J and Richards, L. (eds) (2004) *Applying qualitative methods to marketing management research*. UK. Palgrave MacMillan. 141-156.
- Belch, G.E. & Belch, M.A. 2003. *Advertising and promotion – An integrated marketing communications perspective*, Sixth Edition. 919 pp. The McGraw-Hill Companies
- Berry, L.L. 2000., *Cultivating service brand equity*. Journal of the Academy of Marketing Science,28(1):128-137.
- Blakeman, R., 2015. *Advertising campaign design: Just the essentials*. Routledge.
- Blyth, A. & Worthington, J. 2010. *Managing the brief for better design*. 2nd Edition, Routledge. London
- Bornman, D 2016 *A gap analysis of employee perceptions and expectation of leadership communication*. PhD thesis, University of Pretoria. <<http://hdl.handle.net/2263/53005>> [Accessed: 2016-07-13]

Botha, J.A.R., 1996. *Kreatiewe strategieë gerig op produkposisionering deur die gebruik van reklame*. Unpublished doctoral thesis. Pretoria: University of South Africa. [Online] Available in the University of South Africa Digital Repository. Persistent URL <http://uir.unisa.ac.za/handle/10500/15658> [Accessed: 2016-05-22]

Boulding, W. Kalra, A. Staelin, R. & Zeithaml, V.A., 1993. *A dynamic process model of service quality: From expectations to behavioural intentions*. Journal of Marketing Research. Vol. XXX: 7-27

Bourne, L. 2010. *Stakeholder relationship management*. Presented at 7th Project Management National Benchmarking Forum, PMI Chapter, Rio de Janeiro, Brazil. 24th to 26th Nov. 2010.

Brady, M. K., Bourdeau, B.L. & Heskell, J., 2005. *The importance of brand cues in intangible service businesses: an application to investment services*. The Journal of Services Marketing, 19:401-410. [Online] Available at Emerald: www.emeraldinsight.com/0887-6045.htm. [Accessed: 2009-06-20].

Braungard, E.A., 1997. *Keystone adds value by bringing advertising in-house*. Journal of Retail Banking Services. 19.n3:13(4). Academic OneFile. Gale. Pretoria: University of Pretoria. [Online] Available at http://find.galegroup.com/gtx/infomark.do?&contentSet=IAC-Documents&type=retrieve&tabID=T002&prodId=AONE&docId=A20041333&source=gale&userGroupName=up_itw&version=1.0 . [Accessed: 2011-06-02].

Brebnor, C.S., 1974. *Bank marketing – some theoretical and practical aspects of marketing by banks in South Africa and overseas*. Unpublished master's dissertation. Pretoria: University of South Africa. Available from the University of Pretoria library.

British Council. 2015. *Core skills*. Advisory Memorandum. London.

Brodie, R.J., 2009. *From goods to service branding: An integrative perspective*. Marketing Theory, 9:107. [Online] Available at <http://mtq.sagepub.com>. [Accessed 2009-04-09].

Bryman, A., 2006 *Integrating quantitative and qualitative research: how is it done?* Qualitative Research, 2006, 6: 97-113; Available at: <http://journals.sagepub.com/doi/pdf/10.1177/1468794106058877> [Accessed: 2013-09-09].

CAANZ [2015]. *How to brief an agency*. Best practice guidelines prepared by the Communications Agencies of New Zealand.

Camp, L., 2002. *In the real world*. Money Marketing, 11/14/2002.

Cant, M. & Machado, R. 2002. *Marketing success stories*. 4th ed. South African edition. Cape Town: Oxford University Press Southern Africa.

Carter, T. & Chattalas, M., (2001) *Marketing financial services in London*, Services Marketing Quarterly, 22:4, 63-81, DOI: 10.1300/

Castell, L. 2005. *Empowering the customer in the briefing process*. Khosrowshahi, F (Ed.), 21st Annual ARCOM Conference, 7-9 September 2005, SOAS, University of London. Association of Researchers in Construction Management, Vol. 1, 319-30

Choi, H. Yoon, H.J. Paek, H.J. Reida, L.N., 2012. *Thinking and feeling' products and 'utilitarian and value-expressive' appeals in contemporary TV advertising: A content analytic test of functional matching and the FCB model*. Journal of Marketing Communications, 18(2): 91–111.

Collins English Dictionary, 1988. *Collins English Dictionary*. 1988. 4th Edition. HarperCollins Publishers, Glasgow.

Conrad, D., 2014. *Workplace communication problems: Inquiries by employees and applicable solutions*. Journal of Business Studies Quarterly (4)4.

Creswell, J.W. 2003. Research Design. *Qualitative, quantitative and mixed methods approaches*, Second Edition. Sage Publications. Thousand Oaks.

Creswell, J.W. 2014. *Qualitative Inquiry and research design - Choosing among five approaches*, Third Edition. Sage Publications. LA.

Cuva, A. 2014. *Traversing the uncharted arena of computer assisted qualitative data analysis software: Mapping out QDA miner 4.1 as a first-time user*. The Qualitative Report 2014 Volume 19, Article 19, 1-4

Davies, M.B. & Hughes, N. 2014. *Doing a successful research project: Using qualitative or quantitative methods* (2nd edition). ISBN 9781 137306425, Palgrave-Macmillan, UK

Day, G.S., 1994. *The capabilities of market-driven organizations*. Journal of Marketing 58(4): 37-52, American Marketing Association Stable.
<http://www.jstor.org/stable/1251915> [Accessed: 28/01/2013 10:25].

De Chernatony, L. & Cottam, S., 2006. *Internal brand factors driving successful financial services brands*. European Journal of Marketing, 40(5/6):611-633. Available from:
<http://dx.doi.org/10.1108/03090560610657868> [Accessed: 2016-03-23]

De Chernatony, L. & Segal-Horn, S., 2003. *The criteria for successful services brands*. European Journal of Marketing, 37(7/8):1095-1118.

De Lisle, J. 2011. *The benefits and challenges of mixing methods and methodologies: Lessons learnt from implementing qualitatively led mixed methods research designs in Trinidad and Tobago*. Caribbean Curriculum. Volume 18. 87-120.

DeChurch, L.A. and Mesmer-Magnus, J.L. 2010. *The cognitive underpinnings of effective teamwork: A meta-analysis*. Journal of Applied Psychology, Vol. 95 No 1 32-55

Degener, M., 1999. *Branding of services, with special reference to the financial service sector: A preliminary study*. Unpublished master's dissertation. Stellenbosch: Stellenbosch University. [Online] Available from SUNScholar, University of Stellenbosch University. Persistent URL <http://hdl.handle.net/10019.1/511162> [Accessed: 2016-05-22].

Deloitte, 2013. *Banking industry outlook – Repositioning for growth: Agility in a re-regulated world*. Prepared by the Deloitte Center for Financial Services, Copyright © 2013 Deloitte Development LLC. Member of Deloitte Touche Tohmatsu Limited.

Devlin, J.F. & McKechnie, S., 2008. *Customer perceptions of brand architecture in financial services*. European Journal of Marketing, 42(5/6):654-666. [Online] Available from: Emerald:<http://www.emeraldinsight.com/0309-0566.htm> [Accessed: 2009-04-13].

Duman, T and Mattila, A. 2005 *The role of affective factors on perceived cruise vacation value*. Tourism Management 26(3). 311-323.

Dwyer, J 2009, *Communication in business: Strategies and skills*, 4th ed, Frenchs Forest, Pearson Education, Australia.

- Edgett S, Parkinson S (1993) *Marketing for service industries – A review*. The Service Industries Journal 13(3):19-39.
- Edmonds, S. C., 2010. *The culture engine: A framework for driving results, inspiring your employees, and transforming your workplace*. Wiley Publishers.
- Ehrlich, E. and Fanelli, D., 2012. *The financial services marketing handbook: Tactics and techniques that produce results* (Vol. 150). John Wiley & Sons.
- Ennew, C. and Waite, N., 2013. *Financial services marketing: An international guide to principles and practice*. Routledge.
- Ennew, C.T. & Waite, N., 2007. *An international guide to principles and practice – Financial services marketing*. Oxford: Butterworth-Heinemann Elsevier.
- Ensign, P.C. (2001) *Value chain analysis and competitive advantage: Assessing strategic linkages and interrelationships*. Journal of General Management. 27(1): 18–42.
- Faridyahyaie, R. Faryabi, M. & Noubar, H. B. K., 2012. *Identifying marketing effectiveness metrics. Case study: East Azerbaijan's industrial units*.
- Fill, C. and Jamieson, B. 2011. *Marketing course*, University of Edinburgh, UK. MM-A1-engb 2/2011 (1039)
- Fournier, S., 1998. *Customers and their brands: Developing relationship theory in customer research*. Journal of customer research. Vol 24.
- Ganesan-Lim, C., Russell-Bennett, R and Dagger, T. 2008. *The impact of service contact type and demographic characteristics on service quality perceptions*. Journal of Services Marketing 22(7): 550-561.
- Geereddy, N. 2013. *Strategic analysis of Starbucks Corporation*.
- Goi, C. L., 2009. *A review of marketing mix: 4Ps or more?* International Journal of Marketing Studies, Vol 1, No 1, May 2009; www.ccsenet.org/journal.html.
- Goold, M, and Campbell, 2003. *Making matrix structures work: Creating clarity on unit roles and responsibility*. Ashridge Strategic Management Centre, Matrix Organisation Short Course Material, Ashridge, UK.

- Grace, D. and A. O'Cass, 2005, '*Examining the effects of service brand communications on brand evaluation*', *Journal of Product & Brand Management*, vol. 14, no 2, pp. 106-116.
- Hamel, G. & Prahalad, C.K. 2005. *Strategic Intent*. *Harvard Business Review*, July-August 2005.
- Hamilton, C., 1993. *Communicating for results. A guide for business and the professions*. 4th ed. California: Wadsworth Publishing Company.
- Hanson, K., Kikumbih, N., Armstrong Schellenberg, J., Mponda, H., Nathan, R., Lake, S., Mills, A., Tanner, M., Lengeler, C. [2003] *Cost-effectiveness of social marketing of insecticide-treated nets for malaria control in the United Republic of Tanzania*. *Bulletin of the World Health Organization* 2003, 81 (4), 269-276. Available at: <http://www.who.int/bulletin/volumes/81/4/Hanson0403.pdf> [Accessed: 2016-08-14]
- Haque, F, Arun, T & Kirkpatrick, C. 2007. *Corporate governance and capital markets: A conceptual framework*.
- Hoever, I.J., Van Knippenberg, D, Van Ginkel, W.P. & Barkema, H.G. 2012. *Postinging team creativity: Perspective taking as key to unlocking diversity's potential*. *Journal of Applied Psychology* Vol 97 No 5, 982-996
- Hooker, J. 2008. *Cultural differences in business communication*. Carnegie Mellon University Research Report December 2008.
- Horsky, D., Horsky, S. and Zeithammer, R., 2014. *The modern advertising agency selection contest: A case for stipends to new participants*. *Journal of Marketing Research*.
- Hosseini, M.H. & Navaie, S.M., 2011. *Analysing the influence of promotion mix on increase of sale in cosmetics and beauty products*. *Asian Journal of Business and Management Sciences*. Vol. 1 (4):99-113.
- Hultink, E.J. and Robben, H.S.J. 1995. *Measuring new product success: The difference that time perspective makes*. *Journal of Product Innovation Management*, Volume 12, Issue 5, November 1995. 392–405
- Hunt, S.D. & Morgan, M., 1995. *The comparative advantage theory of competition*. *Journal of Marketing*. Vol. 59:1-15.

Igbaekemen, G.O. 2014. *Marketing intelligence as a strategic tool for competitive edge*. British Journal of Marketing Studies. Vol.2, No.5,pp. 17-34. September 2014. Published by European Centre for Research Training and Development UK (www.eajournals.org)

Jansen van Rensburg, M., 2011. *Dimensions of advertising agency customer satisfaction*. Journal of Contemporary Management, 7:549-573.

Kallmeyer, J.L., 1999. *Integrated marketing communities and the structure of advertising agencies*. Unpublished master's dissertation. Johannesburg: University of the Witwatersrand. Available from the University of Johannesburg library

Kandampully, J and Hu, H-H. (2007) "*Do hoteliers need to manage image to retain loyal customers?*" International Journal of Contemporary Hospitality Management, Vol. 19:6, 435 - 444

Karlsson, J. & Nilsson, F. 2014. *Determining factors in the selection of an advertising agency*. Bachelor thesis in Marketing. University of Halmstad.

Kelchtermans, G., 2017. *The power of stories: understanding and facilitating teacher professional development from a narrative-biographical perspective*. Keynote speech delivered at the EASA Annual Conference 2017, Parys, South Africa.

Keller, K.L. and Lehmann, D.R. 2005. *Brands and branding: Research findings and future priorities*. Columbia University Report Series.

Khan, R. & Sindhu, S., 2015. *An investigation of advertising appeal on customer response in service advertising*. Management Studies and Economic Systems (MSES), 2 (1), 39-50, ITM University, Gurgaon, India.

Kietzmann, J.H. Hermkens, K. McCarthy, I.P. Silvestre, B.S., 2011. *Social media? Get serious! Understanding the functional building blocks of social media*. Business Horizons (2011) 54, 241—25. Indiana University. Kelly School of Business. (Elsevier).

King I, King II, King III, King IV (2001 – 2016) *Corporate governance state-of-the-art trends in South African corporations*.

Kosara, R. and MacKinlay, J. 2013. *Storytelling: The next step for visualization*, Tableau Software Marketing Brochure

Koslow, S. Sasser, S.L. & Riordan, E.A., 2006. *Do marketers get the advertising they need or the advertising they deserve? Agency views of how customers influence creativity*, Journal of Advertising, 35:3, 81-101, DOI: 10.2753/JOA0091-3367350306. Routledge. [Accessed: 2014-04-02]

Kotze, I.J.M., 1991. *Die bemerking van finansiële dienste, met spesifieke klem op die wyse wat takbestuurders, binne Eerste Nasionale Bank van Suider-Afrika Beperk, bemerking doen*. Unpublished MBA dissertation, University of Stellenbosch. Available from SUNScholar, University of Stellenbosch University. Persistent URL <http://hdl.handle.net/10019.1/69149> [Accessed: 2016-05-22]

Kotzé, T., 2009. *Referencing in academic document: Official guidelines of the Department of Marketing and Communication Management*. 4th ed. Department of Marketing and Communication Management: University of Pretoria. [Online] Available at: http://web.up.ac.za/sitefiles/file/40/753/referencing_2009.pdf [Accessed: 2009-05-20].

Lawson, D., Borgman, R. & Brotherton, T. 2007. "A content analysis of financial services magazine print ads: Are they reaching women?" Journal of Financial Services Marketing, Vol. 12, No. 1, August 2007, pp. 17–29.

Leedy, P.D. & Ormrod, J.E., 2005. *Practical research: Planning and design*. 8th ed. Upper Saddle River, NJ: Pearson.

Louw, N.S., 2001. *The impact of e-commerce on the media communications role of advertising agencies*. Unpublished master's dissertation. Johannesburg: University of the Witwatersrand. Available from the University of Witwatersrand library.

Lovelock, C. and Wright, L. 1999. *Principles of service marketing and management*, Second Edition, Prentice Hall, an imprint of Pearson Education, Inc.

Lunenburg, F.C. 2010. *Communication: The process, barriers, and improving effectiveness*. Schooling Volume 1, Number 1, 2010

Mahne, J., 1989. *Advertising effectiveness as measured by advertising agencies*. Unpublished master's dissertation. Johannesburg: University of the Witwatersrand. Available from the University of Witwatersrand library.

Makungo, L., 2015. *Poor brief, real objectives, and the fake budget*. Blog article. 19 AUG 2015. <http://www.bizcommunity.com/Article/196/12/133275.html#topstory>. [Accessed: 2015-08-20].

Mandelli, A., 2010. *Beyond control in social media? Brand and reputation management in markets as mediated conversations* SDA Bocconi, Milan (Italy) Università della Svizzera Italiana, Lugano

Mangold, W.G. & Faulds, D.J. 2009. *Social media: The new hybrid element of the promotion mix*. Business Horizons (2009) 52 (4), 357—365

Manning, T. [2001] *Making sense of management*, Zebra Publishers, 95 pp.

McDonald, J.H. 2014. *Handbook of biological statistics*. Third Edition, Sparky House Publishing, Baltimore, Maryland, U.S.A. 305pp

Miles, R.M., Huberman, A.M. & Saldana, J. 2011. *Qualitative data analysis – A methods sourcebook*. Edition 3. Sage Publications, Los Angeles, CA. Chapter 11 Drawing and verifying conclusions. 275-322.

Moerdyk, C., 2014. *Why advertising agencies lose customers*. Blog article. 17 JUN 2014 <http://www.bizcommunity.com/Article/196/12/114816.html#topstory> [Accessed 2014-06-17]

Mohammad, H. I., 2015. *7Ps Marketing mix and retail bank customer satisfaction in Northeast Nigeria*. British Journal of Marketing Studies, Vol 3, No 3, 71-88, June 2015. Published by the European Centre for Research Training and Development UK (www.eajournals.org)

Morgan, R.M. & Hunt, S.D., 1994. *The commitment-trust theory of relationship marketing*. The Journal of Marketing. 58 (3):20-38.

Morgeson, F.P., DeRue, D.S. & Karam, E.P.. 2010. *Leadership in teams: A functional approach to understanding leadership structures and processes*. Journal of Management, Vol. 36 No. 1, January 2010 5-39

Mortimer, K., 2002. *Integrating advertising theories with conceptual models of services advertising*. Journal of Services Marketing, 16 (5), 460-468.

Mortimer, K., 2001. *Services advertising: the agency viewpoint*. Journal of Services Marketing, 15(2):131-146. [Online] Available from Emerald: <http://www.emerald-library.com/ft>. [Accessed 2009-04-09].

Myers, M.D., 2009 (reprinted 2010), *Qualitative research in business management*, London: Sage Publications.

Nilsson, F. and Karlsson, J., 2015. *Determining factors in the selection of an advertising agency: A case study of three advertising buyers to small advertising agencies*.

Nishimura, S., Nevgi, A. and Tella, S. 2008. *Communication style and cultural features in high/low context communication cultures: A case study of Finland, Japan and India*. Peer-reviewed article.

Nussey, A., 2000. *Branding in financial services, with special reference to banks in the retail market*. Unpublished master's dissertation. Johannesburg: Rand Afrikaans University. Available from the University of Johannesburg library.

O'Cass, A & Grace, D., 2004. *Exploring customer experiences with a service brand*. Journal of Product and Brand Management, 13(4):125-139. [Online] Available from Emerald: www.emeraldinsight.com/1061-0421.htm. [Accessed 2009-04-09].

O'Loughlin, D & Szmigin, I., 2004. Customer perspectives on the role and importance of branding in Irish retail financial services. International Journal of Bank Marketing, 23(1):8-27. [Online] Available from Emerald: <http://www.emeraldinsight.com/0265-2323.htm>. [Accessed 2009-04-09].

Olatunji, R.W., 2005. *Managing advertising creativity in a deregulating economy*. Alliance Journal of Business Research, 83-90. [Online] Available from Emerald: www.emeraldinsight.com/1061-0421.htm. [Accessed 2009-04-09].

OECD/Mountford D., 2009 "Organising for local development: the role of local development agencies. Summary Report", 26-27 November 2009, working document, CFE/LEED, OECD,

Oxford Journals. 2015. *Qualitative field research*. (Ed. Ebrahim, G.J.) Journal of Tropical Paediatrics, Oxford University Press. Available from: http://www.oxfordjournals.org/our_journals/tropej/online/ce_ch14.pdf [Accessed: 2015-08-18]

Penn-Edwards, S. 2010. *Computer aided phenomenography: The role of Leximancer computer software in phenomenographic investigation*. The Qualitative Report Volume 15 Number 2. 252-267

Phillips, J.C.A., 1999. *Globalisation: the implications for and challenges to the financial services sector in South Africa*. Unpublished master's dissertation. Available from SUNScholar, University of Stellenbosch University. Persistent URL <http://hdl.handle.net/10019.1/51283> [Accessed: 2016-05-22]

Pinto, RM., 2010. *Mixed methods design*, in Encyclopedia of research design. (ed. Neil J. Salkind). <http://dx.doi.org/10.4135/9781412961288.n245> [Accessed: 2016-03-23]

Ponterotto, J.G., 2005. *Qualitative research in counseling psychology: A primer on research paradigms and philosophy of science*. Journal of Counseling Psychology, 52(2):126-136. [Online] Available from: EBW 801 Course website, Theme 8. [Accessed: 2009-06-22].

PRCA [2016] *The client brief. An executive summary guide on how to write a client brief*. Joint industry guidelines for young marketing professionals in working effectively with agencies. Available from www.prca.org.uk [Accessed: 2016-07-30]

PRCA, [2011]. *Briefing an agency*. Published by the United Kingdom Public Relations Consultants Association.

PRCA. 2003. *The client brief: a best practice guide to briefing communications agencies*. The UK Public Relations Consultants Association. A joint industry initiative with Chris Herd, Managing Partner, Bates UK, as principal contributing author.

Predictive Analytics Today. 2016a. *The top qualitative data analysis software*. <http://www.predictiveanalyticstoday.com/top-qualitative-data-analysis-software/> [Accessed; 2016-06-25]

Predictive Analytics Today. 2016b. *The top free qualitative data analysis software*. <http://www.predictiveanalyticstoday.com/top-free-qualitative-data-analysis-software/> [Accessed: 2016-06-25]

Presbrey, R., 2000. *The history and development of advertising*. Advertising and Society Review 1(1):5-32. [Online] Available from Project Muse:

<http://muse.jhu.edu/login?uri=/journals/asr/v001/1.1presbrey.html>. [Accessed: 2009-07-28].

Qualtrics (2005). *Qualtrics survey and interview software package*; developed by Qualtrics in 2005, the 2009 version used was 2009:12,038. Provo, Utah, USA

Reddy, J. 2013. *Marketing management*, e-book. Sage Publishing.

Sadek, H. & Tantawi, P., 2016. *Measuring the impact of personal selling on building bank brand*. The Business and Management Review 7(2) International Conference on Globalisation, Entrepreneurship & Emerging Economies, Egypt.

Sahin, J., 2015 *Five communications trends in the financial services industry*. Web article.

<http://www.edelman.com/post/five-communications-trends-financial-services-industry/>

[Accessed: 2014-03-22]

Sater, P.E.R. 1988. *Corporate advertising in the financial press and its effect on a company's share price*. An unpublished master's thesis. Johannesburg: University of the Witwatersrand. Available from the University of Witwatersrand library.

Saunders, M., Lewis, P. & Thornhill, A., 2007. *Research methods for business students*. 4th ed. Harlow, Essex: Pearson.

Saylor Academy, 2013. *The principles of management textbook*, adapted by The Saylor Foundation under a Creative Commons Attribution-NonCommercial-ShareAlike 3.0 License without attribution as requested by the work's original creator or licensee

Scott, B., 2009. *Battling the cost crunch*. Electronics and Communications Abstracts. Broadcast Engineering, 51(2): 46, 48-49.

Severi, E. Ling, K.C. & Nasermodeli, A., 2014. *The impacts of electronic word of mouth on brand equity in the context of social media*. International Journal of Business and Management. Vol. 9 (8). UCSI University, Kuala Lumpur, Malaysia.

Sherwood, D., 2014. *The three laws of organodynamics*. Business Strategy Review. London Business School. Issue 4:56-59.

Simonton, D.K. 2003. *Qualitative and quantitative analyses of historical data*. Annu. Rev. Psychol. 2003. Vol 54. 617-640.

Skaalsvik, H. & Olsen, B., 2015. *Service branding: the development of a typology of service brands at the corporate level*. Problems and Perspectives in Management, 13 (4), 53-62.

Skaalsvik, H. & Olsen, B., 2014. *Service branding: the role of innovative brand leadership*. Problems and Perspectives in Management. 12 (4), 55-66.

Skaalsvik, H. & Olsen, B., 2013. *Service branding in the cruise industry: A case of the Norwegian coastal voyage. (Hurtigruten)* Original scientific paper 427, 61(4):425–449.

Smith, S.M. & Albaum, G.S., 2010. *An introduction to marketing research*. Available online. Qualtrics Survey. [Accessed: 2012-09-05]

Sok, P. and O’Cass, A. (2011) ‘*Understanding service firms brand value creation: A multilevel perspective including the overarching role of service brand marketing capability*’, Journal of Services Marketing, 25(7), 528–539

Stanford University (2012). *Using NVivo for qualitative data analysis*. NVIVO User Manual. Available from:

http://web.stanford.edu/group/ssds/cgi-bin/drupal/files/Guides/UsingNVivo9_0.pdf

[Accessed; 2016-04-07]

Stephen, S. Cheveldave, M. & Gelowitz, C. [2010] *A Strategic Conversation: How to Engage Staff in Scanning and Scenario Building – A Case Study*. Available at:

www.cognitive-edge.com [Accessed: 2015-03-25]

Steyn, P., Wallstrom, A. & Pitt, L. 2010. *Customer-generated content and source effects in financial services advertising: an experimental study*. Journal of Financial Services Marketing. [Online] Available from

<http://find.galegroup.com/gtx/infomark.do?&contentSet=IAC->

[Documents&type=retrieve&tabID=T002&prodId=AONE&docId=A228121665&source=gale&userGroupName=up_itw&version=1.0](http://find.galegroup.com/gtx/infomark.do?&contentSet=IAC-Documents&type=retrieve&tabID=T002&prodId=AONE&docId=A228121665&source=gale&userGroupName=up_itw&version=1.0) [Accessed: 2011-06-02].

Swart, D.H. 2016 *Personal communication* re the use of the Caq²das software package. Pretoria, South Africa.

Swart, D.H. 2016 *Development of the Caq²das software package between 2003 and 2016*, the latest version being dated 2016. What Works Internal Memorandum, Johannesburg, South Africa.

Tait, M., 1995. *Die invloed van geselekteerde bestuursveranderlikes op die diensgehalte van finansiële instellings: 'n interne bemarkingsperspektief*. Unpublished master's dissertation. Pretoria: University of South Africa (UNISA). Available from the UNISA Institutional Repository.

Temple, M.A., 1997. *Visual aspects in integrated marketing communication*. Unpublished master's dissertation. Johannesburg. University of the Witwatersrand. Available from the University of Witwatersrand library.

Theron, E. & Terblanche, N.S., 2010. *Dimensions of relationship marketing in business-to-business financial services*. The Market Research Society. University of Stellenbosch.

Thyer, B.A. 2001. *The potentially harmful effects of theory in social work. human behavior in the social environment*. In *Comprehensive Handbook of Social Work and Social Welfare*, Sowers, K.M. and Dulmus, C.M. (eds) John Wiley & Sons, Ltd

Tustin, D.H., 2002. *The relationship between above-the-line advertising and below-the-line promotion spending in the marketing of South African products and services*. Unpublished doctoral thesis. Pretoria: University of South Africa. [Online] Available from UPeTD: Current & Completed Research [Accessed: 2011-10-29].

Tyagi, B. 2013 *Listening: An important skill and its various aspects*. The Criterion. Volume 12, February 2013 ISSN 0976-8165

USAID. 2009. *Corporate governance. The intersection of public and private reform*. The Center for International Private Enterprise, United States Agency for International Development, Washington, USAID Printers.

Van Staden, E., Marx, S. & Erasmus-Kritzinger, L., 2002 *Corporate communication Getting the message across in business* Pretoria: Van Schaik Publishers.

Verma, R. and Boyer, K.K., 2000. *Service classification and management challenges*. De Paul University Report Series. Article 3-1-2000, School of Hotel Administration Collection. Chicago, IL

Victoria State Government [2012] *Managing major projects. report by the auditor-general of the State of Victoria, Australia*. PP No 175, Session 2010-12. Victorian Government Printer, October 2012.

vocus. 2013. *10 Key metrics for marketing success in 2013*. vocus marketing software guide. <http://americanpetproducts.org/Uploads/PWN/10-key-marketing-metrics.pdf> [Accessed: 2016-03-23]

Warren, L., 1998. *An evaluation of information technology usage in selected advertising agencies in the Western Cape in meeting customers' advertising requirements*. Unpublished master's dissertation. Cape Town: University of Cape Town. Available from the University of Cape Town library.

Welman, J.C. & Kruger, S.J., 2001. *Research methodology*. 2nd ed. New York: Oxford University Press.

Welsh, S. 2002. *Dealing with data: Using NVIVO in the qualitative data analysis process*. Forum for Qualitative Social Research FQS Volume 3, No 2, Art. 26, May 2002.

West, D., Christodoulides, G. and Bonhomme, J., 2016. *What really drives creative choices in an advertising agency?* In *Rediscovering the essentiality of marketing* (15-18). Springer International Publishing.

WFA/EACA [2010]. *WFA/EACA Guidelines on client-agency relations and best practice in the pitch process*; Best practice guidelines drawn up by the World Federation of Advertisers (WFA) and the European Association of Communication Agencies (EACA). Available at: www.eaca.eu. [Accessed: 2016-05-02]

Williams, C. 2007. *Research methods*. Journal of Business and Economic Research, Volume 5, No 1.

Wilson, A., Zeithaml, V.A., Bitner, M.J. & Gremler, D.D., 2012. *Services marketing: Integrating customer focus across the firm*. McGraw Hill. University of Strathclyde, Glasgow. <http://strathprints.strath.ac.uk/42361/> [Accessed: 2016-07-16].

Wood, J.T., 2009. *Communication in our Lives*. 5th ed. Boston: Wadsworth Cengage Learning.

Woolf, T., Malone, E., Schwartz, L. & Shenot, J. 2013. *A framework for evaluating the cost-effectiveness of demand response*. Prepared for the National Forum on the National Action Plan on Demand Response: Cost-effectiveness Working Group

Yassanallah, P. & Vahid, B., 2012. *Studying the status of marketing mix (7ps) in consumer cooperatives at Ilam province from members' perspectives*. American Journal of Industrial and Business Management, 2, 194-199; published online in Scientific Research in October 2012 (www.SciRP.org/journal/ajibm)

LIST OF APPENDICES

APPENDIX A: Logistical and administrative documentation for the study	A-1
APPENDIX B: Ethical clearance	B-1
APPENDIX C: Examples of campaign briefs	C-1
APPENDIX D: Online survey instruments	D-1
APPENDIX E: Response statistics for online surveys	E-1
APPENDIX F: Prompt sheets: - one-on-one interviews	F-1
APPENDIX G: Transcriptions: - one-on-one interviews	G-1
APPENDIX H: Developing the five study themes	H-1
APPENDIX I: Overview & detail of the key leverage areas.....	I-1



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDICES

to the dissertation

INTERPRETATION OF CAMPAIGN BRIEFS BETWEEN SOUTH AFRICAN FINANCIAL SERVICES COMPANIES AND ADVERTISING AGENCIES

by

Esta Calitz

87485789

Submitted in fulfilment of the requirements for the degree
MPhil in Communication Management

in the

FACULTY OF ECONOMIC AND MANAGEMENT SCIENCES

at the

UNIVERSITY OF PRETORIA

Supervisor:

Prof. R. Rensburg

Date of submission:

2016-08-31



LIST OF APPENDICES

APPENDIX A:	LOGISTICAL AND ADMINISTRATIVE DOCUMENTATION FOR THE STUDY	A-1
Document A-1	Notice of intention to submit	A-1
Document A-2	Example of Letter of Introduction and Informed Consent	A-2
APPENDIX B:	ETHICAL CLEARANCE	B-1
Document B-1	Ethical clearance certificate	B-1
APPENDIX C:	EXAMPLES OF CAMPAIGN BRIEFS	C-1
Document C-1	Campaign Brief – Agency brief Momentum	C-1
Document C-2	Campaign Brief – FNB Online Web and UX brief	C-2
Document C-3	Campaign Brief – Sunshinegun creative template	C-3
Document C-4	Campaign Brief – Coppercoast graphic brief template	C-4
Document C-5	Campaign Brief – Gloop briefing template	C-5
Document C-6	Campaign Brief – Etiket briefing template	C-6
Document C-7	Campaign Brief – Ashburton briefing example	C-7
APPENDIX D:	ONLINE SURVEY INSTRUMENTS	D-1
Document D-1	Online Survey Instrument – Advertising Agencies	D-1
Document D-2	Online Survey Instrument – Financial Services Companies	D-2
APPENDIX E:	RESPONSE STATISTICS FOR ONLINE SURVEYS	E-1
Document E-1	Advertising Agency Response Statistics: Initial report	E-1
Document E-2	FSC Response Statistics: Initial report	E-2

APPENDIX F: PROMPT SHEETS: - ONE-ON-ONE INTERVIEWS	F-1
---	------------

Document F-1	Prompt Sheet – 1-on-1 Interviews Advertising Agencies	F-1
Document F-2	Prompt Sheet – 1-on-1 Interviews FSCs	F-2

APPENDIX G: TRANSCRIPTIONS: - ONE-ON-ONE INTERVIEWS	G-1
--	------------

Document G-1	AdAg # 01 and 02 transcript (anonymous)	G-1
Document G-2	AdAg # 03 and 04 transcript (anonymous)	G-2
Document G-3	AdAg # 05 transcript (anonymous)	G-3
Document G-4	AdAg # 06 transcript (anonymous)	G-4
Document G-5	AdAg # 07 transcript (anonymous)	G-5
Document G-6	FSC # 01 transcript (anonymous)	G-6

APPENDIX H: DEVELOPING THE FIVE STUDY THEMES	H-1
---	------------

Document H-1	Advertising campaign brief process as informed by the study findings	H-1
--------------	--	-----

APPENDIX I: OVERVIEW & DETAIL OF THE KEY LEVERAGE AREAS	I-1
--	------------

Section I-1	Key leverage areas for the advertising brief engagement	I-3
Section I-2	Developing framework for the 26 key leverage areas	I-5



APPENDIX A

LOGISTICAL AND ADMINISTRATIVE DOCUMENTATION FOR THE STUDY

August 2016



APPENDIX A: LOGISTICAL AND ADMINISTRATIVE DOCUMENTATION FOR THE STUDY

TABLE OF CONTENTS

A-1	Notice of intention to submit	A.1
A-2	Example of Letter of Introduction and Informed Consent.....	A.2



KENNISGEWING/NOTICE

(Reg.G.39.11(a)(i) – Dissertation/Verhandeling
(Reg. G.50.4(a) (i) - Thesis/Proefskrif

Studenteadministrasie moet minstens **3 maande** voor indiening van die verhandeling/proefskrif skriftelik in kennis gestel word dat u van voorneme is om in te handig vir eksaminering.

*Student administration should be informed, in writing, of the intention to submit the dissertation/thesis at least **3 months** prior to submission for examination*

Van en voorletters:

Surname and initials:.....Calitz E.....

Studente nommer:

Student number:.....87485789.....

Graad:

Degree:.....MPhil Communication Management.....

Finale titel van verhandeling/proefskrif:

Final title of dissertation/thesis:.....

..... INTERPRETATION OF CAMPAIGN BRIEFS BETWEEN SOUTH AFRICAN FINANCIAL SERVICES COMPANIES AND ADVERTISING AGENCIES

Ek gee hiermee kennis dat ek beoog om my verhandeling/proefskrif vir eksaminering in te handig met die oog op die gradeplegtigheid wat gehou sal word gedurende (**merk met X**).

*I hereby give notice that I intend to submit my dissertation/thesis for examination with a view to the graduation ceremony to be held during (**please indicate with X**).*

APRIL (Indieningsdatum: end Augustus) (Submission date: end August) x	SEPTEMBER (Indieningsdatum: end Maart) (Submission date: end March)
---	--


.....
Handtekening/Signature

31 May 2016
.....
Datum/Date



Document A-2

Example of Letter of Introduction and Informed Consent



Letter of Introduction and Informed Consent

Dept. of Communication

Interpretation of Campaign Briefs between South African Financial Services and Advertising Agencies

Research conducted by:

Ms. E. Calitz (87485789)

Cell: 083 273 5617

Dear Participant

You are invited to participate in an academic research study conducted by Esta Calitz, Masters Student from the Department Communication at the University of Pretoria.

The purpose of the study is to provide conceptual frameworks to implement in the campaign briefing stage which could assist in ensuring better results through improved communication. In order to get to the frameworks, the study will unpack and review different formats in which financial services companies brief advertising agencies. The research will also look at possible communication gaps resulting from differences in understanding that the financial services company and the advertising agency has of the value that the services company offers. \

Please note the following:

The research will be conducted using as an exploratory study. Surveys and interviews will be used for data collection.

- This is an anonymous study survey as your name will not appear on the questionnaire. The answers you give will be treated as strictly confidential as you cannot be identified in person based on the answers you give.
- Your participation in this study is very important to us. You may, however, choose not to participate and you may also stop participating at any time without any negative consequences.
- Please answer the questions in the attached questionnaire as completely and honestly as possible. This should not take more than 20 minutes of your time.
- The results of the study will be used for academic purposes only and may be published in an academic journal. We will provide you with a summary of our findings on request.
- Please contact my study leader, Prof. R. Rensburg, +27 12 420 3395, ronel.rensburg@up.ac.za if you have any questions or comments regarding the study.

Please sign the form to indicate that:

- You have read and understand the information provided above.
- You give your consent to participate in the study on a voluntary basis.

Participant's signature

Date



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDIX B

ETHICAL CLEARANCE

August 2016

APPENDIX B: ETHICAL CLEARANCE

TABLE OF CONTENTS

B-1 Ethical clearance certificate B.2

Document B-1

Ethical clearance certificate



FACULTY OF ECONOMIC AND
MANAGEMENT SCIENCES

RESEARCH ETHICS COMMITTEE

Tel: +27 12 420 4102

E-mail: berendien.lubbe@up.ac.za

31 July 2014

Strictly confidential

Prof RS Rensburg
Division: Communication Management

Dear Professor Rensburg

Project: Interpretation of campaign briefs between South African financial services and advertising agencies
Researcher: E Calitz
Student No: 87485789
Promoter: Prof RS Rensburg
Co-promoter: -
Department: Division: Communication Management

Thank you for the application you submitted to the Committee for Research Ethics, Faculty of Economic and Management Sciences.

I have pleasure in informing you that the Committee formally approved the above study on 30 July 2014. The approval is subject to the candidate abiding by the principles and parameters set out in the application and research proposal in the actual execution of the research.

The approval does not imply that the researcher, student or lecturer is relieved of any accountability in terms of the Codes of Research Ethics of the University of Pretoria if action is taken beyond the approved proposal.

The Committee requests that you convey this approval to the researcher.

We wish you success with the project.

Sincerely

PROF BA LUBBE
CHAIR: COMMITTEE FOR RESEARCH ETHICS

cc: Student Administration

Members: Prof BA Lubbe (Chair); Prof RS Rensburg (Deputy Chair) ; Prof HE Brand; Dr CE Eresia-Eke; Prof JH Hall; Prof JF Kirsten; Dr MC Matthee; Prof JE Myburgh; Dr SG Nienaber; Ms K Plant; Prof C Thornhill; Prof R van Eyden; Prof SR van Jaarsveld,
Dr M Wiese

Administrative officer: Mr M Deysel



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDIX C

EXAMPLES OF CAMPAIGN BRIEFS

August 2016



APPENDIX C: EXAMPLES OF CAMPAIGN BRIEFS

TABLE OF CONTENTS

C-1 Campaign Brief – Agency brief Momentum	C-1
C-2 Campaign Brief – FNB Online Web and UX brief	C-1
C-3 Campaign Brief – Sunshinegun creative template	C-3
C-4 Campaign Brief – Coppercoast graphic brief template	C-1
C-5 Campaign Brief – Gloo briefing template	C-1
C-6 Campaign Brief – Etiket briefing template	C-1
C-7 Campaign Brief – Ashburton briefing example	C-1

Document C-1

Campaign Brief – Agency brief Momentum

Agency brief: Connecting employees to our brand purpose

1. Background

For the past decade, Momentum employees have functioned in silos of business units, where every business unit drove its own internal identity and objectives. A Momentum brand purpose was not communicated strongly to our internal audience. Only recently did the whole MMI unite around a single purpose: To enhance the lifetime financial wellness of people, their communities and their businesses. A more focused purpose applies to the Momentum brand: To enhance the financial wellness of families, individuals and businesses. Our current situation is that this purpose has not yet been made real in employees' lives. Employees have not yet connected their daily jobs with the bigger picture of our purpose.

2. Key objective of the internal campaign

The key objective of the campaign is to connect employees to the Momentum brand purpose. We want employees to connect with our brand on an individual and personal level and be proud of what our company does every day. We would therefore like to run an internal staff communication campaign that achieves this on two levels:

- Getting employees to connect with the brand purpose would mean that they have made financial wellness part of their own personal journeys, that they have signed up for financial wellness on www.momentum.co.za and that they know what their MyScores are.
- We would like employees to feel part of a bigger purpose – imagine if every employee's personal purpose was connected to the corporate purpose. Knowing what the company achieves is a great starting point for this. We would like to create a sense of pride in our brand by showcasing the positive impact our company has on the lives of our clients. But let's not think numbers in terms of profit and policies on our books – rather how many individual lives we touch daily in which positive ways, for example:
 - Momentum Health helps prevent breast cancer by paying for a preventative mammogram at least once a day.
 - Momentum Health helps our clients to stay healthy by paying for 569 health assessments every month.
 - Momentum provides a monthly income to 64 000 retired families.
 - Every day Momentum Health pays for a heart-related medical event.

3. Expectations

Present a campaign to the Momentum brand team by 22 August (date depends on Mark's sign-off of the idea) including the following:



- Key messaging by which the two key objectives will be reached
- Ideas for the use of available channels (feel free to suggest additional channels)
- The campaign should run over a year and continuously drive the key messages home. Thus, not a launch and then it's over, rather an ongoing campaign that connects employees to the brand over a long period of time, via various channels, in a quirky and fun way.

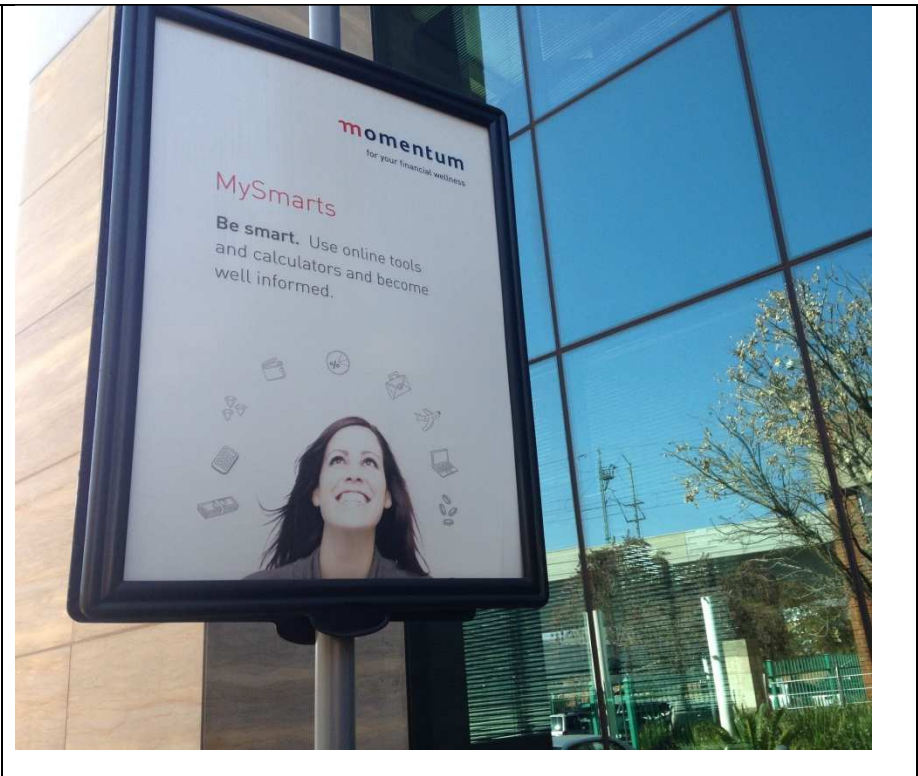
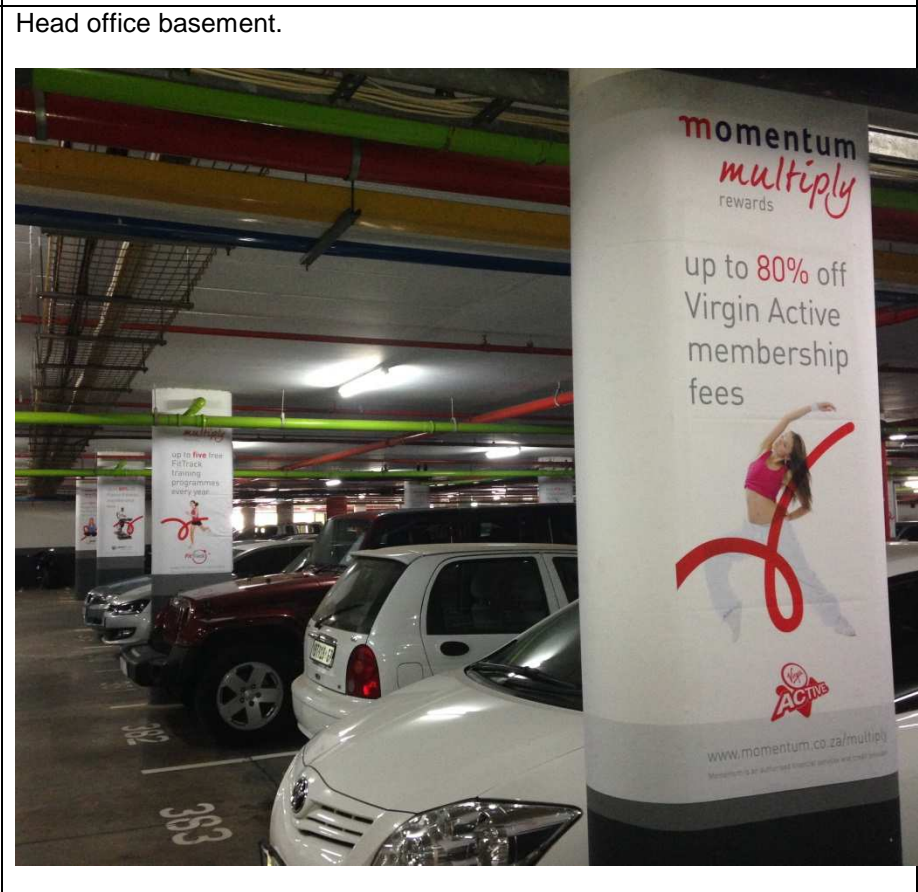
4. Communication brief

4.1 Target audience:

We have 7 000 employees who do work for the Momentum brand. The biggest grouping of employees is at head office in Centurion, where 3 000 employees are based. Another 500 employees are at Centurion Meersig across the road from head office, while 250 employees are stationed at Centurion Doringkloof. In Cape Town we have 500 employees.

4.2 Available channels:



Channels	Description
TheRedBox	Internal email – not limited to head office.
Plasmas	Plasma screens in some areas at head office – running PowerPoint. 
Parking area flags	Head office parking area. 
Parking area posters	Head office parking area.


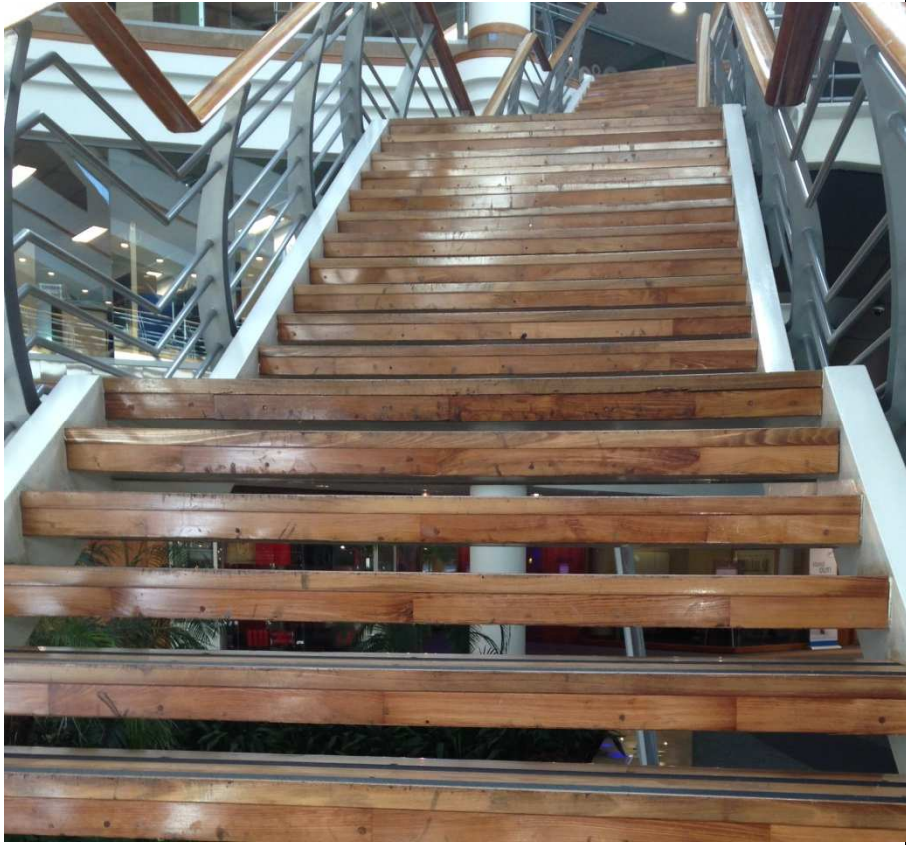
	
<p>Basement pillars</p>	<p>Head office basement.</p> 
<p>Lift decals</p>	



Boom gates	
Table talkers	New idea:



	
<p>Coffee wrappers</p>	<p>New idea: Wrap cappuccino mugs</p> 

Turnstiles	
Stair decals	

4.3 Tone of the employee brand – internal culture:

We have a warm, engaging internal tone. We are quirky and fun whenever the topic allows us to be. We keep our language simple, informal and active – trying to link our messages to action, to something employees can DO. We drive financial wellness, participation and collaboration in all messages.

4.4 Previous learnings:

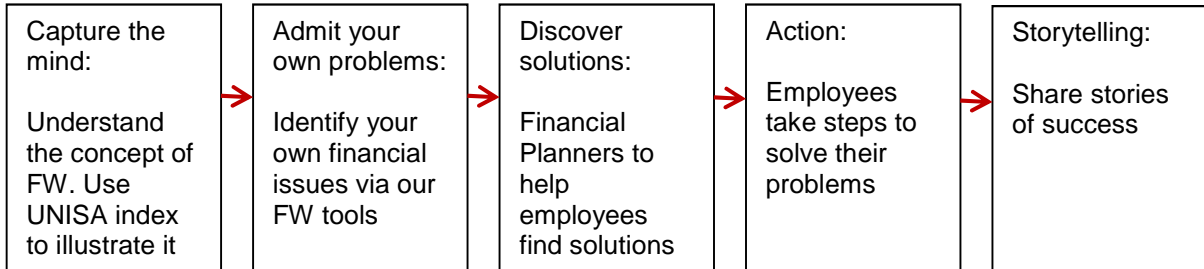
- Only sending messages do not drive the message home. We need to actively involve employees. Either via fun initiatives, or via actual KPIs – or both.
- Managers must be on board and help us drive the messages.
- The possibility of winning prizes always helps.

- We have the wonderful atrium space which enables visible staff activations.

4.5 Some ideas we have already:

Feel free to discard these ideas, but they may help to understand our thinking so far.

Take employees through a journey of understanding their own financial wellness through phases – from understanding to action:



Some specific ideas we have for our existing channels:

Channels	Content
RedBox	Contextualise the following: <ul style="list-style-type: none"> • Understand what financial wellness is • Identify where your own financial wellness is (through financial wellness tools) • Find solutions via our Momentum Financial Planners • Change behaviour • Employees to share their success stories
Plasmas (NEW)	Drive score
Flags and posters outside	Employees with their financial wellness scores
Lift decals	Is your financial wellness score going up or down? Complete your MyScore today.
Boom gates	Open the gateway to your personal financial wellness. Complete your MyScore today.
Basement pillars	Wrap your head around your personal financial wellness. Complete your MyScore today.
Table talkers	
Coffee wrappers	Wrap your head around your personal financial wellness. Complete your MyScore today.
Turnstiles	Welcome to the Capital of Financial Wellness. Complete your MyScore today.
FW booth	Install two portable booths in the atrium. Branded as “Financial wellness. Complete your MyScore here.” Invite individual employees to a specific timeslot during which to complete their financial wellness. Random draw which determine timeslots when employees can win prizes. Alarm (like slot machine) goes off to indicate that someone has just won.
Group sessions:	Invite employees to talks where: <ol style="list-style-type: none"> 1. We show practical examples of how we contribute to people’s lives. For example, Tom Watson, the paramedic and motivational speaker to present how we can all save lives, provide CPR training and link it to how Momentum helps to save lives. 2. We help them with practical financial tips on how to reduce debt etc.

5. Implementation and process:

5.1 Timeline:

Run the internal campaign from September 2014 to September 2015.

5.2 Budget
? R700 000

5.3 Success criteria

As part of connecting with brand purpose we want the following outcomes:

- All employees to complete their financial wellness scores.
- Internal brand survey: Include questions relating to the two main objectives. Employees to rate Momentum at least a 4 out of 5 on:
 - A 4 out of 5 – How proud are you to be working at Momentum
 - A 4 out of 5 – Do you feel that Momentum contributes positively to our society

5.4 Approvals

Campaign to be signed off by Danie van den Bergh and Anneke Hanekom.

Document C-2

Campaign Brief – FNB Online Web and UX brief



Document Purpose

*This document, when fully completed and submitted to the FNB Online Web + UX Account Executive by the responsible stakeholder, serves as an instruction to proceed with the construction, sign-off and launch of a normal web-based project on behalf of our stakeholders. This **excludes** normal maintenance requests which are logged directly with the FNB Online Production support team via the OnlineDesk system, or with the Web & UX Account Executive.*

Stakeholders are requested to complete this document as accurately as possible in order for Web + UX to provide them with an acceptable service and turnaround.

Web + UX uses this document as a signed-off specification / work order in terms of project scope and will not proceed with the project scheduling before this document is completed in full and all supporting material supplied. For more information, refer to Appendix B.

Project scope and overview

(Section 1 always has to be completed in full. Please delete the sections below that are not applicable)

1. Generic project details ▶	<i>(Always complete this section)</i>
2. FNB.co.za banners and campaigns ▶	<i>(Delete if not applicable)</i>
3. External banner elements ▶	<i>(Delete if not applicable)</i>
4. Direct Mailers ▶	<i>(Delete if not applicable)</i>
5. Big-3 messages ▶	<i>(Delete if not applicable)</i>
6. Other Requirements ▶	<i>(Delete if not applicable)</i>
A. Work in progress ▶	<i>(For internal use)</i>
B. Important notes, information and contact details ▶	<i>(Delete)</i>



1. Generic project details

This section needs to be completed in detail for any project that you require Web + UX to assist you. If this section is incomplete, it will be referred back to the originator for further action.

STAKEHOLDER (REQUESTOR) DETAILS

Segment, business unit & department		< Segment> <Business Unit> <Department>	
Stakeholder name	<>	Stakeholder contact details	<> (w) <> (c) <> (email)
FNB Online contact name	<>	FNB Online contact numbers	<> (w) <> (c) <> (email)
Company number	<>	Cost centre	<>

The cost of the project will be recovered from the above company number and cost centre)

GENERAL PROJECT DETAILS

Project name	<Insert descriptive project name>
Project background	<> <i>(Provide a shortened, high level description / background to this project)</i>
Project objectives	<> <i>(Provide a summary of the planned outcome and business objectives of this project, e.g. Sales, Lead generation, Customer retention, Brand recognition, etc.)</i>
Project deliverables	<> <i>(Provide a summary of the end deliverables that you expect from this project, e.g. Homepage banner, campaign page, 4 images, etc.)</i>
Value Proposition	<> <i>(What are the key benefits or value proposition that you're trying to achieve by means of this project?)</i>





Target audience	<p><Target audience> <i>(Which target audience is this project focused at? E.g. clients/prospective clients, specific LSM(s), etc.)</i></p> <p><Income range> <i>(Specify the income range for the project audience)</i></p> <p><Urban> <Rural> users <i>(Specify whether this project is directed at urban or rural users)</i></p> <p><Language> <i>(Specify whether a specific language group users are targeted)</i></p>		
Action dates	<p>Wish: <> <i>(The wish-list date for when this project needs to be finalised and ready for launch)</i></p>	<p>Latest: <> <i>(The absolute latest date that this project needs to be finalised and ready for launch)</i></p>	<p>Launch: <> <i>(For time critical projects, this is the date that this project must be launched / put into production)</i></p>





SCOPE AND RESOURCE SUMMARY

It is important that you complete this section as accurately as possible, so that we can understand what resources are required for this project. Please delete the options that are not applicable.

<p>Content</p>	<p><Yes: New content based on guidelines> <Yes: Minor corrections only> <Yes: Different/alternative approach> <No> <Not applicable> <i>(Delete if not applicable. Please indicate whether the FNB Online Content Manager may propose edits to your supplied content. Note that all online-facing content needs to be signed off by the FNB Online Content Manager)</i></p>
<p>Usability</p>	<p><Yes: Major involvement> <Yes: Minor involvement> <Unsure> <No> <Not applicable> <i>(Delete if not applicable. Please indicate whether the FNB Online Usability team needs to be involved in this project. Note that all online-facing projects need to be signed off by the FNB Online Usability Manager)</i></p>
<p>Design</p>	<p><Yes> <Unsure> <No> <Not applicable> <i>(Delete if not applicable. Please indicate whether the FNB Online Design team needs to be involved in this project. Note that all online-facing projects need to be signed off by the FNB Online Design Manager)</i></p>
<p>Front-end code</p>	<p><Yes> <Unsure> <No> <Not applicable> <i>(Delete if not applicable. Please indicate whether the FNB Online Front-end code team needs to be involved in this project. Note that all online-facing projects need to be signed off by the FNB Online Front-end Manager)</i></p>





	<p>If Yes, please provide the name and contact details of the agency.</p> <p><></p>
<p>Campaign requirements</p>	<p>Please provide details in terms of what you need delivered as part of this campaign:</p> <p><FNB pre-login banner></p> <ul style="list-style-type: none"> → <FNB Home> → <For me> → <For my business> <p><FNB post-login banner></p> <p><External banners> <i>(Complete section 3)</i></p> <p><dot.Mobi banners> <i>(Complete section 3)</i></p> <p><Big-3 message representation> <i>(Complete section 5)</i></p> <p><Campaign page> <i>(Complete items marked with asterisks below)</i></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p>
<p>Banner copy</p>	<p><></p> <p style="text-align: right;"><i>(Provide the text to appear on this banner)</i></p>
<p>Banner link</p>	<p><></p> <p><i>(Provide details (URL) in terms of where this banner will click through to. It may be a product page, landing page or a campaign page. Note that if links to any external sites are not available, such links are to be made available on a campaign page that the banner will link to)</i></p>
<p>Banner design guidelines</p>	<p><></p> <p><i>(Provide details in terms of any specific graphic design elements that we need to incorporate in the design of this campaign. Please attach any supporting graphic files in high resolution, Photoshop (PSD) format)</i></p>
<p>Campaign page text / copy</p>	<p><></p> <p><i>(Provide the text to appear on this campaign page. Note that all content has to be signed off by the FNB Online Content Manager. Where there are any requirement for links in the copy, please provide these URL 's)</i></p>
<p>Campaign page special requirements / functionality</p>	<p><></p> <p style="text-align: right;"><i>(Provide detailed requirements for any special requirements to appear on this campaign page)</i></p>





Campaign page design guidelines	<> <i>(Provide details in terms of any specific graphical design elements that we need to incorporate in the design of this campaign page. Please attach any supporting graphical files in high resolution, Photoshop (PSD) format)</i>
Website / on-site optimisation	<> <> <> <i>(Please provide at least 3 keywords / keyword phrases to implement: E.g.: Gold bank account, Internet bank account. These will assist our SEO manager to best optimise your web pages)</i>
Google ad-words	<Ad-word> <Keyword> <Ad-word> <Keyword> <Ad-word> <Keyword> <i>(If you have an ad-words campaign, kindly paste the actual ad-word text into the above space, as well as the primary keyword used (main keyword). This is to ensure that the SEO on this page is similar to your ad-words campaign – this will assist in a higher conversion rate)</i>





3. External banners

Any banner(s) that we need to design for placement on external websites (including social media elements for sites like Facebook) must conform to some criteria. It is important that the below table be duplicated for **EVERY banner element** that Web + UX has to deliver for you.

Placement	<> <i>(Provide the name of the website or social media site where this banner needs to be placed)</i>
Copy	<> <i>(Provide the copy to appear on this banner)</i>
Format	<JPG> <GIF> <Animated Gif> <Flash> <Social Media: Facebook> <i>(Provide the format(s) supported by this site. Delete if not applicable)</i>
Standards	Maximum permitted file size: <> kB Other standards: <> <i>(Provide any specific standards that we need to adhere to in terms of this banner)</i>
Design guidelines	<> <i>(Provide details in terms of any specific graphical design elements that we need to incorporate in the design of this banner. Please attach any supporting graphic files in high resolution, Photoshop (PSD) format)</i>





4 ■ Direct mailers

This section must be completed for any direct mailers that need to be designed, coded or sent on stakeholders' behalf.

<p>Does this mailer form part of an above-the-line (ATL) campaign?</p>	<p><Yes> <No></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p> <p>If Yes, please indicate the channels that will be used and if you have any final (or draft) elements for these platforms, please attach.</p> <p><Billboard> <Radio> <TV> <Print media> <External digital media></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p>
<p>Is there anything that can be provided to Online as additional visual aids?</p>	<p><Yes> <No></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p> <p>If Yes, please provide details and/or attachments.</p> <p><></p> <p><i>(Attach any elements or documentation that will provide additional information and support the brief. For example: Draft concepts, content, illustrations, videos etc. This includes anything that can be provided before the external creative from the agency can be handed over to FNB Online)</i></p>
<p>Will external agency files be provided?</p>	<p><Yes> <No></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p> <p>If Yes, please indicate when these files will be ready to be handed over to FNB Online.</p> <p><dd/mm/yyyy></p> <p>If Yes, please provide the name and contact details of the agency.</p> <p><></p>
<p>Audience details</p>	<p><External (Customers)> Internal (Staff) with Internet access></p>





	<p><Internal (Staff) without Internet Access></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p>
Emailer type	<p><General communication></p> <p><Newsletter></p> <p><Campaign / Promotion></p> <p><Web based survey></p> <p style="text-align: right;"><i>(Delete if not applicable)</i></p>
Subscription database	<p><i>(Database to be supplied by Business in MS Excel format. Please delete all fields not applicable to this mailer from the supplied spreadsheet. Ensure that all fields required for personalisation purposes are included and that data is accurate. There is a file size restriction of 4MB for data files that may be imported into the Everlytic system. Therefore, please split large data files into smaller (less than 4Mb) files. FNB Online does not take any responsibility for inaccurate data, nor will we fix any incorrect data noted. When FNB Online will not be required to send out the actual mailer (business to send them via a different route) please indicate this here)</i></p>
Date to be actioned	<p><Insert dates (and times if applicable)></p> <p><i>(Please note that, in accordance with best practices, FNB Online does not send out e-mails to external parties on Mondays, Fridays, week-ends or public holidays. Emails will only be sent out between 07h00 and 15h00 so that we can be assured of technical vendor support if and when required. If the transmissions of these mailers needs to be staggered, please indicate your exact requirements here)</i></p>
Look and feel	<p><></p> <p><i>(Please provide very clear guidelines/instructions in terms of the look and feel of the mailer to be sent out. If based on a previous mailer, or should you need us to use a standard template or a specific image, please be concise enough for our design team to be able to interpret and action your preferences)</i></p>
Content	<p><></p> <p><i>(Insert the content that must be published in the mailer. Please note: To ensure that standards are upheld regarding the CI of online content, all content must be reviewed and signed off by the FNB Online content specialists.)</i></p>
Additional functionality & instructions	<p><></p> <p><i>(Insert any additional instructions or requirements in terms of special functionality here. If you need links in the mailer, please be specific and provide us with the correct URLs. If you need a special form or functionality, please be very specific)</i></p>





EMAIL ROUTING AND PERSONALISATION

Email subject	<Insert the subject of the email to be sent>
Email address from	<comms@fnbmailer.co.za> <newsletter@fnbmailer.co.za> <promo@fnbmailer.co.za> <i>(Delete if not applicable)</i>
Email from (name)	<Insert the name as it will appear in the email sent>
Reply to email address	<Insert email address> <i>(This is the address that any response email will go to when the recipient chooses REPLY. If you do not require such an address, please insert noreply@fnbmailer.co.za above)</i>
Reply to (name)	<Insert name> <i>(If a response from the recipient is required, this is the name of the response address that will appear in the email response from the recipient)</i>
Personalisation	<> <i>(Please provide details in terms of any fields to be used for personalisation purposes (Dear Mr. Soap, rather than Dear Customer, etc.) Note that all personalisation fields have to be supplied as part of the distribution database to be sent to FNB Online)</i>





5 ■ Big-3 Messages

The Big 3 Text Tool is used by FNB Online and the product house (CII) to load messages that display on Online Banking (post login) to customers who qualify for specific products. The following table has to be duplicated for any new message to be added, or for any changes to existing messages.

Product offer type code	<> (The product offer (type) code references the category (i.e. GMAF, IPIP, IPSS, etc.) This code is obtained from the product house (CII))		
Main message	<> (Provide details of product offer, i.e. description, terms, standards, special offers, pricing, etc.)		
Pre-selected heading	<> (Maximum number of characters in the header, if the header is only on one line (26 characters including spaces))	Pre-approved heading	<> (Maximum number of characters in the header, if the header is only on one line (26 characters including spaces))
Pre-selected sub-heading	<> (Maximum number of characters in the header, if the header wraps over two lines (44 characters including spaces))	Pre-approved sub-heading	<> (Maximum number of characters in the header, if the header wraps over two lines (44 characters including spaces))
Pre-selected call to action	<> (Any action required from the customer, i.e.: Buy now; Call me back, etc.)	Pre-approved call to action	<> (Any action required from the customer, i.e.: Buy now; Call me back, etc.)



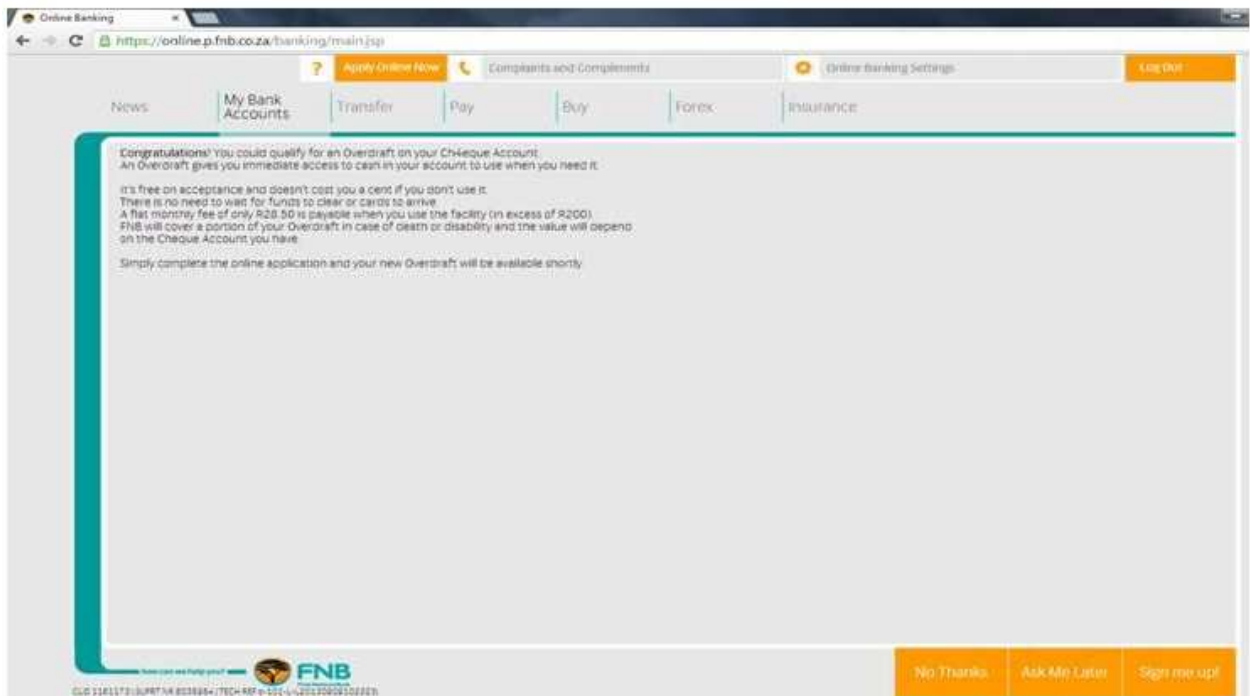


The following screens depict examples of the headings referred to above:

Banners



Long message





6 ■ Other requirements

This section may be completed to brief in any general requirements for which one of the above sections is not suitable. Please provide as much detail as possible in order for us to provide you with an acceptable solution to your Business needs and attach any supporting documentation (images / work requests etc.). If you have a request for copywriting only, please supply the base content that we need to check in the 'details' section below.

Overview	<>
Look and feel	<> <i>(Provide clear guidelines/instructions in terms of the look and feel for this requirement)</i>
Details	<> <i>(Please supply as much detail as possible for us to have a clear understanding of your Business needs, especially from an exact deliverable perspective)</i>





Appendix **A** ● Work in progress

This section is used by FNB Online Web + UX for administration purposes only.

Usability	<> <i>(Any Usability-specific comments may be tracked here)</i>
Content	<> <i>(Any Content-specific comments and versioning may be tracked here)</i>
Design	<> <i>(Any Design-specific comments and versioning may be tracked here)</i>
Front End	<> <i>(Details around the Web + UX design package handed over to Front-end needs to be inserted here)</i>



Appendix **B** ● Important notes, information and contact details

The process in a nutshell	<ul style="list-style-type: none"> Stakeholders initiate a new project and complete this brief in full for any FNB Online Web + UX requirements. The completed brief is sent to the FNB Online Web + UX Operations manager (Ettienne Brunsdon: ettienne.brunsdon@fnb.co.za). The Operations manager will check the brief and if not complete or inaccurately completed, refer it back to the stakeholder for corrections. The Operations manager will schedule resources and advised the stakeholder in terms of time frames, within 24 hours or receiving the final brief. The Operations manager will manage project deliverables as requested and update the stakeholder in terms of progress at the time of project milestones.
Lead times and turnaround	<ul style="list-style-type: none"> For standard campaigns and projects (no special functionality etc.), FNB Online Web + UX requires a lead time of at least 4 weeks for your project to be scheduled into our pipeline. The actual construction turnaround for projects varies hugely. Any design elements provided by an external agency must be provided at least four weeks before the LIVE date. Please note that due to the scalable nature of fnb.co.za, seven days are required for the front-end development alone. All external creatives coming into the studio will be reviewed by the Online Web + UX team; changes will sometimes be made to the creative, if it's in the best interest of the online platform and user experience. If you do not want ANY changes made to the design please indicate it clearly.
Project costs	<p>The cost for your project material will be recovered from the retention fee that your segment has already paid to FNB Online.</p>
Project sign-off	<p>No project will be put LIVE or considered closed if the following parties have not signed off by means of a process put in place by FNB Online:</p> <ul style="list-style-type: none"> Business stakeholder FNB Brand Manager (Gary Manoim) Corporate Identity (CI) (Karen Naven) Web + UX Head (Filippo Cascioli) Web + UX Design Manager (Alexia Laurie) Web + UX Usability Manager (Maria Alves) Web + UX Content Manager (Ettienne Brunsdon) FNB Online Sales & Marketing Manager (Paige Munro) FNB Online Sales & Marketing Key Account Executives (Relevant party assigned to project)

**More
information**

For more information, please feel free to contact:

Your segment's Key Account Executive:

- Yolandie Barnard (087 736 3053)
- Thato Mamathuba (087 736 3304)
- Charlene Boyle-Oosthuyzen (087 736 3304)

or the FNB Online Marketing Manager:

- Paige Munro (087 736 4038)

or the FNB Online Web + UX Key Account Manager (Operations):

- Etienne Brunsdon (087 736 3305)

or one of the following Web + UX managers:

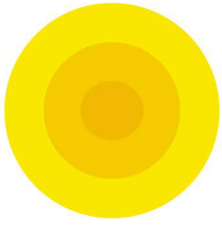
- Maria Alves: Usability (087 736 3302)
- Alexia Laurie: Design (087 736 3313)
- Etienne Brunsdon: Content (087 736 3305)
- Filippo Cascioli: Head (087 736 3306)

or the following Front-end Development manager:

- Paul Fann: Front-end code (Online Development) (087 736 3308)

Document C-3

Campaign Brief – Sunshinegun creative template



THIS IS A SUNSHINEGUN™ CREATIVE BRIEF TEMPLATE

For us this document is the most exciting thing ever.

It gets our minds whirring and our creative juices pumping. For us, it is the first step in a process that will deliver exactly what is needed.

We believe in delivering outstanding **creative solutions**, solutions that are informed by strong strategy, deep insights and, of course, **great briefs**.

What you get out starts with what you put in here.

How does this work?

UNDERSTAND – CONSIDER – ANSWER

Read and understand each section carefully.

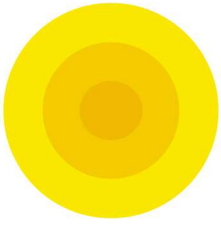
Use the guidelines to help you better **understand** the questions.

Write down your considered answers.

NAME:

PROJECT TITLE:

DATE:



OBJECTIVE:

What is it that this particular piece should achieve?

WHY ARE YOU ADVERTISING: (Background)

Who are you, what are your business goals, what is your competitive environment, what opportunities are there in the marketplace etc. Specifically, what are the challenges / opportunities we need to solve?

COMPETITORS:

Who are the competitors, what is their proposition and what activities have they engaged in to support their proposition?

How is your product different to your competitors'?

TARGET AUDIENCE:

Primary and Secondary target market

- *Define them as people, not just a job title. What makes them tick / what their daily concerns are / what interests them and any typical behaviours.*

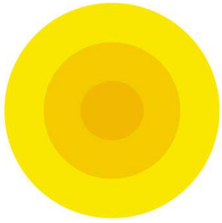
Demographic: age, gender, income and location

Psychographic: Description of each audience that is colourful and creates a picture in your mind

Key insights that reveal what this market needs / is looking for.

CURRENT PERCEPTION:

What does this audience think and feel about your current brand / proposition.



BRAND POSITIONING:

Define the master brand attributes that this brief needs to deliver against.

SINGLE MINDED PROPOSITION: (Promise)

A single benefit –driven (emotional or functional) truth about the proposition brand / proposition.

Why should the target market be interested in your offering / product?

REASON TO BELIEVE: (Support for your promise)

Evidence that our claim (single minded proposition) rings true. This can include product information, research results, consumer perceptions etc. The more information the better and bullet points are good here.

DESIRED RESPONSE:

What is the one thing that we want customers to take out of the communication? What the customer should think / feel and DO as a result of your offering

Is a call to action required?

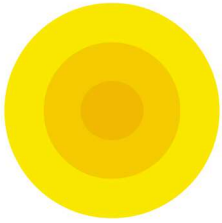
PERSONALITY:

Reference the master brand, highlight areas of the personality that need to be dialed up or down. This is how the brand sees itself and wishes to be seen by others.

STONE:

Reference the master brand; defines how the brand talks in the market.

For example serious, witty, conversational etc.



AGENCY DELIVERABLES (Elements required):

Print advert (sizes are important: xxx mm down X xxx mm wide)

Press advert (xxx cm X xxx Col)

TV / Ratio / Outdoor / Digital (name all elements) / Ambient / Other ...

MANDATORIES:

C.I / Legal line / What guidelines and inclusions do the team need to be aware of?

THOUGHT STARTERS:

Any ideas that you'd like to share with the team?

Any examples / creative or inspiration that you'd like to share?

BUDGET:

Production:

Media:

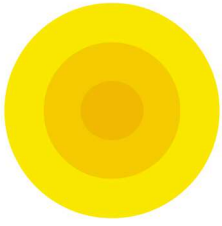
TIMING:

Creative Development:

Client Presentation:

Client revert due:

First Material Deadline:



WHO IS ON THE BUS:

Who are the decision makers? Who is managing the project? Who needs to be involved in the journey?

THANK YOU.

Document C-4

Campaign Brief – Coppercoast graphic brief template

CP/CST.

UNIT 112, 1ST FLOOR, DESIGN QUARTER
CNR. WILLIAM NICOL & LESLIE DRIVE,
FOURWAYS, JOHANNESBURG
TEL +27 11 465 9606, MOBILE +27 83 309 7898

GRAPHIC BRIEF

Client :

Project Description:

Project Deadline :

Hours Quoted :

Hours for this brief:

Reverts :

Job Number :

Client Email :

Project requirements (the brief, project objectives):

The business (market and product background):

Brand Positioning (including reason to believe):

SWOT analysis:

Competitors:

Target Market (including psychographics):

The Message

Single-minded message:

Personality:

Tone:

Design Requirements:

Design Mandatories:

Production Required:

Deadline:



Document C-5

Campaign Brief – Gloo briefing template



BRIEF DOCUMENT

DATE:
CLIENT:
PROJECT:
JOB No:
START DATE:
DELIVERY DATE:
PROJECT
MANAGER:
PROJECT TEAM:
MENTOR:
PROJECT FOLDER LOCATION:

1.1.1.1

1.1.1.2 *Document Control:*

Version:	Date:	Author:	Comments:
1.0	11/08/01	AR	Amendments to functionality and design
2.0			
3.0			
4.0			



CAMPAIGN OVERVIEW

Client Background:

Strategic Objectives:

Brand Contribution:

Value Proposition:

Target audience:

Product Details:

PROJECT OVERVIEW

Online Objectives:

Considerations to be included in

revert: Deliverables:

Measure of campaign success:

Deadline:

Budget:

Approvals:

Supporting Material:

Document C-6

Campaign Brief – Etiket briefing template



ETIKET.

Client Brief				Job Nr	
Original		Amendment			

Client		Project		
Description				
Date		Client Service	Verona	
Language		Client Contact		
Production		Cost estimate		
		Requires date		
Size		Quantity		
Colour		Production Budget		
Insertion date				
Task				Allocated hours
Briefing date/time				
Review date/time				
Press date/time				
Attention				

Background

1. What does the client want to achieve? (Objective)
2. Who does the client want to talk to? (Target audience)
3. What does the client want to say to his/her audience?

If applicable please answer the following: Print:

- Size
- Colour
- Printed sides
- Amount
- Printing process
- Finishing
- Logos/corporate font/colours
- Copy [generate or from client)

Media [TV, AV and Animation):

- Stock footage
 - o Black and white
 - o Size
 - o Usage {national/international)
 - o Stock House
- Shoot
 - o Studio
 - o Camera
 - o Lights
 - o Sound
 - o Actor
 - o Voice-over
- Music
 - o Composition
 - o Library

- Copy/script
 - o Duration
 - o Generate or from client
 - o Format for delivery

Radio:

- Duration
- Exposure period
- Stations
- Language
- Flighting date
- Music (see media)
- Voice-over actor (gender, race, type of voice/delivery)
- Studio
- Format for delivery

Digital communication:

- Type (emailer/newsletter/invite/aide memoire/campaign page}
- Size (pixels)
- File size
- Corporate colours (RGB values)
 - o Format

Website:

- Content:
 - o Images o
Copy
 - o Banners
- Server

Document C-7

Campaign Brief – Ashburton briefing example

1.1 BRIEFING FORM

ASHBURTON

I Project Ashburton website refresh & development
Contacts Lizzie Fancourt / Jane Flemmer / Elenor Bouchet

[Date] j11 Oct2011

The brief

- To refresh the website look and *feel- modernise, make cleaner & add dynamic elements*
- To add product specific pages- to include fund manager profiles, relevant documentation etc
- To add a blog section *-to be created in Wordpress*
- Improve the navigation & SEQ- make content easier to find by removing landing pages {external}. Also make CMS easier to use (internal). *Also ensure meta descriptions used correctly for Google.*
- Segment the site by client type- professional adviser/ private investor/ institutional
- Develop South African web section- utilising the co.za domain, will mirror the .com site
- Add regional filter (Offshore/South

Africa}

Context

The Ashburton website was last re-vamped in 2008 and it is now in need of a refresh to keep it fresh and enticing for consumers. The main aim of the website is to provide latest performance and market information for consumers & to generate news leads through the sign-up forms. The website should enhance our positioning as 'a high conviction, boutique asset manager' 'Insight' & 'innovation' is at the heart of Ashburton brand and should run through all we do, not just the way we run our investments but in the service delivery and processes too.

In addition to the above, the Ashburton brand is expanding its remit from a purely 'Offshore Asset manager' to offering South African domestic Funds and Portfolios. It therefore needs to have site tailored specifically to this market, this will mirror the current site but will have some different content and include new data feeds. This content of this site will also be managed by SA marketing.

Website Objectives (to be measured Dec 2011)

- To improve the bounce rate by 10% (currently around 45% mainly due to disclaimer page}
- To increase number of subscribers to our email bulletins by 10%
- To increase the number of page views of Market Insights section (Hot Topics/strategy updates etc) by 10%
- To increase average number of pages visited (not just the Daily prices page which is over 25% of all traffic}
- To increase the overall number of unique visitors to the site by 5% (via improved SED}
- To increase the number of hits on Online Valuations homepage by 10% " To track the number of PDF downloads (need to add a measure of these}
- To successfully launch Ashburton.co.za

Timescales

The detail of the project timescales needs to be discussed and agreed but the ultimate aim is to be able to launch the new look website (including the Ashburton.co.za site) by mid January 2012.

Deliverables

We'd like Kurtosys to provide a detailed proposal to include:

- New design style example of homepage and landing pages
" 104-
- Example wireframes showing new navigation
- Project timeline with key milestones
- Costings

Notes from discovery day with Paull• Fawcett - September 2011

Below details the discussion and outcomes from the discovery day which should be used as a basis for the re-design.

However the detail in terms of which pages exactly need removing and adding will be provided by Ashburton in due course.

Website development

Discussion:

Redesign Market insights section to improve navigation for users and improve CMS usability!

- – look at having a 'dashboard' for all 'insight' eg. Weekly insights, Latest hot topic, blog, Ashburton TV, strategy updates, Perspective etc.
 - Remove landing pages
 - Create archive section
 - Link to PDF's rather than new web pages?
 - Integrate Twitter feed?
 - Or maybe all this should be incorporated into home page instead??

ACTION: rather than just changing this section, improve navigation across the site (using mega menus) to make thought leadership elements easier to find, linking to PDF's and only showing 5 previous stories in each section with also improve CMS usability. Also re-name this section 'News and Insights'

Possible mock-up below:



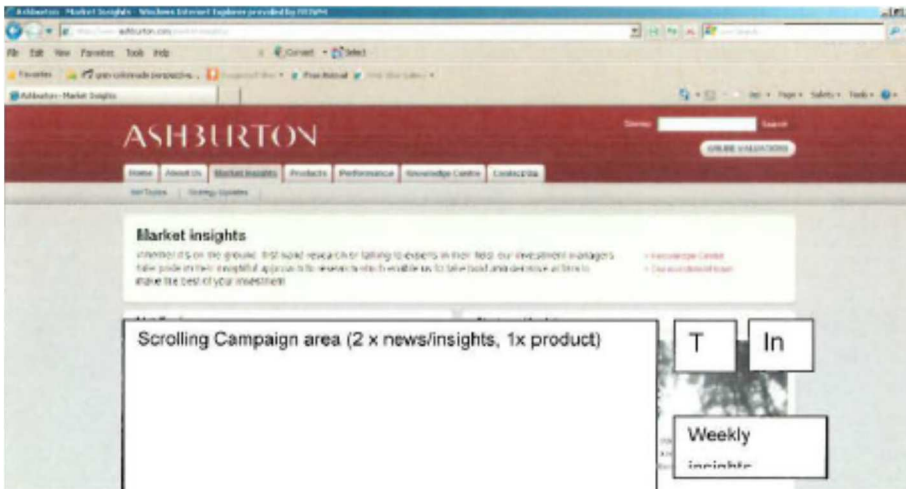
Strategy Updates

Company news

Events

Also discussed giving home page a refresh, include scrolling campaign area, link to Blog and Ashburton TV – perhaps similar to JPMorgan <http://www.jpmmorganinvestmenttrusts.co.uk/> or BBC homepage.

Layout could be something like below...





Subscribe to our e-mail

Performance

Blog

How to invest?

Ashburton TV

Product Overview pages to be added – create design template based on Sales flyers and need to include overview of Fund, Fund manager profiles, latest performance of Fund, links to relevant documentation & articles

New pages needed for the following:

- MultiAsset Funds- Cautious, Balanced & Aggressive
- Asset Management Funds
- Americas Equity Fund
- European Equity Fund
- Chindia Equity Fund
- Japan Equity Fund
- International Equity Funds
- Total Return Bond Funds
- Money Market Funds

Re-design daily prices page

Using current price data - redesign our daily prices page to similar to Aberdeen asset management example

Brand extension project (Ashburton SA)

- - Website -Discuss specific requirements
 - o Segment site (Private Investor/Professional Adviser) & include regional filter
 - o separate websites, with SA updating SA content (Ashburton.com & ashburton .co.za)

Mobile development phase 2

- o Mobile optimised website – need to discuss which areas to include – base on BBC design
- o Smart phone app(s)-development a News and Performance (and charting) app after the mobile optimised site above – *we have now been told that any app development will be done through South Africa as part of a wider FNB segment initiative.*



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDIX D

ONLINE SURVEY INSTRUMENTS

August 2016

APPENDIX D: ONLINE SURVEY INSTRUMENTS

TABLE OF CONTENTS

- D-1 Online Survey Instrument – Advertising Agencies D.1
- D-2 Online Survey Instrument – Financial Services Companies D.1

Document D-1

Online Survey Instrument – Advertising Agencies

Survey 1 for: Advertising agencies

(Briefed by Financial Services)

1. What is your gender?

Male

Female

2. What is your home language?

Afrikaans

English

Isizulu

Sesotho

Setswana

Xhosa

Other, please specify

3. How old are you?

18 - 24

25 - 34

35 - 44

45 - 54

55 and older

4. Where is your office located?

Johannesburg, Gauteng Province

Pretoria, Gauteng Province

Cape Town, Western Cape Province

Other, please specify



5. Are you involved in advertising?

Yes

No

6. In which department or area inside the agency do you work?

Marketing

Brand

Communications

Business

Other, please specify

7. What is your role at the Agency?

Manager/Head/Director

Account Executive

Creative Director

Strategist

Designer/Desktop Operator

Copywriter

Other, please specify

8. What is your academic background? Please tick your highest qualification.

School - passed Grade 12

Grade 12 and trained by experience

Completed courses

Obtained a diploma

Obtained a degree

Obtained a post-graduate degree

9. What is the size of your business unit in terms of people employed there?

- | | | | | | | |
|--------------------------|---------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|--------------------------|
| < 50
employee
s | 50 to 99
employee
s | 100 to
149
employee
s | 150 to
249
employee
s | 250 to
499
employee
s | 500 to
1000
employee
s | > 1000
employee
s |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

10. What is the core business/focus of your agency?

- Print campaigns
- Online campaigns
- Social media campaigns
- Google adwords/SEO optimisation
- Television
- Radio
- Other, please specify

>>

11. When thinking of your clients in financial services, are you their primary design agency as well as primary advertising agency? In other words, are you responsible for creating their advertisements, and also do their branding and design work?

- Never
- Rarely
- Sometimes
- Most of the Time
- Always

12. How would you rate your relationship with your clients in the financial services?

- Very Bad
- Bad

- Neither Good nor Bad
- Good
- Very Good

13. Do your clients use different agencies for different types of advertising campaigns? For example do they use one agency for a printed campaign and another for a digital campaign?

- Yes
- No

14. How often do you use a brief?

- | Never | Rarely | Sometimes | Most of the Time | Always |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

15. In your opinion, do financial SERVICE use a brief more often than other (non-financial services) companies?

- Yes
- No

16. Do you think there is a difference between a brief from a financial services company and a company selling tangible goods?

- Yes
- No

17. What do you consider to be a formal brief?

- Written document created uniquely per campaign
- Template document to be completed
- Form to tick
- Face-to-face discussion between client and agency, followed by status report
- Face-to-face discussion between client and agency

- email from client to agency
- Telephone conversation

18. In your opinion, how formal is the average brief from your clients in the financial services?

- Very informal
- Somewhat informal
- Neither formal nor informal
- Somewhat formal
- Very formal

19. Please choose the most important elements in the brief and mark them in order of importance (with 1 being the most important).

- Visuals
- Content, words
- Message
- Cost
- Timing schedule
- Accountability
- Action steps

20. Do you think there is a difference between the language used in the financial services and the language used in the advertising agency?

- Strongly Disagree
- Disagree
- Neither Agree nor Disagree
- Agree
- Strongly Agree

21. Would you say that the financial services uses industry language (jargon) that the AVERAGE MAN would not know?

Yes

No

22. In general how many reverts does it take before you and the financial services clients agree on the goals and way forward for the advertising campaign?

0

1

2

3

4 to 10

More than 10

23. Do you have tools to measure the success of your advertising campaigns?

Yes (if yes, please name the tools)

No

24. In your opinion, how effective is the briefing process between yourselves and the financial services clients?

Very Ineffective

Ineffective

Neither Effective nor Ineffective

Effective

Very Effective

25. DO YOU THINK THAT THE PROCESS USED TO CREATE AN ADVERTISING CAMPAIGN SHOULD CHANGE?

Yes

No

26. On a scale of 1 to 5 how important do you think communication is with 1 being very important and 5 not important?

1

2

3

4

5

27. Do you try to improve your communication success by controlling the environment?

Yes (If yes, how do you do this?)

No

28. Do you sometimes experience barriers when communicating to the financial services client?

Yes

No

29. Rank the barriers according to importance – which ones will influence the communication process the most?

Physical

Psychological

Perceptual

Document D-2

Online Survey Instrument – Financial Services Companies

Survey 2 for: Financial Services Companies

(Briefing Advertising agencies)

1. What is your gender?

- Male
- Female

2. What is your home language?

- Afrikaans
- English
- Isizulu
- Sesotho
- Setswana
- Xhosa
- Other, please specify

3. How old are you?

- 18 - 24
- 25 - 34
- 35 - 44
- 45 - 54
- 55 and older

4. Where is your office located?

- Johannesburg, Gauteng Province
- Pretoria, Gauteng Province
- Cape Town, Western Cape Province



Other, please specify

5. Are you involved in your business unit's advertising?

Yes

No

6. In which department or area do you work?

Marketing

Brand

Communications

Business

Other, please specify

7. What is your role in Marketing?

Manager/Head/Director

Marketing Consultant/Expert

In-house Designer/Desktop Operator

Strategist

Other, please specify

8. What is your role in Brand?

Brand Manager/Head/Director

Brand Consultant/Expert

Strategist

Other, please specify

9. What is your role in Communications?

Communications Manager/Head/Director



- Communications Consultant/Expert
- Strategist
- Other, please specify

10. What is your role in Business?

- Business Development
- Finance
- Research
- IT
- Other, please specify

11. What is your academic background? Please tick your highest qualification.

- School - passed Grade 12
- Grade 12 and trained by experience
- Completed courses
- Obtained a diploma
- Obtained a degree
- Obtained a postgraduate degree

12. What is the size of your business unit in terms of people employed there?

- | | | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|-----------------------------|--------------------------|
| > 50
employees | 50 to 99
employees | 100 to 149
employees | 150 to 249
employees | 250 to 499
employees | 500 to
1000
employees | < a 1000
employees |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

13. What is the core business of your business unit?

- Banking
- Lending

- Wealth Services
- Investment products
- Insurance products

14. Is your primary design agency also your primary advertising agency? In other words, does the agency responsible for creating your advertisements, also do your branding and design work?

- Yes
- No

15. Do you have a good relationship with the agency responsible for your advertising campaigns?

- Very Bad
- Bad
- Neither Good nor Bad
- Good
- Very Good

16. Do you use different agencies for different types of advertising campaigns? For example do you use one agency for a printed campaign and another for a digital campaign?

- Yes
- No

17. How often do you use a brief?

- | Never | Rarely | Sometimes | Most of the Time | Always |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

18. In your opinion, does a financial services company use a brief more often than other (non-financial services) companies?

- Yes

No

19. Do you think there is a difference between a brief from a financial services company and a company selling tangible goods?

Yes

No

20. What do you consider to be a formal brief?

Written document created uniquely per campaign

Template document to be completed

Form to tick

Face-to-face discussion between client and agency, followed by status report

Face-to-face discussion between client and agency

email from client to agency

Telephone conversation

21. In your opinion, how formal is the average brief to your agency?

Very informal

Somewhat informal

Neither formal nor informal

Somewhat formal

Very formal

22. Please choose the three most important elements in the brief... and mark them in order of importance (with 1 being the most important).

Visuals

Content, words

Message

- Cost
- Timing schedule
- Accountability
- Action steps

23. Do you think there is a difference between the language used in the financial services industry and the language used in the advertising agency?

- Strongly Disagree
- Disagree
- Neither Agree nor Disagree
- Agree
- Strongly Agree

24. Would you say that the advertising agency uses industry language that the average man would not know?

- Yes
- No

25. In general how many reverts does it take before you and the agency agree on the goals and way forward for the advertising campaign?

- 0
- 1
- 2
- 3
- 4 to 10
- More than 10

26. Do you have tools to measure the success of your advertising campaigns?

- Yes (If yes, please name them)

No

27. In your opinion, how effective is the briefing process between yourselves and the agency?

Very Ineffective

Ineffective

Neither Effective nor Ineffective

Effective

Very Effective

28 DO YOU THINK THAT THE PROCESS USED TO CREATE AN ADVERTISING CAMPAIGN SHOULD CHANGE?

Yes (If yes, how would you change the briefing process if you could?)

No

Somewhat

No

29 ON A SCALE OF 1 TO 5 HOW IMPORTANT DO YOU THINK COMMUNICATION IS WITH 1 BEING VERY IMPORTANT AND 5 NOT IMPORTANT?

1

2

3

4

5

30 DO YOU TRY TO IMPROVE YOUR COMMUNICATION SUCCESS BY CONTROLLING THE ENVIRONMENT?

Yes (If yes, how do you do this?)

No

31 DO YOU SOMETIMES EXPERIENCE BARRIERS WHEN COMMUNICATING TO THE ADVERTISING AGENCY?

Yes

No

32 RANK THE BARRIERS ACCORDING TO IMPORTANCE – WHICH ONES WILL INFLUENCE THE COMMUNICATION PROCESS THE MOST?

Physical

Psychological

Perceptual



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA



APPENDIX E

RESPONSE STATISTICS FOR ONLINE SURVEYS

August 2016



APPENDIX E: RESPONSE STATISTICS FOR ONLINE SURVEYS

TABLE OF CONTENTS

E-1	Online Survey Response Statistics – Initial Report for Advertising Agencies	E.1
E-2	Online Survey Response Statistics – Initial Report for Financial Services Companies	E.1

Document E-1

***Online Survey Response Statistics – Initial Report for
Advertising Agencies***



Electronic Survey Response Statistics – Initial Report for Advertising Agencies

Initial Report

Last Modified: 01/12/2015

1. What is your gender?

#	Answer	Response	%
1	Male	7	39%
2	Female	11	61%
	Total	18	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.61
Variance	0.25
Standard Deviation	0.50
Total Responses	18

2. What is your home language?

#	Answer	Response	%
1	Afrikaans	3	18%
2	English	12	71%
3	Isizulu	0	0%
4	Sesotho	0	0%
5	Setswana	2	12%
6	Xhosa	0	0%
7	Other, please specify	0	0%
	Total	17	100%

Other, please specify



Statistic	Value
Min Value	1
Max Value	5
Mean	2.18
Variance	1.28
Standard Deviation	1.13
Total Responses	17

3. How old are you?

#	Answer	Response	%
1	18 - 24	0	0%
2	25 - 34	9	50%
3	35 - 44	7	39%
4	45 - 54	2	11%
5	55 and older	0	0%
	Total	18	100%

Statistic	Value
Min Value	2
Max Value	4
Mean	2.61
Variance	0.49
Standard Deviation	0.70
Total Responses	18



4. What is your academic background? Please tick your highest qualification.

#	Answer		Response	%
1	School - passed Grade 12		1	6%
2	Grade 12 and trained by experience		1	6%
3	Completed courses		1	6%
4	Obtained a diploma		4	22%
5	Obtained a degree		4	22%
6	Obtained a post-graduate degree		7	39%
	Total		18	100%

Statistic	Value
Min Value	1
Max Value	6
Mean	4.67
Variance	2.24
Standard Deviation	1.50
Total Responses	18

5. Are you involved in advertising?

#	Answer		Response	%
1	Yes		14	82%
2	No		3	18%
	Total		17	100%



Statistic	Value
Min Value	1
Max Value	2
Mean	1.18
Variance	0.15
Standard Deviation	0.39
Total Responses	17

6. What is your role at the agency?

#	Answer	Response	%
1	Manager/Head/Director	7	41%
2	Account Executive	2	12%
3	Creative Director	3	18%
4	Strategist	0	0%
5	Designer/Desktop Operator	0	0%
6	Copywriter	1	6%
7	Other, please specify	4	24%
	Total	17	100%

Other, please specify

Editor

involved in most of the above

Client Service Manager

Account Director

Statistic	Value
Min Value	1
Max Value	7
Mean	3.18
Variance	6.40
Standard Deviation	2.53
Total Responses	17



7. In which department or area inside the agency do you work?

#	Answer		Response	%
1	Marketing		1	6%
2	Brand		2	12%
3	Communications		0	0%
4	Business		4	24%
5	Traffic		1	6%
6	Customer service		3	18%
7	Finance		0	0%
8	Design		3	18%
9	Media		2	12%
10	Other, please specify		1	6%
	Total		17	100%

Other, please specify

in most of the above

Statistic	Value
Min Value	1
Max Value	10
Mean	5.65
Variance	7.37
Standard Deviation	2.71
Total Responses	17



8. Where is your office located?

#	Answer		Response	%
1	Johannesburg, Gauteng Province		14	78%
2	Pretoria, Gauteng Province		3	17%
3	Cape Town, Western Cape Province		1	6%
4	Other, please specify		0	0%
	Total		18	100%

Other, please specify

Statistic	Value
Min Value	1
Max Value	3
Mean	1.28
Variance	0.33
Standard Deviation	0.57
Total Responses	18



9. What is the size of your agency in terms of people employed there?

#	Answer	Response	%
1	< 10 employees	8	44%
2	10 to 19 employees	5	28%
3	20 - 49 employees	3	17%
4	50 to 99 employees	2	11%
5	100 to 149 employees	0	0%
6	150 to 249 employees	0	0%
7	> 250 employees	0	0%
	Total	18	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	1.94
Variance	1.11
Standard Deviation	1.06
Total Responses	18



10. What is the core business/focus of your agency?

#	Answer		Response	%
1	Print campaigns		3	17%
2	Online / digital campaigns		8	44%
3	Google adwords/SEO optimisation		0	0%
4	Television		1	6%
5	Radio		0	0%
6	Internal campaigns		3	17%
7	Out of home (including billboards)		0	0%
8	Other, please specify		3	17%
	Total		18	100%

Other, please specify

Online / digital campaigns/Google adwords/SEO optimisation

strategy and presentation

All of the above

Statistic	Value
Min Value	1
Max Value	8
Mean	3.61
Variance	6.84
Standard Deviation	2.62
Total Responses	18



**11. Do your clients use different agencies for different types of advertising campaigns?
For example do they use one agency for a printed campaign and another for a digital campaign?**

#	Answer		Response	%
1	Yes		16	89%
2	No		2	11%
	Total		18	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.11
Variance	0.10
Standard Deviation	0.32
Total Responses	18

12. Do you work with financial services companies?

#	Answer		Response	%
1	Yes		17	94%
2	No		1	6%
	Total		18	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.06
Variance	0.06
Standard Deviation	0.24
Total Responses	18



13. How would you rate your relationship with your clients in financial services?

#	Answer	Response	%
1	Very Poor	0	0%
2	Poor	0	0%
3	Fair	1	6%
4	Good	7	39%
5	Very Good	10	56%
	Total	18	100%

Statistic	Value
Min Value	3
Max Value	5
Mean	4.50
Variance	0.38
Standard Deviation	0.62
Total Responses	18

14. When thinking of your clients in financial services, are you their primary design agency as well as primary advertising agency? In other words, are you responsible for creating their advertisements, and also do their branding and design work?

#	Answer	Response	%
1	Never	4	22%
2	Rarely	2	11%
3	Sometimes	7	39%
4	Often	5	28%
5	All of the Time	0	0%
	Total	18	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	2.72
Variance	1.27
Standard Deviation	1.13
Total Responses	18



15. Do you think there is a difference between a brief from a financial services company and a company selling tangible goods?

#	Answer		Response	%
1	Yes		14	78%
2	Maybe		0	0%
3	No		4	22%
	Total		18	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.44
Variance	0.73
Standard Deviation	0.86
Total Responses	18



16. When creating an advertising campaign, what do you consider to be a formal brief?

#	Answer		Response	%
1	Written document created uniquely per campaign		10	63%
2	Template document to be completed		5	31%
3	Form to tick		1	6%
4	Face-to-face discussion between client and agency, followed by status report		5	31%
5	Face-to-face discussion between client and agency		3	19%
6	eMail from client to agency		7	44%
7	Telephone conversation		4	25%
8	Combination of elements		10	63%

Statistic	Value
Min Value	1
Max Value	8
Total Responses	16



17. Please choose the three most important elements in the brief

#	Answer		Response	%
1	Visuals		0	0%
2	Content, words		5	29%
3	Message		5	29%
4	Budget		2	12%
5	Timing schedule		0	0%
6	Who will be responsible for which element		1	6%
7	Action steps		0	0%
8	Customer journey		0	0%
9	Other, please expand on the elements you think is important that are not mentioned above:		4	24%
	Total		17	100%

Other, please expand on the elements you think is important that are not mentioned above:

Content, words / Budget / Timing Schedule

Content, budget, deadline (couldn't select 3)

Communication objective

Objective of the Campaign, the business objectives and the Budget



Statistic	Value
Min Value	2
Max Value	9
Mean	4.41
Variance	7.88
Standard Deviation	2.81
Total Responses	17

18. How often do you use a formal briefing template?

#	Answer	Response	%
1	Never	1	6%
2	Rarely	3	18%
3	Sometimes	4	24%
4	Most of the time	8	47%
5	All of the time	1	6%
	Total	17	100%

Statistic	Value
Min Value	1
Max Value	5
Mean	3.29
Variance	1.10
Standard Deviation	1.05
Total Responses	17

19. In your opinion, do financial services companies use a formal, prescribed briefing process more often than other (non-financial services) companies?

#	Answer	Response	%
1	Yes	5	29%
2	No	12	71%
	Total	17	100%



Statistic	Value
Min Value	1
Max Value	2
Mean	1.71
Variance	0.22
Standard Deviation	0.47
Total Responses	17

20. In your opinion, how formal is the average briefing process your clients in the financial services adhere to?

#	Answer	Response	%
1	Very informal	2	12%
2	Somewhat informal	7	41%
3	Neither formal nor informal	3	18%
4	Somewhat formal	5	29%
5	Very formal	0	0%
	Total	17	100%

Statistic	Value
Min Value	1
Max Value	4
Mean	2.65
Variance	1.12
Standard Deviation	1.06
Total Responses	17



21. Do you think there is a difference between the language financial services employees use compared to the language the advertising agency employees use?

#	Answer	Response	%
1	Strongly Disagree	0	0%
2	Disagree	1	6%
3	Neither Agree nor Disagree	6	35%
4	Agree	9	53%
5	Strongly Agree	1	6%
	Total	17	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	3.59
Variance	0.51
Standard Deviation	0.71
Total Responses	17

22. Would you say that the financial services uses industry language (jargon) that the average man would not know?

#	Answer	Response	%
1	Yes	7	41%
2	Sometimes	9	53%
3	No	1	6%
	Total	17	100%







Statistic	Value
Min Value	1
Max Value	3
Mean	1.65
Variance	0.37
Standard Deviation	0.61
Total Responses	17

23. In your opinion, how effective is the briefing process between yourselves and the financial services clients?

#	Answer	Response	%
1	Very Ineffective	0	0%
2	Ineffective	0	0%
3	Somewhat Ineffective	3	18%
4	Neither Effective nor Ineffective	1	6%
5	Somewhat Effective	7	41%
6	Effective	5	29%
7	Very Effective	1	6%
	Total	17	100%

Statistic	Value
Min Value	3
Max Value	7
Mean	5.00
Variance	1.38
Standard Deviation	1.17
Total Responses	17

24. In general how many reverts does it take before you and the financial services clients agree on the goals and way forward for the advertising campaign?

#	Answer		Response	%
1	0		0	0%
2	1		2	12%
3	2		4	24%
4	3		5	29%
5	4 to 10		6	35%
6	>10		0	0%
	Total		17	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	3.88
Variance	1.11
Standard Deviation	1.05
Total Responses	17



25. What do you feel you have to achieve to consider it to be a successful advertising campaign?

#	Answer		Response	%
1	If the campaign aligns with the original brief		4	25%
2	When the client is satisfied		8	50%
3	When the client uses you for further work		4	25%
4	When the campaign achieves the specified number of sales		6	38%
5	When the campaign achieves the specified profit		6	38%
6	When the campaign achieves a level of awareness		7	44%
7	When the campaign achieves a level of interest		7	44%

Statistic	Value
Min Value	1
Max Value	7
Total Responses	16



26. Do you have tools to measure the success of your advertising campaigns?

#	Answer	Response	%
1	Yes	9	56%
2	No	7	44%
	Total	16	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.44
Variance	0.26
Standard Deviation	0.51
Total Responses	16

27. Please name the tools you have to measure the success of your advertising campaigns:

Text Response

built in stats programme in our platform

Google Webmaster Tools, Google Adwords, SEOmoz, Facebook Insights, Twitter Ads, Brandseye, Radian6, Effective Measure, Media Shop reporting, Brand Index Indicators (client specific)

surveys

It varies greatly. Some examples: Javascript based analytics tools (such as Google analytics), server side analytics tools (log file based), Clients internal CRM systems that track the leads to sales, ORM sentiment tools (such as brandseye), etc. It really does depend on the objectives of the campaign, the clients budget and the internal systems a client already has.

BrandsEye

Google Analytics & Radian6

Mediamind - this is linked to the SSA sales process within FNB.

Depending on the campaign of course - for an event the process is very important and feedback from clients gives us a very good idea of what to change. Client Emails forwarded by Fin Institution Excel reports on event-campaigns

Statistic	Value
Total Responses	8



28. On a scale of 1 to 5 how important do you think communication is in the briefing process with 1 being very important and 5 not important?

#	Answer		Response	%
1	1		11	65%
2	2		1	6%
3	3		0	0%
4	4		0	0%
5	5		5	29%
	Total		17	100%

Statistic	Value
Min Value	1
Max Value	5
Mean	2.24
Variance	3.44
Standard Deviation	1.86
Total Responses	17

29. Do you try to improve your communication success by taking specific actions?

#	Answer		Response	%
1	Yes		17	94%
2	No		1	6%
	Total		18	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.06
Variance	0.06
Standard Deviation	0.24
Total Responses	18



30. Please choose the boxes that will indicate which actions you take:

#	Answer		Response	%
1	Meet face to face		10	59%
2	Use a template for briefing		5	29%
3	Follow a process agreed by all parties involved		11	65%
4	Making sure that everyone is comfortable with the communication medium ie email, face to face, telephone call		8	47%
5	Other, please specify		1	6%

Other, please specify

Change the process with experience

Statistic	Value
Min Value	1
Max Value	5
Total Responses	17



31. Do you sometimes experience barriers when communicating with the financial services client?

#	Answer	Response	%
1	Yes	16	94%
2	No	1	6%
	Total	17	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.06
Variance	0.06
Standard Deviation	0.24
Total Responses	17

32. According to you which physical barriers will influence the communication during the briefing process the most?

#	Question	Important	Neither Important nor Unimportant	Very unimportant	Total Responses	Mean
1	Venue (meeting room)	2	7	8	17	2.35
2	Noise	6	5	6	17	2.00
3	Temperature	5	9	3	17	1.88
4	Outdated, faulty equipment	7	7	3	17	1.76



Statistic	Venue (meeting room)	Noise	Temperature	Outdated, faulty equipment
Min Value	1	1	1	1
Max Value	3	3	3	3
Mean	2.35	2.00	1.88	1.76
Variance	0.49	0.75	0.49	0.57
Standard Deviation	0.70	0.87	0.70	0.75
Total Responses	17	17	17	17

33. According to you which physiological barriers will influence the communication during the briefing process the most?

#	Question	Very Important	Neither Important nor Unimportant	Very Unimportant	Total Responses	Mean
1	Physical discomfort like pain	9	3	4	16	1.69
2	Ill health	10	2	4	16	1.63
3	Poor eyesight	6	6	4	16	1.88
4	Hearing difficulties	11	3	2	16	1.44

Statistic	Physical discomfort like pain	Ill health	Poor eyesight	Hearing difficulties
Min Value	1	1	1	1
Max Value	3	3	3	3
Mean	1.69	1.63	1.88	1.44
Variance	0.76	0.78	0.65	0.53
Standard Deviation	0.87	0.89	0.81	0.73
Total Responses	16	16	16	16



34. According to you which phsycological barriers will influence the communication during the briefing process the most?

#	Question	Important	Not at all Important	Total Responses	Mean
1	Background, upbringing	10	6	16	1.38
2	Education	14	2	16	1.13
3	Culture	10	6	16	1.38
4	Business focus	13	3	16	1.19
5	Language	15	1	16	1.06

Statistic	Background, upbringing	Education	Culture	Business focus	Language
Min Value	1	1	1	1	1
Max Value	2	2	2	2	2
Mean	1.38	1.13	1.38	1.19	1.06
Variance	0.25	0.12	0.25	0.16	0.06
Standard Deviation	0.50	0.34	0.50	0.40	0.25
Total Responses	16	16	16	16	16

35. Please write down anything that you can think of that could possibly improve the briefing process between the advertising agency and the financial services company when creating an advertising campaign?

Text Response

more face to face interaction

regular meetings during the process so that everyone is always in the loop.

The length of client/agency partnership has a positive correlation to quality of briefing.

Compiling a brief should a joint effort by client and agency i.e. involve agency in helping you compile the brief for the agency. This will avoid potentially important blindspots.

Greater degree of understanding each others' processes and role.

Clarity of thought and not last-minute briefs

The person with the mandate to spend the budget must be part of the initial briefing process. So often, a junior is left to brief the agency - they do not have a broad view of the organisation, the objectives of the campaign, or certain intangibles like tone, feel, etc and this creates untold waste - time, money, resources on both sides

My only suggestion would be lead time on a project and an upfront budget.

I often find that clients are too rushed to give a proper, thought through briefing initially, causing a lot of wasted time, frustration and eventually a campaign that is not as effective as it may / should have been.

For the client to better understand the platforms available to them for advertising and driving awareness and the messaging that aligns with that specific market. It is also important to understand if the campaign is a conversion based campaign that the landing page allows for ease of conversion. For the agency to better understand the goals for the business and then quantify an acquired conversion.

Internal consensus on how a campaign should work. Final copywriting should be carefully considered. A solid understanding of the core Brand. Branding should be placed before personal likes/dislikes. A good brief saves A LOT of time.

Statistic	Value
Total Responses	10

Document E-2

***Online Survey Response Statistics – Initial Report for
Financial Services Companies***



Electronic Survey Response Statistics – Initial Report for Financial Services Companies

Initial Report

Last Modified: 01/12/2015

1. What is your gender?

#	Answer	Response	%
1	Male	5	17%
2	Female	25	83%
	Total	30	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.83
Variance	0.14
Standard Deviation	0.38
Total Responses	30

2. What is your home language?

#	Answer	Response	%
1	Afrikaans	6	19%
2	English	21	68%
3	Isizulu	1	3%
4	Sesotho	0	0%
5	Setswana	2	6%
6	Xhosa	0	0%
7	Other, please specify	1	3%
	Total	31	100%

Other, please specify

Siswati

Statistic	Value
Min Value	1
Max Value	7
Mean	2.19
Variance	1.63
Standard Deviation	1.28
Total Responses	31



3. How old are you?

#	Answer	Response	%
1	18 - 24	3	10%
2	25 - 34	17	55%
3	35 - 44	6	19%
4	45 - 54	4	13%
5	55 and older	1	3%
	Total	31	100%

Statistic	Value
Min Value	1
Max Value	5
Mean	2.45
Variance	0.92
Standard Deviation	0.96
Total Responses	31

4. What is your academic background? Please tick your highest qualification.

#	Answer	Response	%
1	School - passed Grade 12	0	0%
2	Grade 12 and trained by experience	1	3%
3	Completed courses	2	6%
4	Obtained a diploma	6	19%
5	Obtained a degree	5	16%
6	Obtained a post-graduate degree	17	55%
	Total	31	100%

Statistic	Value
Min Value	2
Max Value	6
Mean	5.13
Variance	1.32
Standard Deviation	1.15
Total Responses	31



5. What is your role in the financial services company?

#	Answer	Response	%
1	Head of marketing	5	17%
2	Marketing manager	11	38%
3	Brand manager	1	3%
4	Public relations officer	0	0%
5	Designer/Desktop Operator	2	7%
6	Copywriter	0	0%
8	Media planner	0	0%
9	Head of digital marketing	1	3%
10	Digital marketing manager	3	10%
11	Campaign manager	1	3%
12	Social media marketing	0	0%
13	Other	5	17%
	Total	29	100%

Other

Micro-project Manager
Marketing coordinator
marketing co-ordinator
Head of internal communication

Statistic	Value
Min Value	1
Max Value	13
Mean	5.34
Variance	22.38
Standard Deviation	4.73
Total Responses	29

6. In which department or area inside the financial services company do you work?

#	Answer	Response	%
1	Marketing	18	60%
2	Brand	4	13%
3	Communications	1	3%
5	Finance	0	0%
6	Social media	0	0%
7	Digital marketing	4	13%
9	Media	0	0%
10	Other, please specify	3	10%
	Total	30	100%



Other, please specify

Web and Usability studio
sales
HR

Statistic	Value
Min Value	1
Max Value	10
Mean	2.90
Variance	9.89
Standard Deviation	3.14
Total Responses	30

7. Where is your office located?

#	Answer	Response	%
1	Johannesburg, Gauteng Province	28	97%
2	Pretoria, Gauteng Province	1	3%
3	Cape Town, Western Cape Province	0	0%
4	Other, please specify	0	0%
	Total	29	100%

Other, please specify

Statistic	Value
Min Value	1
Max Value	2
Mean	1.03
Variance	0.03
Standard Deviation	0.19
Total Responses	29

8. Are you involved in advertising financial services products?

#	Answer	Response	%
1	Yes	26	87%
2	No	4	13%
	Total	30	100%



Statistic	Value
Min Value	1
Max Value	2
Mean	1.13
Variance	0.12
Standard Deviation	0.35
Total Responses	30

9. What is the size of your operational division in terms of people employed there?

#	Answer	Response	%
1	< 10 employees	9	31%
2	10 to 19 employees	4	14%
3	20 - 49 employees	2	7%
4	50 to 99 employees	2	7%
5	100 to 149 employees	3	10%
6	150 to 249 employees	2	7%
7	> 250 employees	7	24%
	Total	29	100%

Statistic	Value
Min Value	1
Max Value	7
Mean	3.69
Variance	6.08
Standard Deviation	2.47
Total Responses	29



10. What is the core business/focus of your area?

#	Answer	Response	%
1	Retail / Individual customers	14	48%
2	Business customers	2	7%
3	Channel management	2	7%
4	Brand	8	28%
5	Media	0	0%
6	External communication	2	7%
7	Internal communication	0	0%
8	Other, please specify	1	3%
	Total	29	100%

Other, please specify

Cross segments

Statistic	Value
Min Value	1
Max Value	8
Mean	2.62
Variance	3.74
Standard Deviation	1.93
Total Responses	29

11. Do you work with advertising agencies?

#	Answer	Response	%
1	Yes	28	100%
2	No	0	0%
	Total	28	100%

Statistic	Value
Min Value	1
Max Value	1
Mean	1.00
Variance	0.00
Standard Deviation	0.00
Total Responses	28



12. Do you use different agencies for different types of advertising campaigns? For example do you use one agency for a printed campaign and another for a digital campaign?

#	Answer	Response	%
1	Yes	26	93%
2	No	2	7%
	Total	28	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.07
Variance	0.07
Standard Deviation	0.26
Total Responses	28

13. How would you rate your relationship with the employees of the advertising agencies?

#	Answer	Response	%
1	Very Poor	0	0%
2	Poor	1	4%
3	Fair	5	18%
4	Good	14	50%
5	Very Good	8	29%
	Total	28	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	4.04
Variance	0.63
Standard Deviation	0.79
Total Responses	28

14. When thinking of the advertising agencies you use, are they your primary design agency as well as primary advertising agency? In other words, are they responsible for creating your advertisements, and also do your branding and design work?

#	Answer	Response	%
1	Never	1	4%
2	Rarely	6	21%
3	Sometimes	7	25%
4	Often	12	43%
5	All of the Time	2	7%
	Total	28	100%



Statistic	Value
Min Value	1
Max Value	5
Mean	3.29
Variance	1.03
Standard Deviation	1.01
Total Responses	28

15. Do you think there is a difference between advertising financial services and tangible goods?

#	Answer	Response	%
1	Yes	24	86%
2	Maybe	2	7%
3	No	2	7%
	Total	28	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.21
Variance	0.32
Standard Deviation	0.57
Total Responses	28



16. When creating an advertising campaign, what do you consider to be a formal brief?

#	Answer	Response	%
1	Written document created uniquely per campaign	10	38%
2	Template document to be completed	9	35%
3	Form to tick	0	0%
4	Face-to-face discussion between the financial services company and the advertising agency, followed by status report	11	42%
5	Face-to-face discussion between the financial services company and the advertising agency	6	23%
6	eMail from the financial services company to the advertising agency	4	15%
7	Telephone conversation	1	4%
8	Combination of elements	12	46%

Statistic	Value
Min Value	1
Max Value	8
Total Responses	26



17. Please choose the three most important elements in the brief

#	Answer	Response	%
1	Visuals	1	4%
2	Content, words	7	27%
3	Message	9	35%
4	Budget	1	4%
5	Timing schedule	0	0%
6	Who will be responsible for which element	0	0%
7	Action steps	0	0%
8	Customer journey	2	8%
9	Other, please expand on the elements you think is important that are not mentioned above:	6	23%
	Total	26	100%

Other, please expand on the elements you think is important that are not mentioned above:

Strategic intent, clear description of objectives and outcome

timing schedule, action steps

Content, message and customer journey

Objectives, target market and message

The question above only allows for one selection not three

Message, Timing schedule and budget

Statistic	Value
Min Value	1
Max Value	9
Mean	4.46
Variance	8.90
Standard Deviation	2.98
Total Responses	26



18. How often do you use a formal briefing template?

#	Answer	Response	%
1	Never	0	0%
2	Rarely	4	15%
3	Sometimes	3	12%
4	Most of the time	13	50%
5	All of the time	6	23%
	Total	26	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	3.81
Variance	0.96
Standard Deviation	0.98
Total Responses	26

19. In your opinion, do financial services companies use a formal, prescribed briefing process more often than other (non-financial services) companies?

#	Answer	Response	%
1	Yes	14	54%
2	No	12	46%
	Total	26	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.46
Variance	0.26
Standard Deviation	0.51
Total Responses	26

20. In your opinion, how formal is the average briefing process you adhere to?

#	Answer	Response	%
1	Very informal	0	0%
2	Somewhat informal	6	23%
3	Neither formal nor informal	4	15%
4	Somewhat formal	14	54%
5	Very formal	2	8%
	Total	26	100%



Statistic	Value
Min Value	2
Max Value	5
Mean	3.46
Variance	0.90
Standard Deviation	0.95
Total Responses	26

21. Do you think there is a difference between the language financial services employees use compared to the language the advertising agency employees use?

#	Answer	Response	%
1	Strongly Disagree	0	0%
2	Disagree	1	4%
3	Neither Agree nor Disagree	4	15%
4	Agree	16	62%
5	Strongly Agree	5	19%
	Total	26	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	3.96
Variance	0.52
Standard Deviation	0.72
Total Responses	26

22. Would you say that financial services use industry language (jargon) that the average man would not know?

#	Answer	Response	%
1	Yes	15	58%
2	Sometimes	9	35%
3	No	2	8%
	Total	26	100%

Statistic	Value
Min Value	1
Max Value	3
Mean	1.50
Variance	0.42
Standard Deviation	0.65
Total Responses	26



23. In your opinion, how effective is the briefing process between yourselves and the advertising agency?

#	Answer	Response	%
1	Very Ineffective	2	8%
2	Ineffective	1	4%
3	Somewhat Ineffective	2	8%
4	Neither Effective nor Ineffective	0	0%
5	Somewhat Effective	11	42%
6	Effective	9	35%
7	Very Effective	1	4%
	Total	26	100%

Statistic	Value
Min Value	1
Max Value	7
Mean	4.85
Variance	2.46
Standard Deviation	1.57
Total Responses	26

24. In general how many reverts does it take before you agree with the advertising agency on the goals and way forward for the advertising campaign?

#	Answer	Response	%
1	0	0	0%
2	1	1	4%
3	2	4	15%
4	3	12	46%
5	4 to 10	9	35%
6	>10	0	0%
	Total	26	100%

Statistic	Value
Min Value	2
Max Value	5
Mean	4.12
Variance	0.67
Standard Deviation	0.82
Total Responses	26



25. What do you feel the advertising agency has to achieve for you to consider an advertising campaign to be successful?

#	Answer	Response	%
1	If the campaign aligns with the original brief	16	62%
2	When the business is satisfied	9	35%
3	When you use the advertising agency for further work	2	8%
4	When the campaign achieves the specified number of sales	13	50%
5	When the campaign achieves the specified profit	3	12%
6	When the campaign achieves a level of awareness	12	46%
7	When the campaign achieves a level of interest	10	38%

Statistic	Value
Min Value	1
Max Value	7
Total Responses	26

26. Do you have tools to measure the success of your advertising campaigns?

#	Answer	Response	%
1	Yes	17	65%
2	No	9	35%
	Total	26	100%



Statistic	Value
Min Value	1
Max Value	2
Mean	1.35
Variance	0.24
Standard Deviation	0.49
Total Responses	26

27. Please name the tools you have to measure the success of your advertising campaigns:

Text Response

SSA, Mediamind
 Reports, sales, ppc, ctr
 Google analytics, in-house tracking
 Responses,Data,Mis
 Google Analytics Our data team analyses client take-up from campaigns in their management tool Sieble Sell It Media post campaign reports Creative post campaign reports
 Google Analytics, Site Catalyst, Pmailer
 tracking - SMSs, mailers, calls, online click throughs, sales (over a 3 month period), change in banking behaviour.
 Outside agency to track GTP Campaign
 Media tracking tools Google Analytics Internal reporting
 ROI Sales generated Leads generated
 Sales Tracker, Google Analytics, Click-through rates
 MIS, Data analytics, Online activity
 Google Analytics, Internal sales tracking, Effective Measure, Social Bakers, platforms' own Insights tools (Facebook, LinkedIn etc have their own analytics)
 In house MI analysis and reports pmailer reports Sitecatalyst/Google analytics Digital advertising reports (Mediamind)

Statistic	Value
Total Responses	14

28. On a scale of 1 to 5 how important do you think communication is in the briefing process with 1 being very important and 5 not important?

#	Answer	Response	%
1	1	19	76%
2	2	2	8%
3	3	0	0%
4	4	0	0%
5	5	4	16%
	Total	25	100%



Statistic	Value
Min Value	1
Max Value	5
Mean	1.72
Variance	2.21
Standard Deviation	1.49
Total Responses	25

29. Do you try to improve your communication success by taking specific actions?

#	Answer	Response	%
1	Yes	25	100%
2	No	0	0%
	Total	25	100%

Statistic	Value
Min Value	1
Max Value	1
Mean	1.00
Variance	0.00
Standard Deviation	0.00
Total Responses	25

30. Please choose the boxes that will indicate which actions you take:

#	Answer	Response	%
1	Meet face to face	21	84%
2	Use a template for briefing	14	56%
3	Follow a process agreed by all parties involved	15	60%
4	Making sure that everyone is comfortable with the communication medium ie email, face to face, telephone call	13	52%
5	Other, please specify	1	4%

Other, please specify

Ensure that the brief is clear and the agency understand the content, from the objectives, the target market, competitor landscape as well as the message and look and feel I require.



Statistic	Value
Min Value	1
Max Value	5
Total Responses	25

31. Do you sometimes experience barriers when communicating with the advertising agency?

#	Answer	Response	%
1	Yes	19	76%
2	No	6	24%
	Total	25	100%

Statistic	Value
Min Value	1
Max Value	2
Mean	1.24
Variance	0.19
Standard Deviation	0.44
Total Responses	25

32. According to you which physical barriers will influence the communication during the briefing process the most?

#	Question	Important	Neither Important nor Unimportant	Very unimportant	Total Responses	Mean
1	Venue (meeting room)	9	11	5	25	1.84
2	Noise	15	8	2	25	1.48
3	Temperature	7	12	6	25	1.96
4	Outdated, faulty equipment	16	4	5	25	1.56

Statistic	Venue (meeting room)	Noise	Temperature	Outdated, faulty equipment
Min Value	1	1	1	1
Max Value	3	3	3	3
Mean	1.84	1.48	1.96	1.56
Variance	0.56	0.43	0.54	0.67
Standard Deviation	0.75	0.65	0.73	0.82
Total Responses	25	25	25	25



33. According to you which physiological barriers will influence the communication during the briefing process the most?

#	Question	Very Important	Neither Important nor Unimportant	Very Unimportant	Total Responses	Mean
1	Physical discomfort like pain	18	4	3	25	1.40
2	Ill health	18	4	3	25	1.40
3	Poor eyesight	16	5	4	25	1.52
4	Hearing difficulties	18	3	4	25	1.44

Statistic	Physical discomfort like pain	Ill health	Poor eyesight	Hearing difficulties
Min Value	1	1	1	1
Max Value	3	3	3	3
Mean	1.40	1.40	1.52	1.44
Variance	0.50	0.50	0.59	0.59
Standard Deviation	0.71	0.71	0.77	0.77
Total Responses	25	25	25	25

34. According to you which psychological barriers will influence the communication during the briefing process the most?

#	Question	Important	Not at all Important	Total Responses	Mean
1	Background, upbringing	12	12	24	1.50
2	Education	20	5	25	1.20
3	Culture	12	11	23	1.48
4	Business focus	23	2	25	1.08
5	Language	22	3	25	1.12

Statistic	Background, upbringing	Education	Culture	Business focus	Language
Min Value	1	1	1	1	1
Max Value	2	2	2	2	2
Mean	1.50	1.20	1.48	1.08	1.12
Variance	0.26	0.17	0.26	0.08	0.11
Standard Deviation	0.51	0.41	0.51	0.28	0.33
Total Responses	24	25	23	25	25



35. Please write down anything that you can think of that could possibly improve the briefing process between the advertising agency and the financial services company when creating an advertising campaign?

Text Response

An online tracking system to track feedback and changes. Better communication instead of going to far on a creative

More discussions around goals

Ensure that the briefing process and template are updated as needs change.

Clear communication. The person briefing the agency needs to know exactly what he/she wants before approaching the agency. It is also important to have a single line of communication rather than multiple people talking to each other across the two companies

Clearly written brief, ... strategic intent, objectives and agreed measures by which the desired outcome can be measured, followed by a face to face meeting with the agency to ensure understanding.

After the business has met with the agency, the agency should summarize how they interpret the brief to ensure that everyone is on the same page before creative commences

Open, honest conversation from the get go. The agency needs to buy into our business objectives & immerse themselves in understanding our products, markets & requirements. SENIOR AGENCY STAFF SHOULD ALSO ATTEND THE BRIEFING SESSION - junior staff (only) just does not work; the agency must also understand the sign-off process within the business; they often don't come up with unique ideas/ offer alternative options; they often come across as though they're doing US a favour(!)

Making sure that everyone is on the same page Having status meetings

Providing agency with the necessary product and industry understanding

Bring the designers and copy writer to a briefing session, not just the account managers.

I think its critical that face to face briefings are part of the process whereby the financial guys and the agency are in the room together and it is not just about marketing relaying the brief to the agency.

Clarity in processes followed internally and within the agency should be disclosed upfront to manage timings Having business in the session to unpack their expectations is very beneficial



Text Response (continued)

proper info from product owners face to face briefing complete template copy must be 99% complete and signed off by stakeholders before the creative process starts - otherwise it leads to endless reverts the agency must understand the company CI Be able to think outside the box within CI Get rid of agencies bored with your brand or giving you average / mediocre work de -brief face to face, emails do not convey the whole message or understanding

Drawing the distinct link between the business problem and the end product (campaign). The agency needs to see the problem the same way the business does, and then they have the background/context toward effectively delivering the right campaign. Too often marketers (financial business side) focus more on the creative and message, and with the agency fail to remember the primary reason for the campaign.

Statistic	Value
Total Responses	15



APPENDIX F

PROMPT SHEETS: - ONE-ON-ONE INTERVIEWS

August 2016

APPENDIX F: PROMPT SHEETS: - ONE-ON-ONE INTERVIEWS

TABLE OF CONTENTS

F-1	Prompt Sheet for Interviews with Advertising Agency Participants	F.3
F-2	Prompt Sheet for Interviews with Financial Services Company Participants	F.3

Document F-1

***Prompt Sheet for Interviews with Advertising Agency
Participants***

PROMPT SHEET FOR INTERVIEWS WITH ADVERTISING AGENCY PARTICIPANTS

Interpretation of Campaign Briefs between South African Financial Services and Advertising Agencies

Time:

Place:

Agency:

Interviewees:

Interview questions for Advertising agencies:

1. Are you involved in the campaign brief from the financial services company? What is your role in this process?
2. How does the financial services company brief you? Is there a formal process in place? Expand on it, please. Do you have a briefing template or any other documentation that you use at the briefing process?
3. Is it important to have a formal process? Why would you say that?
4. What are the elements that need to be included in the brief?
5. How do you ensure that you understand what the financial services company wants to achieve? What are your expectations from the financial services company? In general how many reverts do you go through before you start executing the brief?
6. Do you think there is a difference in creating advertising campaigns for tangible and non-tangible goods?
7. In your opinion, do you have a good relationship with the financial services company? Would you say that the quality of the relationship is important in the outcome of the campaign?
8. Do you prefer it if the financial services company is involved in the campaign creative process or not? Why?

9. What are the measurements you put in place to ensure that your campaign is effective?

10. In planning for and developing the campaign brief, how would you handle each of the issues on the list below / what did the financial services company tell you about each of these issues:

- ❖ Objectives
- ❖ Scope
- ❖ Deliverables
- ❖ Business Benefits
- ❖ Assumptions
- ❖ Constraints
- ❖ Risks
- ❖ Other Areas of Business Affected
- ❖ Major Dependencies
- ❖ Stakeholders Resources
- ❖ Outline estimates of time and cost

11. Which actions and/or activities in the briefing process should fall under each of the following headings?

- ❖ Plan
- ❖ Organise
- ❖ Lead
- ❖ Control

Document F-2

***Prompt Sheet for Interviews with Financial Services
Company Participants***

PROMPT SHEET FOR INTERVIEWS WITH FINANCIAL SERVICES COMPANY PARTICIPANTS

Interpretation of Campaign Briefs between South African Financial Services and Advertising Agencies

Time:

Place:

FSC:

Interviewees:

Interview questions for FSCs:

12. Are you involved in a campaign brief with advertising agency? What is your role in this process?
13. How do you brief the advertising agency? Is there a formal process in place? Expand on it, please. Do you have a briefing template or any other documentation that you use at the briefing process?
14. Is it important to have a formal process? Why would you say that?
15. What are the elements that need to be included in the brief?
16. How do you ensure that the advertising agency understands what you as the financial services company want to achieve? What are your expectations from the advertising agency? In general how many reverts do you go through before they start executing the brief?
17. Do you think there is a difference in creating advertising campaigns for tangible and non-tangible goods?
18. In your opinion, do you have a good relationship with the advertising agency? Would you say that the quality of the relationship is important in the outcome of the campaign?
19. Do you as financial services company involve yourself in the campaign creative process or not? Why?

20. What are the measurements you put in place to ensure that your campaign is effective?

21. In planning for and developing the campaign brief, how would you handle each of the issues on the list below / how did you brief the advertising agency about each of these:

- ❖ Objectives
- ❖ Scope
- ❖ Deliverables
- ❖ Business Benefits
- ❖ Assumptions
- ❖ Constraints
- ❖ Risks
- ❖ Other Areas of Business Affected
- ❖ Major Dependencies
- ❖ Stakeholders Resources
- ❖ Outline estimates of time and cost

22. Which actions and/or activities in the briefing process should fall under each of the following headings?

- ❖ Plan
- ❖ Organise
- ❖ Lead
- ❖ Control



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDIX G

TRANSCRIPTIONS: - ONE-ON-ONE INTERVIEWS

August 2016

APPENDIX G: TRANSCRIPTIONS: - ONE-ON-ONE INTERVIEWS

TABLE OF CONTENTS

G-1	AdAgl # 01 and 02 transcript (anonymous)	G.3
G-2	AdAgl # 03 and 04 transcript (anonymous)	G.15
G-3	AdAgl # 05 (anonymous)	G.1
G-4	AdAgl # 06 (anonymous)	G.1
G-5	AdAgl # 07 (anonymous)	G.1
G-6	FSCI # 01 (anonymous)	G.1

Document G-1

AdAgl # 01 and 02 transcript (anonymous)

Advertising Agency Interviewee 1 and 2

Interviewer: Are you involved in the campaign brief from the financial services company?

Advertising Agency Interviewee 2: Yes

Advertising Agency Interviewee 3: Yes, definitely

Interviewer: How are you involved?

Advertising Agency Interviewee 2: We have to clearly define the hmm product that we take to the market and understand the messages.

Advertising Agency Interviewee 3: I agree, we also have to define and clearly articulate the messages we take to the market. We have to define the brand. We have to enable a way to take the message to the market, make it tactical. Hmm

Advertising Agency Interviewee 2: Hmm I would say we have to find the manner in which to achieve the business objectives.

Interviewer: okay, tell me do you have a briefing template hmm or any other documentation that you use at the briefing process?

Advertising Agency Interviewee 3: No

Advertising Agency Interviewee 2: No, not really. No

Interviewer: Okay, so how does the financial services company brief you? Is there a formal process in place? Expand on it, please. Tell me some more

Advertising Agency Interviewee 2: We are usually present at a meeting where the client gives us instructions. But this could also be on the phone. There are often instances where the customer briefs us telephonically. Then we also meet face to face. And we ask questions to do a sense check.

Advertising Agency Interviewee 3: I found that the manner in which the client briefs us, sets the tone. You know, hmm if the client is not even prepared to meet face to face, it means he is not as passionate, not as serious about the work. He is not willing to spend time on the project and it will reflect in the work. For quick jobs, it is different, then we do not need to meet face to face, but for bigger campaigns it is important to start with the brief as the origination of the campaign. The client and the agency need to give a big campaign the time it deserves, otherwise it will show in the work.

Advertising Agency Interviewee 2: The communication need to be clear upfront, from the beginning. There is a difference between a smaller campaign and a big integrated campaign with different components.

Interviewer: Interesting.

Advertising Agency Interviewee 3: Definitely

Interviewer: Is it important to have a formal process, I mean when you are briefing or taking a brief, when the client is briefing you? And why would you say that?

Advertising Agency Interviewee 3: Yes, it is important. For sure.

Advertising Agency Interviewee 2: It creates and establishes the responsibilities hmm on both sides, on the side of the agency and on the side of the client.

Advertising Agency Interviewee 3: Also a.... having a formal process gives the project or campaign the focus it needs. It also establishes the relationship between the two parties in the execution thereafter.

Interviewer: So which steps would you follow?

Advertising Agency Interviewee 2: if there's no formal brief we usually follow these steps: Number 1 we receive the brief, the task, in a meeting or via an email or on the phone. And then we will have a first presentation to the client where we show a kind draft, a mood board...

Advertising Agency Interviewee 3: To see if we are on the right track.

Advertising Agency Interviewee 2: Yes, and then we get feedback from the client which helps us to better understand what it is they want to achieve, what their goals are, so that we can come up with better communication, a better end product. Once we have received feedback, hmm we edit our ideas and work on them some more to do up to three presentations by which time we usually have sign off. Once that is done, once we have concept approval, hmm we can continue to the actual art work.

Advertising Agency Interviewee 3: We bill for our time, and if we work according to a brief, everything is easier. Everyone knows what they are doing and what the implications in terms of money and time would be.

Interviewer: Okay thanks. Let me see, okay: What are the elements that need to be included in the brief?

Advertising Agency Interviewee 3: We need to know what you want to achieve. What will constitute success for you as a client? What is it that you are looking for?

Advertising Agency Interviewee 2: Yes, we need to know what is the goal. Be clear on this. For example position us as... and so on. And then the offering. What is the actual product or service that the business wants to advertise or wants to create awareness around?

Advertising Agency Interviewee 3: It boils down to the end user's experience, the customer's experience. What is the value offered to the customer? We have to create a story to tell the customer.

Advertising Agency Interviewee 2: Oh yes. It is the story that helps to make sense of what the value is.

Interviewer: That is very true. I get that. Is there hmm anything else that you need to know, that needs to be covered in the briefing stage?

Advertising Agency Interviewee 3: We also need to know what the pitfalls are for the client. What is worrying you? Is there anything we need to mend, or that you need to mend? Or is there anything hmm that we need to stay away from, steer clear of? We need to understand both sides of the fence.

Advertising Agency Interviewee 2: I agree with Claire. In order for us to know the full story we have to understand, hmm really understand where the client is coming from. What is keeping him awake at night and what makes him excited.

Interviewer: If the client does not express any of these concerns openly or hmm if he does not give it to you by his own accord, how do you make sure you get to the bottom of the matter?

Advertising Agency Interviewee 3: We do desktop research. We look at what the competitors are doing and what other players in the market do. We do our best to understand the market, to see and hmm to know what is out there. We look at trends and listen to conversations about the market or the product or service.

Advertising Agency Interviewee 2: If necessary, we will conduct consumer research. Research is not part of our day to day role, but if we need to conduct that in order for us to better understand the market or the service, we will also do that.

Advertising Agency Interviewee 3: Yes, yes.

Interviewer: We have spoken about the value or product that the client has, hmm and the goal or outcomes they want to achieve and the customer's experience and hmmm let me see, ja also what is, what are the pitfalls that hmm that the client might have. Which other elements are, hmm do you need to know about, that should ideally be included in the brief?

Advertising Agency Interviewee 3: Budget, definitely what the available budget is that the client has.

Advertising Agency Interviewee 2: We need to know what the scope of the project is, what we have to work with...

Advertising Agency Interviewee 3: We can work with blue sky thinking, but the budget should be clear. We will accommodate any size of budget and if it is small, hmm just be clever about it.

Interviewer: I understand that. You probably often have to work without a stipulated budget? I know that we (as a business) have sometimes briefed without giving a definite budget and that hmm that must be so frustrating.

Advertising Agency Interviewee 3: It makes it difficult. If the budget is clear, it changes our thinking hugely. We need to be realistic and plan for what is possible to achieve.

Advertising Agency Interviewee 2: Although we get it, sometimes the person briefing does not know what the budget is. They want to get great ideas to help them motivate for more budget.

Advertising Agency Interviewee 3: Yes, that happens. And it is great if the ideas get accepted or approved, hmm but it is often very demotivating to have our ideas that we are passionate about and that we have worked hard to put together, get turned down.

Advertising Agency Interviewee 2: It is also demotivating for the people we deal with, usually in the marketing department.

Interviewer: Okay that is all about a clear budget. So where possible and in the perfect world, the budget should be hmm clear in the brief. What other questions do you ask when you get the brief?

Advertising Agency Interviewee 2: Timing. We need to know what the timing of the campaign is. When does the client want to go to the market? Hmm and when will the products, hmmm if not yet ready or available, when will that be ready to be launched.

Advertising Agency Interviewee 3: We need to know what the timings of the various elements is. Where does the initiative fit into the total brand stable? We need the full understanding of the brand and hmm the brand philosophy. Even for small projects like a mailer to clients. We need to understand if it will form part of a series or will it be a once off communication to clients?

Advertising Agency Interviewee 2: We need to be intelligent about our work. What does the rest of the projects do, say? Where do we fit in.

Advertising Agency Interviewee 3: We usually do not do... hmm, how shall I put it, execute the small elements, if they are not existing or if the bigger brand themes have not been finalised. We would rather educate the client.

Interviewer: Is that not a difficult task, I mean to educate a client if he asks for something?

Advertising Agency Interviewee 3: It could be, but we try to be emphatic towards the client and make suggestions. We ask: what do you want? And then we tell them: this is what I have. Our role is to advise on the in brackets, laundry list. We advise on what it is that you should be thinking about. The industry needs partners, not auditors.

Interviewer: Very important, yes. So how do you ensure that you understand what the financial services company wants to achieve?

Advertising Agency Interviewee 2: Communication is key.

Advertising Agency Interviewee 3: And clarity in the communications.

Advertising Agency Interviewee 2: I agree, yes. The client need to understand themselves what it is that they want to communicate on, in, in brackets, agency level. Otherwise we have to dig to find the truth. This could be complex.

Advertising Agency Interviewee 3: You know, you get good marketers and you get bad marketers. Good marketers are the ones who understand the value. To put it in English, they will be able to tell you what the value is they add to the market in simplistic sense. On the other hand, bad marketers will use jargon and convoluted stories that they want the agency to dissect and understand. And then in the end they want the agency to formulate the solution.

Interviewer: What are your expectations from the financial services company? What do you need the client to do?

Advertising Agency Interviewee 3: What do I need the client to do? Hmm We get the client to do that – whatever is needed for the campaign, to understand what they

want – by offering them this value. We come up with the value through different interactions.

Advertising Agency Interviewee 2: You could call it thinking sessions. Brainstorm sessions where we extract the value we need. Sometimes we have to ask many questions to enable us to get what we want.

Interviewer: I see, and in general how many reverts do you go through before you start executing the brief? Before you get the go ahead or sign off of concept, hmm approval of your suggested concept?

Advertising Agency Interviewee 2: We do have clients like, Montagu, who approved the concept the first time. Sometimes there are up to 30 small reverts.

Interviewer: Sjoe

Advertising Agency Interviewee 3: Our norm is three reverts. After three reverts, the client starts incurring extra charges. Our quote includes three reverts.

Advertising Agency Interviewee 2: We will be reasonable or fair. If we really missed the point or misunderstood the client, we will rework our concept, but hmm under normal circumstances around three reverts are fair.

Interviewer: How do you get it right though?

Advertising Agency Interviewee 3: We use cost as a tool. If a client knows that he needs to be serious about commentary, feedback, otherwise he will incur costs, he is usually far more focused.

Advertising Agency Interviewee 2: We also put in an effort to consolidate all feedback from business to ensure we are communicating properly and understanding what was said rightly.

Advertising Agency Interviewee 3: It is frustration from the studio if they have to keep on making small changes to the concept or creative work. We feel that the client needs to respect the agency. It is also the client's own time that gets wasted if they do not get all the input from everyone, or everyone that needs to, in the business. Time is money... Yes.

Interviewer: Okay. I can imagine it will be hmmm frustrating on both sides. Yes. Moving on to the advertising side: Do you think there is a difference in creating advertising campaigns for tangible and non-tangible goods?

Advertising Agency Interviewee 2: uh uh yes.

Advertising Agency Interviewee 3: Yes, I think there is a difference. There is a difference in the product. The effort and approach is also different. When one has to advertise a service, it is the theoretical selling of an idea. And a product, one can just say, here is the product.

Interviewer: In your opinion, do you have a good relationship with the financial services company?

Advertising Agency Interviewee 3: Of course we have. (Laughter)

Advertising Agency Interviewee 2: We do. We have. We feel that there is a huge role of emotion in the relationship with the client. Hmm we aim to have a close relationship with the client.

Advertising Agency Interviewee 3: We have a good relationship with our clients. If it is good, we respect and align our objectives. It is on trust that we chain our collaboration, the work we do have the same end goal. An agency can easily feel and act as the client's slave. They never get outside of the agency, but is always working for the client.

Interviewer: Would you say that the quality of the relationship is important in the outcome of the campaign? Does it hmmm have an influence in the work hmmm on the work at the end?

Advertising Agency Interviewee 3: Yes, definitely. I would say it is an emotional thing and would by all means have a huge impact on the outcome of the campaign. Where we have a great relationship with our clients, we have the same goals and ambitions. If not, we did not get on an even kilter. It has happened that a marketer will commission our services, but we find that we cannot work with that client. If so, it will not work and we suggest another agency.

Advertising Agency Interviewee 2: We need a good fit with our clients. The brand should be right for our business also. If there is no mutual understanding, it is better not to work, hmm embark on a journey together.

Advertising Agency Interviewee 3: Look, we will obviously do our best to look at the business and solve the problem but if you have to cut the ties, it is better to face the facts than to hang on to business that will not be a success and damage our own reputation as a result.

Advertising Agency Interviewee 2: We have an example, when we were commissioned by EY. Their brand is beautiful and the business if good, but there was not match between the client and the agency. It just could not work. They did not afford us the time we needed, for various reasons. They were too busy, had too many priorities, and never had time for us. The project suffered as a result.

Interviewer: Are there issues between, say male and female, different genders?

Advertising Agency Interviewee 3: No that has never been a problem for us to work with males or females. We listen to what they need and want.

Advertising Agency Interviewee 2: Men want pretty ladies, but not on this level.

Advertising Agency Interviewee 3: People respond differently to different people. We work with the energies in the room and see how to deal with that.

Interviewer: What about race? Has that ever been a challenge for you in terms of communication? I mean hmm different backgrounds, different mother tongue languages?

Advertising Agency Interviewee 2: No race is never an issue.

Advertising Agency Interviewee 3: Sometimes it is easier when people speak the same language and understand the language the same way, but the business prevails. No, it has never been an issue for us.

Advertising Agency Interviewee 2: For me, it is the level of comfort one has in terms of, or when it comes to the nature of the business. If I think of Momentum, or how it used to be: it has a proudly Afrikaans culture. So it is human nature to want to speak your mother tongue where possible. It is just easier. In that case, I will be in all the meetings and discussions, as I am Afrikaans. But we see how to deal with the client so that he is comfortable and we are comfortable.

Interviewer: Do you prefer it if the financial services company is involved in the campaign creative process or not? Like if they have ideas that they want you to implement they hmm the way they see it?

Advertising Agency Interviewee 3: In short, no, not really. Clients think that they should come up with the creative process, that they should have the answers to the questions. They think that, creatively speaking, they should solve the problem. We prefer it if they tell us what they want us to communicate. Tell me what the problem is, not the answer. That is my job.

Advertising Agency Interviewee 2: We will use the clients knowledge, but not in the exact way as they give it to us. The content of what they tell us will be important and we will interpret that. We will use their style and translate it for them. It boils down to the reason why you use the image. The client needs to tell us what they want their customers to see. We will distil what the client wants into a creative execution for their clients.

Advertising Agency Interviewee 3: Allow the client to tell you why they need the campaign and the client should allow the agency to ask the questions about the campaign. That way the rapport is better.

Interviewer: And what if they have a specific image or idea that they want you to implement that they think will work?

Advertising Agency Interviewee 2: We will listen to them and incorporate if that is the right thing to do. Otherwise, we will have to convince them of our creative ideas or solutions.

Interviewer: I am sure that it often is a challenge.

Advertising Agency Interviewee 3: Yes, but that is what makes us, hmm that is the value we add to the process.

Interviewer: Good. So, what are the measurements you put in place to ensure that your campaign is effective? That you are successful?

Advertising Agency Interviewee 2: Firstly we think it is important to celebrate why hmm what has happened and what we have achieved. Where possible, we love to get the data on the results, but that is often in the hands of the clients. If you look at the digital campaigns, we do not have access to the analytics. We can only rely on the client to give us the actual numbers.

Advertising Agency Interviewee 3: Yes. We also look at the effect that the collective communication strategy has had. That tells us if we or our campaign was successful or not. Digital is fantastic as there are definite or direct measures to prove how the campaign has fared. For television and billboards the reports or results are delayed and results cannot necessarily be contributed directly to the advertising on those mediums.

Advertising Agency Interviewee 2: I find that there are different measurements. If I think of one of our clients, Tashas, who wanted interaction with the brand. We changed the packaging's look and feel and the feedback is constant and good. There the solution was perfect on trend.

Advertising Agency Interviewee 3: The measure here can be described and the amount of 'yumminess' that was needed. Measurements are dependent on the brief, what the original request was.

Interviewer: Thank you. So, if I look at my notes, we have discussed most of the elements that should be in a brief. I will just, hmm let me recap and please add in anything if there is more that should be hmm that you would like to add to any of the topics. Okay, I will just read them here:

Interviewer: 'Objectives', 'Scope'...

Advertising Agency Interviewee 2: I would include budget here too as we have discussed

Interviewer: Right. Then: 'Deliverables'?

Advertising Agency Interviewee 3: That would be the laundry list that we need to provide.

Interviewer: Yes, exactly. What about these, I think we have covered that, but just confirm that you think it should be included in the brief: 'Business Benefits', 'Assumptions', 'Constraints', 'Risks', 'Other Areas of Business Affected', 'Major Dependencies', 'Stakeholders Resources' and lastly 'Budget' or as I have it here 'Outline estimates of time and cost'. Would you like to comment on any of these or add to them?

Advertising Agency Interviewee 3: The most important role of the agency is to get to the crux of what it is that the client wants to advertise, what the core value is that they want to communicate.

Advertising Agency Interviewee 2: We often find that what the client thinks is unique or special, is just what everyone else is offering. The client will tell us about a feature of the product or service that is nothing else than what the rest of the business, hmm industry is offering.

Advertising Agency Interviewee 3: It is natural, because if you are too close to the product, one cannot understand what it is that differentiates them. We need to ask questions to get clients to tell us enough of the products or services that we can find the special features or special, uniqueness of what it is that they are offering. It might be something very different from what they think it is.

Interviewer: As part of this study, I would like to organise the brief into the following steps. Hmm plan, organise, lead and control.

Advertising Agency Interviewee 2: Okay we can do that.

Interviewer: So then what would you include in the Plan stage, which activities, or requirements?

Advertising Agency Interviewee 3: I would include all the upfront work in this stage. The planning that goes into the project before approaching the agency even.

Advertising Agency Interviewee 2: The client needs to tell us what the objective is. I would say that this is the client's responsibility. If they brief us their heads should be clear on what it is they want.

Advertising Agency Interviewee 3: Yes, the client should know what it is that they want to achieve, what their objectives are.

Interviewer: Thanks. If we move on to 'Organise'... What would need to be done there?

Advertising Agency Interviewee 2: Get everyone together, get the input from all the stakeholders and tell them what it is that is needed from them. This is the client's lead.

Advertising Agency Interviewee 3: The client would know who the stakeholders are and who should be in the meeting. They should also prepare the brief and have all the relevant information about the product or service, other useful facts like business stats and competitor info would also help.

Interviewer: Great. If you think of anything else, you are welcome to come back to any of the previous questions hmm steps in the process. Let's look at the next one, 'Lead'. What would make up this hmm section, or stage in the development of the advertising campaign?

Advertising Agency Interviewee 3: I think this is the communication between the client and the studio. This is the transfer of knowledge to the studio, and the translation of what it is that the client wants. The agency's role is the account management and everything that goes with that.

Advertising Agency Interviewee 2: The agency should know their clients and their business inside out. It is like a coach. The agency should manage the entire process.

Advertising Agency Interviewee 3: Yes. Once the client gave the instructions and background.

Advertising Agency Interviewee 2: Lead is getting into action, kicking off the creative part of the campaign and the initiative lies in the hands of the client. The brief would be in this phase.

Interviewer: I agree with this – it makes sense to me that the client will be the one to start the hmm process. Okay, so if we look at the last step – what would you say fits

under 'Control'? What are the actions that need to be taken to control the hmm process or hmm project?

Advertising Agency Interviewee 2: We as the agency, need to make sure we deliver on time and in full – whatever it was that was briefed in to us.

Advertising Agency Interviewee 3: Yes, at a bigger agency there is usually somebody looking after traffic, but with us, as a smaller agency, the process and interaction is much more direct.

Advertising Agency Interviewee 2: This all needs good planning from the first meeting to the lead and ensuring that roles and responsibilities are clarified and everyone knows what to do.

Advertising Agency Interviewee 3: Yes, also on the side of the main stakeholders. Everyone needs to be help responsible for their part of the campaign and getting it out successfully.

Interviewer: That is all the questions I had, thank you so much for helping and please let me know if at any time you think of anything else that you hmm that you think would be useful to include in this study.

Document G-2

AdAgl # 03 and 04 transcript (anonymous)

Advertising Agency Interviewees 3 and 4

Interviewer: So just for the record are you involved in the campaign brief from the financial services company obviously you are because you are here with us (Advertising Agency Interviewee 4: yes, Yes) but and what is your role in that brief in that process?

Advertising Agency Interviewee 4: Well I am client service so I will come and meet the client see exactly what their needs are what their campaign brief is then I will then take it back to the agency um first of all to um a quote um then get that to the client get the client to sign that off and then after that if it is signed off then we brief um the designers.

Interviewer: So this all of this focuses this is perfect what you just told me but this whole thing it focuses on the brief that the process (Advertising Agency Interviewee 4: Okay) okay so um I'd like to understand how you get briefed?

Advertising Agency Interviewee 4: Well usually it's either a meeting depending on how big the campaign is sometimes it's a start of a new completely different campaign then we would have a meeting then discuss what the needs are okay and then um yah so it is verbal (Interviewer: hmm) then we go back to the office like I said to get the quote and then once that is signed off then I would then put it into a campaign brief for the designers.

Interviewer: okay so you do have a you do have a formal template?

Advertising Agency Interviewee 4: we have we actually implemented that formal template what so I would write what the campaign needs are for the designers um what the needs are the time that is required to do it the reverts all the important info put it in a formal brief and then sent it off to the designer and obviously they have questions and then we take it from there.

Interviewer: and do you think it is important to have a formal process?

Advertising Agency Interviewee 4: Well we didn't have a formal process and I see the benefits of it and I think she can also vouch for it that it just structures everything it just makes the process easier.

Advertising Agency Interviewee 3: Actually for us designers from the mental it is very important to have a proper brief um written exact expecting what the client needs what is their expectations everything most info they could gave us the more complete the brief is it is perfect for us to understand exactly what the client wants so yeah.

Advertising Agency Interviewee 4: and I think it will also be great if maybe I mean I know we have the meeting with the client but maybe sometimes if we had a formal brief for the client like in terms of their important that they can fill in in their in the brief maybe write down all the important parts u know because sometimes verbally may sometimes miss something so maybe if they can get it in a written format.

Interviewer: okay so you don't have that (Advertising Agency Interviewee 4: no not between the clients) so the brief you were talking about is (Advertising Agency Interviewee 4: Designers) okay so it is internal (Advertising Agency Interviewee 4: it is internal) and then you can help me what is in that in that brief for the designers? what what elements is included there?

Advertising Agency Interviewee 4:

that would be the um the company obviously the client name the job description the job number um you know whether we dealing in a you know is it um who the competitors are um what the campaign brief is about the objectives the goals the deadline the target market.

Interviewer: Would it be possible for me to get a hold of one of those briefs?

Advertising Agency Interviewee 4: Luckily, no.

Interviewer: Okay so the company name job description job number competitor info objective or goals deadlines target market.

Advertising Agency Interviewee 4: yah so the time as well is very important for the designers how much time do I have to work on it.

Interviewer: okay and how do you ensure that you understand what the financial services company wants?

Advertising Agency Interviewee 4: well we ask questions we interrogate um I know like I mean when I arrived here they already had um a relationship with them so I mean it is very difficult especially with you know with FNB, RMB, Private Clients, Private Wealth and you guys are always changing, so I mean I it is important to understand that also like the different apartments and you know so we just interrogate and ask questions and try and understand as far as we can.

Interviewer: okay and in this um you refer to the relationship do you think it is important to have a good relationship with the (Advertising Agency Interviewee 4: definitely it is vital that is number one) and the quality of that relationship?

Advertising Agency Interviewee 4: Absolutely like how far will it go (Interviewer: Yah) as in yah I you know you try and understand you know their family situation who they children's names are where you know as far as understanding humanly possible it's not it's not just (Interviewer: to really get to know the person) to know the person it is not just a work it is a business obviously relationship but u know to understand the person who helps you also understand you know the way they work who they are u know just helps that relation the business relationship.

Interviewer: and do you think um if somebody briefs you and you just realise I can't connect with this person or there is no relationship personally can you still work with them?

Advertising Agency Interviewee 4: yah you have to since it is business at the end of the day you see especially with client service I think you have to be a kind of person that understands people um emotionally you know like you can't take things personally and if you feel that maybe you don't get along it shouldn't be about that it should be about exactly what they needs are company business so if u have to ask more questions that's what you need to do but obviously it is how you ask them you are not going to be rude to a client and say listen you are not making sense it's just about how you try and get through to that client to actually try and bring them to your level and you know.

Advertising Agency Interviewee 3: that's why it is important for a designers to have clients service (Advertising Agency Interviewee 4: yah it's very important to try and

understand people to try not be nice in that way but to be able to read to be able to understand them so that at some point you do get along).

Interviewer: okay so so if I if I interpret or if I translate properly just check I the relationship ultimately the relationship should be fantastic up to a personal level if you can get that kind of relationship with the client if not you still work with the client and you try to bui a personal relationship. And um then if in this backwards and forward with this client how many reverts do you um allow?

Advertising Agency Interviewee 4: it depends how how big the company I mean the campaign is if it is a big campaign maybe we will start from four to five you know if it is something that is extensions of the current um campaign or that we have done before and it is easy enough then it is not so many reverts.

Interviewer: okay what the least amount reverts to to and if if the client um is almost unreasonable you know they just change and change and change how would at some point.

Advertising Agency Interviewee 4: you have to become firm with them um you have to make them firstly understand the process that whatever reverts are in and they are quoted in the you know.

Interviewer: Okay so you quote this quote includes these quotes.

Advertising Agency Interviewee 4: and it says reverts time whatever and if it is a back and forth then we make them understand listen you got two more um reverts if there is more than that we will have to requite you. You have to be nice up to a certain point because you are also you know in business.

Interviewer: Yah to get the work done. And what are your expectations from the financial services company.

Advertising Agency Interviewee 4: Well to deliver good service I mean to deliver in terms of campaign brief from the minute we understand what they need to carry to (Interviewer: so they need to make you understand what they need you expect them to) yes I mean obviously you have to understand what exactly it is that they need and then to make sure you deliver exactly what they ask for.

Interviewer: And do you think they also know what they need.

Advertising Agency Interviewee 4: Not I mean sometimes I mean they ask us to advice you know in terms of what they cause sometimes it is a bit of a they are creators because they are marketers you know cause obviously you are dealing with marketers within the financial institutions but sometimes they need the creative ideas and you know what they would tell us what they are trying to do and we can advise them and maybe inform them maybe you know maybe if you go this direction you know give them options.

Interviewer: Just for interest sake um do you prefer if the financial services are part of the creative process or do you want to advise them do you want to be in control of the creative process on your own.

Advertising Agency Interviewee 4: Um I think at some point it is important so they know exactly what it is they want because at some point it might waste time if they don't know what they want and you keep coming back to them because they don't know what they want they are not happy so I think at some point they have to have a creative element in terms of the directions.

Interviewer: Says for instance the financial services company tells you we want birds in our creative (Advertising Agency Interviewee 4: hahaha) whatever you know they have got a specific idea (Advertising Agency Interviewee 4: yes yes) do you use that idea or do you say I will look at that and lets bring our own idea how do you deal with that if they are that specific.

Advertising Agency Interviewee 4: we try and implement it and see if it works you know but at some point if it doesn't work then we will have to advice otherwise to say you know it doesn't work because of these following reasons you know we obviously try and give them what they want you know but we would also advice if it doesn't work if it doesn't communicate what they want it to communicate.

Interviewer: But you are comfortable say for instance this bird idea (Advertising Agency Interviewee 4: yes) whatever the idea they gave you you will work with it and see if it can work and if it does work you go with it (Advertising Agency Interviewee 4: yes yes) you are not precious about it has to be your ideas.

Advertising Agency Interviewee 4: no because it is their idea we are there to actually accommodate and give them what they want but obviously we there to also make sure that the work that they put out is on a level of professional and quality you know because that is also our name in there so we obviously try and enhance and you know help.

Interviewer: Great. Um and do you think there is a difference in creating advertising and campaigns for tangible and non-tangible goods. If you call say for instance um coffee whatever there is a or cars there is a product (Advertising Agency Interviewee 4: FMCG) yes versus (Advertising Agency Interviewee 4: and non-tangible) versus services.

Advertising Agency Interviewee 4: I think there is a different process definitely very different (Interviewer: elaborate a little bit about that...) FMCG you know it is like moving products so I think their life span is so quick were as you know something that's going to live a bit longer gives you a bit more time to actually put more work and creativity and substance (Interviewer: and do you do you view services as having a longer span) well in terms of well sometimes maybe that is not necessary the case but it would seem like their campaigns would live longer (Interviewer: o the campaigns themselves ?) yah cause FMCG you are moving stuff on the shelves so it is about getting sales I don't know sales now I mean obviously of services also is about getting sales as well but I don't know if it would seem like maybe their campaign can you know live a bit longer than FMCG the approach would be different.

Interviewer: Okay is it more complex more difficult or just a um just a completely different process.

Advertising Agency Interviewee 4: I think it might just be a different process (Interviewer: Okay so it is not more challenging because you don't see what you (Advertising Agency Interviewee 4: yah I think both of them is challenging at some point you know if you are trying to sell magheho you know (Interviewer: Yah) that properly it must be challenging and if you are trying to get someone to come and open an account as well it has its own challenges (Interviewer: So so they both have) yah.

Interviewer: Okay. In your campaigns to make sure they are successful do you have measurements that you put in place how do you know that the that the advertising campaign was effective.

Advertising Agency Interviewee 4: well I mean it is usually you know we wed ask the marketing people within that organization to let us know how effective it is I mean I think that is as far as our measurements goes but um for us I think as an agency how we know um our campaigns are working or our work is good is repeat so like if the company would come back to us and reuse re-use us and ultimately give us a retake you know that's how we measure it (Interviewer: but that is a good point so for you repeat work is a measure of success) yes (Interviewer: and then a retainer is the ultimate measure of success) yah exactly but I mean for us it up to also the marketing department to see how successful a campaign that they implement is.

Interviewer: Okay but there is no you don't have any tools that you measure click troughs or success or in the market you just rely on the marketing department okay great .Then I have got some just a list of things that that's come up um trough out umm included in a brief okay so objectives you said then the scope you know what the size of how big you want to go (Advertising Agency Interviewee 4: Yes) deliverables (Advertising Agency Interviewee 4: Yes) business benefits?

Advertising Agency Interviewee 4: Not necessarily but I mean I think that would be covered in maybe other element of the brief.

Interviewer: Assumptions?

Advertising Agency Interviewee 4: Yah I think that is in our brief but haha we don't necessarily use it (Interviewer: no but it is) but haha (Interviewer: it is there you refer to it) yah (Interviewer: not adversely).

Interviewer: Constraints?

Advertising Agency Interviewee 4: Yes

Interviewer: Risks?

Advertising Agency Interviewee 4: I am not sure if it's in the brief not sure (Interviewer: but you refer to it) but I mean we refer to it in terms of um you can't go

to a client and say we can do this and that that they have got three weeks to go and you know we can't deliver in three weeks (Interviewer: yah).

Interviewer: So this is more of a practical (Advertising Agency Interviewee 4: yah) is it is it (Advertising Agency Interviewee 4: is it possible) is it seas able (Advertising Agency Interviewee 4: seas able yah before you can go and actually present it to a client can we do it and you know what are those constraints.

Do you find out if you are doing a campaign if other areas of the business are affected by this would be affected by this campaign? do you include this with your discussions with the financial services (Advertising Agency Interviewee 4: but what do you mean know) so say for instance now we launch a what did you a check we want a check but to get a check means our credit card sales will drop (Advertising Agency Interviewee 4: yes yes) or if you get a check you automatically get a credit or get a petrol card or whatever so it's or you get a check card (Advertising Agency Interviewee 4: yah we try and understand that) online banking is involved (Advertising Agency Interviewee 4: yah yah) you know the whole echo system.

Advertising Agency Interviewee 4: Yes yes no we obviously have to understand that we have to understand the business.

Interviewer: Okay. Major Dependencies do you ask that specifically (Advertising Agency Interviewee 4: no) or do you take it that the business has sorted out whatever needs to be done (Advertising Agency Interviewee 4: yah) so by the time you get briefed (Advertising Agency Interviewee 4: yah) everything is in place?

Advertising Agency Interviewee 4: Yah

Interviewer: And then stakeholders do you sometimes require or do you require um stake holders from the business to be involved in your project?

Advertising Agency Interviewee 4: Um in terms of the client?

Interviewer: Yes

Advertising Agency Interviewee 4: well usually how it works is we have to get buy in from you know the leader of whatever the department it is or so I think that is always

the case you know the people that we deal with are not usually the ones that sign off (Interviewer: who ever signs off) who ever signs off is always involved.

Interviewer: Okay and then you have already mentioned um timelines and costs.

Advertising Agency Interviewee 4: Yes.

Interviewer: Okay does that influence the brief? So if the client comes to you and says I don't know what my budget is can you do can you execute or do you need to (Advertising Agency Interviewee 4: no we need sign off first we need to be advised this is how long it is going to take us this is how much it cost usually you know sometimes clients aren't happy and we have a you know we have a relook at it and maybe sometimes maybe we misunderstood what the brief is and that is why we get to relook at the quote.

Interviewer: Okay then um a point for some management principals there is a there is a way um of doing any project okay so um the four step are you plan you organize you lead and you control um if if you were looking at this yah what would you put in the planning phase just the brief that the portion of you know getting from the client says I have a need (Advertising Agency Interviewee 4: yah yah) until you say okay signed of lets execute (Advertising Agency Interviewee 4: okay) before you just before the designers get involved.

Advertising Agency Interviewee 4: Yah well the plan is to also see the flow of work within the our agency so depending on some briefs are more urgent than others so you have to plan that in terms of okay how many designers we have who can we put on this certain brief who actually has the um the insight the knowhow of a certain brief some people are better at you know designers are better at other things you know so we have a look at that and then we will assign (Interviewer: okay so you math your skills to the need of the client) yah yah because sometimes you know that is how you get work done quicker than re you know um retelling somebody what to do somebody just already knows or they have worked on that campaign like you know the past campaign so it is easier for them to brief them.

Interviewer: okay and then organise.

Advertising Agency Interviewee 4: um that's when we then give um the brief (Interviewer: okay) and then obviously (Interviewer: so you will say writing it down) writing it down yes (Interviewer: creating a document) yah.

Interviewer: Okay and lead.

Advertising Agency Interviewee 4: lead would come in where you know even after we have given the designer the brief you know if they don't really understand maybe what I am talking about or if they need some guidance you know I am still there because I am the one you know that is in touch with the client and know more of what they want.

Interviewer: and then control?

Advertising Agency Interviewee 4: Control is makings sure that you know the work has been done and delivered on time and if we can't we let the client know that you know these are the constrains or what is happening and just keep them informed so we don't tell them on D-day that actually it is not coming trough but we usually just keep the client inform in terms of what is happening with the project.

Interviewer: okay just to wrap up is there if you think of briefing in general is there anything that would make your life easier if that was in the brief or the briefing process that would help you if you can think of.

Advertising Agency Interviewee 4: I think um usually when clients you have client that know exactly what they want but then on the other hand you have client that don't know and that actually don't understand their own business that is my biggest um constrained I guess because it would be easier if the people that brief you understand exactly what they want and their business so we don't have to understand their business for them.

Interviewer: Okay earlier you said you also in the brief if you also ask for um competitive view um information do you do you does the client give that to you. We will sometimes just do the research usually they don't I must say but I suppose they just expect us to understand you know the market. And sometimes now in this you say that it is fantastic for the client to understand his business then it helps you to know what to do (Advertising Agency Interviewee 4: yah) do you sometimes find and

this might be leading back to but just to understand you will be um a client so I say we want to have a check account out there this is the benefit we offer a check account whatever we offer a certain kind of product that's our benefit that what we do in the meantime that is not the benefit every other bank offers check accounts you know the benefit might be something else how do you get the real benefit out of the client ? So even if the client does understand the business (Advertising Agency Interviewee 4: yah yah).

Advertising Agency Interviewee 4: Well I think for us it is manly also research obviously also understanding exactly what we are dealing with so we can then actually communicate the real like you say the unique selling point cause like you say if there is no point in saying this is a unique selling point when five other bank are doing it (Interviewer: exactly) so it is very important for us to also understand exactly what we are doing you know.

Interviewer: yah I think what I found is because you are also so involved with the work you forget that this is actually amazing you know this is how we do stuff (Advertising Agency Interviewee 4: so you do it for the excitement yah) exactly (Advertising Agency Interviewee 4:yah we are definitely there to help with that).

Interviewer: But in getting to that excitement you need certain propositions and you say you do research that research is it reading up um or what research do you do.

Advertising Agency Interviewee 4: Through the client reading up asking questions you know wherever it is appropriate to actually understand I mean most of it should come from that company but you know sometimes we do our own research to understand what we dealing in terms of the you know marketing environment and currently what is happening who is leading the actual you know.

Interviewer: So the more you know, the easier it is.

Advertising Agency Interviewee 4: It is its easier otherwise you just come up with you know a concept which somebody else has done with is actually useless for the client.

Interviewer: Okay great .Is there anything you want to add? Is there anything you can think of?

Advertising Agency Interviewee 4: No, nothing else.

Interviewer: Okay so the aim of this is just to find something maybe to do a suggestion that this should be included in a brief or this is an idea of (Advertising Agency Interviewee 4: yah yah) you know to give the agency after when I finish the studies these are steps you can follow (Advertising Agency Interviewee 4: yah) you know almost like a plan of (Advertising Agency Interviewee 4: please also give us) no no of course. I will um just to see this is what came out of all the interviews all the agencies these are the thing everyone includes this and this but people forget this or some say this is important other don't so obviously you will have your own (Advertising Agency Interviewee 4: But I think it is working I am not sure from the people you have interviewed if they have briefs from their clients proper briefs but I think) that's the thing this is not a exact science you run your own business the way you want but obviously it helps um (just getting clarity from the)but on the other hand the client has a specific exactly we want you to do this so they just needs somebody to executed (Advertising Agency Interviewee 4: but sometimes it doesn't work) but but often that the so far from what I have found that's not the norm but here and there um or in general the client has we have got a thing we want to do something with that product or service (Advertising Agency Interviewee 4: yah yah) and then to get the agency to understand like you said the unique sitting proposition and take that to the market however. Okay great.

Advertising Agency Interviewee 4: That would be interesting to find out though.

Interviewer: Thank you so much

Document G-3

AdAgl # 05 (anonymous)

Advertising Agency Interviewee 5

Interviewer: Are you involved in the campaign brief from the financial services company?

Advertising Agency Interviewee 5: Yes, I meet with clients and take the brief.

Interviewer: What is your role in this process? What do you actually have to accomplish?

Advertising Agency Interviewee 5: I am strategically involved in developing the solution for the brief. We are a smaller agency, so not the main agency that the client deals with. We usually do not initiate the projects, and we do not set the rules for the projects, or the corporate identity guidelines and so on.

Interviewer: Hmm. What is the size of your agency?

Advertising Agency Interviewee 5: We're a team of 10 people.

Interviewer: How does the financial services company brief you? Is there a formal process in place? Expand on it, please. Do you have a briefing template or any other documentation that you use at the briefing process?

Advertising Agency Interviewee 5: Yes, we have a briefing template, but we don't use it. The brief is usually a verbal brief and there is no formal process. Because we are a small agency this way is easier for the client. However, we need to ensure that we interpret the clients' needs correctly. We have to make sure that we understand what it is they want.

Interviewer: Hmm and do you have any other documentation, apart from the template?

Advertising Agency Interviewee 5: Yes, we use Chase Software. It is a Project Management system developed in South Africa for ad agencies. It also helps us to understand the process.

Interviewer: Do you think that it is important to have a formal process?

Advertising Agency Interviewee 5: Yes

Interviewer: Why would you say that? Expand a little, please?

Advertising Agency Interviewee 5: A formal process would include a brief, cost estimate, timelines, timeline management – actually everything except the creative.

Interviewer: Can you tell me more about that?

Advertising Agency Interviewee 5: It depends on the level of the campaign. If it is a big campaign, it helps to have a brainstorming session to get to the main message. This is charged out as a deliverable. The plan is to get it right. After the concept has been approved, we charge more. For smaller executions there are three reverts. But this also depends on the relationship with the client and the product.

Interviewer: Explain a bit about the process.

Advertising Agency Interviewee 5: It is about Workflow into the system. One inputs the brief into Chase by using the set briefing template. You have to ask the right questions for example technical specifications, format, size, print or whatever the output format should be. It could also be video and so on. Then it opens a creative brief and we talk through it with the client. This gets send back to the client for interpretation and to ensure the insights and messages are right and that we have the technicalities right like formats and media. We also have to make sure that the message is right. What is the message? And creatively how do you want to do that to illustrate the message.

Interviewer: What are the elements that need to be included in the brief?

Advertising Agency Interviewee 5: If it is a campaign like a communications campaign for a new product for hmm for example a funeral plan, one needs to include:

Who the market is, or who will be receiving the message, aimed at which target market. I would think that is number one. Then the key insights for the message. I mean, what the main selling point is. And the key insight into how you are going to sell your product. It is important for the agency to know how the product will be hmm sold. Also what is the media that is best suited for the campaign. It is not always the same for each campaign. By the time the client briefs us, usually the media agency had already planned the media for hmm for above the line, for below the line and print.

Interviewer: Okay. What are the specific detail that you need to include in the brief?

Advertising Agency Interviewee 5: Technicalities should be noted. If it is a print campaign, what is the size of the ad, how many does the client need. We need to get the CI, the corporate identity guidelines, and photography if there is any for brochures for example. If it is a point of sale campaign, should we create banners, posters, or if it is an activation campaign like a conference or event? We need copywriting – has anything been written, produced already? We need information about all practicalities. What is the size.

Interviewer: Yes yes

Advertising Agency Interviewee 5: In the activation, we need to open a brief. That is where the advertising agency comes up with the document. The financial services

company have a strong message and CI and we have to adhere to this set of rules. The activation is to catch people's attention.

Interviewer: How do you ensure that you understand what the financial services company wants to achieve?

Advertising Agency Interviewee 5: Hmm. Like I said, usually the media agency has done a strategy for the media, but we have to physically write the brief. So, we have to come up with a plan in line with what is planned and also what the media agency has in mind. So it is a lot of back and forth communication. It is mostly direct or verbal communication. But it depends on the size of the project. In the case of a big project, we will conduct a formal meeting. For a small project we will take the brief telephonically or via email. You could get more information and understanding in a face to face meeting.

Interviewer: What are your expectations from the financial services company?

Advertising Agency Interviewee 5: We expect to get the key insight, their goal from them. They have to be clear about their goal. That is not always the case.

Interviewer: Yes, I can imagine.

Advertising Agency Interviewee 5: We need as much information as is available. Rather too much than too little. Financial services industry companies are usually better. Perhaps because we are not the main agency. We also need the budget, hmm the deadline, the key insights and hmm. Hmm Restrictions. Restrictions are very important. What is not acceptable in the environment that the man on the street might not know. For example it should be environmentally friendly or politically correct or legally correct. Hmm it also helps to know what not to spend time on.

Interviewer: Yes, I understand that.

Advertising Agency Interviewee 5: Hmm it is important: we need to understand what they want to achieve. Otherwise it is difficult to find the right solution for them for example is it brand awareness, or flooding the market. These are very different objectives. I think, we have to know the main goal.

Interviewer: How do you do that?

Advertising Agency Interviewee 5: To get there, we ask a lot of questions. Hmm questions like: Do you want to get more visits to the site or do you need brochure information regarding the product? How and what do you want? We have to drive different information on different platforms. Information on the website is different from information on a brochure.

Interviewer: Okay thanks. Let's see. So tell me in general hmm how many reverts do you go through before you start executing the brief?

Advertising Agency Interviewee 5: I'd say about three.

Interviewer: Right, thanks. Hmm do you think there is a difference in creating advertising campaigns for tangible and non-tangible goods?

Advertising Agency Interviewee 5: Yes. It would be. It is easier to find a creative way for something that is tangible. Metaphorical vs non-metaphorical. Non-tangible is more difficult. For these briefs, the client needs to attach hmm or we need to create the identity for the product or solution. I would say that we are restricted by the intangibility.

Interviewer: Yes.

Advertising Agency Interviewee 5: And the message is more complex. There is more opportunity in the creative execution, hmm to find a solution through the creative execution. To have a solution in the end. One therefore needs to know a lot about the business objectives and how the financial services institution sees themselves. Hmm also how they are perceived by the people out there.

Interviewer: Okay, anything else that you want to add here?

Advertising Agency Interviewee 5: The lead agency would, hmm is dictating what we should do. They decide the emotive execution. The main agency decides that the execution should be x. For an intangible campaign it is necessary to understand the essence of the company. What do they do and care about and what do they want to achieve. What is the perception that they want for themselves. The second agency follows this. Or the main agency tells the second agency the positioning should be x.

Interviewer: In your opinion, do you have a good relationship with the financial services company, hmm the people you deal with? And would you say that the quality of the relationship is important in the outcome of the campaign?

Advertising Agency Interviewee 5: Yes. We have a good relationship particularly when we have reached the goals. It is also better when there is a measurable outcome for the achieved goals. I also think that apart from the results, the client needs to get along or feel comfortable with the character of our agency. There should not be a lot of drama. Availability is important and a no-fuss attitude. We have a can-do attitude that the client likes. We make the process easy for the financial institution to work with the marketing department. There is an awareness that people have bigger fish to fry... We try to simplify their lives.

Interviewer: Okay I get that. Now, let me see. Do you think it is easier when it is the same kind of people in the advertising agency and the financial services company? If the people are the same gender, race, educational background and so on, without sounding politically incorrect.

Advertising Agency Interviewee 5: The reality is that it works better when people are the same. I mean people who are the same with the same background or ideas find it easier to understand one another. To work with people who think completely

differently, who has a different outlook on everything, is more difficult, but it still is possible to work together.

We have a good relationship with our clients. It is important for the results. The results are more important than the relationship but we have to always be professional, courteous. It is necessary to have a good relationship, then the interaction is easier and we get closer involved, also physically with the work. It might be idealistic but it is better if you know the individuals you work with as people, not just members of a team of a business. If you know the person, understanding comes easier. Also of the work.

Interviewer: Do you prefer it if the financial services company is involved in the campaign creative process or not? For example are you comfortable if they tell you which pictures to use or perhaps which direction they like you to go in? Why?

Advertising Agency Interviewee 5: The financial services company should only be involved in the creative while they brief the agency. In the initial stages. Once the concept is signed off and approved the involvement ends, it should end. Or at least hmm where the creative is where it is about the creative, the concept. The involvement ends where the approval ends. From the agency's point of view, the agency wants the client to be happy, but wants to be the one to deliver the creative concept. It is important and necessary that the client gives the insights that will result in the creative idea or plan. If the client shows another idea, the agency will try to sell its own idea first. Selling the idea involves a visual execution. I often get the feeling that the client is not as visually literate and we don't get the message across unless we show the concept visually.

Interviewer: What are the measurements you put in place to ensure that your campaign is effective? Do you have tools to measure your campaigns?

Advertising Agency Interviewee 5: Yes, we have tools to measure the success. We have, for example, implemented website analytics. If product sales are up, that is a measure of success. We look at the financial institution's data and work with them to ascertain what success would look like. How to measure is decided beforehand. We show the results visually in a Powerpoint presentation or we show the campaign in an interactive visual presentation for example we did a CSI, a corporate social investment campaign for a financial services company and built a tower that as the fund grew, the tower grew to illustrate the results.

Interviewer: Okay, lastly. If you look at the briefing process in the campaign, let us just go over all the elements, and then you can tell me what your thoughts are about those. HmmnSome we have discussed already, but I will, I just want to go through the list to be thorough. I will say the word and then you can respond to that and tell me if it should be included in the brief: "Objectives".

Advertising Agency Interviewee 5:Yes, that is the goal. It is an important element.

Interviewer: Scope?

Advertising Agency Interviewee 5: I would say that target market, reach and how big the reach should be, should be discussed here.

Interviewer: Let's see: "deliverables"

Advertising Agency Interviewee 5: That would be the medium, the actual collateral that needs to be produced. What is the product that the client wants?

Interviewer: Business benefits?

Advertising Agency Interviewee 5: Business benefits is about the key insights. How will it help business? Should the campaign increase brand awareness, increase sales or should it change perceptions?

Interviewer: Assumptions?

Advertising Agency Interviewee 5: That would be the restrictions for example the campaign is for a specific income market, a certain LSM. We often make assumptions about what the clients know about the product.

Interviewer: Constraints?

Advertising Agency Interviewee 5: I think that is similar to assumptions.

Interviewer: Next: Risks?

Advertising Agency Interviewee 5: Hmm competitor information. They might have the same product as what the client wants to advertise. Other risks could be legal issues, or political. Social sensitivities could be a risk factor. If you have the same message as another product has, or even just the same construct. Ask yourself, does the creative solution work with the rest of the business?

Interviewer: That comment leads to this one: would other areas of the business be affected?

Advertising Agency Interviewee 5: Yes, that needs to be in the brief. There could be multiple products that need to be advertised and one needs to understand how the one you are briefed on fits in with the others.

Interviewer: Any major dependencies that should be kept in mind?

Advertising Agency Interviewee 5: One needs to understand the business and see how the campaign could be measurable. How it could be measured. And who the stakeholders are.

Interviewer: Stakeholders or resources available for the project?

Advertising Agency Interviewee 5: Yes, where business need to participate it is important to have the buy in from the stakeholders. This is a practical implication, the execution of the project. Business stakeholders need to be available for things like signoff. And the people who are available should also have the authority to sign off.

Interviewer: Thanks. Then I have an outline or estimates of time and cost?

Advertising Agency Interviewee 5: Agree. That is important as discussed earlier.

Interviewer: Is there anything else that need to be included in the initial brief from the client?

Advertising Agency Interviewee 5: I will think a little, but I think that is everything. Hmm, you could also add in target market.

Interviewer: In academic... hmm for purposes of the study, I would like to group the project and the brief, what we have discussed in four steps: Plan, organise, lead and control. What do you think about those and which actions will you include in each? If we can start with 'Plan':

Advertising Agency Interviewee 5: Plan?

Interviewer: Yes

Advertising Agency Interviewee 5: Okay, I think that is who needs to hear the brief. Who needs to be briefed. Who will be involved from the agency. One could also research the client or the person who will see you from the business. Look at who it is and what they do. Hmm you could look at the person's LinkedIn profile.

Interviewer: That is all part of the planning.

Advertising Agency Interviewee 5: Yes.

Interviewer: Okay what will you put into the 'Organise' phase?

Advertising Agency Interviewee 5: I would say knowing what information you need. One needs to ensure that all information is extracted in one meeting. Fill in the briefing doc. Find out what the timelines are. Describe the process. Hmm yes.

Interviewer: Thanks and then "Lead"?

Advertising Agency Interviewee 5: Hmm I will have to think a little. Perhaps which questions to ask. The reverts – first getting the creative right or the draft creative until the concept has been signed off.

Interviewer: Anything else?

Advertising Agency Interviewee 5: No, I think that's it.

Interviewer: And lastly 'Control'?

Advertising Agency Interviewee 5: That would be the measurement to see how the campaign did.

Interviewer: Thank you, that is all my questions. You are welcome to add anything? Also at a later stage if there is anything that you can think of with regards to the brief.

Advertising Agency Interviewee 5: Hmm I think that is it. Hmm perhaps I can add that as a second agency or hmm not the lead agency, the lead agency already has set the rules and restrictions, so we usually deal more with sub-campaigns or smaller campaigns. Usually we don't deal with the new campaigns.

Interviewer: Would that make a difference to the brief or the briefing process?

Advertising Agency Interviewee 5: I think that as the lead agency, you would need more information from the current situation, the business's challenge, where they want to be and how to make the adjustment to get there. You will need a lot of information on where you are now and where you want to be.

Interviewer: Yes, I see, I also think so. I suppose it is quite different for a hmm the smaller agency like yourselves.

Advertising Agency Interviewee 5: Yes, definitely.

Interviewer: So, is there something else that you would like to include in the brief?>

Advertising Agency Interviewee 5: Have I said scope? We need to know if it is, for example, a rebrand or a change in direction. How big is it? The scope. What are the challenges? We will need to come up with a big solution. The brief for a financial services company going under... what one then has to manage is the perception and to find an abstract way of looking at it.

Interviewer: Yes.

Advertising Agency Interviewee 5: What the scope is of the campaign. Yes.

Interviewer: Thank you. Remember you can add anything you can think of at a later stage too. I appreciate your help.

Document G-4

AdAgl # 06 (anonymous)



Advertising Agency Interviewee 6

Interviewer: Advertising Agency Pretoria, Okay Advertising Agency Interviewee 6 um are you involved in the campaign brief between the financial services and the ja obviously you did the creative agency advertising agency are you involved in the brief?

Advertising Agency Interviewee 6: Yes

Interviewer: And what is your role?

Advertising Agency Interviewee 6: my role is to figure out what the client wants and what the client needs um and then read through their brief um if we feel that the brief can be extended or better applied we always do that.

Interviewer: okay so how do you this brief how what is it what does it consist of?

Advertising Agency Interviewee 6: normally it is a mail that is being send through by the bank um and then we we we work through the mail we phone back and discuss it via um telephone and then um try to sort it try to sort it and then we go to quotation the quotation is sent to a throw until we get all the detail right quantities right all of the you know the different elements right and then we finalize.

Interviewer: what are the documents that you require in this briefing up backward and forward process?

Advertising Agency Interviewee 6: um well that is one of the reasons why there is a back and forward process because the briefing system is not is not um perfect so what we have done from our side is to um fill out or to to make a form that will make it easier for the client to sent us a brief. Do you want me to continue with that or (Interviewer: yes, please) does that answer your question ?(Interviewer: no, no please continue) okay so what we what we do is what we have done is we created a form and what this form actually do is to get the client to think really what is the outcome who is their client who does this you know go to will it be the ultimate, ultimate thing um dankie so we always try we try to and hopefully we only implemented the form now hopefully it goes much better but if you have a form like



this clients will think better of what they want to do so um the result will be much clearer and better I think I know.

Interviewer: Okay

Advertising Agency Interviewee 6: oo the point is the better the brief are um the better, the quicker the turnaround really on a job because you know we got complete clarity on what we need what is needed when its needed by um and there's no little things you know along the way that has been added and added and added and making the project not late but putting lots of pressure on us to be a good supplier.

Interviewer: okay and so you mentioned some of the elements included in that brief outcome who the client is or the target market?

Advertising Agency Interviewee 6: well say we say we do an event okay um it is very important to know from the um clients perspective is who is the event for, when where where is the event um so that will that will make the client think of you know do they want to do they want to do it under umbrellas or do they want to do it under moonlight do they want to do it inside is the weather good you know all of that that's just for the where when do they want the event who will be the speaker and all of that information adds to the value of of the event and at the end of the day say at the event you want to give a gift do you have a budget for the gift um will the will the gift be personalized um and then for the personalisation we need a we need a list of clients that actually will attend um and do they do they require dietary requirements you know all of that is built into the system so when we sent out the invite we know with the first run to say you know you are invited click here if you like to register on the briefing form there is also sorry it's a bit deurmekaar but on the briefing form we also have are you inviting are you going to bring a guest.

Interviewer: okay, so this is all the event and I am stopping you here but um if you focus on advertising campaigns or any kind of communication campaign (Advertising Agency Interviewee 6: Okay) so talk about that (Advertising Agency Interviewee 6: alright) okay.

Advertising Agency Interviewee 6: So a communication, so say we do that advertising campaign around a new product okay again we want to get the image

relevant and correct so we would we would need your target market is it a is it a um product that goes out to only 50 55 years old plus or you know and then have a relevant relevant imagine is it going to um your your black clients then we need to we need not to have a you know white girl their but you know you need to have a relevant (Interviewer: relevant) relevant imagine image um you need to use a relevant image and that is very very important so um so part of the brief is to say what is the what is the um what is the client or um I said that the target market getting getting that right is actually quite important getting it and getting it right the first time saves a lot of time and if you have a briefing form you know a client can can and knows what his target market, where it goes to they would also um think about what the image look looked like.

Interviewer: okay um then how do you insure (Advertising Agency Interviewee 6: antwoord dit jou vraag ?) Ja ek gaan nog baie vra (Advertising Agency Interviewee 6: o okay) how do you insure that you understand what the financial services company wants to achieve so cause they some... or what I am trying to say is sometimes the um the financial services company says I want my clients to know about it but what they actually want is I want the clients to buy it not just know but buy so how do you make sure that you extract whatever the result is is really the results this aside ?

Advertising Agency Interviewee 6: um well um its it's slightly difficult but if you if you ask the right questions in this briefing form you know how to structure your your content so um you would have a call to action in your in your um with your call um your call offering given there were opportunities to phone immediately to um to immediately come back with the results putting the call to action in the right spot in the in the advertisement if it's for electronic or for you know some other some other outlet but it also need well it always needs to be relevant to your outlet I think (Interviewer:Okay and what) maak dit sin (Interviewer:ja-nee) of praat ek nonsens (Interviewer: nee, ek gaan nog baie vra) Okay.

Interviewer: What are your expectations from the financial services company? So in terms of in this to get it right what what do you need from them to make your life easier?



Advertising Agency Interviewee 6: we need as much info as possible because if you have more info it easier to reduce and we always tend to get just the little bit of info and it is very it's very difficult to do a frame work without the content the content because the content is is the frame work is built around on the content it's not the other way around.

Interviewer: Okay so now you have got this brief um and what I um what you said is an email and then you follow up telephonically etc. sometimes email. How many reverts do you go through before you can actually start executing whatever you want to do?

Advertising Agency Interviewee 6: Before actually sending out the email in this instance?

Interviewer: Ja or the concept, until you get the concept?

Advertising Agency Interviewee 6: um

Interviewer: So backwards and forwards until this is what we gonna do?

Advertising Agency Interviewee 6: We end up more or less at version eight because the brief, brief (Interviewer: eight) is not... eight ja.

Interviewer: Okay. um

Advertising Agency Interviewee 6: So there is eight versions before before um.... you know text text text text edits and things like that are.

Interviewer: Okay so um so eight versions later, now you start executing. Then after that how many reverts do you have?

Advertising Agency Interviewee 6: um four or five even.

Interviewer: Do you allow for those or do you quote extra or do you change the....

Advertising Agency Interviewee 6: No we do allow for for those but it is something that we looking at changing because we don't because we allow for those. We we don't put a cap on you know allowing for three and we are going to start doing that

because um when you start doing that people people tend to think (Interviewer: to focus?) and to focus.

Interviewer: Would you say there is a difference in creating an ad campaign for tangible and non-tangible goods?

Advertising Agency Interviewee 6: Um...

Interviewer: If you can compare work that you have done for other people?

Advertising Agency Interviewee 6: Yes, because um um a tangible um product is per definition you know you touch it you feel it you you experience it so there is a whole different different approach to to um to creating it to give you an example we have created cookie boxes for Momentum where a lot of thought went into how this or tea box rather how this tea box is put together um its its how we like to do a tangible... tangible product is to actually for them to open the box and smell, touch, you know to involve all the senses whereas with an electronic um file you only have your heading which would be spot on, you only have your image that should be spot on you don't have the senses you just have the visual. Maak dit sin?

Interviewer: Jip. Okay and do you have a good relationship in your opinion with your financial services company?

Advertising Agency Interviewee 6: Yes.

Interviewer: Is that important to have that relationship?

Advertising Agency Interviewee 6: It's the base.

Interviewer: And how far do you extend the relationship with them what is it a personal... do you have outside of work? Is it strictly work what how do you what would you say is a good relationship in this um sense?

Advertising Agency Interviewee 6: Um a good relationship business is built on relationship, it's not it's not you can't do business any other way um and one of our core values is hero support what that means is um we support you and get the job done so I think they need us more than we need them basically. Ek weet dit klink verskriklik maar.



Interviewer: No, that's good so so would you say the relationship is based on need what other if you can say to have to have a good relationship? This is a good relationship somebody brings me coffee every morning or somebody is open to me, to listen to me, or somebody phoned me whenever they need me you know whatever what if you can think of anything that makes that good relationship?

Advertising Agency Interviewee 6: Um always delivering on time um it is a the advertising agency is a very... it's a cut throat business unfortunately you are you are um judged on your last, on your last um project um so it's very very key that um you know there is a lot of things that that adds to this relationship and that is good planning um good project management good feedback um you know keeping in touch follow up that type of thing. If you know if if sometimes we need to follow up twice for a deadline that is or not twice a couple of times for a deadline that is coming up but sometimes, sometimes the client feels that we do have it under control although, although we do need their input its um you know we I think we go to the complete extra mile.

Interviewer: Okay thank you. Okay, so in in your ,now this whole process of creating a campaign, do you prefer that the financial services company is involved in the creative part, side of it or to what extent do you like them to be involved?

Advertising Agency Interviewee 6: Um the difficult um before answering your question the difficult part in it and I am quoting Momentum now is we absolutely believe in a CI and FNB has got a very full rounded beautiful CI to work with you know how to do thing momentum has got a CI it's not a good CI um and people do not embrace their own CI so um when you give them a brief back you followed the rules and what makes it difficult then is they don't um they don't like the image but the image is spot on for for an image and they end up using it's not really answering your question but it's a you know a in house um a in house feel of what is actually what actually is is expected of this this um communication whatever it is that in house understanding of what what what our stuff should look like is very good and well setup in FNB. Its it's you know it's there and you know a trained eye or even a non-trained eye would see if something is is not right.

Interviewer: Okay, so can I say that no I am saying something so just correct me here, so you do you don't mind the the involvement from the from the financial



services company as long as its um as it adheres to the CI (Advertising Agency Interviewee 6: Yes) that makes you this is all trying to find a simple way the way to the the easiest way to work with (Advertising Agency Interviewee 6: O Okay) okay so that is something that you would need from the financial services company a very clear um (Advertising Agency Interviewee 6: message) properly set out, okay so message plus CI (Advertising Agency Interviewee 6: Ja a very clear message of what needs to be conveyed um ja.)

Interviewer: And... okay so just in terms of the involvement of from the financial services or whatever the company that you deal with so they say um we want whatever this product campaign for this product please use flowers or x whatever the the visual is use people use cups use a thing would you use that thing or would you bring them other proposals, other ideas and not use whatever they proposed or would you use exactly what they have done and not bring any of your own ideas?

Advertising Agency Interviewee 6: We will definitely use exactly what they they they have given us and then give um if it's in line with with the CI and what the company stands for if it's not in line with the CI we will anyway make the example try to fit it in to the CI but just give them the proper option.

Interviewer: Okay

Advertising Agency Interviewee 6: But it is very important for a client to see you know that one listens to them, although you know at sometimes it's just impossible to explain to them why something is not working so we taught we always think it is just the route of less least resistance to just give them what they need but um then give them a proper, proper solution for their problem.

Interviewer: Okay.

Advertising Agency Interviewee 6: ...for their campaign.

Interviewer: And do you have measurements that you put in place to say whatever this campaign is that afterwards it has been effective. So I am sure it will differ for different campaigns but do you check that it worked?



Advertising Agency Interviewee 6: The only thing the only product that we can actually check... the only product that we can actually check is with the events because we use a system that you know allows for feedback um but we do not get too much feedback from the bank with regards to a to a product a new product that has been launched because we have been with the bank very long we know that you know something that went into pilot is now working because we see it more we see other communication coming out of it but in the end it would be I think we've been with the bank quite a few years so um and that makes the whole brief easier because we know you know how they communicate how they do things we know all of that but it is sometimes very difficult to get proper feedback with an email or you know one of the one of the plain plain you know digital projects it's just difficult to its a difficult thing to measure.

Interviewer: Okay if there were measurements in place would it have helped you in future projects?

Advertising Agency Interviewee 6: Yes definitely because you know one could definitely look at why it was successful maybe it was just a good product but if a product is well placed and well rolled out its bound to succeed better than just you know not not putting all the thinking in process and because in the end a new product went through a product house development went through a lot of a lot of testing periods and things to get it out there running you know available to client so it would be nice to not really be part but almost get almost almost get a broader view of a product because then you will be you will be able to be in a position to give to give better input.

Interviewer: Okay, so lots of information?

Advertising Agency Interviewee 6: Lots of information... the more information, the more background information we have even if its seems irrelevant and not to the point it helps because you you understand the thinking behind the the project better.

Interviewer: Okay um here are some, some um elements that other people have mentioned so perhaps I'm just going to go through them then you can say if it will work for you and how will you work um use them okay so if this was in the brief um would you agree okay they are objectives?



Advertising Agency Interviewee 6: um are you just meaning there should be objectives?

Interviewer: Yes, so okay, so now I've got a briefing I'm trying to put together the ultimate briefing form okay so if I put in their objective would it be used for you?

Advertising Agency Interviewee 6: Absolutely um it is absolutely crucial, it can't be without.

Interviewer: ... and should I expand on that or?

Advertising Agency Interviewee 6: um the point of a good objective is is not to make my life easier but to make um because a lot of the time a project is, sorry I am just going to answer via a little story, but the point of an objective is because people in the bank do not always work directly with a project they get briefed by the product house

Interviewer: So this would be marketing people?

Advertising Agency Interviewee 6: hmm so the marketing people get briefed by the product house they get they normally just forward me that mail. So between that person and our team we need to come up with a solution that will be the ultimate solution for you know for the original team (Interviewer: hmm) but actually the the the team (Interviewer: The product house) the product house so...

Interviewer: So there is already one step of translation?

Advertising Agency Interviewee 6: Yes, ja and things get lost so um an an objective could be if it's well defined makes makes that marketing person also more aware of what what they actually require so it is almost like an internal briefing form that gives clarity before and and that moment of clarity is absolutely crucial in determining your true objective.

Interviewer: Perfect okay scope?

Advertising Agency Interviewee 6: Well that's always important because you need to know what you do you need to know where the limits are so it is very very important so again the the um project owner needs clarity on how far and what exactly they



need to do and if they got clarity they can convey the message with clarity and certainty.

Interviewer: Okay so this might be the same deliverables?

Advertising Agency Interviewee 6: um well um it it it its important and it needs to be also added on the perfect briefing form because um you need to know when are going to receive your first draft when are you going to um you know that type of thing and so with a good project plan that goes with a with that will be rolled out one you know once the project kicks of it is very important to stick to the deliverables and you know get it done

Interviewer: Okay, business benefits?

Advertising Agency Interviewee 6: Absolutely crucial ja the business benefits um is obvious but I think it is very obvious especially with um you know once you once you get to a um a stage where you roll out a product, the business benefits have been very clearly defined. You know exactly what you want so um I think it might be a bit um like the objective 'want die' because... because you know it should be beneficial to the business otherwise you would not roll it out in the first place.

Interviewer: Okay this also means the benefits that you for the client or maybe I should ask that separately what are the benefits to the client?

Advertising Agency Interviewee 6: Um well the benefits to the client should be very clearly is the is the core core of the message all messages needs to go out being you know built around a client's needs around the clients um um benefits because they don't they want to see how will I benefit? How will I save? How will I um get there (Interviewer: ja)... so it it absolutely absolutely crucial.

Interviewer: If there are any assumptions, do you need to know about that?

Advertising Agency Interviewee 6: um Absolutely assumptions assumptions is um I can't really say anything about that. I don't really know what to say about that it's um.

Interviewer: Ja whatever is relevant for that one (Advertising Agency Interviewee 6: relevant for that one) ja.



Interviewer: And constraints?

Advertising Agency Interviewee 6: Absolutely important um because of our position we are we've been with the bank quite a while so we know what the what the constraints are um but if there is clear constraints its should be is very its beneficial to have that on a form because again um the project owner will know exactly how to say things and what not to where not to go.

Interviewer: Risks?

Advertising Agency Interviewee 6: um...

Interviewer: Do you ever discuss that?

Advertising Agency Interviewee 6: Not really, no.

Interviewer: Okay, so for you it would be the the client would already have factored in the risk or not?

Advertising Agency Interviewee 6: Absolutely.

Interviewer: Okay do you need to know about the other areas of business that will be affected?

Advertising Agency Interviewee 6: Um yes like a um like an if we do a a campaign that that recount an internal clients it will be communicated slightly in a slightly different manner so um um if um it's very important because say you are giving... you are doing a campaign and you need input from clients. You would need this you know the input system that needs, needs to run so its needs to you know so the client (am I making sense?) You need to... you need to take that project and make sure its rolled out on all the different elements of that project to actually be successful. Like if you have a... have a just to get back to the bank were you have a um example you doing a campaign with this e-Bucks campaign with the um you got a lot of you can win ten thousand e-Bucks. Quite, quite nice it's a nice idea beautiful and you send out a mail but you don't update the website. That is not good so you need to align those two absolutely and get it right on time independent and it needs to be it if you click on the mail and people can't find it it is very bad for business.



Interviewer: Yes, okay that's good, that's a good example and then major dependencies?

Advertising Agency Interviewee 6: um meaning?

Interviewer: Say for instance, okay we like this e-Bucks one, you can communicate it if you have a database you can send out an email if you have a database or this can only go e-bucks campaign can only go live if the business answer this e-Bucks.

Advertising Agency Interviewee 6: Okay dependency is very important and lots of times being a bit overlooked like the e-Bucks campaign, like the you know if we if we don't brief dependencies well ahead of time and I am going to can I use the sample of the event (Interviewer: ja, sure) so the sample of the event would be it is the event that the client that the bank hosts it goes to, it goes to clients but because we didn't have a proper briefing form saying that clients' needs to register and we need the dietary requirements, for like for a better example we need to send out another mail saying you know and find a find a reason why we are contacting them and that could have been solved very clearly very professionally. You look better when you do it right the first time.

Interviewer: Ja.

Advertising Agency Interviewee 6: Beantwoord dit jou vraag?

Interviewer: Yes and then do you ask about stakeholders resources or do you just assume it is there?

Advertising Agency Interviewee 6: We... we assume it is there it might be a wrong approach might be a wrong approach.

Interviewer: No its fine. That's the thing I want to find out what works for you in that whole process.

Advertising Agency Interviewee 6: Ja we assume it's there.

Interviewer: Okay so so that is something the business needs to sort out, it's not for you.

Advertising Agency Interviewee 6: Ja



Interviewer: and then time I think you have already alluded to that that you need the timelines and then obviously (Advertising Agency Interviewee 6: absolutely) 'the budget'.

Advertising Agency Interviewee 6: absolutely

Interviewer: do you start cause I know you quote you give a brief or a request for a to do a campaign or whatever the project is then you quote do they give you um a budget beforehand or do you first quote and then they because I think you can you can work differently if you if you have if you know you can work with a huge amount vs a small amount (Advertising Agency Interviewee 6: um) or in your case not

Advertising Agency Interviewee 6: We... I think we use both um sometimes we do a CE... CE because, because it is a standard product and we've got quite a few standard you know like a pricelist but when its um sometimes a product is not well um you know thought up or not well defined and then we need to go back and change the... change the quote the client. The client asks for one email template and actually needs nine. (Interviewer: Ja, so their briefing is incorrect so a lot of times we need to revisit our quotes and actually send out a new... a new CE which is um not accepted with um with um that's the internal... that's the internal issue but sometimes they get angry when you resend a quote or the scope that is completely, completely different so we always look at the scope and make sure that our quotes is for that scope, if the scope changes, we we requote.

Interviewer Okay perfect. Um, would you say because you got such a good relationship with a client that you can do that it's kind of almost more informal (Advertising Agency Interviewee 6: Yes) It's you don't have that very strict process of this is the budget and you have to stick to that or work with that it's more we know you will deliver so you tell us how, much you asked for it

Advertising Agency Interviewee 6: I think our prices are extremely reasonable and um so when I phone you and there's a there's a big price difference the client... the client has got the confidence to believe us because it is not as if we got a you know sometimes we've got a pricelist to work so we've got as structure so um you know when we say that we actually its true and haha that one wants to go in to you know if I tell you the truth it's not like that because of a long-term relationship if we phone

and tell you you are over budget it is because there... there is a scope change or there is something.... something changed but it is very informal, it's an informal um process but it needs to be backed up by a, by a by a quote and a you know like a acceptance and a process because the clients sometimes forget and the phone call is just not good enough.

Interviewer: So the most formal part of the brief would be the quote?

Advertising Agency Interviewee 6: ja.

Interviewer: Do you think even in this this um instance where you've got such a good relationship with the client would it be more beneficial to you if you had a more formal process or not?

Advertising Agency Interviewee 6: Yes it would number one save a lot of time um and um things can be rolled out you know quicker if... if the process was more formal because because and that is also part of the problem is because we know them so well they feel that they don't need to need to actually complete a form so it is a difficult process for us to get them to complete a form and think about what they need. Its easier for them to say okay you think of something you come up with something. Without info it is very difficult, sometimes because we are with the bank along time we can do it but it's a difficult process.

Interviewer: This is interesting for me because I think you are one of the agencies with the closest relationship with FNB specifically or Momentum, that they are your main client so in this instance it's almost as (and I am asking) it's almost as if your good relationship is a is a drawback to you. (Advertising Agency Interviewee 6: Ja) It is fantastic for the client because you just pick up the phone you don't fill in all the formal documents it's so easy just ask and how take it on and you deliver?

Advertising Agency Interviewee 6: One hundred percent right.

Interviewer: So for you it is (Advertising Agency Interviewee 6: not beneficial) Ja, so you could and I am just asking one's again for the books and the study you could pull back and say these are the steps to follow if you don't follow that we don't..

Advertising Agency Interviewee 6: We actually tried to put that well we are busy we we we put that in place and um because it's very easy to pick up the phone and phone and phone... phone me and brief me on the phone um clients do not tend to go through our process because they know how I process you know, or how it works. It goes through the traffic manager which is the estimated um everything is sorted on that level and then it gets scheduled. If it does not go through that churning process it is very difficult to it gets tricky to manage all of this because of the the extreme tight deadlines that there are. So it needs to go through um you know, or through that process. To give an example someone will phone and tell you something is very urgent. We do cater for a bit of urgent time but because we are quite efficient in what we do we've been doing it very long it is difficult to um and that pay breaks. What I mean with that is they they think we are... we are... we can we can just you know they can just add things and we can still deliver and we can't um it needs to go (Interviewer: Add things like elements and new scopes) new scopes and things like that. It's... its they think they can just ask and the it will be done in a day which implies that um that um give less and less time before they they give us the briefs because I get the idea that a mail sits in a client's mailbox for a long time before they actually brief us and then it is urgent. So we try to accommodate but we can't always accommodate because we do have a process if you want something at a certain time and I promise you that you will get that at a certain time we need to plan that.

Interviewer: Ja are clients comfortable with that?

Advertising Agency Interviewee 6: um it comes back to the briefing form um it's too easy for clients to actually if if they have a briefing form with a with a true deadline um it would have been easier to say um you know to actually plan it and clients do not always feel its um they want want things quicker and then you know again the internal process is. It, it, they need it today its sent to them today but because you have only have 10 min to think about something you can't you can't we think we get it right but you know if you have a bit longer to think about it your communication is better so if you have ab it more time and I am not talking your know a week or two weeks for small projects I'm talking I'm talking a day you know I am not talking you know a month or whatever banking business I understand that it's a quick turnaround things happen things change I am completely with you there that's our markets that's our statement but that is not a problem but you know everything can't happen today.



Interviewer: Okay in management there um a few principals um so perhaps this would also help you to organize um so in in your in the whole campaign to plan, organize, lead and control so if you think of that in your planning that would only be you get an email but more would you request request info what other what other?

Advertising Agency Interviewee 6: If we do not get a briefing form the after the um cost admits is accepted what we do is we do a rough planning and at that stage we um we let the client know this aspect. We don't understand... this aspect is not clear um but and then really the thinking process starts for the client to say: oh these two and its... it's... something that could be sorted with a good um briefing for to see how relationships in the business affect a product so we try to cater for that but it is different if you do not have enough information because if you do not have enough information you can't make the connection to start off with.

Interviewer: Okay then how do you organise this?

Advertising Agency Interviewee 6: Um well it it will start with a mail (Interviewer: okay) and um it will be a1, it will be a mailing to and throw and um once that is sorted it's you know the the actual final thing or whatever can commence.

Interviewer: Okay so then you can execute?

Advertising Agency Interviewee 6: Maak dit sin?

Interviewer: Okay leading this would be the discussions with the client?

Advertising Agency Interviewee 6: Um discussions with the client via mail and telephone discussions um.

Interviewer: Okay, do you ever have physical meeting?

Advertising Agency Interviewee 6: Once in a blue moon.

Interviewer: Okay, so not really?

Advertising Agency Interviewee 6: I embrace electronic you know. I am finding if I need to talk to someone I Skype them I do whatever I don't think it is necessary I think the doc is the ultimate ultimate because but with bigger projects it is good to see a expression you know so depending on I wont say ever with bigger project



more the momentum project which is different from the bank because a lot of their projects are um it's got a different different slants its its its not all product driven if I can say it like that it's not all product driven its its um helping the brokers do better business so it's the slightly different sling that will benefit momentum at the end of the day so it is important there to meet through them because the stakeholders are are more directly involved were as with the bank you sit with the middle man the marketing person that is a whole lot of times the middle man does that answer your question?

Interviewer: Yes that is interesting okay then the last one is control?

Advertising Agency Interviewee 6: controlling the process or (Interviewer: Yes the outcome of your campaign) um (Interviewer: under the process to get to that) well we could very set um let's say we... we busy with the design process we got very set mylpale (Interviewer: milestones) milestones ja of getting to certain places so we got an internal process to get there, you know. Who does what? how to manage it so it's an internal control I think an internal control thing it's are you asking if it's important?

Interviewer: Ja, what are the actions in this control process?

Advertising Agency Interviewee 6: because we don't we do quite a lot of different thing each process has got a different process with what we do is when we have the brief or the scope, whoever defines that scope. there will be a scope at the end of the day, you know. If we do it, if the client is responsible you know whoever it is done so if you have the scope it get you um it a team discussion going through what needs to happen, when it needs to happen, what needs to be required, do we need external skills do we have all the skill internal getting all the skills ready for for that for the ultimate goal is the delivering on date on time

Interviewer: Great would it be possible to get a copy of that brief document that you?

Advertising Agency Interviewee 6: Hmm.

Interviewer: If you got anything else to add? Dankie.

Document G-5

AdAgl # 07 (anonymous)



Advertising Agency Interviewee 7

Advertising agency interviewee 7: Hello

Interviewer: Advertising agency interviewee 7, uhm to start with just give me, what is your role, your title?

Advertising agency interviewee 7: I am the director of the Johannesburg branch of Worldwide Creative, uhm we're a digital marketing agency uhm working with blue chip clients across various industries and sectors.

Interviewer: Uhm are you involved in the campaign brief from the financial services company?

Advertising agency interviewee 7: My primary objective is business development uhm and as part of that role is to help define uhm campaign briefs and to help refine those briefs in order to uhm provide a more accurate uhm outcome from the briefs.

Interviewer: Great. At the moment, if you could generalise, how does the financial services companies brief you?

Advertising agency interviewee 7: Inconsistent. The uhm, I do not find that there is a formal template in place uhm and the state of advertising has changed quite a lot since some years ago and I find that the briefs and the templates currently being used hasn't adapted to this changing environment. Jy moet se as ek nog goeters moet, soos bietjie meer.

Interviewer: If you if you have any, you can. Any... as much content as you can give. You say briefs have not adapted.

Advertising agency interviewee 7: They have not adapted. I also don't think uhm uhm critical thinking has been applied to the structure of the briefs and the content that goes into the briefs. Uhm as a general rule, I try and spend a lot of time to try and compile the brief in partnership with the client rather than just taking a brief and executing on it uhm directly.



Interviewer: So you would say that it is important to have a formal process in the ultimate world.

Advertising agency interviewee 7: It is vital to have a formal process uhm but it is just as vital to go through that formal process with the client and the client with the agency in particular in our agency where we specialise in digital marketing there are multi-faceted discipline and a lot of components that need to be considered. It helps with the accuracy of the brief and ultimately with the execution of the brief if both parties are actively collaborating to define the brief.

Interviewer: I know you say there's no consistency, if... if you would say... what would the proper process be, not the document but the meetings, the discussions, what would step 1 to whatever?

Advertising agency interviewee 7: Step one is just to have a good old-fashioned face-to-face conversation uhm and within that conversation ask as many questions from agency point of view. Ask as many questions uhm as possible about the reasons and the context around the brief and what the role is of the brief in context of the broader objectives and ask questions about the restraints. I suppose it's a verbal unpacking of the brief to come. The second step is to translate that face-to-face meeting into a formal written brief uhm a first draft so to speak uhm that is often created by the client of which is sent through to us and which lead us to the third step which is refining the brief in partnership with the client. The refining process uhm can take close over two or three reverts and uh it is a collaborative exercise between the two parties.

Interviewer: And do you have specific elements that you look for?

Advertising agency interviewee 7: Very much so. It starts off with understanding the objectives uhm the company objectives, then try and bring it back to the marketing objectives are and if relevant what the specific channel objectives are. Uhm so step 1 is the objectives, the second component is what are the uhm key performance indicators. What will be measured as a means of testing the success of a campaign? Thirdly, practically speaking what are the deliverables, what do the deliverables need to be and that is really a shopping list of things that need to be created as part of uhm as part of the campaign. Uhm Fourth would be what resources are available to



support the campaign with the internal or external resources, it might even be other agency partners. Uh fifth is uhm relevant creative material and where that can be found for example brand guidelines, relevant links to platforms and in our case, any resources that will be required to execute the brief and then lastly, and which I find is often the most challenging one, is what is the available budget or at least a range for budget.

Interviewer: uhm How do you ensure that you understand what this financial services company would like to achieve? Uhm because... maybe answer it first and then I will explain what I am thinking about.

Advertising agency interviewee 7: So, how do we get clarity around the objectives of the brief, is that it?

Interviewer: Ja

Advertising agency interviewee 7: hm

Interviewer: And make sure that you understand, because in a way you come from a different world than the financial services company. In their minds it might mean something and your mind it might mean something different.

Advertising agency interviewee 7: Number 1 is trying to understand, again, the context of why this brief is being created. Secondly is to based on our experience, is comment in our experience what happens has been best practice and what has worked before within the industry. uhm I think, thirdly, is to it sounds like a simple thing to say but to reiterate what has just been spoken about, so just repeat an understanding

Interviewer: I don't think it is a simple thing, I think it is a very valid point.

Advertising agency interviewee 7: It reiterates so a simple question... starting your question with "so, just to be sure... what you are saying is dot dot dot" Uhm, I think then the fourth step is to put it on paper and obviously send it through to client to comment on or to confirm.

Interviewer: Okay. Uhm I've just had a recent example of the client saying we want 100 000 sales, but the sales - were they active sales or what kind of sales? So just



saying that made sense to the client against the goal, but if you unpack uhm it was on a tablet, the banking app on the tablet, do you want people to use it, or do you want people to download it, do you want people to buy the actual tablet to get the online banking?

Advertising agency interviewee 7: I do find that the downside of following a formal process too strictly is a barrier to asking critical questions to uh about the brief and the objective of the brief, so it really is a case of allowing for some critical thinking and critical questioning throughout the briefing process.

Interviewer: So, it is a combination of both to really cover the whole spectrum.

Advertising agency interviewee 7: Hmmm

Interviewer: What is your, in this briefing process, what is your expectations from the financial services company for you to have a successful campaign, what do you need from the company?

Advertising agency interviewee 7: Uhm First of all is full transparency and that relates to in particular around budget. Budget is such a sticky point. Not just within the financial service industry across all industries and the worst case scenario is "here's an idea, here's our objectives, come back with ideas, we don't wanna say to you what the budget is" and the reality is the budget allows us to focus and prioritise uhm components of a campaign relative to the objectives uhm so to answer your question straightforward, the most important thing is to sit with client and define the budget and it doesn't need to be like a figure per se, one figure, and that says there is no movement on that, it can even be a range to say look, we're looking at between x and y sort of range.

Interviewer: Yeah. Okay what else?

Advertising agency interviewee 7: Uhm

Interviewer: So, so, in general, expectations uhm also asking, a client could phone you and ask you to do something.

Advertising agency interviewee 7: hmmm



Interviewer: So do you expect them to be, do you expect them to be, do you expect them to give you feedback, do you expect them to...?

Advertising agency interviewee 7: Hmm okay so so obviously from a communication point of view, there is an expectation to allow for multiple conversations, not just a once off conversation, and then a brief and a proposal. Uhm so I suppose access to the client is an important part. uhm For smaller campaigns, a telephone or e-mail sort of conversations should suffice. I mean, it's sometimes does happen. uhm For more integrated, more complex campaigns, nothing beats a face-to-face meeting. uhm So as far as other expectations from a client point of view is concerned, or at least from an agency point of view from the client's side, we spoke about budget and transparency, we spoke about communication, uhm trying to think. I want to reiterate the collaboration in creating the brief. So that has been found, we've seen a direct link between the quality of the collaboration on the brief and the success of the campaign itself.

Interviewer: Okay. So in general how many reverts do you have? When you start writing it let's say just to.

Advertising agency interviewee 7: As an average we, for briefs, we have three reverts as an average. It does depend again on the complexity of of the campaign. uhm And also of the quality of the partnership you have with the clients. Often when the partnership is very strong, or let me rather put it in another way, when the partnership is new, the amount of reverts are higher than when the partnership is established.

Interviewer: How many, so if it's a new relationship, for how many reverts do you allow or do you always just say?

Advertising agency interviewee 7: Well, we don't have a cap on the amount of reverts, in fact, we would rather have multiple reverts at brief stages than on execution and creative stages.

Interviewer: How do you ensure in this instance where you have multiple reverts that the client actually focuses on it? What I'm asking is also how do you ensure that the client gives her, whatever, the client's attention to that specific project or campaign?

Advertising agency interviewee 7: Hmmm

Interviewer: Because sometimes it could be, and I don't want to lead it, but sometimes it's like uhm "do something for us and then a week later, oh no, no, AND do this. And we actually also want...." Well sit down, think about it and give us everything you want from us.

Advertising agency interviewee 7: I think that where a formal process and structure does have its benefit. hmmm In particular the power of a signature on a document uhm is a good way to commit a client to a specific direction. hmm I think our experience as an agency also allows us to upfront avoid any escalation in briefs or just an unstructured process to unfold. uhm So during, for example, during initial conversations you would, you know, ask the question "Is there another component that you want us to think about?" And if the answer is: "No", you could even ask leading question like "Okay, but what about this?" you know and immediately that puts something on the table whether there is a yes or a no response to that. I have to say, at the same time it is not as black and white as that. Often as an agency uhm we need to be flexible and and and be able to respond to different types of personalities and work ethics from client point of view. It is the nature of our business.

Interviewer: Uhm So in your opinion do you a good relationship with the financial services company?

Advertising agency interviewee 7: Exceptional relationship (laughter) We love them. uhm In general we have quite strong relationships with all our clients. Uhm in the financial services sector, it is very much personality driven and whether it is myself building a relationship with a client or whether it is another person in our team building a relationship with the client, it's really, it does differ from person to person, but in general the the relationships are strong.

Interviewer: So would you... if if there is just a clash in personality for whatever reason, white male, whatever the reason is, it just doesn't work, would you hmmm get somebody else from the agency, how do you deal with this?

Advertising agency interviewee 7: Aaah we won't hesitate to do that. uhm And also the answer is yes, and we are acutely aware of personality clashes and personality types and people relating with each other. hmmm For example, well, in our company we have as a leadership, there are three very distinct personalities. There's the creative persona, there's the, I will call it the OCD persona, but the more operationally focused persona uhm and then there's the more uhm what I call the connecting the dots persona, the more big picture, uhm strategic thinker, right? We've seen some of our clients, if we were for example with an engineering company, the OCD persona is ideal for for that client and we try and avoid the creative persona to to to deal with that client if if possible. So it really is horses for courses and uh we we in a often speak to the client and find out as well what they're comfortable with or who they'd be comfortable to speak to at least.

Interviewer: And if the client, if you can't find that touch point or that comfortable kind of personality in the relationship, what do you do then?

Advertising agency interviewee 7: Okay, so sometimes you get a difficult client, a difficult personality to to deal with and you try weigh it up in terms of, you know, the return you will get as an agency from that relationship... whether in the short term or whether in the longer term and it's there's a correlation between the expected return and the amount of time and effort you want to spend working with that client. Uhm And an important point is that often clients don't realise it but the partnerships that you as an agency have with brands and and uhm companies is forms a big part of our own reputation and by extension our own success as an agency. So if that partnership is not strong and that partnership is being, you know, there's a barrier to creating an effective relationship, our future clients and industry finds out about that and it might have a negative impact. So, we have in the past decided to not do business with a particular client or personality because we just feel it will damage our relationship or our reputation within the industry in the long run.

Interviewer: Let me just see. Okie dokes. Hmm. Just a side question, just talking about financial services that does not have any tangible products. Do you think there's a difference in in creating an ad campaign for a tangible product vs a services, like financial services, product?



Advertising agency interviewee 7: So, there is a difference. Hmm and the difference comes in that in a world where there's more and more information, more and more things that vie for your attention, people are looking increasingly looking for experiences and a way of doing it is tangible experiences, hmm and I've seen, you know, a direct link between, as a digital agency, I've seen a direct link between, work that we do in the digital space and if it allows, if there's a tangible component to that, an offline component uh to that. In saying all of that, we need to keep in mind that marketing as a discipline has some fundamental truths to them whether it is a tangible or intangible product and we can know that in that case there's no particular difference between tangible and intangible.

Interviewer: That's in theory

Advertising agency interviewee 7: In theory, ja.

Interviewer: Okay. Hmm do you prefer it or appreciate it or do you feel comfortable with the financial services company being involved in the actual campaign creative process.

Advertising agency interviewee 7: Yes. Hmm uh hmm the there obviously needs to be room for our creative team to work without any distraction and come back with concepts and and uhm proposals, but as soon as that phase is completed, uhm we'd want to get as much feedback as possible and make the client as much part of that process as possible. Uhm. An important thing to notice is, as an agency, our currency is essentially time, so we bill by the hour, hmm and a way that we can try and reduce the total project time, is to actually bring the client in that creative process sooner later than later, which, in the long run, will save us time on the on the project. Uhm the disclaimer is that we don't want the client to micromanage the creative process and we call it pixel pushing. Uhm Uhm And literally sitting over the shoulder of the designer, because it becomes a distraction and it becomes unproductive in terms of the overall product.

Interviewer: And if a client says, okay this is very literal, but if the client says we want in the look and feel, we want pictures of people... you know they have an exact: this is what we want you to do. (22:00 in the clip)



Advertising agency interviewee 7: Yes, Ja. Uhm well, sometime you need to lose the battle to win the war and it, what we've found, is, and again it comes down to the length and the strength of the partnership that you have with the client. In new partnerships and new clients we have, we often, you know, we have a bit of a radar of the length of creativity from a scale from zero to 10, how can we push the the the creativity on the campaign. We try and start it off with as a high a rating, creative rating, as possible. It's not the right word, but you know what I mean. And then to in order to show the client, look this is what we can do, often there isn't an appetite to go that far and there is a sort of you know, risk, aversion uh to to bring it back. And then we're comfortable to bring it back, but already there's that stake in the ground to say, you know we can push the boundaries slightly. Hmmm As relationships grow and as there's more of a comfort of an agency with the client and from the client with the agency, uhm it allows us to be a bit more creative and also it allows for the feedback we get from the client to be less just you know, we want, as you said uhh pictures of people and it becomes more about what's best from a sort of campaign point of view.

Interviewer: Okay

Advertising agency interviewee 7: Maybe as a as a point, there is, when there's conversations or maybe a difference in opinion, you try and bring it back to, you know, fundamental truths and the way of doing that is, going back to the brief and highlighting what some of the objectives are and asking the question: "Does this suggestion that you have of in your example of putting more people in, speak to the objectives that you have or does it contradict it?" Hmm ja

Interviewer: Hmm how do you handle it if somebody, the client is not, is just ignorant in terms of whatever is needed, even if they are in the marketing team, so they don't understand design, they don't understand the rules of aesthetics, whatever, and they give you feedback like "I don't like it."

Advertising agency interviewee 7: Hmmm the best feedback that we've received in the past, was: "I need more fruit salad."

Laughter



And it basically our designer just stepped out of the meeting, because he had no idea what that meant. Laughter. So that does that does happen. I suppose you need to have a bit of intuition and if you get a vague, you know, feedback on creative, is try and scrutinise that feedback. So from an agency point of view, I can reiterate what you understand with that word, so for example, the fruit salad example is, so okay with fruit salad you are saying, you want more uhm creative elements within the design or you want more detail within the design. Is that correct? Ask the question. Uhm Ja, it's it's a difficult part from an agency point of view when the quality of the feedback that you get, but with experience comes that intuition and the worst case is then if you do not come to a resolution and sort of get to a point where there is no happiness really coming through, then it becomes a case of one of two routes. Either you force a decision and say "guys we need to uhm go with a direction". And within that first option you communicate the reason why, the reasons why, why we are not finalising this this process. The second option is in fact to come back with a suggestion of using another designer, or using another agency to help and often that might be an agency that the client has worked with in the past and as an agency we need to be comfortable with that if it really becomes a barrier to executing on the brief.

Interviewer: I'm sure that must be difficult.

Advertising agency interviewee 7: Uhm it's it's difficult, but again it comes back to what's the best for the client. Uhm and I see a lot of value in established relationships and if we are a new agency uhm it makes sense if we're just not getting it in inverted commas, to try and bring the you know existing agency relationships as part of that relationship.

Interviewer: Great. Do you have measurement to to uhm for you, to check that your campaign was effective, or what is a measure of success?

Advertising agency interviewee 7: So, I mean. There are so many measurements, you know ways to measure the success of a campaign. From a marketing speak point of view, the the standard that we hold ourselves accountable, we ask ourselves the question, "Is this remarkable?" In other words is it worthy for people to remark on it and say well that is a good strong campaign. So that's a bench mark for us, but obviously that's quite sort of top line as a concept. There are more practical ways to



test the success of a campaign. One is through measurement instruments. Uhm In particular in the digital space that allows us to track in particular, you know, objectives objectively and empirically. Uhm The second measurement instrument that relate more to the quality of the creative, uhm is which is a bit of a subjective instrument is what we have network of people within the industry that we often take work to and ask their opinion on while the campaign is live, not before at the conceptual stages. The good word is peer reviews. Uhm and then we ask them and they are very honest with their feedback and it helps us test the standard of our creative as an agency.

Interviewer: I've got a few words here that's come up from other briefs. So I'm just gonna mention it and if you want to expand on it, it would be great. To include in a brief, would be objectives, you mentioned that before.

Advertising agency interviewee 7: Hmm

Interviewer: Scope, you didn't really refer to that. Do you think the budget covered that?

Advertising agency interviewee 7: I think, I think scope is important because it gives uhm context to the objectives. You know basically with the objectives, the scope gives us some understanding why these objectives are in place as well as what is the role of these objectives as it relates to uhm you know, the campaign or broader company objectives rather.

Interviewer: Deliverables, you've said.

Advertising agency interviewee 7: Yes. Uhm And I try and well, we as an agency try and spend as much time as possible to be a hundred percent clear on what those deliverable are. Uhm and deliverables does not only relate to saying that I need a banner, it actually can relate to the size of the banner and the type of the banner. So as detailed as possible.

Interviewer: Do you also advise clients if they say: "I need a billboard, I need a banner, I need uh ad..."

Advertising agency interviewee 7: Hmm



Interviewer: Would you advise them to say "Don't use a billboard, rather..."

Advertising agency interviewee 7: Ja. We do. So it comes back to the brief and casting a critical eye over the elements within the brief. Uhm So you know we often put it on the table and discuss it. Often I find clients do not know what questions to ask, so it is uhm an important, you know, it's our responsibility to highlight things the client might not even be aware of and in particular in the digital space, this is prevalent.

Interviewer: Business benefits, I think you've mentioned that is if you say company objectives... Assumptions.

Advertising agency interviewee 7: Assumptions, yes, we try to minimise the amount of assumptions. So, the success of the campaign might be based on assuming that there will be, you know, support from other agency partners for example, hmmm or there might be, you know, particular resource available that we can rely on. Hmm, Yes. So it is important to highlight the assumptions and try to turn the assumptions into facts as best possible.

Interviewer: Constraints?

Advertising agency interviewee 7: Constraints are important, hmm monetary constraints is an obvious one. Resource constraints, because often as a creative agency you might think of ideas and not think of what the consequence or the impact is on actually managing hmmm that particular component of the campaign and whether the resources are available to manage that component of the campaign. Hmm so I mean it's to highlight the constraints is important as it helps us to focus our creative energy as an agency.

Interviewer: Risks?

Advertising agency interviewee 7: The risks, often we try to mitigate the risks by, you know again, the detail of the brief and directly proportionate to the amount of risk within the campaign. Hmm the... some briefs ask for more innovative, creative solutions in which case we just make clear what the risk are with hmm with that approach. In other words, a campaign might not get the traction that we hope it would. Or a risk might be that a campaign gets too much traction, not attraction,

traction hmm and we can't manage the scale of of that response. In particular in the digital space where things can balloon to quite quickly.

Interviewer: Are there areas that the campaign might affect... are there areas of business that the campaign might affect? Do you look at that?

Advertising agency interviewee 7: Hmm yes, I think it is closely related to the risks. So for a very easy example is is customer service. Hmmm would you like me to give me some sort of case studies?

Interviewer: That would be fantastic.

Advertising agency interviewee 7: Okay, so so an example of of other areas of the business that might be affected is is hmm work that we did with Exclusive Books who launched an Online Store. And we used social media to drive traffic and sales in the online store. For various reasons it was a... it was a very successful campaign, but we underestimated the impact of the buying of products online, so the traffic and the purchases that we got through the campaign, the impact of that on their logistical capabilities to fulfill the orders to such an extent that we had to stop the campaign halfway through, because because they could not keep up with the orders.

Interviewer: So you exceeded the expectations?

Advertising agency interviewee 7: It exceeded the expectations, but it costed them money, because they couldn't obviously from a customer sentiment point of view there were a lot of frustrated customers. Because their deliveries would come late. There was an inherent risk that was, that came with the success. Hmm it remind us to always try and identify the risk and the impact of what we do on other areas of the business.

Interviewer: Major dependencies... I think we've touched on that in terms of resources as well as stakeholder resources. uhh and then obviously your time and costs that need to be included in the brief

Advertising agency interviewee 7: Those... timings and cost help us to focus and it helps us to hmm I suppose in a agency where we have multiple clients, multiple projects coming in - all of which are always in inverted commas urgent hmm it is vital



for us to understand what the timelines and budgets are that are available and that allows us to come back with realistic sort of schedule of events.

Interviewer: Okay. If there is any other topics that should be included in the brief

Advertising agency interviewee 7: Hmm

Interviewer: Even if you can't think of it now, as you

Advertising agency interviewee 7: I think, look I think it comes back to our initial, uh the initial question of what typically makes up a brief hmm The creative notes we find is quite important, so immediately the expectations around hmm how does it relate to the brand, hmm brand guidelines as well, what design resources hmm of files at least are available hmm what is, from a client's point of view, what are some of the ideas that a client already has and and experience. What has worked in the past hmm ja, so so creative notes, I think, is quite important.

Interviewer: Research?

Advertising agency interviewee 7: Yes, insights. We call it market information, so hmm that's a very good point. Sorry I did not even mention that. hmm Statistics, customer insights can be relevant, you know with... to the financial services industry or it can be outside of the financial services industry that hmm that hmm that is relevant insights. So what the market information allows us to do is take the market information and make key decisions from that market information and when we present creative ideas, concepts and strategies we can rationalise it by referencing back to hmm the insights and market information that was hmm that was gleaned.

Interviewer: Lastly, I've got a... in in terms of management, just to... if this was a project that you've had to manage hmm this is more academic, you plan, organise, lead and control a project. What hmm actions would you put in these steps.

Advertising agency interviewee 7: So from a planning point of view hmm okay, so from a planning point of view is hmm is is the brief. Define the brief. Check internal resources and availability. Hmm I am just trying to think. Hmm. Finalise budgets and timelines.

Interviewer: uh hmm



Advertising agency interviewee 7: Which is a component of the brief but

Interviewer: To make it feasible.

Advertising agency interviewee 7: Yes. To organise is hmm is look at studio schedules, allocate appropriate resources, hmm just trying to think uh. So from an organising point of view, it's what we said studio schedules

Interviewer: Yes, and look at appropriate resources.

Advertising agency interviewee 7: Allocate resources. Hmm... Finalise sequence of events, just the steps so to speak. Hmm and setup key performance measurements, measurement instruments at least.

Interviewer: Leading?

Advertising agency interviewee 7: So, leading can be broken down into two components. The one is project management, so it's leading the deliverables of a project against the timelines and the budgets, against timelines and budgets and then there's the strategic lead that keeps the campaign accountable to its objectives and its purpose.

Interviewer: Okay and then lastly control.

Advertising agency interviewee 7: Hmm... Control again is... we call it iterative development. So, it's to make slight changes based on performance that might be technical or design or marketing hmm changes. Hmm it is reviewed I suppose as part of the process. To review performance constantly throughout the period of the campaign hmm communicate and... Communicate feedback... uh sorry, not communicate feedback. Communicate performance to client and get feedback from client on their own expectations and experiences of of the campaign to date. hmm Ja and at the end there's a final reporting, hmm a final dissection of of uh the campaign.

Interviewer: Do you have a format under this type of brief, just for interest sake, do you have a format for the report? Is it a powerpoint, is it a document?

Advertising agency interviewee 7: Oh yes, no we have a format and we've spent a lot of time in trying to refine that format. So, there is a template we use... hmm. There's



templates for different types of reporting for different components. Hmm some of it are Word uh formatted although the client can see all out documents in PDF format. Just cause it retains the integrity of this structure of the... of the... of the report. Hmm Maybe let me rather put it... there's different layers of reporting. There's detailed reporting that is often done by the specialists involved within a specific component of a campaign and then there's the executive report which is like a summarised version hmm of of the reporting. Hmm. We've spent a lot of time trying to refine the template and that relates to the layout, it relates to even the design of the template. Hmm and the priority of of components within the template. What I mean with that is there's a... there is a degree of customising the report to what the client is really really interested in to in to hear. So we do put the template forward to the clients and ask them: Are you happy with the structure? or after the first report we ask the question: Can we, or are there elements of the report that you want us to repackage or maybe just change the layout of things? Again, we've seen as... as an agency our reports... and I constantly say this to our guys internally... is probably one of our most effective marketing tools, cause 1. it give an impression of of the agency, 2. it communicates our understanding of the client's business and the objectives etc. hmm ja, and and and thirdly if the communication is clear and the results are clear hmm it removes the ambiguity of question marks around a... around components or the success of a of of a campaign which in turn allows us to do a better job and the client obviously a bit more happy as well.

Interviewer: Do you ever just, seeing that this is all about the brief, that in the feedback, the proposal to implementation, the reviews, and the reports and all of that, do you refer back to the brief?

Advertising agency interviewee 7: Yes, we do. So, the brief already helps us to create the template for the reporting. Hmm, so for example, if you are a bank and you are running a campaign and the primary objective was to get signups of a cheque account, hmm that would form probably the first part of the report in our our reporting. So immediately, we don't hide, you know we don't try and stay sort of give, I am trying to just get my words creative, we don't try to give a lot of detailed information and the big result at the end. You start with the big result and then you start unpacking it.



Interviewer: And the big result obviously

Advertising agency interviewee 7: relates to the to that objective or the brief at least.

Interviewer: Okay great. Thanks Advertising Agency Interviewee 7, I really appreciate your time.

Document G-6

FSCI # 01 (anonymous)

Financial Services Company interviewee 1

Financial Services Company Interviewee 1: Halo

Interviewer: Haha

Financial Services Company Interviewee 1: Okay so this is very generic I am just doing it in English (Financial Services Company Interviewee 1: that's fine) for the sake of text (Financial Services Company Interviewee 1: typing) typing.

Interviewer: Okay so um you and you don't have to worry this won't I won't devolve any confidential information or whatever.

Financial Services Company Interviewee 1: Thank you

Interviewer: So firstly what is your title at work?

Financial Services Company Interviewee 1: I am the head of internal communication agent for the Financial Services Company brand.

Interviewer: Okay great. And are you involve in the campaign brief um to an agency.

Financial Services Company Interviewee 1: The campaign some yes, what do you mean by...

Interviewer: At least in a campaign brief.

Financial Services Company Interviewee 1: Yes yes

Interviewer: um and um so so even if you don't if you are not directly involve if you have knowledge about it (Financial Services Company Interviewee 1: Hmm) the whole idea of the studies is to understand what would be (Financial Services Company Interviewee 1: Hmm) beneficial if that is in the brief in the process of briefing (Financial Services Company Interviewee 1: yes) um challenges you might have (Financial Services Company Interviewee 1: okay) etc.

Financial Services Company Interviewee 1: Can I ask something else? Do so I am involved sometimes in brief processes when it concerns external communication but



mostly it has to do with internal communication so is that the same? So can I talk about my process?

Interviewer: Yes exactly, please um talk from your actual experience it doesn't really matter for this study it doesn't matter what the results or the end product is of cause that is what the results is but the project if it is internal and it is successful then the brief was successful as far as I am concerned so um whatever however you deal with it um if your agency is internal even then how do you brief what is the process. (Financial Services Company Interviewee 1: Hmm) okay so internally so if you brief how do you do this?

Financial Services Company Interviewee 1: So there are two different types of briefs we have very small projects and then we have some bigger ones and the small ones are often with an internal agency or an external agency that we have worked with for a very very long time so they almost feel like collages and so um when it is almost um let's say a medium sized brief or a small brief then it often is a informal conversation so I prefer to call a meeting and sit together and discuss where we want to go so it almost becomes like a brain storming session so those briefing sessions so you must tell me if I am going into too much detail.

Interviewer: No any detail

Financial Services Company Interviewee 1: Okay those briefing session we I will I prefer to start with what the purpose of the communication is I believe that communication always aims to get some sort of action as an outcome so we talk about why are we doing this and what is the outcome that we want from this whole thing and then we go into detail about the feeling of the communication the feeling the character and the identity of the messaging because with internal comes we very much try to create an internal identity so the way in which we speak is very important and then we go into the detail of which channels um which messages um the detail of the messages and also the specific ideas we have with regards to applications so...

Interviewer: Applications um just explain that.



Financial Services Company Interviewee 1: So for example um sometimes we I already have a picture in my head of things that can work well for example we want to use our own employees as actors in the photos that is going to be in these channels, posters email whatever um with speech bubbles so if we have specific ideas of how we want to apply the theme we talk about that.

Interviewer: So that has to do with the tone as well.

Financial Services Company Interviewee 1: Um let me think quickly um okay channels we also talk about um the target audiences so that is part of the detail we say what the message must be what the channels are ideas in terms of how we can apply the messages the target audiences how we want to reach them and what action we want from them how will we know that the message was successful so it has to do with our expectations what we want the outcome to be. So that is the more informal briefing and then we will often in that briefing process the agency the internal or external agency will come up with the ideas and say o this worked well we did it somewhere else or what about this and so the briefing expands almost as part of that conversation and at the end of that conversation we put down the details in writing about what we want by when um so it is a bit of a project scope.

Interviewer: So would you say would you say the um the revert so first it is a discussion it's a meeting, discussion, brainstorm and then in the revert from the agency it becomes more formal (Financial Services Company Interviewee 1: yes) you put down deadlines (Financial Services Company Interviewee 1: Yes, yes) um what about budget (Financial Services Company Interviewee 1: and budget sorry I left out budget) when does that come in?

Financial Services Company Interviewee 1: um we try to get that in the very first conversation so it is part of the scope conversation if we talk about what channels we want to use you have to talk about budget otherwise the conversation will be very different if you have no idea of the budget.

Interviewer: Okay and before you start with this briefing where do you get the actual this is the goal this is what we want does that come from business.



Financial Services Company Interviewee 1: Yes and that is also very important so that first briefing meeting where I am being briefed by business is almost for me I I I very need to understand in depth what the business purpose is and I prefer to be involved in business in business meetings bunkum meetings so that I understand where business is going so that I can shaped the communication accordingly I don't believe that communication is a separate function from business where you are told what business wants you have to translate business news into proper communication.

Interviewer: Um, do you think sometimes there is a bit of a um um lost in translations because it is business and you have to understand that you not although you are involved you are not actually part of the business in that sense that you create the product or the services so from there they you have to understand what they are doing then you brief the agency they have to understand what you understand and what the business understands (Financial Services Company Interviewee 1: yes yes).

Financial Services Company Interviewee 1: That is one of the main challenges so it can there can be a lost in translation how we how I try to bridge that is by I insist on being part of business meetings even if it is a monthly summary meeting or a high level mancome meeting so that I fully understand the business needs and from there I have to be in close contact with the agency so that I can monitor their understanding of the business needs.

Interviewer: and you go back to business to check?

Financial Services Company Interviewee 1: yes definitely so ag so now that I am talking about it it a very lengthy process cause then the agency almost goes into the creative phase comes up with ideas how are they going to apply the message and then I will always take that back to business to get their sign off even though it's not that formal it is not literally a sign off but they have to be happy with how we translated their business need into a creative message.

Interviewer: Okay so firstly you say in a setting up a meeting schedule do you tell them the free ag the background (Financial Services Company Interviewee 1: Business with the agency) no no initially the agency sorry (Financial Services

Company Interviewee 1: hmm) so business tells you when what to communicate X (Financial Services Company Interviewee 1: yes) now you phone the agency (Financial Services Company Interviewee 1: Yes) in that telephone conversation do you already is there already parts of the briefing involve included lets meet to discuss what.

Financial Services Company Interviewee 1: Um I prefer to have those meetings face to face so it depends on the size of the briefing if it is a very small task and the agency knows as well and we have already no no it is not telephonic actually I haven't ever done it telephonically because it doesn't work.

Interviewer: But... but do you mail them to say let's meet.

Financial Services Company Interviewee 1: I phone.

Interviewer: So you phone and say let's meet (Financial Services Company Interviewee 1: lets meet) to discuss...

Financial Services Company Interviewee 1: Yes... yes we have a campaign where we want to um drive financial wellness internally and we need to think how we are going to apply it all over. (E: Okay).

Interviewer: so in that telephone call you just mention the them (Financial Services Company Interviewee 1: The theme yes yes) okay then you meet and you have the brainstorm, the revert with an informal creative.

Financial Services Company Interviewee 1: Yes, but before the brainstorm it is also the so first the first step is to provide them with lots of background what is the business need. (Interviewer: before the meeting) in the meeting... (Interviewer:in the meeting) so the first step in the meeting before we go into any anything else it's about what's the business need, why are we doing this, what is the key objective of the campaign um (Interviewer: just a just a second I just want to write all this business need, key objectives) and often background so it depends on um how well the agency knows us (Interviewer: uhm)what is the business background sometimes it starts with years ago we use to do this and now we are doing this um... (Interviewer: so the history) Yes, background why the need for this campaign what are we trying to achieve what is the outcome that we want and the outcome have



often to do not just with numbers um we want the employees to sign up for this thing but we also want behavior to change and often we want emotions to change.

Interviewer: And the target market you have mentioned and the budget (Financial Services Company Interviewee 1: yes) timelines (Financial Services Company Interviewee 1: Timelines) timelines...

Financial Services Company Interviewee 1: And timelines very definitely timelines...

Interviewer: Do you tell the agency which... which channels you want to use i.e. you want to make a poster, we want to do an add we want to send out (Financial Services Company Interviewee 1: yes yes) would they um come back with you've... you've asked for a certain kind of execution channels i.e. posters um whatever then they come back and say no we should rather do digital campaign would that happen and how do you handle that.

Financial Services Company Interviewee 1: it can happen we are very open to other ideas internally we have very specific channels that is available to us and those are channels that we put in place so we like using them but if people come with creative ideas it is fantastic and it has happened where we had specific channels in mind and a agency came up with some industrial theatre that we didn't think of so we like it if they can add our ideas is just the base I actually expect them to have ideas that are better than ours.

Interviewer: I think it depends on the person but from other interview I have had is some people have a definite idea and there is no negotiations that's what you... (Financial Services Company Interviewee 1: hmm) but it sounds that you are not like that (Financial Services Company Interviewee 1: hmm) so, so you give your ideas and what all the background all the information (Financial Services Company Interviewee 1: hmm) and then you give them free range.

Financial Services Company Interviewee 1: No I don't give them free range I see it as a process of co creation so I want them to come up with great ideas and then I want them to be willing to shape it together so I would like to be able to pull back here and there or change tweak some of their ideas.



Interviewer: Do you find the agencies you work best with where the best results obviously um that they um they are comfortable with you working with them?

Financial Services Company Interviewee 1: Yes one can't imagine it any other way.

Interviewer: Some agencies have very definite ideas and um if you don't go with the ideas they get deflected demotivated they don't so do you think the relationship with the agencies is important.

Financial Services Company Interviewee 1: Very.

Interviewer: Can you work with an agency that you don't have a good relationship with?

Financial Services Company Interviewee 1: I can I have had to but I believe that you get a better outcome in the creative process when you work together well perhaps because when it is a process of recreation the way I see it people have to be comfortable with each other you have to be comfortable with the positive and negative feedback with taking it and giving it and it is easier to do that in a relationship where there is trust and comfort.

(Interviewer: Sorry can we pause and then we will find a new room.)

Interviewer: Okay where were we....Oh, the relationship with the agency I was wondering how far do you want to take the, or should one take that relationship should it just be a formal relationship or is it even better if it is a personal relationship what, what do you mean by having (Financial Services Company Interviewee 1: a good relationship) a good relationship?

Financial Services Company Interviewee 1: I don't mean that it should be a personal relationship or that you should socialize together and go out for drinks um so not that at all. Not that I have anything against it but that's not how I work what I mean with a good relationship is that... maybe a mature working relationship where people have learned to give their opinions without holding back in a straight forward authentic way and also to be able to discuss those opinions and if it's your opinion to be open to input that differs from your ideas or differs from your input so what I mean with a good relationship is aah a work relationship a mature work relationship really.



Interviewer: Great. Then in terms of financial services I know this is internal communication but um so you brief an agency to get some result especially you've mentioned earlier that you want to change behaviour or you want to change emotions so it's very it's not tangible?

Financial Services Company Interviewee 1: Sometimes it is (Interviewer: Okay) so sometimes we want employees to sign up for something and we are driving numbers so...

Interviewer: I get that sorry what I am saying is um tangible good you not selling a product (Financial Services Company Interviewee 1: No) So would you say if you were if you would promote whatever substantial product would it have been different the way you briefed the agency would it be different from briefing changed behaviour in the inside and out feel different on the inside and out?

Financial Services Company Interviewee 1: I don't think so because it is still linked to exactly the same thing you want to stir some emotion you want some behaviour whether you want something to be bought or whether you want changed behaviour in an organisation. It's still you want stir emotion you want behaviour for a specific outcome the fact that the outcome differs doesn't mean the brief will differ or the way that you brief I think the brief itself may differ if its change communication for example change management where behaviour needs to change the type of communication will differ so...

Interviewer: Type of communication as in content or?

Financial Services Company Interviewee 1; As in content or maybe timelines because it would have to be an iterative process where you go back um behaviour takes a long time to change so it's not just well this funky product go and buy it but I don't think the briefing process changes.

Interviewer: Perfect. What else? Oh, then to insure that whatever you briefed the agency it actually works do you have measurements in place I know it would be different for the different campaigns or different projects but do you have measurements can you think of some?



Financial Services Company Interviewee 1: I don't have measurements in place for the briefing process (Interviewer: No no just the outcome of the projects) For the outcome yes definitely so... And that depends on what the project was could be how, did we get the reaction that we did how many employees reacted in which ways.

Interviewer: So you count actually?

Financial Services Company Interviewee 1: Yes

Interviewer: These numbers?

Financial Services Company Interviewee 1: Yes

Interviewer: And do you tools for this?

Financial Services Company Interviewee 1: Yes, so also it depends on what type of message (Interviewer: Ja) if it was a change process it's harder to measure because then it would be a survey um if it is something were we wanted them to sign up for um something its easy because then you just count how many signed up.

Interviewer: um And do you do you have a post-implementation review where you see what worked?

Financial Services Company Interviewee 1: Yes, ideally we have these things but often this is the part that falls away so... because the next project is on top of you (Interviewer: Ja) and you need to run with that one so in the perfect world we must definitely have reviews afterwards and do the research but very often it doesn't happen in our world. But I say that's a point failure.

Interviewer: But you report back on the success though?

Financial Services Company Interviewee 1: Yes, we report back on the success.

Interviewer: Okay, so in a sense you put everything in a document you just don't discuss the document?

Financial Services Company Interviewee 1: No we will always put everything in a document and discuss it but what I mean is we don't always do the physical (Interviewer: the inside) review where we sit around the table and say so what could



we have done better, what will we do next time that happens... (Interviewer: Learning's from the projects) Ja learning's from the projects almost happens informally where we will say o my word we must remember last time this didn't work so well hahaha so it's almost as we go along we review but it is not a formal very often a formal process.

Interviewer: some of the things that came out from other briefings process were also we didn't specifically mention it so I am just naming it now and then you can talk about it assumptions you assume the agency understand whatever the assumptions is and then also constrains and risks.

Financial Services Company Interviewee 1: Yes, do you want me to talk about those?

Interviewer: ja if it is relevant to your...

Financial Services Company Interviewee 1: Yes so assumption I think is... that's why we have this back and forth process where I talk to them what's the idea they come back with how they would apply my need and then and that's why I wouldn't give them free rein to go with something them coming back with how they apply the ideas we discussed so in that sorry now I am going back but in that discussion of our ideas in the briefing session. That's already a place where we check assumptions because do they understand what the business need is, how would they translate it then they go and they do something physical create some communication and then they come back and then we check assumptions again.

Interviewer: And constraints. You told them which what is not allowed?

Financial Services Company Interviewee 1: Yes.

Interviewer: And risks?

Financial Services Company Interviewee 1: so there is many constrains in term on how we apply the brand budget and so on channels.

Interviewer: And legal?



Financial Services Company Interviewee 1: Legal sometimes yes we think of staff communication um competitions often so we have a process in place were we um write the t's and c's as best we can then go through the legal team and they add and so on so there is a whole very specific process that we adhere to.

Interviewer: Okay and risks? it is slightly different from constrains in that if you implement something it could go either way it could work or it can really (Financial Services Company Interviewee 1: Yes..) backfire (Financial Services Company Interviewee 1:Yes)

Financial Services Company Interviewee 1: So risks I am not exactly sure how we look at that from an internal comms perspective I think in our minds its, it depends on what, what it is that you are doing very often we think about physical risks if it is a physical activation say(Interviewer: yes exactly) ja say you have an event outside um all those risk of taking employees to a place where something physical can go wrong but there is also other risks its um I don't actually now if this is a risk but often the communication leads to risk what maak jy um if people are excluded from communication so at this stage we are finding it very hard to include everybody in our messages because the company has restructured to the extent that we don't know exactly where our audients is so often the risk of producing something very nice and exciting is that you exclude people from that (ek weet nie) if that is what you mean?

Interviewer: No no it is a risk because it creates negative perceptions (Financial Services Company Interviewee 1: yes the very positive thing you did has the opposite effect) the same thing happens with competitions (Financial Services Company Interviewee 1: yes people who loose are not impressed hahaha) do you also look at other areas that that's effected in so so (Financial Services Company Interviewee 1: yes) you do one project um in It and then this is how it was effected (Financial Services Company Interviewee 1: Yes no definitely you look at the holistic business picture)

Interviewer: And matured audiences does that come into play?

Financial Services Company Interviewee 1: Yes



Interviewer: and do you do something if something else?

Financial Services Company Interviewee 1: Yes especially we look at the financial services company's relationship with another company currently so often the brands are now mixed multiplies crosses um over Metropolitan, Momentum and MMI so if we do any financial services company communication which involves multiplies sudden it becomes MNI communication and there is a lot of dependency on the other brand communication.

Interviewer: And are you um depended or do you have to look at other resources internal resources that you need to draw in to get the projects done?

Financial Services Company Interviewee 1: Yes depending on the communication message and the team the audience that it is focused on so very often we, we work as a communication hub and we will supply different business areas with communications but they also have communication people in their teams then we work with them.

Interviewer: um I am wondering what do you if, if you can think of anything you expect from the agency?

(Financial Services Company Interviewee 1: Hm) do you have a kind of list of things that a typical agency would, would provide me with this and they will do it in this way?

Financial Services Company Interviewee 1: I think they will ... they will they must have the ability to understand internal communication business challenges um its yes it's not a world, it's not advertising it's not BR there are very specific business requirements usually so if they I prefer that they have some experience in internal communication so they understand the challenges um I expect them to be able to understand the brief so I think to reach a conclusion after the brief on what they need to deliver and provide me with a good idea of what they will deliver and then very important I think is deadlines if we agreed on deadlines and budget they have to stay within those (Interviewer: adhered) adhered to those I also expect them to have the creative ability to, to execute the communication I think that's what I mean by to



apply communication to execute the communications in a skilful creative way so they creative expertise is very important to me we don't have because we don't have those skill internally.

Interviewer: Does it matter to you if they have any um formal background like they need university degrees or some kind of um?

Financial Services Company Interviewee 1: no I have never check that but I have check their previous work.

Interviewer:okay um (Financial Services Company Interviewee 1: Practical application of their knowledge)let me just see if there is anything that I still would like to ask you... For interest sake would you change the agency if, if they don't you brief them how many reverts do you go backwards and forwards until you are happy in general?

Financial Services Company Interviewee 1: umm sjoe it can't it depends on the level of progress you see between the reverts probably if it continues to be a misunderstanding, you are writing on a different page will you be able to follow this(Interviewer: oh yes the revert) o yes I see (Interviewer: haha) so if it continues to be a misunderstanding I think it should rather end then the meeting if the minds is not there so continue to be a misunderstanding I'd say after 3 reverts then (Interviewer: with no progress) we are not connecting yes somehow I don't understand the way in which I explain the business need so (Interviewer: then you will find a new agency)then I have stopped it and you cut your losses and move on I find that things shouldn't be too hard in when it comes to relationships business relationships and other relationships here is my peach of wisdom for you professor(Interviewer: hahahaha) I think it should things work when it works it works .

Interviewer: And do you find that there are some agencies that work with you and other that just don't gel with you they don't get you?

Financial Services Company Interviewee 1: yes even though they were very nice people it just happened that it didn't work I think there is a huge intellectual and creative component that needs to be there you said what do I want from an agency



(Interviewer: yes) so there has got to be that understanding they have to get it and then they have to have the creative savvy to execute it in a fantastic creative communication and often it has happen that people are very creative but they didn't get the essence of the business need.

Interviewer: to summarise if there is anything else that you can think of um in terms of briefs and what would help and what would make you ... (Financial Services Company Interviewee 1: no I taught of more than I have ever taught of before hahaha I didn't know we have all these things to think about.)

Interviewer: so in management there is a there might be um you might know about there's a there's a kind of model where everything um is structured in term of planning organising leading and controlling it's just management principals so in for your planning would be um and um you can help me here would be the meetings with the business and getting the understanding and the gold objectives from them?

Financial Services Company Interviewee 1: and my own internal processes, getting my head around what business needs.

Interviewer: Okay then after that I would say the organising of all of this what you want the budget cause that's set then you take it to the you have a meeting set up a meeting have a meeting um give all the background all of this you dump onto the agency and then you brainstorm.

Financial Services Company Interviewee 1: yes I think the brainstorm probably I don't know it's also part of leading cause you have to lead a team to get the best out of them.

Interviewer: okay let's put it here o all of this so you get from business we want x and x and y and blah blah this do you put this in a document or is it in your head and you just tell the agency or do you give it to them on an email before and...?

Financial Services Company Interviewee 1: no I will definitely try to put things in a document because it also helps my planning process so if you start writing things down it also help you to get your head around things um it depends on on the type of the brief I can sent it to the agency before hand or I could keep it for the meet the



discussion we had I prefer to first have the discussion and then leave them with the documentation.

Interviewer: And the control phase would come in from the actual execution ?

Financial Services Company Interviewee 1: yes and perhaps that iterative proses were we check whether (Interviewer: backwards and forwards) ja did are we on the same page regarding the business need and the execution of it and then the implementation definitely.

Interviewer: and in here there is also edits and reverts from business input?

Financial Services Company Interviewee 1: yes.

Interviewer: Great thank you so much!

Financial Services Company Interviewee 1: thank you Interviewer!



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

APPENDIX H

DEVELOPING THE FIVE STUDY THEMES

August 2016



APPENDIX H: DEVELOPING THE FIVE STUDY THEMES

TABLE OF CONTENTS

H-1 Developing the Five Study Themes

H.1

Document H-1

Developing the five study themes

CAMPAIGN BRIEF PROCESS AS INFORMED BY THE STUDY FINDINGS

[Synthesis of data involved in online surveys and one-on-one interviews done for this study]

Survey questions fitted into the five central themes of the final model of analysis

The questions were grouped into five key themes that encompass the steps, including the process that practitioners need to follow in the briefing of an advertising campaign.

- A. The brief
- B. Parties to the engagement
- C. Communication
- D. Process of engagement
- E. Success of the engagement

Questions and summary of results or synthesis relating to Group A: *The brief for the engagement*

- *When creating an advertising campaign, what do you consider to be a formal brief?*
- *Please choose the most important element in the brief: visuals / content, words / message / cost / timing schedule / accountability / action steps.*
- *How often do you use a formal briefing template?*
- *In your opinion, do financial services companies use a formal, prescribed briefing process more often than non-financial services companies?*



Synthesis: The main purpose of this analysis is to ascertain the degree of correspondence (or lack of correspondence) in the way in which the two parties view the questions as put here. The results show that the parties agree on what the brief should entail, as well as on the most important element of the brief, being the message and the content (actual words), both of which was selected by between 25% and 35% of all respondents, both in the financial services companies and in the advertising agencies.

On the other hand the two parties disagreed on how frequently a formal brief is used and on whether there is a difference in the type of brief employed by financial and non-financial services companies. This indicates a difference in the way the financial service company perceive its professional conduct and adherence to processes compared to the perception of the advertising agency who is more inconvenienced by the lack of properly completed or formal briefs. In the absence of a formal briefing document, the advertising agency has to put in more effort to find the detail that should have been clear from a formal brief.

The latter two questions, on which the parties disagree, are not crucial for the process of establishing a brief and crafting a campaign, whereas the two questions on which the parties agreed are crucial to the establishment of a viable, success-oriented brief and campaign. Once again, this could be an indication of the fact that financial services companies view themselves to act more formally than the suppliers perceive their behaviour.

KEY LEVERAGE POINTS:

The crucial point here is the content and structure of the brief. Although both parties in this instance agreed on these two points, it could lead to a less than successful engagement and campaign if there is misalignment between the parties on the content and structure of the brief.

Questions and summary of results or synthesis relating to Group B: *Parties to the engagement*

- *How would you rate your relationship with the employees of the advertising agencies?*



- *When thinking of your clients in financial services, are you their primary design agency as well as primary advertising agency? In other words, are you responsible for creating their advertisements, and also do their branding and design work?*
- *Do you use a different agency for a different function?*

Synthesis: The agreement between the views of the financial services company respondents and those of the advertising agency respondents is in a difference class for each of the three questions. In the case of the first question, which rates the relationship with the employees of the agency, the two parties have statistically different views (no agreement from a statistical perspective) on the quality of this relationship.

The advertising agency is in the role of the worker and the financial services company the “boss”, the party that hands out the work. The perception of the relationship could be correlated to the effort put into maintaining and building the relationship. The advertising agency is more dependent on the financial services company for sustaining the business. There are various advertising agencies and fewer large corporates that will employ them. Part of this skew would be a result of the need for the services rendered and the scarcity concept.

For the second question, which tests the perception of the parties as to the degree to which the financial services companies would use the agencies for both the design of campaigns and for their primary advertising needs, the data show only weak agreement between the parties. Lastly, in the question about the perception of respondents on whether there is a difference between the advertising of financial services and that of tangible goods, the parties show good agreement.

The results to the first question, which show no agreement, or at best extremely weak agreement, should be a source for major concern, as it shows that there is every possibility that this could be a major point of friction between the parties, with potential major negative impact on the brief and the subsequent roll-out of the campaign as well as for the success of the overall venture.



Lack of recognition from the financial services company with regards to the hard work and effort that the advertising agency contributes to the relationship might hinder communication between the two. Another angle could be the dependency on the other. The party giving the instructions could take a more superior stance in the relationship and from that point of view are not as dependent on the approval of the other.

KEY LEVERAGE POINTS:

It is imperative that the organisational values and company culture of the financial services company and the advertising agency should be aligned. Misalignment is almost certainly going to lead to a less than successful (even failed) campaign.

It may be useful to host some sort of ice breaker for the staff from both parties who are going to be involved in the engagement to ensure good alignment. This ice breaker should highlight the important role that both parties play in the relationship – where the advantage of a mutual beneficial relationship is entrenched, both parties will feel more valued and will put in more effort to live up to the expectation.

Questions and summary of results or synthesis relating to Group C: Communication

- *Do you think there is a difference between the language financial services employees use compared to the language used in the advertising agency?*
- *On a scale of 1 to 5 how important do you think communication is in the briefing process?*
- *Do you try to improve your communication success by taking specific actions?*

Please choose the boxes that will indicate which actions you take.

- *Do you sometimes experience barriers when communicating with the advertising agency?*
- *According to you which physical barriers will influence the communication during the briefing?*



- *According to you which physiological barriers will influence the communication during the briefing process?*
- *According to you which psychological barriers will influence the communication during the briefing?*

Synthesis: The two parties are entirely agreed on the fact that communication is pivotal for a successful engagement and campaign. The responses to the eight specific questions in this regard are in some cases in total agreement and in others they differ. The implications of responses are discussed below.

The issues on which the parties have good agreement, as indicated by the survey responses, are the importance of communication in the briefing process, and on the fact that if the communication process is less than ideal certain corrective steps would be taken, as well as on what steps to take (1. Meet face to face; 2. Follow a process agreed by all parties involved; and to a lesser extent 3. Use a template for briefing; and 4. Making sure that everyone is comfortable with the communication medium i.e. email, face to face, telephone call).

Lastly, the parties agree on the type of psychological barriers that could potential obstruct the communication process (1. Language (terminology used); 2. Business focus (interpreted as degree of professionalism in the focus on the business); and 3. Education).

The agreement between the responses of the respective parties is not that good (only weak to reasonable agreement) for the following four issues, namely, as to whether the LANGUAGE used (terminology etc) is the same in each of the two parties; as to whether there are at times COMMUNICATION barriers between the members from the respective parties; and what physical and physiological barriers exist to good communication (PHYSICAL: (Outdated, faulty equipment; noisy environment; venue (room) temperature; and to a lesser extent the particular venue where the engagement team works) and PHYSIOLOGICAL: (Hearing difficulties (exacerbated by a noisy venue environment); ill-health of some members; physical discomfort (like pain) of some members; and poor eyesight).



KEY LEVERAGE POINTS:

From the above discussion of results it is therefore clear that in order to ensure that the quality of the communication between the respective parties in the engagement is at all times of the highest quality and professional standard, must be the MAIN FOCUS of both parties to the engagement.

This would inter alia imply that the parties should agree on the venue, the equipment provided in the venue and also the preparation of the venue, as well as on the ambience of the immediate surroundings of the venue. Secondly, each of the parties should ensure that there are no issues concerning any of the members of their time that could lead to barriers to a sound communication process.

The list of parameters listed in the survey responses above provides a good framework to ensure that these leverage points are optimally utilised to ensure an excellent communication environment and process at all times during the engagement.

Questions and summary of results or synthesis relating to Group D: *Process of engagement*

- *Do you think there is a difference between advertising financial services and tangible goods?*
- *In your opinion, how formal is the average briefing process you adhere to?*
- *In your opinion, how effective is the briefing process between yourselves and the advertising agency?*
- *In general how many reverts does it take before the financial services company agrees with the advertising agency on the goals and the way forward for the advertising campaign?*

Synthesis: The respective parties (financial services company respondents vs. advertising agency respondents) to the engagement agree on the effectiveness of the briefing process, and on the number of reverts required before the Advertising



Agency agrees with the Financial Services company on the goals for the Marketing Brief (three).

This viewpoint concurs with the earlier points raised with regards to the perceived relationship between the financial services company employees and the advertising agency employees. The financial services employees see themselves and their actions as formal and professional as that is what is expected of them and what they are held accountable for. The world of the advertising agency does not have as much red tape as does the world of financial services which has to adhere to strict legal requirements from a variety of legal entities (laws, the ombudsman, Financial Services Board and so on), customer complaints and queries, as well as the requirement to fulfil the needs of a far bigger and more varied customer base. Working in such a controlled environment might aid the perception of being more formal and working in a more structured manner.

Advertising agencies are smaller companies and are able to be more flexible in their time schedules and approach to work. The way they perceive the briefing process could also reflect the way they operate internally.

Although the parties disagree strongly on how formal the average briefing process is, as gauged by the p-value score (1.19%), the choice mostly selected by respondents from both parties, that is both Financial Services company respondents and Advertising Agency respondents, is the same, namely, we opt for a “somewhat formal” approach.

KEY LEVERAGE POINTS:

The key point here is that it is important to agree a process, whatever it is, and to stick to that, except if both parties agree that there is a need to change it.

Questions and summary of results or synthesis relating to Group E: *Success of the engagement*

- *What do you feel the advertising agency has to achieve for you to consider an advertising campaign to be successful*
- *Do you have tools to measure the success of your advertising campaigns?*



Financial Services Company respondents:

Google Analytics; Internal (in-house) MI tracking and reports; Media Post campaign reports; reports on click-through rates; changes in sales patterns (over say a three-month period); and changes in banking behaviour of clients. Various other measures were also mentioned.

Success from the financial service company is often measured in business results and numbers (more so in the digital environment with the ability to track numbers exactly) - new customers, sales and value of these sales.

Advertising Agency respondents:

Built-in statistics package on the Advertising Agency platform; Internal tracking tools of the Financial Services Company (the client). The type and array of measuring tools used is typically determined by the client's budget and specific requirements.

Success in the advertising agency environment would be the value of the relationship / engagement, money made from the engagement and if the financial services company uses them again – as seen from interview results.

KEY LEVERAGE POINTS:

It is important to agree upfront what the measures of success will be, and to adhere to that strictly. It is also in this regard important to agree



APPENDIX I

KEY LEVERAGE AREAS IN ADVERTISING BRIEF

December 2016

APPENDIX I: KEY LEVERAGE AREAS IN ADVERTISING BRIEF

TABLE OF CONTENTS

KEY LEVERAGE AREAS FOR THE ADVERTISING BRIEF ENGAGEMENT	3
DEVELOPING FRAMEWORK FOR THE 26 KEY LEVERAGE AREAS	5
Introductory comments	5
KLA # 01: Strategic intent	7
KLA # 02: Service offering	9
KLA # 03: Market intelligence	11
KLA # 04: Company brand.....	13
KLA # 05: The scope of the briefing engagement	15
KLA # 06: The actual message underlying the engagement and ultimately the campaign	17
KLA # 07: High-functioning team	19
KLA # 08: Quality team members	21
KLA # 09: Strategic leadership	23
KLA # 10: Corporate governance framework.....	24
KLA # 11: Alignment of organisational values and company culture	26
KLA # 12: Strategic conversations and dialogue with the team	28
KLA # 13: Unlocking team potential	30
KLA # 14: Operating to the highest professional and ethical standards.....	32
KLA # 15: Logistical arrangements for the advertising brief engagement.....	35
KLA # 16: Project managing the advertising brief engagement.....	37
KLA # 17: Strategic conversations and dialogue with key market role players	39
KLA # 18: Advertising brief process value chain	41
KLA # 19: Value chain governance framework.....	43
KLA # 20: Mutual agreement on the process to be followed	45



KLA # 21: Managing performance in the advertising brief engagement	49
KLA # 22: Rigorous success matrix to evaluate successful roll-out of advertising campaign	52
KLA # 23: Measuring impact on organisational brand leadership.....	54
KLA # 24: Cost-effectiveness of the advertising brief	57
KLA # 25: Upfront, mutual agreement on the measures of success.....	58
KLA # 26: Upfront, mutual agreement on the respective roles and responsibilities	60

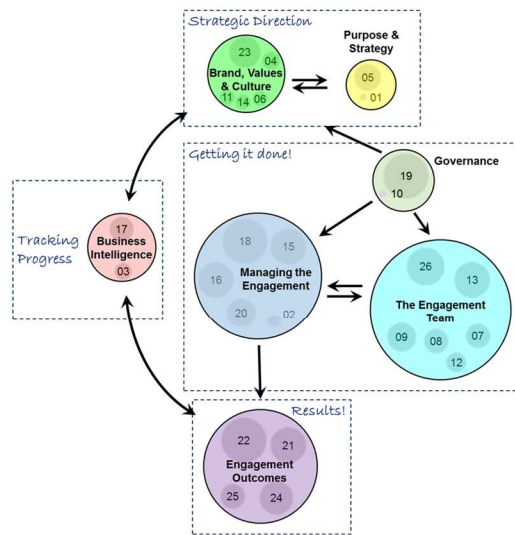
KEY LEVERAGE AREAS FOR THE ADVERTISING BRIEF ENGAGEMENT

Theme A: The advertising brief	
<ul style="list-style-type: none"> ✓ KLA # 01: Strategic intent ✓ KLA # 02: Service offering ✓ KLA # 03: Market intelligence ✓ KLA # 04: Company brand 	<ul style="list-style-type: none"> ✓ KLA # 05: The scope of the briefing engagement ✓ KLA # 06: The actual message underlying the engagement and ultimately the campaign.
Theme B: Parties to the advertising brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 07: High-functioning team ✓ KLA # 08: Quality team members ✓ KLA # 09: Strategic leadership 	<ul style="list-style-type: none"> ✓ KLA # 10: Corporate governance framework ✓ KLA # 11: Alignment of organisational values and company culture
Theme C: Communication	
<ul style="list-style-type: none"> ✓ KLA # 12: Strategic conversations and dialogue with the team ✓ KLA # 13: Unlocking team potential 	<ul style="list-style-type: none"> ✓ KLA # 14: Operating to the highest professional & ethical standards ✓ KLA # 15: Logistical arrangements for the advertising brief engagement.
Theme D: Process of the advertising brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 16: Project managing the advertising brief engagement ✓ KLA # 17: Strategic conversations & dialogue with key market role players 	<ul style="list-style-type: none"> ✓ KLA # 18: Advertising brief process value chain ✓ KLA # 19: Value chain governance framework ✓ KLA # 20: Mutual agreement on the process to be followed
Theme E: Success of the advertising brief engagement	
<ul style="list-style-type: none"> ✓ KLA # 21: Managing performance in the advertising brief engagements ✓ KLA # 22: Rigorous success matrix to evaluate roll-out of advertising campaign ✓ KLA # 23: Measuring impact on organisational brand leadership 	<ul style="list-style-type: none"> ✓ KLA # 24: Cost-effectiveness of the advertising brief ✓ KLA # 25: Upfront, mutual agreement on the measures of success ✓ KLA # 26: Upfront, mutual agreement on the respective roles and responsibilities

The figure below (Figure 28 in the dissertation) also highlights the relative impact that each key leverage area can potentially have, or in other words, how important it is to include each of these KLAs. The list of 26 key leverage parameters in this figure contain some that are highlighted in bold, these 11 KLAs can be seen from the figure to have the biggest potential impact and should if either cost or time is a major consideration be used in preference to the others.

Visual representation of the Key Leverage Areas impacting the Advertising Brief Engagement (after DOLOS, 2016)

KLA # 01	Strategic intent
KLA # 02	Service offering
KLA # 03	Market intelligence
KLA # 04	Company brand
KLA # 05	The scope of the briefing engagement
KLA # 06	The actual message underlying the engagement and ultimately the campaign.
KLA # 07	High-functioning team
KLA # 08	Quality team members
KLA # 09	Strategic leadership
KLA # 10	Corporate governance framework
KLA # 11	Alignment of organisational values and company culture
KLA # 12	Strategic conversations and dialogue with the team
KLA # 13	Unlocking team potential



NOTE: The sizes of the circles show the relative importance attached to the respective concepts by the Advertising Agency respondents. The numbers refer to the KLA numbers shown on the sides of this diagram

KLA # 14	Operating to the highest professional & ethical standards
KLA # 15	Logistical arrangements for the advertising brief engagement.
KLA # 16	Project managing the advertising brief engagement
KLA # 17	Strategic conversations & dialogue with key market role players
KLA # 18	Advertising brief process value chain
KLA # 19	Value chain governance framework
KLA # 20	Mutual agreement on the process to be followed
KLA # 21	Managing performance in the advertising brief engagements
KLA # 22	Rigorous success matrix to evaluate roll-out of advertising campaign
KLA # 23	Measuring impact on organisational brand leadership
KLA # 24	Cost-effectiveness of the advertising brief
KLA # 25	Upfront, mutual agreement on the measures of success
KLA # 26	Upfront, mutual agreement on the respective roles and responsibilities

DEVELOPING FRAMEWORK FOR THE 26 KEY LEVERAGE AREAS

Introductory comments

Originally, when the research proposal for this study was developed, the focus was heavily on the quality and content of communication during the advertising brief development phase. The proprietary diagnostic filtering software package, the DOLOS (What Works, 2016), identified a further four constructs that are complementary to communication *per se*, namely, to also include the actual content of the brief, the composition of the team involved in the development of the advertising brief, the value chain of this development process and the success measures being used to evaluate the outcome of the process of developing the advertising brief. The following five constructs were therefore used in the study in the development of a new advertising brief protocol:

<i>Pivotal construct</i>	<i>Brief description</i>
Theme # A	The advertising brief
Theme # B	Parties to the advertising brief engagement
Theme # C	Communication
Theme # D	Process of the advertising brief engagement
Theme # E	Success of the advertising brief engagement

Furthermore, at a lower level, a series of issues were identified which can be termed key leverage areas (KLAs) – see table on Page I-3 above. Each of these 26 KLAs will, provided that appropriate attention is given to the particular key leverage point, contribute to the smooth execution of the specific theme where it has its main impact (see the table below). These key leverage areas are used in the body of the dissertation to explain how each of them can contribute to the development of the advertising brief in the most efficient manner.

However, it goes even further, because in the dissertation these five constructs are cross-correlated with the eight steps in the methodology for the development of an advertising brief as proposed by the United Kingdom Public Relations Consultants Association (PRCA, 2003; 2011). This is illustrated in the dissertation in Table 11,



shown below in reduced format. The numbers in the cross-correlating blocks indicate how many areas in the new protocol will benefit from proper attention to these key leverage areas.

<p>NOTE:</p> <p>The numbers in the cells of the matrix are the number of active KLAs; as estimated using the quantitative CAQ²DAS software</p>		2	3	4	5	6
		Where are we now?	Where do we want to be?	What are we doing to get there?	Who do we need to talk to?	How will we know we've arrived?
		The route		The journey		
A	The ticket	9	4	-		
B	The participants	-	8	4		
C	The maintenance schedule	5	19	10		
D						
E	The yardstick	4	15	8		

The tabular representation below uses the framework as developed above (in Table 11) and indicates on the one hand an estimate of total time spent on each set of cross-sectional activities, but on the other it indicates the relative overall impact to be achieved by giving appropriate attention to the respective key leverage areas.

	The route	The journey	The logbook	Σ
The ticket	10.5%	4.7%	0.0%	15.1%
The participants	0.0%	9.3%	4.7%	14.0%
The maintenance schedule	5.8%	22.1%	11.6%	39.5%
The yardstick	4.7%	17.4%	9.3%	31.4%
Σ	20.9%	53.5%	25.6%	100%

In the rest of this Appendix a summary will be given for each of the key leverage areas of (1) its definition, (2) key defining constructs, (3) its relevance to the development of the advertising brief, and (4) some pertinent literature references.

Please note that this information provides guidance only to the reader tackling an engagement of this type. Those areas that needed further in-depth discussion and analysis are treated in the main body of the dissertation.

KLA # 01: Strategic intent

KLA # 01 Definition

The strategic intent or purpose of the financial services company will help define the playing field they want to operate in, and answers the following four questions, namely, 1. Whom do we serve? (Who are our markets/customers?); 2. What do we offer? (What does our products and services portfolio contain?); 3. Why do we matter? (What is our competitive advantage?) and 4. What is our ambition? (what is our medium-term whereas the service offering will largely contribute to how the financial services company can operate in their desired playing field (Hamel & Prahalad, 2005);

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Business purpose is the operational mirror of the strategic intent, and is specifically focused to leverage value for the benefit of customers and shareholders. Strategic intent, on the other hand, is the means by which the (financial services) organisation will achieve its vision.
- Manning (2001) states that strategic intent is the collective answer to the following four questions:
 - ❑ Whom do we serve (i.e. who are our clients)?
 - ❑ What do we offer (i.e. our product & services portfolio)?
 - ❑ Why do we matter (i.e. what is our competitive advantage which makes it imperative that clients should come to us and not go to the competition)? and
 - ❑ What is our ambition (i.e. what is our medium to longer-term goals and intent with the organisation)?

The relevance of this key leverage area in the broader advertising brief context is that it is this elusive strategic intent that is one of the key leverage areas in the establishment of an advertising brief and the subsequent roll-out of the advertising campaign. It is clear that the purpose here should be to ensure that the advertising



brief as developed and the subsequent campaign should both be aligned with the organisational brief and should through the advertising campaign contribute to the further building out of the organisational strategic intent.

Therefore, the business purpose here would have to be that which is specific to the particular advertising brief envisaged here, and would have to ultimately once a campaign is rolled out be aligned with the strategic intent of the financial services company and would in time further improve the market's perception of the brand of the organisation as aligned to the strategic intent, and would lead to better financial performance.

Further reading is available in the brief reference list below.

KLA # 01 References.

Hamel, G. & Prahalad, C.K. 2005 Strategic Intent. Harvard Business Review, July-August 2005.

Manning, T. 2001 Making Sense of Management, Zebra Publishers, 95 pp.

Mantere, S & Sillince, J.A.A. 2007 Strategic Intent as a rhetorical device. Scandinavian Journal of Management, ELSEVIER Publishers.

Odita, A.O. & Bello, A. 2015 Strategic Intent and Organizational Performance – A study of Banks in Asaba, Delta State, Nigeria. Journal for Information and Knowledge Management, Vol. 5, No. 4.

Times Media Group 2013 Market Pitch by TMG. Times Media Group

KLA # 02: Service offering

KLA # 02 Definition

The portfolio of service offerings of the financial services company will largely contribute to how well they can operate in their desired playing field (Hamel & Prahalad, 2005) and is the aggregate total of all the service offerings that the financial services company has deployed in the marketplace.

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- There are distinct differences between products and services (Lovelock et al, 2011):
 - Customers do not obtain ownership of services.
 - Service products are intangible performances.
 - There is greater involvement of customers in the production process.
 - Other people may form part of the product.
 - There is greater variability in operational inputs and outputs.
 - Many services are difficult for customers to evaluate.
 - There is typically an absence of inventories.
 - The time factor is relatively more important.
 - Delivery systems may involve both electronic and physical channels.
- The management of the service offering is best described by the 8P model of Lovelock and Wright (1999) which is an extension of the earlier 4P model of McCarthy (1960) and the 7P model of Booms and Bitner (1981) and addresses the following eight key components:
 - Product elements;
 - Place and time;
 - Process;
 - Productivity and quality;
 - People;
 - Promotion and education;

- Physical evidence; and
- Price and other costs of service.

The relevance of this key leverage area in the broader advertising brief context is that the financial services company has to ensure that it positions whatever it rolls out through an advertising campaign against its own offerings in the marketplace, where they would have to ensure that there is enough of a segmentation and the information shared in the marketplace is pitched such that customers can make an informed choice, but also in competition with those of its competitors. In doing so, it has to consider amongst others the 8Ps framework as mentioned above, with particular reference to the financial services taxonomy and demographics.

Further reading is available in the brief reference list below.

KLA # 02 References.

Booms, B.H. and Bitner, M.J. 1981 'Marketing Strategies and Organizational Structures for Service Firms', in Marketing of Services (eds), J.H. Donnelly and W.R. George (Chicago: American Marketing Association, 1981), pp. 47–51.

Hamel, G. & Prahalad, C.K. 2005 Strategic Intent. Harvard Business Review, July-August 2005.

Lovelock, C.H., Vandermerwe, S., Lewis, B. & Fernie, S. 2011 Services Marketing, Edinburgh Business School, Herriot-Watt University, Course Material SE-A1-engb 2/2011 (1027)

Lovelock, C.H. and Wright, H. 1999 Principles of Service Marketing and Management. Upper Saddle River: Prentice Hall.

McCarthy, E.J. 1960. Basic Marketing: A Managerial Approach, Homewood, IL: Richard D. Irwin, Inc., 1960.

KLA # 03: Market intelligence

KLA # 03 Definition

Appropriate market intelligence will inform management in the financial services company whether they are indeed achieving what they set out to do (Igbaekemen, 2014).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Although professionals and business managers frequently speak about market intelligence, business intelligence and competitive intelligence in an entirely interchangeable manner, these three concepts only partially overlap (Insource, 2008);
 - *Market intelligence* is information relevant to a company's markets, gathered and analysed specifically for the purpose of accurate and confident decision-making in determining strategy in areas such as market opportunity, market penetration strategy, and market development (Igbaekemen, 2014)
 - *Competitive intelligence* is the act of understanding a company's industry and industry rivals so the company can make better business decisions, while *business intelligence* refers to the tools, software and systems that play a vital role in the strategic planning process of a company (Tarver, 2015).
 - So in summary, competitive intelligence is important to make the marketing effective for a business (Ahmed et al, 2014)
- In this appendix, and thus also in this Key Leverage Area, we use market intelligence as the glue which pulls together market, business and competitive intelligence, as the mechanism that informs the (financial) services business of what is going on in the marketplace where they operate.



The relevance of this key leverage area in the broader advertising brief context is that market intelligence is like the eyes of the observer – without it the financial services company will stumble through the marketplace in an unsighted manner.

Further reading is available in the brief reference list below.

KLA # 03 References.

Ahmed, R.R., Ahmad, N., Khoso, I., Arif, K.A. & Palwishah, R.I. 2014. Competitive intelligence and marketing effectiveness of organizations: An investigation from Pakistan. European Scientific Journal May 2014 edition vol.10, No.13 ISSN: 1857 – 7881 (Print) e - ISSN 1857- 7431

Igbaekemen, G.A. 2014. Marketing intelligence as a strategic tool for competitive edge. British Journal of Marketing Studies, Vol.2, No.5, pp. 17-34. September 2014. Published by European Centre for Research Training and Development UK (www.eajournals.org) ISSN 2053-4043(Print), ISSN 2053-4051(Online)

INSOURCE 2008. Market Intelligence:- Method to Understand the Market. Course material for two-day Workshop in Prague, Czech Republic, 5th – 6th February 2008

Tarver, E. 2015 Investopedia Forum, Accessed online on 27 March 2016.

<http://www.investopedia.com/ask/answers/040915/what-difference-between-business-intelligence-and-competitive-intelligence.asp>

KLA # 04: Company brand

KLA # 04 Definition

The extended company brand will have to be adjusted to encompass the new reality that will be defined by the destination the financial services company decides on (Keller, 2002). The company brand is the collective medium to longer-term image created in the eyes of the marketplace, and specifically customers and potential customers of the financial services company.

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Aaker (2004) argues that the corporate brand of any organisation is defined primarily by its organisational associations; and that the corporate brand will therefore have a rich heritage of associations with organisational assets and capabilities, with the people of the organisation, present and past, with the values, principles and strategic intent of the organisation, with the geographic extent of its operational footprint, and with its projects, programmes and performance, business and otherwise.
- The terms company brand and corporate brand are used interchangeably in this appendix and in the dissertation.

The relevance of this key leverage area in the broader advertising brief context is that the service offering that is launched into the marketplace has to be aligned with the broader corporate brand of the financial services company, otherwise it will lead to confusion in the marketplace concerning the portfolio of offerings of the financial services company, and therefore also about its corporate brand, a development no company can afford.

Further reading is available in the brief reference list below.



KLA # 04 References.

Aaker, D.A 2004 Leveraging the Corporate Brand, California Management Review, Vol 46. No 3, Spring 2004. Adapted from Aaker, D. A. (2004) BRAND PORTFOLIO STRATEGY, Free Press, a division of Simon & Schuster, Inc. New York.

Keller, K.L. 2002 "Branding and Brand Equity", in Handbook of Marketing, eds., Weitz, B. and Wensley, R. Sage Publications, London, 151-178.

KLA # 05: The scope of the briefing engagement

KLA # 05 Definition

The scope of the briefing engagement will obviously go a long way towards putting in place exactly how one should go about it, but also importantly what you should and what you should not do and/or mention in the campaign, with due consideration for market conditions and the particular strengths and weaknesses of potential competitors in the marketplace (Manning, 2001; Hamel & Prahalad, 2005).

Against the background of the above definition, the following key defining references and its inherent constructs should be carefully considered and blended into the approach selected:

- The scope of the briefing engagement is very much part and parcel of the core theme of the dissertation. It is however, also, one of the key leverage areas for a successful briefing engagement and associated campaign, Therefore, it is listed here but not discussed in detail as that is done in the dissertation proper.
- For further reading on the topic, over and above Hamel & Prahalad (2005) and Manning (2001) – both papers incidentally being outside of the core literature on advertising briefs – it is recommended that readers refer to PRCA (2011; 2003), which are considered the definitive guides for the development of a briefing engagement, and/or the North American complementary guideline (ANA-4A's, 2011)

The relevance of this key leverage area in the broader advertising brief context is that more detail is always better than less detail, with the particular purpose of properly informing and educating customers and potential customers in the marketplace.

Further reading is available in the brief reference list below.



KLA # 05 References.

ANA-4A's, 2011 Agency Selection Briefing Guidance, Joint White Paper prepared by the US Association of National Advertisers (ANA) and the American Association of Advertising Agencies (4A's), October 2011.

Hamel, G. & Prahalad, C.K. 2005 Strategic Intent. Harvard Business Review, July-August 2005.

Manning, T. 2001 Making Sense of Management, Zebra Publishers, 95 pp.

PRCA, 2011. Briefing an Agency. Published by the United Kingdom Public Relations Consultants Association.

PRCA, 2003. THE CLIENT BRIEF: A best practice guide to briefing communications agencies. The UK Public Relations Consultants Association. A joint industry initiative.

KLA # 06: The actual message underlying the engagement and ultimately the campaign

KLA # 06 Definition

The message underlying the briefing engagement and the marketing campaign is really what the advertising agency has to embrace and fully understand and internalise if they are to do justice to the approach that the financial services company would want to follow as well as where they want to end up once a successful marketing campaign is launched (AccountAbility, 2011).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- The underlying message in the briefing to an advertising agency should clearly articulate, without any possibility of confusion or misunderstanding, how this brief fits in with the organisational strategic intent, or purpose, as defined in key leverage area number 1. Put in different words to those used in KLA # 01, the message to the agency should leave no uncertainty about any of the following (Mars DD, 2010):
 - The target customer(s) or market;
 - The compelling reason to use/buy the service;
 - The placement of the product/service within a new or existing market sector/category;
 - The key benefit(s) that directly address(es) the compelling reason(s) to buy;
 - The primary alternative source(s) (i.e. competitors) of (delivering) the same benefit; and
 - The key difference(s) or point(s) of differentiation of our service/product.

The relevance of this key leverage area in the broader advertising brief context is that this message has to be transmitted to any and every customer and potential



customer in such a way that they have no doubt about or confusion concerning the particular offering.

Further reading is available in the brief reference list below.

KLA # 06 References.

AccountAbility 2011 AA1000 Stakeholder Engagement Standard 2011 (Final Exposure Draft). Downloaded from www.accountability.org on 27 March 2016

MARS DD (Discovery District) 2010 Marketing Communications – MARS Entrepreneur Workbooks. Downloaded from www.marsdd.com on 28 March 2016

PRCA, 2011. Briefing an Agency. Published by the United Kingdom Public Relations Consultants Association.

Urban Wallace Associates 2005 Develop Marketing Communications or a Sales Message. White Paper downloaded from www.uwa.com on 27 March 2016

KLA # 07: High-functioning team

KLA # 07 Definition

The marketing brief engagement will be undertaken by a high-functioning team of participants from both the financial services company and the advertising agency, selected for their ability to get the job done (see Hoever, Van Knippenberg, Van Ginkel & Barkema (2012) for key enablers of high-functioning teams).

The relevance of this key leverage area in the broader advertising brief context is that diversity in the team has the potential to get the team to achieve beyond their normal sum of parts, because of the fact that the diversity in the team (financial services professionals as opposed to advertising professionals) kick-started the team, leading to innovative breakthroughs and excellent results.

Against the background of the above definition, it is important to note that the characteristics of high-functioning, or high-performing or high performance teams are fairly consistent across all industries, sectors, markets and businesses. Depending on the particular corporate brand and organisational culture and values, it may be necessary to by considering the key characteristics as listed in the sample reference list below tweak the characteristics required for any specific organisation. The references in the brief reference list below provide useful further reading in this regard.

KLA # 07 References.

Bank of America/Merrill Lynch 2012 How Leaders Build – and Impact – High-Performing Teams, a Bank of America / Merrill Lynch White Paper.

Hakanen, M., Häkkinen, M. & Soudunsaari, A. 2015 Trust in building high-performing teams – conceptual approach. EJBO Electronic Journal of Business Ethics and Organization Studies, Vol. 20, No. 2 (2015). Downloaded on 30 March 2016 from <http://ejbo.jyu.fi/>

Hoever, I.J., Van Knippenberg, D., Van Ginkel, W.P. & Barkema, H.G. 2012 Fostering Team Creativity: Perspective Taking as Key to Unlocking Diversity's



Potential. Journal of Applied Psychology, 2012, Vol. 97, No. 5, 982–996, © 2012 American Psychological Association.

IMA 1994 Managing Cross-functional Teams, Statements on Management Accounting, a title in the IMA Series Leadership Strategies & Ethics. IMA Publication Number 94295. Downloaded from www.imanet.org on 29 March 2016.

Taneja, S., Sewell, S. & Pryor, M.G. 2012 High Performance Executive Teams. American Journal of Management vol. 12(2/3) 2012 11

The Performance Room 2012 Characteristics of high performing teams. Online coaching resource, downloaded from <http://theperformanceroom.co.uk> on 28 March 2016.



KLA # 08: Quality team members

KLA # 08 Definition

This high-functioning team will be made up of quality team members, who will be appropriately skilled and experienced in the particular focus area for the marketing brief, will be excellent communicators, listeners and team players and who will in creative and innovative ways work together to craft the best possible campaign, focused on success (British Council, 2015).

The relevance of this key leverage area in the broader advertising brief context is that the collective ability, capacity and performance of the team will determine the quality of the outcomes achieved. Therefore the selection of team members is anything but a trivial exercise.

The sample reference list for high-functioning teams, from KLA # 07 above, is repeated here, as it provides good start-up reading to stimulate the team leader per se and the team members in general. It contains clear guiding principles on team composition, team functioning, team leadership and the impact of the above on team performance.

It is useful to against the background of the discussions in these articles/resources compare to the two overlapping but different lists of 9 characteristics/ingredients of good and effective teams, as given in Frico (2016) and Delta Partners (2016). Again, it is worthwhile taking the lessons on teamwork from across industry sectors.

KLA # 08 References.

Bank of America/Merrill Lynch 2012 How Leaders Build – and Impact – High-Performing Teams, a Bank of America / Merrill Lynch White Paper.

British Council 2015 Unlocking a world of Potential, British Council guiding document F038. Downloaded from the British Council website on 30 March 2016 at https://schoolsonline.britishcouncil.org/sites/so/files/core_skills_brochure_unlocking_a_world_of_potential.pdf



DeChurch, L.A. & Mesmer-Magnus, J.R. 2010. *The Cognitive Underpinnings of Effective Teamwork: A Meta-Analysis*. Journal of Applied Psychology 2010, Vol 95, No 1, 32-53.

Delta Partners 2016. *The nine ingredients of effective teamwork*; Downloaded on 31 March 2016 from the Delta Partners website at <http://deltapartners.ca/blog/the-9-ingredients-of-effective-teams>

Frico, D. 2016. *The nine attributes of successful teams, teamwork, and projects*. Downloaded from David Frigo's Management Resources website on 31 March 2016; <http://davidfrico.com/teamwork-attributes.pdf>

Hakanen, M., Häkkinen, M. & Soudunsaari, A. 2015 *Trust in building high-performing teams – conceptual approach*. **EJBO Electronic Journal of Business Ethics and Organization Studies, Vol. 20, No. 2 (2015)**. Downloaded on 30 March 2016 from <http://ejbo.jyu.fi/>

Hoever, I.J., Van Knippenberg, D., Van Ginkel, W.P. & Barkema, H.G. 2012 *Fostering Team Creativity: Perspective Taking as Key to Unlocking Diversity's Potential*. Journal of Applied Psychology, 2012, Vol. 97, No. 5, 982–996, © 2012 American Psychological Association.

IMA 1994 *Managing Cross-functional Teams, Statements on Management Accounting*, a title in the IMA Series Leadership Strategies & Ethics. IMA Publication Number 94295. Downloaded from www.imanet.org on 29 March 2016.

Jiang, X. 2010 *How to Motivate People Working in Teams*, International Journal of Business and Management Vol. 5, No. 10; October 2010, pp 223 - 229

Taneja, S., Sewell, S. & Pryor, M.G. 2012 *High Performance Executive Teams*. American Journal of Management vol. 12(2/3) 2012 11

The Performance Room 2012 Characteristics of high performing teams. Online coaching resource, downloaded from <http://theperformanceroom.co.uk> on 28 March 2016.

KLA # 09: Strategic leadership

KLA # 09 Definition

The team will be guided in a lead-from-the-front but inclusive decision taking manner with the highest level of strategic leadership (see, for example, Morgeson, DeRue & Karam 2010).

The relevance of this key leverage area in the broader advertising brief context is that the strategic leader will know where he or she is headed with the engagement, will furthermore know what skills, experience and team dynamics will be required to achieve it and will guide the team put together for this engagement towards success in an unerring manner.

The references below, again drawn from both previous KLAs and from across disciplines and market sectors, provide excellent exploratory further reading on team leadership.

KLA # 09 References.

Bank of America/Merrill Lynch 2012 How Leaders Build – and Impact – High-Performing Teams, a Bank of America / Merrill Lynch White Paper.

IMA 1994 Managing Cross-functional Teams, Statements on Management Accounting, a title in the IMA Series Leadership Strategies & Ethics. IMA Publication Number 94295. Downloaded from www.imanet.org on 29 March 2016.

Jiang, X. 2010 How to Motivate People Working in Teams, International Journal of Business and Management Vol. 5, No. 10; October 2010, pp 223 - 229

Morgeson, DeRue & Karam 2010 Leadership in Teams: A Functional Approach to Understanding Leadership Structures and Processes. Journal of Management, Vol. 36 No. 1, January 2010 5-39.

KLA # 10: Corporate governance framework

KLA # 10 Definition

Team practices, protocols and principles will be informed by the corporate governance framework of the financial services company. In choosing the preferred advertising agency as partner for the development of the marketing brief and associated campaign, due consideration should be given to the corporate governance “credentials” of the advertising agency, to ensure that the team of participants from the financial services company and the advertising agency can seamlessly come together and function as one highly effective team. In the South African context the King Commission’s work on corporate governance frameworks has really revolutionised thinking about how one goes about running a corporation (King I, II, III, IV; 2001 – 2015) but excellent literature also exists which links the principles of corporate governance to effective roll-outs in the operational domain (see for example Haque, Arun & Kirkpatrick, 2007)

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Corporate governance describes the relationship between the corporate body and the outside world, and is concerned with satisfying legitimate expectations for accountability (and transparency) and regulation by stakeholders beyond corporate boundaries. It refers to how management and employees regulate their behaviour with reference to decision making and the business environment, as well as to organisational relationships and structures, articles of association, fiduciary responsibility, shareholder reporting, assessment of pure risk exposure and assessment of SHE performance (King IV, 2016)
- According to Cadbury (1999) in a World Bank report on corporate governance, the core of Corporate Governance is not about power, but about finding ways to ensure that decisions are made effectively for the benefit of all stakeholders. He furthermore states that Corporate Governance has to achieve an optimal balance between freedom to manage, accountability (and transparency) and satisfying the interests of different stakeholders and that Corporate Governance

is thus dynamic in nature (underlined by entrepreneurial vision, flair and innovation).

The relevance of this key leverage area in the broader advertising brief context is that as stated in the definition above the corporate governance will dictate how things are done, and the team and specifically the team leader should at all times be attentive to potential pitfalls caused either by specific corporate governance guidelines or by the advertising brief undermining elements of the corporate governance.

Further reading is available in the brief reference list below. In studying these few references, in the context of the various other, earlier KLAs that deal with team composition, dynamics and functioning, one has to keep in mind that the field of corporate governance has developed maybe more than any other management area over the past twenty years, so later references should bear more weight.

KLA # 10 References.

Cadbury, A., 1999. Corporate Governance Overview, a World Bank Report, Washington, 1999.

Haque, F, Arun, T & Kirkpatrick, C 2007 Corporate Governance and Capital Markets: A Conceptual Framework, Corporate Ownership & Control, 5(2), 264-276. Downloaded on 25 April 2016 from <https://pureapps2.hw.ac.uk/portal/files/1920738/Haque2012.pdf>

King IV 2016 Draft King IVTM Report on Corporate Governance in South Africa. A report by the Institute of Directors, South Africa.

Maher, M & Andersson T 1999. Corporate Governance: Effects on Firm Performance and Economic Growth, OECD, 1999

KLA # 11: Alignment of organisational values and company culture

KLA # 11 Definition

In selecting the advertising agency partner to this venture the financial services company would have to ensure that there is sufficient alignment of values and culture between the individuals but also collectively between the advertising agency and the financial services company (Edmonds, 2010).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Yang and Hsu (2010) showed that there is a positive relationship between organizational process alignment, culture and innovation. Based on 175 culture surveys with results from numerous Asian organisations, they showed that there is a positive effect of structural and strategic alignments on adaptability culture, and that adaptability culture in turn has a direct impact on process innovation, and an indirect impact on product innovation through process innovation.
- Gorenak and Košir (2012), in a study based on a survey of 303 companies in Slovenia, demonstrated that those companies that had explicitly noted organisational values had a statistically significant positive correlation between these values and their performance, whereas that was not the case for those companies that did NOT have explicitly noted organisational values.
- Barrett (2006) argues that organisational values stand at the very core of organisational decision-making, and that when organisational values and culture align with the values and culture of individual employees (managers and staff members), these employees are more likely to bring personal commitment, energy, creativity, enthusiasm and passion to the table, which when unleashed on the job energises the entire team and leads to a positive relationship between values, culture and performance.

It therefore stands to reason that it would be advantageous to pay appropriate attention to the alignment of the individual and organisational culture and values of



members of the briefing team originating from both the financial services company and the advertising agency, as it is apparent from the literature that it is a key success factor (key leverage factor).

Therefore, the relevance of this key leverage area in the broader advertising brief context is that it would be beneficial for the development of an advertising brief if the team members originating from the financial services company and the advertising agency had aligned and/or complementary values and culture, although it is important to also remember the earlier comments about the impact of team diversity on team performance.

Further reading is available in the brief reference list below.

KLA # 11 References.

Barrett, R. [2006 Building a Values-Driven Organization: A Whole-System Approach to Cultural Transformation, Boston: Butterworth-Heinemann, 2006

Edmonds, S. C. 2010. The Culture Engine: A Framework for Driving Results, Inspiring Your Employees, and Transforming Your Workplace. Wiley Publishers.

Gorenak, M. and Košir, S. 2012. The Importance of Organizational Values for Organization. Paper presented at the International Conference on Management, Knowledge and Learning, 20–22 June 2012, Celje, Slovenia; pp 563 – 569.

O'Donnell, O. and Boyle, R. 2008. Understanding and Managing Organisational Culture, CPMR Discussion Paper No 40; Institute of Public Administration, Dublin, Ireland.

Viksten, A. and Holmström, L. 2015 Aligning Corporate Culture with Brand Values: - A case study of a financial tech SME. Master's Thesis in the Master's Programme Entrepreneurship and Business Design, Chalmers University of Technology, Sweden.

Yang, Y-C. and Hsu, J-M. 2010 Organizational process alignment, culture and innovation. African Journal of Business Management Vol. 4 (11), pp. 2231-2240, 4 September, 2010. Downloaded on 17 April 2016 from <http://www.academicjournals.org/AJBM>.

KLA # 12: Strategic conversations and dialogue with the team

KLA # 12 Definition

The marketing brief engagement team should, right from the planning phase, engage in team conversations and dialogue to ensure that both as far as the financial services team members briefing the rest of the team and in critical two-way communication to ensure that all viewpoints are taken on board in developing a sound project plan. DeChurch and Mesmer-Magnus (2010) through a meta-analysis of team dynamics showed the importance of team cognition, a parameter which is underpinned by open and transparent team conversations and dialogue, for successful team operations and teamwork.

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected (Please note that

- Van der Heijden (2005) introduces the combination of scenarios of the future on the one hand and strategic conversations on the other, as the powerful formula that made Shell a world leader in developing robust strategies that optimised the company's performance irrespective of which scenario of the future became the actual operating environment for the company. Using these principles in the briefing process can assist in the development of robust strategies for the advertising brief and associated campaign.
- Lunenburg (2010) shows the importance, when putting a team together such as is the case in the briefing engagement from staff originating from on the one hand the financial services company and on the other the advertising agency, to understand the communication process, the barriers potentially introduced by putting together the team from these two organisations, and how to optimise the communication process to ensure that optimal results are achieved.

The relevance of this key leverage area in the broader advertising brief context is that it is ever more important for all members of the team to be both good



communicators and good listeners, to ensure that nothing comes as a surprise to the team

Further reading is available in the brief reference list below.

KLA # 12 References.

DeChurch, L.A. & Mesmer-Magnus, J.R. 2010. The Cognitive Underpinnings of Effective Teamwork: A Meta-Analysis. Journal of Applied Psychology 2010, Vol 95, No 1, 32-53.

Lunenburg, F.C. 2010. Communication: The Process, Barriers, and Improving Effectiveness. Schooling, Volume 1, Number 1, 2010. Downloaded on 3 April 2016 from:

<http://www.nationalforum.com/Electronic%20Journal%20Volumes/Lunenburg,%20Fred%20C,%20Communication%20Schooling%20V1%20N1%202010.pdf>

Stephen, S., Cheveldave, M. & Gelowitz, C 2010 A Strategic Conversation: How to Engage Staff in Scanning and Scenario Building – A Case Study. Originally prepared in 2007 but updated in 2010. Downloaded from www.cognitive-edge.com on 20 March 2016. Copyright © 2007–10 Cognitive Edge Pte Ltd.

Van der Heijden, K. 2005. Scenarios – The Art of Strategic Conversation. 2nd Edition. John Wiley & Sons, Ltd. West Sussex, England. 393 pp.

KLA # 13: Unlocking team potential

KLA # 13 Definition

It would be pivotal to firstly select a marketing brief engagement team that has the right skills, competence and capacity mix as well as the right experience profile to address the brief and achieve and exceed success targets. However, associated to this but even more important is that one of the keys to achieve success is to make sure that the right resources and project governance is in place to ensure that it would be possible to unlock the individual and team potential to the benefit of the engagement (See for example Hoever, Van Knippenberg, Van Ginkel & Barkema, 2012).

Against the background of the above definition, it is apparent that unlocking team potential is a key leverage area for virtually any type of initiative. Therefore, the references quoted here are not aimed at advertising briefs per se, but they do highlight clearly key defining constructs that should be carefully considered and blended into the approach selected.

What is very clear in the quoted literature is that leadership from the front and good, appropriate and professional coaching and facilitation are key constructs that will help unlock the potential of the team members, in order to obtain a sum many times the parts, with the parts being individual potential.

The relevance of this key leverage area in the broader advertising brief context is that by unlocking the full team potential the chance of the engagement being a huge success is just so much better.

Further reading is available in the brief reference list below.

KLA # 13 References.

British Council 2015 Unlocking a world of Potential, British Council guiding document F038. Downloaded from the British Council website on 30 March 2016 at https://schoolsonline.britishcouncil.org/sites/so/files/core_skills_brochure_unlocking_a_world_of_potential.pdf



Hoever, I.J., Van Knippenberg, D., Van Ginkel, W.P. & Barkema, H.G. 2012 Fostering Team Creativity: Perspective Taking as Key to Unlocking Diversity's Potential. Journal of Applied Psychology, 2012, Vol. 97, No. 5, 982–996, © 2012 American Psychological Association.

International Coach Federation (2016) Unlock your potential. Brochure by the ICF, Lexington, Kentucky. Website accessed on 30 March 2016 at www.coachfederation.org/findacoach



KLA # 14: Operating to the highest professional and ethical standards

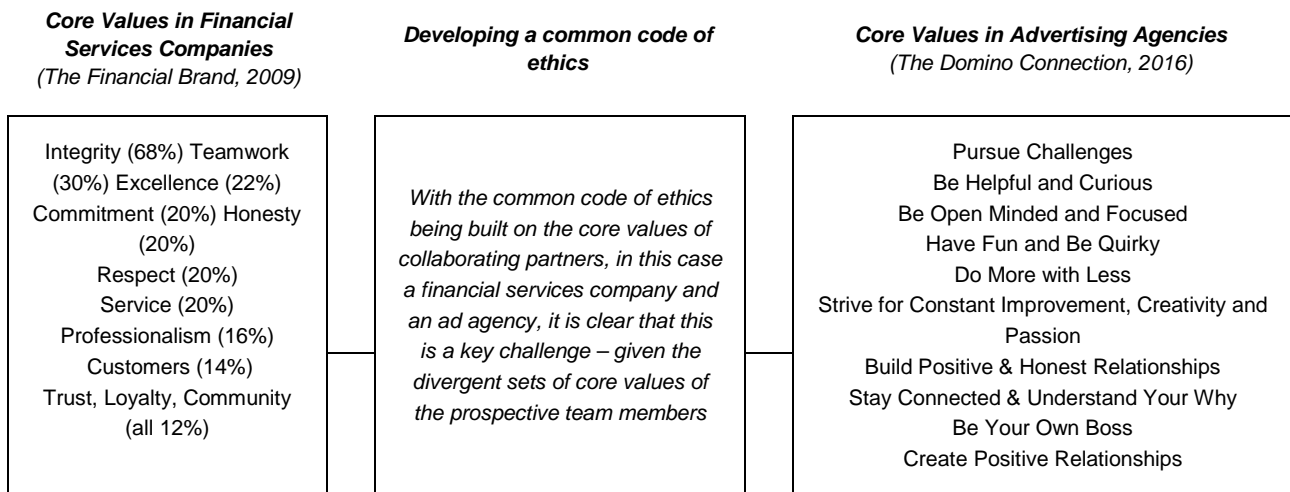
KLA # 14 Definition

The team should at all times uphold only the highest professional and ethical standards and team members should at all times keep one another honest and should not tolerate anything but the highest standards. With specific reference to marketing, the engagement team should ensure that all decisions taken in establishing the promotion mix i.e. 4P's, follow ethical principles and the team should act as if they will personally be responsible for the consequences of all activities following on their particular decisions (Reddy, 2013)

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Reference to the literature shows that irrespective of the industry sector, a company's code of ethics is underpinned by its values (see e.g. FPI, 2016; American Counseling Association, 2014; CFA Institute, 2014; PMI, 2006);
- It therefore stands to reason that in order to identify any possible challenges to the process of establishing a code of ethics for any venture, one has to look at the specific organisations (Reddy, 2013);

Comparison of core values in financial services companies and ad agencies





- The tabular representation above shows the substantial challenges in this regard faced by financial services companies every time they are contracting with advertising agencies for an advertising brief (The Financial Brand, 2009; The Domino Connection, 2016).

The relevance of this key leverage area in the broader advertising brief context is that it is not even negotiable, in order to deliver a service of the highest ethical and professional standard the team in general and every member of the team has to be measured by the same standards. Based on the evidence above, it is however one of the key matters to be negotiated and agreed up front. In this regard it is evident that there is substantial benefit involved for a financial services company to within reasonable limits stick to the same advertising agency, as the time and emotional investment involved to negotiating the code of ethics applicable to a collaborative venture is then spread over multiple ventures.

More detail is available in the brief reference list below.

KLA # 14 References.

American Counseling Association 2014. 2014 ACA Code of Ethics. As approved by the ACA Governing Council. Downloaded from www.counseling.org on 30 March 2016.

CFA Institute 2014 Code of Ethics and Standards of Professional Conduct. A document of the Chartered Financial Analysts Institute. Downloaded from www.cfainstitute.org on 2 April 2016.

FPI 2016 Code of Ethics and Professional Responsibility. A document of the Financial Planning Institute. Downloaded from www.fpi.co.za on 2 April 2016.

(ISC)² 2010 Code of Ethics. A document by (ISC)², the premier not-for-profit organisation dedicated to certifying information security professionals around the world. Downloaded from www.isc2.org/ethics/ on 6 April 2016.

PMI 2006 Code of Ethics and Professional Conduct, Project Management Institute. It was approved by the PMI Board of Directors in October 2006.



Reddy, G.H. 2013. Ethical Challenges in Marketing. IOSR Journal of Business and Management (IOSR-JBM) e-ISSN: 2278-487X, p-ISSN: 2319-7668 PP 48-50 www.iosrjournals.org IOSR Journal of Business and Management (IOSR-JBM) e-ISSN: 2278-487X, p-ISSN: 2319-7668 PP 48-50 www.iosrjournals.org

The Domino Connection 2016. The Domino Connection System. Downloaded from www.dominconnection.com on 7 April 2016.

The Financial Brand 2009. Core Values: Do All Banks Really Believe the Same Thing? Downloaded from <https://thefinancialbrand.com/4410/banks-core-values/> on 7 April 2016.

United Nations 2007. UN Core Values and Standards of Conduct. Working Together – Putting Ethics to Work. United Nations, New York.

KLA # 15: Logistical arrangements for the advertising brief engagement

KLA # 15 Definition

Over and above the detail of the marketing brief engagement and the associated marketing campaign, it is essential for the team to consider and appropriately address any and all logistical aspects of and arrangements regarding the brief (see for example Action for Enterprise (AFE), 2014; Geereddy, 2013);

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Porter (1985) mentioned the concept “value chain” in his seminal work on competitive advantage, and stated that the value chain analysis describes the activities performed by any organisation and that these activities are intrinsically linked to the organisation’s competitive position. In the context of this dissertation, therefore, it is imperative to properly plan all aspects of the engagement, or in the terminology of Porter the value chain of the advertising brief engagement. This is covered in more detail in Key Leverage Area # 18;
- What is more relevant here is to conduct an in-depth analysis of the aspects to be covered in the advertising brief engagement and analyse to what extent these could influence the roll-out of the engagement. In this respect the article by McDonald, Bradford & Erickson (2012) contains an excellent fault-finding approach used to highlight issues, bottlenecks, obstacles and critical failure paths upfront;
- When addressing this specific Key Leverage Area, it should not be done in isolation as it is clearly part of a larger portfolio of leverage areas in the broad area of communication, but it is at the same time the pivotal area to ensure appropriate engagement on the assignment.



The relevance of this key leverage area in the broader advertising brief context is that well-planned operations usually leads to well-executed operations and better than expected results.

Further reading is available in the brief reference list below, which is largely common to that of Key Leverage Area # 18, as there are significant touch points between the two leverage areas.

KLA # 15 References.

Action for Enterprise (AFE), 2014 Value chain program design: Promoting market-based solutions for MSME and industry competitiveness. Updated January 2014. Downloaded from www.actionforenterprise.org on 23 March 2016.

Agriculture and Food Council of Alberta 2004 Value Chain Guidebook: A Process for Value Chain Development. Prepared by the Value Chain Initiative. Downloaded from www.agfoodcouncil.com on 25 March 2016.

Geereddy, N. 2013 Strategic Analysis of Starbucks Corporation. Downloaded from <https://www.starbucks.com> on 25 March 2016.

Kaplinsky, R. and Morris, M. 2002. A handbook for value chain research. Prepared for the IDRC. Downloaded on 5 April 2016 from <http://www.value-chains.org/dyn/bds/docs/395/Handbook%20for%20Value%20Chain%20Analysis.pdf>

McDonald, M., Bradford, E. & Erickson, S. 2012 Marketing Plans: How to implement them and avoid the awful fate of others. Downloaded on 27 March 2016: <https://es.scribd.com/document/322546268/47-Marketing-Implementation-EB-v4>

Porter, M 1985 Competitive Advantage: Creating and sustaining superior performance. New York, Free Press, 1985.

USAID 2008 End market research toolkit – Upgrading value chain competitiveness with informed choice. Prepared for USAID by Rob Henning and Neal A. Donahue of OTF Group, and Margie Brand of EcoVentures International. USAID Press Washington. Downloaded from <https://www.usaid.gov/> on 30 March 2016.

KLA # 16: Project managing the advertising brief engagement

KLA # 16 Definition

It has been shown above that the ultimate approach is (would be) to manage the engagement “for success”. However, the question remains, how that will be done. The answer is simple, by managing the intricate detail the greater whole of the project will get into focus and success will be achieved through the proper project management of the engagement (See for example Bourne, 2010);

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- The reference by the Project Management Institute (PMI, 2006) used in the professional values and ethics Key Leverage Area # 14 above is equally relevant here and should provide excellent perspective on what the prerequisites are for a sustainable project management approach;
- Equally, the Value Chain discussion in Key Leverage Area # 15 is pertinent here as it defines the scope and time scales of the project management plan;
- Specifically the article by McDonald et al (2012) is valuable in that it helps structure the project management thinking up front to anticipate potential problem areas;
- Lastly, although this will be handled elsewhere, in the Key Leverage Areas dealing with monitoring and success measurement (# 19, # 21, # 22, # 23, # 25) and on the cost-effectiveness of the advertising brief (# 24), it will be important to when drawing up the project management plan pay attention to the respective roles and responsibilities of the respective teams (team members), covered in Key Leverage Area # 26, as this will influence the success of any engagement.



The relevance of this key leverage area in the broader advertising brief context is that managing for success is one of the best ways to get success, done consistently it leads to a culture of success.

Further reading is available in the brief reference list below.

KLA # 16 References.

Bourne, L 2010 Stakeholder Relationship Management: Using the Stakeholder Circle methodology for more effective stakeholder engagement of senior management. Paper presented at the 7th Project Management National Benchmarking Forum; PMI Chapter, Rio de Janeiro, Brazil. 24 to 26 November, 2010.

Long View Systems 2016 Converged Infrastructure Engagement Overview. Downloaded from <http://www.longviewsystems.com/> on 29 March 2016.

McDonald, M., Bradford, E. & Erickson, S. 2012 Marketing Plans: How to implement them and avoid the awful fate of others. Downloaded on 27 March 2016: <https://es.scribd.com/document/322546268/47-Marketing-Implementation-EB-v4>

PMI 2006 Code of Ethics and Professional Conduct; Project Management Institute. It was approved by the PMI Board of Directors in October 2006.

PMI and BCG 2014 Pulse of the Profession® In-Depth Report: Executive Sponsor Engagement – Top Driver of Project and Program Success. Published in October 2014. Downloaded from <https://www.PMI.org/PULSE/> on 29 March 2016.

KLA # 17: Strategic conversations and dialogue with key market role players

KLA # 17 Definition

In order to keep abreast of the newest trends and expectations in the market, and to further the cause as promoted by the marketing campaign through the maintenance and building out of the commitment and trust as promoted by the so-called relationship marketing (Morgan & Hunt, 1994), it will be essential to engage in market stakeholder conversations and dialogue (Stephen, Cheveldave & Gelowitz, 2010).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- The field covered here lies at the heart of the study of advertising briefs commissioned by financial services companies and is discussed in detail in the main body of the dissertation. The references below provide a broad and fresh perspective on the topic and could prove useful when read in conjunction with the references and text contained in the dissertation proper.

The relevance of this key leverage area in the broader advertising brief context is that the quality of the conversations in the market will determine the quality of the outcome of the advertising brief process.

Further reading is available in the brief reference list below.

KLA # 17 References.

Igbaekemen, G.A. 2014. Marketing intelligence as a strategic tool for competitive edge. British Journal of Marketing Studies, Vol.2, No.5, pp. 17-34. September 2014. Published by European Centre for Research Training and Development UK (www.eajournals.org) ISSN 2053-4043(Print), ISSN 2053-4051(Online)

Morgan, R.M. and Hunt, S.D. 1994. The Commitment-Trust Theory of Relationship Marketing. Journal of Marketing, Volume 58 (July 1994), pp 20-38.



Saylor Academy 2010 BUS203 Principles of Marketing; Chapter 10 – Gathering and using information: Marketing research and market intelligence. Downloaded from <http://www.saylor.org/courses/bus203> on 27 March 2016.

Smid, P. 2008 Market Intelligence – Method to understand the market. Paper presented at INSOURCE 2008 held in Prague, Czech Republic, 5 – 6 February 2008. Downloaded from www.insource.cz/en/proceedings/178/ on 4 April 2016.

Stephen, S., Cheveldave, M. & Gelowitz, C 2010 A Strategic Conversation: How to Engage Staff in Scanning and Scenario Building – A Case Study. Originally prepared in 2007 but updated in 2010. Downloaded from www.cognitive-edge.com on 20 March 2016. Copyright © 2007–10 Cognitive Edge Pte Ltd.

KLA # 18: Advertising brief process value chain

KLA # 18 Definition

The advertising brief engagement team needs to consultatively with other key stakeholders in the process value chain develop the advertising brief process value chain (Action for Enterprise (AFE), 2014), and with due consideration for the resources available to the team.

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Porter (1985) mentioned the concept “value chain” in his seminal work on competitive advantage, and stated that the value chain analysis describes the activities performed by any organisation and that these activities are intrinsically linked to the organisation’s competitive position. In the context of this dissertation, therefore, it is imperative to properly plan all aspects of the engagement, or in the terminology of Porter the value chain of the advertising brief engagement;
- The brief reference list below contain a few excellent guide books on how to design value chains specifically for the benefit of all collaborating parties to a venture or agreement (Agriculture and Food Council of Alberta, 2004; Kaplinsky and Morris, 2002 and USAID, 2008);
- Sturgeon (2008) discusses aspects relating to (1) the perspective used to develop the value chain (“buyer-driven” versus “producer-driven” or a more neutral approach which is more objective) and (2) following on from the previous point, the desired framework for the governance value chain. It provides an excellent platform for the assessment of the relevance, adequacy and target-focus of the value chain(s) as developed. It is also a useful link to the next Key Leverage Area (# 19), which deals in more detail with the governance of value chains.

The relevance of this key leverage area in the broader advertising brief context is that the very process of talking about the value chain, learning to better understand



the value chain and where appropriate and relevant to improve the existing value chain makes it easier to operate in the value chain and helps guarantee better and more consistent results.

Further reading is available in the brief reference list below.

KLA # 18 References.

Action for Enterprise (AFE), 2014 Value chain program design: Promoting market-based solutions for MSME and industry competitiveness. Updated January 2014. Downloaded from www.actionforenterprise.org on 23 March 2016.

Agriculture and Food Council of Alberta 2004 Value Chain Guidebook: A Process for Value Chain Development. Prepared by the Value Chain Initiative. Downloaded from www.agfoodcouncil.com on 25 March 2016.

Geereddy, N. 2013 Strategic Analysis of Starbucks Corporation. Downloaded from <https://www.starbucks.com> on 25 March 2016.

Kaplinsky, R. and Morris, M. 2002. A handbook for value chain research. Prepared for the IDRC. Downloaded on 5 April 2016 from <http://www.value-chains.org/dyn/bds/docs/395/Handbook%20for%20Value%20Chain%20Analysis.pdf>

Porter, M 1985 Competitive Advantage: Creating and sustaining superior performance. New York, Free Press, 1985.

Sturgeon, T.J. 2008 From Commodity Chains to Value Chains: Interdisciplinary theory building in an age of globalization. MIT Report MIT-IPC-08-001 MIT Press, Cambridge, MA.

USAID 2008 End market research toolkit – Upgrading value chain competitiveness with informed choice. Prepared for USAID by Rob Henning and Neal A. Donahue of OTF Group, and Margie Brand of EcoVentures International. USAID Press Washington. Downloaded from <https://www.usaid.gov/> on 30 March 2016.

KLA # 19: Value chain governance framework

KLA # 19 Definition

At the same time it is importance to establish a sub-set of the organisational corporate governance framework on and for the engagement team, which identifies and beds down the governance framework for the marketing brief engagement value chain. Refer to useful practical notes based on extensive experience in this regard as captured in USAID (2008).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- USAID (2008) discusses the matter in great detail and is a very good reference to guide one along with regard to value chain governance, but it is useful to highlight just a few points here, USAID says amongst others that one should:
 - Clearly define the decisions to be made with the research;
 - Understand the context and capabilities of the Value Chain;
 - Strategy should begin with understanding customer needs (remember that strategy can be defined as “Informed Choice and Timely Action”);
 - Competitors should be benchmarked to determine best practice and differentiation strategies;
 - Market research is useless without clear communications throughout the process; and,
 - Strategic choices should be the outcome of a well-designed market research effort (NOTE: Research for the sake of information gathering is money poorly spent).

The relevance of this key leverage area in the broader advertising brief context is that in similar fashion to the adherence to corporate governance, it remains



incredibly important to also establish rigorous value chain governance and to at all times adhere to it.

Further reading is available in the brief reference list below.

KLA # 19 References.

Sturgeon, T.J. 2008 From Commodity Chains to Value Chains: Interdisciplinary theory building in an age of globalization. MIT Report MIT-IPC-08-001 MIT Press, Cambridge, MA.

USAID 2008 End market research toolkit – Upgrading value chain competitiveness with informed choice. Prepared for USAID by Rob Henning and Neal A. Donahue of OTF Group, and Margie Brand of EcoVentures International. USAID Press Washington. Downloaded from <https://www.usaid.gov/> on 30 March 2016.

Willis, J.S. 2014 Governance and Innovative Capabilities in Global Value Chain: A Conceptual Framework. Paper presented at the DRUID Academy Conference in Aalborg, Denmark on 15-17 January, 2014.

KLA # 20: Mutual agreement on the process to be followed

KLA # 20 Definition

Whereas on the one hand the advertising brief engagement team has to mutually agree on the respective roles and responsibilities for the team members and the parties to the engagement, it is also imperative that these same parties should upfront reach mutual agreement on the processes in the engagement value chain. Frequently it will be easier for the parties to the engagement team to agree a process by which to establish what the engagement value chain will look like, thus in a way leading to an indirect approach to get mutual agreement on the processes (see for example, Ensign, 2001)

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Ensign (2001) discusses the development of efficient and effective value chains, and he suggests that one should up-front understand all the different linkages and interrelationships associated with the value chain, the various stakeholders and the impacted and implicated parties and areas;
- Tyagi (2013) reviews the various types of listening styles and emphasises the importance of all team members from all participating parties listening attentively, objectively and without prejudice to any communication. Active discussion of key points to ensure a shared understanding of all that is involved is encouraged to in turn ensure that the end result is what everyone bought into;
- Mutual agreement on the process to be followed in the advertising brief engagement is such a critical aspect of the whole process that it essential to make sure that all team members from all parties represented in the engagement are totally on board in this regard. There are essentially three broad approaches to follow to achieve this:

- Senior management members from all participating partners thrash out the deal and then simply instruct their staff on the team on what to do. This approach is low on empowerment and is also generally not recommended. However, depending on the organisational cultures of the respective parties to the agreement this approach is frequently the one followed (by necessity);
- Typically one or more parties to the engagement team develop a framework document that contains a list of all the items/actions/issues that are usually part of such an engagement and use this document – or in cases where both parties have such documents/check lists – develop jointly a mutually agreed single document that agrees on processes, protocols, review procedures and the likes. Important to this approach, which is preferable, is that once this protocols, processes and procedures document, or as it is frequently more formally called, a “terms of engagement” document, has been finalised, it is essential that all team members are totally familiarised with the contents. One approach for such a familiarisation is to give each engagement team member a copy, another is for each party to the engagement team to thoroughly grill (familiarise) their team members in the content but the best is for the senior members on the team to in a joint session of the entire team discuss every aspect of these terms of engagement document, to ensure that everybody from all (mostly both) parties are on the same page. Deloitte (2014) and AIGA (2013) contain generic guidelines for what is involved. Although neither document is directly relevant to either the advertising fraternity or the financial services sector, it does give an idea of the types of issues to be addressed. The research in this academic study has shown that few of those surveyed and/or interviewed made mention of such a general terms of agreement document. However, it is reasonable to expect that the financial services company will have some sort of briefing document, containing not only the detail of what is to be achieved, but also the process to be generally followed, and equally, that the advertising company will have a list or

schedule that they will use to ensure that everything they deem important to have been addressed upfront has in fact been covered.

- It is clear that the first two options can also be executed by mixing the two approaches to a greater or lesser extent. Since it is clear that good communication skills are pivotal in this process of mutual agreement, and in fact listening skills are paramount, it is a good supportive tactic to make some tutoring material on communication or listening competence or both available to new or junior team members, to ensure that they get up to speed with this important team skill. As such this would then support such team members, irrespective of whether the first or the second approach is followed. The reference list below contains some references which can effectively be used to teach communication and/or listening skills, but this is a fast-growing field and either a book search in your bookshop or library or a properly structured search on the internet will yield a wealth of resources.

In conclusion, the relevance of this key leverage area in the broader advertising brief context is that by focusing on the value chain, but more importantly also agreeing on the value chain, helps pull the team together, it leads to better team performance and it will contribute to success.

Further reading is available in the brief reference list below.

KLA # 20 References.

General Reading

Ensign, P.C. (2001) Value Chain Analysis and Competitive Advantage: Assessing Strategic Linkages and Interrelationships. Journal of General Management. 27(1): pp 18–42.

Markos, S. and Sridevi, M. S. 2010. Employee Engagement: The key to improving performance. International Journal of Business and Management, Vol 5, No 12; December 2010.



Hsu, C-C, and Sandford, B.A. 2007 The Delphi Technique – Making Sense of Consensus. Practical Assessment, Research & Evaluation, Vol 12, No 10, August 2007

References dealing with Terms of Engagement

AIGA 2013 *Standard form of agreement for design services.* An AIGA instructional resource available to all its members. Downloaded on 7 June 2016 from:

<https://www.aiga.org/globalassets/aiga/content/tools-and-resources/46874510-standard-form-of-agreement-for-design-services.pdf>

Deloitte 2014 *Stakeholder engagement.* A Deloitte South Africa framework document, downloaded on 6 April 2016 from:

https://www2.deloitte.com/content/dam/Deloitte/za/Documents/governance-risk-compliance/ZA_StakeholderEngagement_04042014.pdf

References dealing with Communication and/or Listening

Tyagi, B. 2013 *Listening: An important skill and its various aspects.* The Criterion, Issue 12, February, 2013. Downloaded from www.the-criterion.com; e-journal.

Dixon, T. and O'Hara, M. 2006 *Communication Skills – Making Practice Based Learning Work.* A resource commissioned by the Making Practice Based Learning Work project, an educational development project funded through FDTL Phase 4 Project Number 174/02 and produced by staff from the University of Ulster. Downloaded on 5 April 2016 from www.practicebasedlearning.org

Lunenburg, F.C. 2010. *Communication: The Process, Barriers, and Improving Effectiveness.* Schooling, Volume 1, Number 1, 2010. Downloaded on 3 April 2016 from:

<http://www.nationalforum.com/Electronic%20Journal%20Volumes/Lunenburg,%20Fred%20C,%20Communication%20Schooling%20V1%20N1%202010.pdf>

KLA # 21: Managing performance in the advertising brief engagement

KLA # 21 Definition

Managing performance in the engagement is typically a project management activity; it should be taken on board by the marketing brief engagement team and managed with appropriate consideration for project time lines, the project team's competence, capacity and experience and as always with eye on day-to-day unfolding of the project playing field and horizon (See for example Victoria State Government, 2012; Bourne, 2010).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Pulakos (2004) amongst others lists the following possible outcomes from effective performance management:
 - “Clarifying job responsibilities and expectations.
 - Enhancing individual and group productivity.
 - Developing group member capabilities to their fullest extent through effective feedback and coaching.
 - Driving behaviour to align with the group's core values, goals and strategy.
 - Providing a basis for making operational human capital decisions, for example, about each group member's contributions and worth to the group; and
 - Improving communication between group members and group management.”

The relevance of this key leverage area in the broader advertising brief context is that performance management of team (group in the list above) and project outcomes against well-established, agreed and shared targets is a certain success recipe.



The references below cover a wide range of performance management topics and are a useful set of further reading.

KLA # 21 References.

Aguinis, H. 2005 Performance Management. Course presented at the Edinburgh Business School, Herriot-Watt University. Downloaded on 30 March 2016 from <https://www.ebsglobal.net/EBS/media/EBS/PDFs/Performance-Management-Course-Taster.pdf>

Bourne, L 2006 Project Relations Management and the Stakeholder Circle™. Paper presented at the PMI Conference in Montreal, Canada. 16 to 19 July, 2006.

Bourne, L 2010 Stakeholder Relationship Management: Using the Stakeholder Circle methodology for more effective stakeholder engagement of senior management. Paper presented at the 7th Project Management National Benchmarking Forum; PMI Chapter, Rio de Janeiro, Brazil. 24 to 26 November, 2010.

GUIDEMAPS Consortium 2011 Successful transport decision-making: A Project Management and Stakeholder Engagement Handbook. A Resource prepared by the GUIDEMAPS Consortium for the European Commission. Downloaded on 17 March 2016 from http://www.osmose-os.org/documents/316/GUIDEMAPSHandbook_web%5B1%5D.pdf

Hsu, C-C, and Sandford, B.A. 2007 The Delphi Technique – Making Sense of Consensus. Practical Assessment, Research & Evaluation, Vol 12, No 10, 08-2007

Long View Systems 2016 Converged Infrastructure Engagement Overview. Downloaded from <http://www.longviewsystems.com/> on 29 March 2016.

PMI and BCG 2014 Pulse of the Profession® In-Depth Report: Executive Sponsor Engagement – Top Driver of Project and Program Success. Published in October 2014. Downloaded from <https://www.PMI.org/PULSE/> on 29 March 2016.

Pulakos, E. D. 2004 Performance Management – A roadmap for developing, implementing and evaluating performance management systems. Developed for the Society for Human Resource Management. Downloaded on 12 April 2016 from <https://www.shrm.org/india/hr-topics-and-strategy/performance-management/creating-high-performance-culture/Documents/Performance%20Management.pdf>



University of Wisconsin 2007 Facilitator Tool Kit – A guide for helping groups get results. Document prepared by the Office of Quality Management, University of Wisconsin, Thayer-Hart (Ed). Version 2.0, Revised September, 2007.

Victoria State Government 2012 Managing Major Projects. Report by the Auditor-General of the State of Victoria, Australia. PP No 175, Session 2010-12. Victorian Government Printer, October 2012.

KLA # 22: Rigorous success matrix to evaluate successful roll-out of advertising campaign

KLA # 22 Definition

The roll-out of a success matrix which clearly stipulates what has to be achieved, how it has to be achieved and importantly how the financial services company will measure whether the marketing brief engagement team has indeed achieved this, is a crucial first step. Over the past twenty years a number of excellent articles have been published that charts the elements of the success matrix for a marketing campaign for a new product, services or an upgraded version of an existing product or service (Hultink and Robben, 1995).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Kanagal (2014) looks on the one hand at the nature of objective setting in marketing metrics (that is, the up-front process) and on the other at potential influencers (positive and/or negative), such as team performance, managerial effectiveness, managerial efficiencies and the impact of (other) internal or external parameters that may have been overlooked. Kanagal then proceeds to review the use and functionality of marketing metrics to evaluate impact as well as monitor results and return on marketing investment (ROMI).
- Farris et al (2010) is indeed a definitive guide and provides an authoritative and comprehensive review of marketing metrics approaches, tools and templates, and is really a must-read reference.
- Ambler et al (2004) discuss the assessment of marketing performance and specifically how to make sense of and select the appropriate metrics from more than 50 available metrics constructs. The settle on a list that includes aspects of consumer attitudes and behaviour, customer perspectives and satisfaction; competitor performance and impacts; product and service innovation; and value for money.



- Hultink and Robben (1995) on the other hand, specifically addressed measures (16 in all) to measure the degree of new product success. Since this is crucial in the development of advertising briefs for new financial services sector products and services it is of particular relevance here. They highlight issues pertaining to customer acceptance and satisfaction; product/service performance and perceived quality; development cost and breakeven time; time to market measures; sales statistics and return on investment and conclude that most of these are sensitive to when the measurement is done (thus they are time sensitive).
- When establishing a success matrix for an advertising brief engagement, it is important that the engagement team is well aware of all aspects of the product/service as well as current market sentiment and what measures are most appropriate to assess both the advertising brief development and ultimately the product/service launch.

The relevance of this key leverage area in the broader advertising brief context is that the establishment of a success matrix covering all aspects of the advertising brief engagement is a prerequisite to proper and quality project and performance management.

Further reading is available in the brief reference list below.

KLA # 22 References.

Ambler, T., Kokkinaki, F. & Puntoni, S. 2004 Assessing Marketing Performance: Reasons for Metrics Selection. Journal of Marketing Management, 2004, 20, pp 475-498.

Farris, P.W., Bendle, N.T., Pfeifer, P.E. & Reibstein, D.J. 2010 Marketing Metrics, 2nd Edition. The Definitive Guide to Measuring Marketing Performance. 432 pp. Pearson Education, New Jersey, USA.

Hultink, E. J. and Robben, S. H. J. 1995 Measuring new product success – The difference that time perspective makes. Journal of Product Innovation Management, 1995, Volume 12, pp 392-405. Elsevier, New York.



Kanagal, N.M. 2014 Conceptualizing objective setting and metrics in marketing strategy. *Journal of Management and Marketing Research* Volume 16 – August, 2014. Downloaded on 22 March 2016 from <http://www.aabri.com/manuscripts/141925.pdf>

KLA # 23: Measuring impact on organisational brand leadership

KLA # 23 Definition

It is also important to establish up-front what the potential contribution would be to the organisational brand leadership of the financial services company in the likely event that the campaign is a success, on the one hand, but on the other to assess up-front what the potential risk to the organisational brand leadership of the organisation would be in the unlikely event of campaign failure (see excellent discussion in Aaker, 2004).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Aaker (2004) argues that the corporate brand of any organisation is defined primarily by its organisational associations; and that the corporate brand will therefore have a rich heritage of associations with organisational assets and capabilities, with the people of the organisation, present and past, with the values, principles and strategic intent of the organisation, with the geographic extent of its operational footprint, and with its projects, programmes and performance, business and otherwise. Therefore, it is important to develop metrics for the ultimate impact of the advertising brief engagement on the organisational/corporate brand leadership;
- Székely and Knirsch (2005) evaluated the wide array of approaches for the measurement of organisational brand perception and effectiveness that have increasingly started to expand to include above and below the line items as well as business performance and social impact dimensions;
- Aaker (2004); Heding et al (2009); Székely and Knirsch (2005) and CIM (2003) all contain very useful discussions about and frameworks for the establishment of brand leadership measurement frameworks and it may be useful for the contracting organisation in the marketing brief engagement, in the case of this academic study the financial services company, to establish

such a framework with specific reference in the measurement framework to the measurement of the launch of new products and/or services on the organisational brand leadership.

The relevance of this key leverage area in the broader advertising brief context is that the success or not of the advertising brief engagement and associated advertising campaign is bound to impact either positively or negatively on the corporate brand leadership, in fact not only that of the financial services company but also of the advertising agency.

Further reading is available in the brief reference list below.

KLA # 23 References.

Aaker, D.A 2004 Leveraging the Corporate Brand, California Management Review, Vol 46. No 3, Spring 2004. Adapted from Aaker, D. A. (2004) BRAND PORTFOLIO STRATEGY, Free Press, a division of Simon & Schuster, Inc. New York.

Heding, T., Knudtzen, C. and Bjerre, M. 2009 Brand Management – Research, Theory and Practice. Routledge, New York. 286 pp.

Székely, F. and Knirsch, M. 2005 Leadership and Corporate Responsibility – Metrics for Sustainable Corporate Performance. Document ESMT CRLSF # 1; Working Paper Series on Responsible Leadership and Sustainability. Center for Responsible Leadership and Sustainable Futures; European School of Management and Technology, Berlin. Downloaded on 21 April 2016 from <http://bengin.net/paperse/ESMT%20Working%20Paper%20Metrics.pdf>

The Chartered Institute of Marketing (CIM) 2003 Measuring Brand Performance. A copyrighted resource of the CIM. Downloaded from <http://mktg.uni-svishtov.bg/ivm/resources/Measuring%20Brands%20and%20their%20Performance.pdf>

KLA # 24: Cost-effectiveness of the advertising brief

KLA # 24 Definition

The project may have been given specific targets and time lines, but at all times the project team management has to make sure that they also keep the cost-effectiveness of the marketing brief in mind. The only time when the project team should be able due to throw cost-effectiveness overboard would be if due to unforeseen circumstances they would only be able to reach the desired end point for the race if they splash on the expenses, and then only if they had carefully considered all other alternatives (for example see a best practice guide (Woolf et al, 2013) and a practical assessment in the field by Hanson et al, 2003).

The relevance of this key leverage area in the broader advertising brief context is that the contest for market share is fierce and grossly over-budget campaign would attract all the wrong attention and can and will negatively impact the service offering and the brand.

Further reading is available in the brief reference list below.

KLA # 24 References.

Hanson, K., Kikumbih, N., Armstrong Schellenberg, J., Mponda, H., Nathan, R., Lake, S., Mills, A., Tanner, M. & Lengeler, C. 2003 Cost-effectiveness of social marketing of insecticide-treated nets for malaria control in the United Republic of Tanzania. Bulletin of the World Health Organization 2003, 81 (4). Downloaded on 5 April 2016 from <http://www.who.int/bulletin/volumes/81/4/Hanson0403.pdf>

Woolf, T., Malone, E., Schwartz, L. & Shenot, J. 2013 A Framework for Evaluating the Cost-Effectiveness of Demand Response. Prepared for the National Forum on the National Action Plan on Demand Response: Cost-effectiveness Working Group. Downloaded on 29 December 2016 from https://emp.lbl.gov/sites/all/files/napdr-cost-effectiveness_0.pdf

KLA # 25: Upfront, mutual agreement on the measures of success

KLA # 25 Definition

Although the financial services company has to establish a framework for and have a clear indication of the success criteria that they want to inform the engagement and campaign, mutual agreement on the success measures are absolute essential to ensure that the marketing brief engagement, firstly, will be a success. Various approaches can be followed to reach agreement on the success measures, however, when selecting a method for use in the engagement team it will be essential to select an approach that will not compromise the work done to reach agreement (AmyPoh, Saludin & Mukaidono, 2004).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- In addressing this Key Leverage Area about developing consensus regarding measures of success, the reader also has to refer to Key Leverage Areas 12, 16, 18, 20, 21 and 22. The references quoted and listed for these KLAs are equally relevant here.
- Whether one uses a simple communication-based approach to reach consensus or a more formal, structured approach, the references below provide a good basis for deciding how to approach this. KLA # 20, that is, the “terms of engagement” KLA, is specifically relevant here since it may be appropriate to in this “terms of engagement” document stipulate how consensus on the success measures for the engagement will be reached.

The relevance of this key leverage area in the broader advertising brief context is that just means that the members from the two parties, that is the financial services company and the advertising agency are playing to the same set of goal posts.

Further reading is available in the brief reference list below.



KLA # 25 References.

AmyPoh, A., Saludin, M. N. & Mukaidono, M. 2004 Deriving consensus rankings via multicriteria decision making methodology. A University of Malaysia Research Report. Downloaded from <https://arxiv.org/ftp/arxiv/papers/1201/1201.1604.pdf>

International Organization for Standardization 2010 Guidance for ISO national standards bodies – Engaging stakeholders and building consensus. © ISO – December 2010/3 000 – ISBN 978-92-67-10540-6. Downloaded on 3 April 2016 from http://www.iso.org/iso/guidance_nsb.pdf

World Health Organization (WHO) 2014 Chapter 16 Decision-making for guideline development at WHO. Handbook for guideline development – 2nd ed. (ISBN 978 92 4 154896 0). pp 201-214. © World Health Organization 2014. Downloaded on 23 June 2016 from http://www.who.int/publications/guidelines/Chp16_May2016.pdf

KLA # 26: Upfront, mutual agreement on the respective roles and responsibilities

KLA # 26 Definition

Mutual agreement on the roles and responsibilities of the individual team members, but also of the corporate parties to the agreement, the financial services company and the advertising agency, with due consideration for the skills, competence and experience portfolio of each team member (see for example Goold & Campbell, 2003; OECD/Mountford 2009).

Against the background of the above definition, the following key defining constructs should be carefully considered and blended into the approach selected:

- Goold and Campbell (2003) suggest that managers find matrix structures, as is often used in engagements such as the advertising brief engagement described in this academic dissertation, ambiguous and difficult to manage properly, basically because they do not upfront have clarity on the respective roles and responsibilities of the various units/groups making up the engagement team. They proceed to put forward eight generic types of unit role, which we believe can be a valuable addition to the “terms of engagement” document discussed in KLA # 20 and KLA # 25. They suggest that addressing these eight areas is essential to making a matrix structure work effectively. These eight generic roles are:
 - The *managing unit/group*, typically the contracting party (such as the financial services company), will play a ***value-added managing role***, to protect mutual self-interest;
 - The *core resource group*, typically a project management unit from the contracted party (such as an ad agency) and who are responsible for resource deployment and utilisation, will play a ***resource-focused role***;
 - *Service units*, typically from either the contracting or the contracted party, such as HR, Finance or ICT Units, play a ***service-focused role***;

- *Project units*, typically from the contracted party, who are responsible for project delivery, typically play a **project-focused role**;
 - *Overseeing units and/or resources*, such as (a) principal(s) of either the contracting and/or the contracted parties and who are responsible for overall effectiveness of the engagement, play a **market-focused role**;
 - The *business unit and sub-business units* for which the engagement is being undertaken, typically from the contracting party but NOT usually involved in the engagement play both play **bottom-line based market-focused roles**; and
 - *Functional resources* (specialist service providers) typically either brought onto the team by the contracted party to perform a specific specialist function or by the contracting party to oversee specialist functions on the team, play a **functional role** only.
- KLA # 20, that is, the “terms of engagement” KLA, is specifically relevant here since it may be appropriate to in this “terms of engagement” document stipulate how consensus about the respective roles and responsibilities of team players will be reached.

The relevance of this key leverage area in the broader advertising brief context is that if the team members from across the two groups really understand what contributions each member of the team can make towards the engagement performance and outcomes, thus integrating their contributions.

Further reading is available in the brief reference list below.

KLA # 26 References.

AmyPoh, A., Saludin, M. N. & Mukaidono, M. 2004 Deriving consensus rankings via multicriteria decision making methodology. A University of Malaysia Research Report. Downloaded from <https://arxiv.org/ftp/arxiv/papers/1201/1201.1604.pdf>

Goold, M, and Campbell, A. 2003 Making Matrix Structures Work: Creating clarity on unit role and responsibility. Ashridge’s Course Material for One Day Workshop on



“Matrix Organisations” and 4-day Course on “Organisation Design”. Downloaded on 19 April 2016 from

<https://www.ashridge.org.uk/Media-Library/Ashridge/PDFs/Publications/MakingMatrixStructuresWork.pdf>

International Organization for Standardization 2010 Guidance for ISO national standards bodies – Engaging stakeholders and building consensus. © ISO – December 2010/3 000 – ISBN 978-92-67-10540-6. Downloaded on 3 April 2016 from http://www.iso.org/iso/guidance_nsb.pdf

OECD/Mountford D., 2009. Organising for local development: the role of local development agencies. Summary Report”, 26-27 November 2009, working document, CFE/LEED, OECD, Downloaded on 13 April 2016 from www.oecd.org/dataoecd/54/41/44682618.pdf?contentId=44682619.

World Health Organization (WHO) 2014 Chapter 16 Decision-making for guideline development at WHO. Handbook for guideline development – 2nd ed. (ISBN 978 92 4 154896 0). pp 201-214. © World Health Organization 2014. Downloaded on 23 June 2016 from http://www.who.int/publications/guidelines/Chp16_May2016.pdf